

PAYCHEX Download Guide - Year 2020

Version of the Portal: Paychex Flex.

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1) Download Employee Year To Date Report

- a. Locate Report Analytics Section
- b. Search for Year to Date report
- c. Open Year to date Report
- d. Download and save the version of the report that was printed beginning January. For example, if we need 2020 year, you will download the first version available for the 2021 that includes information for 2020 closing.



Search for Year To date report.

Search Results

× Search

Output Format ▾

Results in All Reports (1)

 **Year To Date Report**
A record of employees' year-to-date wages, withholding taxes, deductions, and net pay. 












Pick up the correct Year To date Report.

Year To Date Report

[Show Description](#)[Download](#)

All ▾

Report Results

<input type="checkbox"/>	Report Title	Run Date ↓
<input type="checkbox"/>	 Year To Date Report	Apr 15 11:37 PM
<input type="checkbox"/>	 Year To Date Report	Apr 8 3:05 AM
<input type="checkbox"/>	 Year To Date Report	Apr 2 11:30 PM
<input type="checkbox"/>	 Year To Date Report	Mar 4 1:54 AM
<input type="checkbox"/>	 Year To Date Report	Jan 9 1:24 AM
<input type="checkbox"/>	 Year To Date Report	Jan 6 1:18 AM
<input checked="" type="checkbox"/>	 Year To Date Report	Jan 1 4:30 PM
<input type="checkbox"/>	 Year To Date Report	Oct 20, 2020 1:14 AM
<input type="checkbox"/>	 Year To Date Report	Oct 10, 2020 2:38 AM
<input type="checkbox"/>	 Year To Date Report	Oct 8, 2020 4:00 AM
<input type="checkbox"/>	 Year To Date Report	Oct 3, 2020 2:21 AM

2) Download Employee Earning Record summary

Instructions:

- Locate Report Analytics Section
- Search for Employee earning Record summary
- Run Report with correct Settings (Check dates must be prior year (Jan – Dec) and ensure to show all employees)

Employee Earning Record report options

New Custom Cancel Run Report
Employee Earnings Record

Report Options

Name
Ignacio Villalobos

Company *
[Redacted]

Employee(s) *
All

Date Range
Previous Calendar Year

Start Date * 1/1/2020 End Date * 12/31/2020

Report Totals

- Employee and Company
- Show Each Earning
- Show Summed Amounts
- Company Only

3) Download Employee W2 records

Instructions:

- Locate Report Analytics Section
- Locate option W-2 Wage and Tax Statement
- Click on report Title to select all W2s
- Click download and select the Combine Option

W-2 - Wage and Tax Statement [Show Description](#)

Q Filter Reports

Download (34)

Report Results

Report Title

Run Date

Last 180 days

Last 30 days

Last 90 days

Last 180 days

Custom

Mar 4 12:00 PM

Combine PDF

Combine PDFs? X

Want to combine your PDF reports into one PDF file?

FYI - Everything will be in one ZIP file either way, no extra charge.
Non-PDFs will be there separately.

Keep Separate Combine Them

4) Download your Employee Census report

Instructions:

- Locate Report Analytics Section
- Locate option Employee Listing
- Select the option Demographic Data
- Remove the Filter Terminated (see caption below)
- Edit Column options to add missing columns (see caption below)
- Add Hire dates and rehire (see caption below)
- Add Full SSN (see caption below)
- Add Termination (see caption below)
- Download Report option (see caption below)
- Download Excel Format

Search for Employee Listing Option

The screenshot shows a web interface titled "Live Reports" with a search bar and a list of report types. The "Employee Listings" report type is highlighted with a yellow background.

Live Reports [Close]

Search All Reports [Search]

Output Format ▾

Report Types

- Diversity and Equal Pay**
Includes a blend of employment data, pay data, and employee info. Useful for verifying a fair and diverse workplace. >
- Document Management**
Track expiration dates, employees who received documents, and upload activity. >
- Emergency Contacts**
Always know who to contact if something happens to an employee on the job. Add names, numbers, and more. >
- Employee Change History**
Find out which employees have switched jobs, moved, or gotten a new manager. See where they work now and who they work for. >
- Employee Listings**
View employee demographic data. Stay on top of important dates and info, like birthdays or work anniversaries. >

Select Demographic Data

< Back

Employee Listings

Filter Templates

Report Results

Template Name ↑

Employee Anniversary List

Employee Birthday List

Employee Custom Fields

Employee Demographic Data

Remove Terminated Employee Filter

< Analytics & Reports

Employee Listings

Template: Employee Demographic Data

▼ Report Settings

Date

📅 Today (Jul 23, 2021) ▼

Companies

Filters

Status is not Terminated  + Add Filter

▼ Summary

Birthdays

10

8

Adjust your Report to include all necessary data. Update Columns on the report.

The screenshot shows a report interface with a table. At the top, there are navigation tabs for 'Sep' and 'Nov'. Below the table, there are controls for 'Columns' (highlighted in yellow), 'Groups', and a download icon. The table has three columns: '(SSN or Fe...', 'Sex', and 'Birth date'. The first row shows 'male' for Sex and 'Feb 10, 1...' for Birth date. Subsequent rows show 'Male' for Sex and various birth dates: 'Mar 22, 1...', 'Jun 18, 1...', 'Jan 30, 1...', 'Feb 20, 1...', 'May 08, 1...', and 'Sep 19, 1...'. At the bottom of the table, it says '1 - 25 of 38 items'. A blue question mark icon is visible in the bottom right corner of the interface.

Add Columns by clicking on the Bottom

The screenshot shows a 'Column Settings' dialog box with a close button (X) in the top right corner. Inside the dialog, there is a blue button with a plus sign and the text '+ Add Columns'. Below this, a box displays '38 Columns'. At the bottom, there is a table with two columns: 'Column' and 'Aggregate'.

Add Hire and Rehire to the report

Columns

▼ Employment

- Most recent hire date
- Most recent hire month
- Original hire date
- Original hire month
- Rehire date

38 selected

Add Full SSN tax ID option to the report

Columns

▼ Personal Information

- Taxpayer ID (SSN or Fed ID)
- Taxpayer ID masked (SSN or Fed ID)

39 selected

Cancel

⋮ Full name None

Add Termination dates Report


Columns

Q term X

- Employment
- Benefits termination reason
- Termination date

41 selected Cancel Apply



Click on the Download Option

Columns Groups 

Fe...	Sex	Birth date
	Female	Apr 04, 1
	Male	Oct 03, 1

Make sure to select the Excel version.

Download X

-  Report Details
-  Report Details

Male Oct 03, 1

5) Download Payroll Labor Report

Instructions:

- Locate Report Analytics Section
- Search for Payroll Labor Cost
- Run Report with correct Settings (Check dates must be prior year (Jan – Dec) and ensure to show all employees)
- Add Columns to ensure you are adding all earning Types (select all earning types)
- Download Report in Excel Format.

Make Sure to adjust the options for the Payroll Labor Cost

The screenshot shows a web interface for configuring a report. At the top, there is a navigation breadcrumb: < Analytics & Reports. Below this, the report title is "Payroll Labor Cost" and the template is "Payroll Labor Cost by Location". Under the "Report Settings" section, the "Date Range" is set to "Custom (Jan 1, 2020 - Dec 31, 2020)". There is also a "Filters" section with an "Add Filter" button. At the bottom, there is a "Summary" section.

< Analytics & Reports

Payroll Labor Cost
Template: Payroll Labor Cost by Location

▼ Report Settings

Date Range
📅 Custom (Jan 1, 2020 - Dec 31, 2020) ▼

Filters
+ Add Filter

▼ Summary

Adjust your Report to include all necessary data. Update Columns on the report.

The screenshot shows a payroll report interface. At the top, there are navigation tabs for 'Sep' and 'Nov'. Below this is a menu bar with 'Columns' (highlighted in yellow), 'Groups', and a download icon. The main area contains a table with the following data:

(SSN or Fe...	Sex	Birth date
	male	Feb 10, 1
	Male	Mar 22, 1
	Male	Jun 18, 1
	Male	Jan 30, 1
	Male	Feb 20, 1
	Male	May 08, 1
	Male	Sep 19, 1

At the bottom of the table area, it says '1 - 25 of 38 items'. A blue circular help icon with a question mark is located at the bottom right corner of the interface.

Add Columns by clicking on the Bottom

Column Settings

+ Add Columns

38 Columns

Column	Aggregate
--------	-----------

Search for Earning, and make sure to include all Columns available, look down and ensure all were added.

Columns

Q **earning**



- Earnings & Reimbursements
 - Bonus amounts
 - Bonus hours
 - Cash tips amounts
 - Cash tips hours
 - Charged tips amounts
 - Charged tips hours
 - Commissions amounts
 - Commissions hours
 - Direct tipped amounts
 - Direct tipped hours
 - Holiday amounts
 - Holiday hours
 - Indirect tips amounts
 - Indirect tips hours
 - Net pay

38 selected Cancel App

Click on the Download Option

Columns	Groups	Download
Fe...	Sex	Birth date
	Female	Apr 04, 1
	Male	Oct 03, 1

Download the excel version of the report

! taxes	Tot	Download	
\$1,502.10		 Report Details	
\$455.52		 Report Details	
\$814.45	\$9,238.45	152-70-0772	
\$2,744.50	\$26,404.02	500-25-9214	