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Your Online Help and Support for our Portal-Archive



Q Search in the Paychex manual

Did not find what you were looking for? Here is the link to our [Service Desk](#).
Nicht fündig geworden? Hier kommen Sie zu unserem [Service Desk](#).

User manual

- Welcome to the Digital HR Office
 - What characterizes the Digital Personalbüro (DPB)?
 - What can the Digital Personalbüro and what can I do with it?
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- 5. Functions / general descriptions
 - 5.1. Download of files / documents
 - 5.1.1. Download and print of single files / documents
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List of keywords

A

ablage
admin
administration
administrator
aktivieren
anlegen
annual-archive
archiv
archive
archivierung
auftrag
austausch
austausch-ordner

B

bank
basic_admission
basiszugang
beauftragung
benutzer
berechtigung
berechtigungen
bericht
browser
browsersetting

C

chrome
communicate
controller
controlling
cookies
crosssite-tracking

- 5.2. Indexing downloaded documents - properties/fields to fill in
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 - DPB News 12/2018
 - Improved printing and downloading of files
 - Easier access to the Paychex Portal
 - Tips for browser settings
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 - Released – improvements since the last DPB News
 - Know-how – tips and tricks for working in DPB
 - Three powerful tools for collaborating with your employees
 - The DPB can do even more: Digital storage for your HR department
 - DPB News 09/2019
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 - Know-how – tips & tricks for working in DPB
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 - DPB News 07/2020
 - New releases – improvements since the last DPB News
 - Coming soon- new features in i-DOS 1.9 (available end of July)
 - Good to know – tips & tricks for working in DPB

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[datenschutzgrundverordnung](#)
[datenübermittlung](#)
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[dokumentensuche](#)
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[edge](#)
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K-M

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N-Q

nachricht
namensänderung
payroll
personal
personalabteilung
personalakte
popups
portal
portal-access
portal-visibility
portal-zugang
problem
prüfer

R-S

rollen
safari
search
share
signatur
signieren
sortieren
sozialversicherung
speichern
stb
steuerberater
steuerberaterzugriff
suchen

T-U

tabelle
teilen
treffer
trefferliste
unterlagen
unterschreiben
upload
upload-an-arbeitgeber
user-admin

Ü

übermitteln
übermittlung

V-Z

verifizierung
verschlagworten
verschlagwortung
verwalten
vollzugang
voreinstellung
vorlage
vorlagen
vorschau
wert
werteliste
zertifikat
zugangsdaten

Welcome to the Digital HR Office

With our new application the Digital Personalbüro is opened. Enter the safe environment with your personal login to communicate and exchange data with us. You can fill out mandatory forms or upload documents to transmit them within the data secured space. Your personal wages clerk will be notified and will work on your request instantly. Confirmations are sent to you after you have placed the request as well as when it has been completed.

- [What characterizes the Digital Personalbüro \(DPB\)?](#)
- [What can the Digital Personalbüro and what can I do with it?](#)
- [What does the DPB mean in terms of your collaboration with Paychex / Lohndata?](#)
- [Where do I get help?](#)
- [When to use the Archive and when to use the Portal for data transfer?](#)

① Our Application runs on all common browsers. Although you may experience restricted functionality on Internet Explorer as older versions of IE are no longer maintained and supported by Microsoft.

What characterizes the Digital Personalbüro (DPB)?

The DPB is archive and exchange platform for all sensitive data all in one. Only users that you have added get access to your database. Clearly defined access rights guarantee the correct display of data/documents related to the user's role.

- + The DPB-application works on all end devices - PC, tablet and smartphone. So you can work with the archive even when you are out of office. You have access to all files, can fill out forms and submit an assignment.
- + When you want to share files with your employees, tax accountant or within your company you need to follow the rules of an encrypted transmission. For this you give access to those users and can exchange data in a secured environment.
- + With the usage of DPB you meet your legal obligations. Our transmission is safe and legally compliant.

What can the Digital Personalbüro and what can I do with it?

[Login / Logout](#)

[Forgot password / Request new password](#)

Documents in the archive

- [Search](#)
- [View / Display](#)
- [Download](#)
- [Print](#)
- [Share documents](#)
- [Split / Merge](#)
- [Upload](#)
- [Ease of reference \(indexing\)](#)
- [Set a reminder](#)
- [Create a new version of a document](#)

Receive payroll data from Paychex

- Automatic storage in the proper categories
- Payroll data cannot be deleted
- Automatic deletion in compliance with the legal retention period
- Grant access to specific data for audits
- Proof of data usage (right of access)

Collaboration with employees

- Epayslip (grants employees access to their payslips, income tax certificates, social insurance notices)
 - Employee (epayslip, files / photos)
 - Access to files / documents with type "exchange with employee"

Collaboration with the tax accountant (CPA)

- CPA basic access / full access to files/documents with type "payroll"
- Access to files / documents with type "exchange with CPA"

You can decide if your CPA will get full access to all your Paychex payroll files or only the basic access (list of payroll records, payroll journals). If you inform us before the initial setup, we will add the appropriate access for your CPA or their employee.

Transmit documents/files to Paychex & place assignments

- Recurring monthly tasks
- Order the current payroll
- Approve payroll
- Temporary assignments

Communication

- Send and receive mail in the portal

Create online data notes and assignments

- Forms in the portal

Manage personnel files

- Maintain all personnel documents digitally
- Provide documents from the personnel file
- Manage documents for HR-processes (e.g. storage of application files)

What does the DPB mean in terms of your collaboration with Paychex / Lohndata?

The new General Data Protection Regulation (GDPR) of the EU prescribes the encrypted transmission of files containing personal data. Our DPB fulfills exactly this prerequisite and is therefore the base of our collaboration.

The secured environment of our application guarantees the safe exchange of sensitive personal data. For each shared document a receipt stamp will be generated automatically. With this stamp your submit date is documented.

You will experience an enormous time saving when working with our DPB-solution. All documents and files are centrally stored and easily accessible.

Our template forms will help you to create and transmit a document digitally.

The integrated user guidance helps to improve the data quality of all processes and applications. So we can work on your assignments even faster. As per EU-regulation you are obliged to transmit sensitive personal and payroll data encrypted - in our cooperation it does mean through our Digital Personnel Office (DPB) application. Paychex / Lohndata can not accept any sensitive data sent unencrypted by email or fax.

Where do I get help?

Within our DPB-application you will find an online-help with explanations how to work with the DPB.

 Learn more about the different kinds of support we offer

Functional overview in DPB

You will find it within the DPB-application by clicking on the "?"-symbol in the upper right corner of your display choosing the option "help".
In the [i-Dos Help / Introduction to i-DOS](#) a menu will open where you will find keywords and explanations to all basic functionalities.

DPB-Manual

Our user guide contains all information and instructions on how to work with DPB and further interesting facts about it.

Paychex Customer Support

For errors and problems occurring when working with DPB please open a ticket at our online Paychex Service-Desk.

<https://paychexdeutschland.atlassian.net/servicedesk/customer/portal/15>

We will get in touch with you immediately.

In which cases can your personal wages clerk help?

For all payroll related questions please contact your personal wages clerk.

When to use the Archive and when to use the Portal for data transfer?

The Digital Personalbüro consists of two separate parts - The Archive and the Portal. Both offer the functionality to transfer data to Paychex. In the Archive you exchange documents by using the "Share" functionality. In the Paychex Portal you send documents as an attachment to a message.

Criteria when to use the Archive and when to use the Portal:

Transfer via the Archive

- The document needs to be saved in the Archive
- Transfer must be documented by receipt stamp and/or handshake
- Document is subject to audit requirements
- Obligation to provide proof of evidence in compliance with DSGVO requirements

Transfer via the Portal

- Document transfer as needed
- Document does not have to be saved in the Archive
- Saving the message including attachment in the "Completed"-folder of your mail box is sufficient
- Document won't be needed after transfer and may be deleted

1. First steps in the Digital HR Office

We received the request to set up your Digital HR Office. The setup of your digital archive has now been completed. Please read the following pages for details regarding the initial registration and setup of the application.

- [1.1. Initial registration at the Digital HR Office](#)
- [1.2. First steps in the Digital Personalbüro](#)

1.1. Initial registration at the Digital HR Office

Welcome to our application! We are delighted that you are joining us in our digitalization of payroll accounting. To make your initial registration as easy as possible, please follow these instructions.

You will receive three e-mails

Your payroll specialist at Paychex has successfully initiated the setup for you at our data center in Gütersloh.

As part of the setup process, three emails will be sent to the email address that you specified or confirmed on your return receipt as the primary authorized user of the Digital HR-Office. The contractor is pre-registered here. Please contact our Service Desk if you, as the employee responsible for payroll processing, do not know how to gain access to the Digital HR-Office.

For technical reasons it may take up to 48 hours for you to receive all three e-mails, which are all required for registration. Here's what you can expect:

1. Welcome message

Sender: Paychex Deutschland GmbH <info@paychex.de>

Subject: Your Digital HR-Office

Content / Meaning: Your welcome message informs you about the next steps for registration. Please read carefully as it contains further important hints, first of all about checking the spam folder if you are not receiving the second e-mail within the next 24 hours.

2. Verification e-mail

Sender: Paychex Deutschland GmbH <info@paychex.de>

Subject: "Activate your access to the Digital HR-Office now!"

Content / Meaning: The verification e-mail contains a link that you must click to verify the accuracy of your e-mail address. After successful verification, you will receive your login data in a third e-mail.

If clicking on this link does not show any results, please copy the link and call it up via the address bar of your browser.

Hints:

- Please pay special attention to the above-mentioned details on the sender and the subject line and the following hints:
- The verification e-mail may be delayed in individual cases. It may take up to 24 hours for the second e-mail to arrive.
- Some e-mail clients/free e-mail providers list the verification e-mail as SPAM or JUNK and it does not appear in your inbox. This is triggered by fact that e-mail is being sent from the i-DOS system, which forms the basis of the Digital HR-Office. Please search the corresponding folders if you have not received the verification e-mail within 24 hours of receiving the first e-mail. If you find the verification e-mail in a SPAM folder, please adjust the spam detection so that mails from this sender will be recognized as trustworthy in the future.

Antworten Allen antworten Weiterleiten



Mi 25.09.2019 10:35

Paychex Deutschland GmbH <info@paychex.de>

Activate your access to the Digital HR-Office now!

An

Aufbewahrungsrichtlinie 7-year Retention (7 Jahre)

Läuft ab 23.09.2026



Welcome to the Paychex Digital HR-Office,

Your access to the Digital HR-Office has just been created. Activate your access now by clicking on the following link.

https://my.i-dos.de/idos/#verification?token=8d5ab2b98cce415e9544dc2e8d7dfe57&lang=en_GB

If clicking on this link does not show any results, please copy the link and call it up via the address bar of your browser.

After successful confirmation of your e-mail account, you will receive another e-mail with the login details. Please log into the Digital HR-Office for the first time as soon as possible (mein.paychex.de), as the one-time password is only valid for 7 days. You will need to change your password the first time you log in.

The Digital HR-Office of Paychex Germany is based on the document management system i-DOS. i-DOS is a cloud application operated by aov IT.Services GmbH, which organizations and companies can use to digitally manage their documents and make them available to their employees for collaboration. In accordance with the EU Data Protection Ordinance (DSGVO), the application allows the exchange of personal data, which can be accessed securely at any time via any terminal device.

We hope you enjoy working in the Digital HR-Office.

3. E-mail with login information

Sender: Paychex Deutschland GmbH <info@paychex.de>

Subject: "Your login details to the Digital HR-Office"

Content / Meaning: The third e-mail contains your access details. You will be asked to change your password, please pay attention to password rules!

Hints:

Use your access details right away to register for the first time at <https://mein.paychex.de>. The provided password is only valid for 7 days. If you register later, you can request new access details via the password-forgotten procedure at <https://mein.paychex.de>. To do this, the system asks you for your user name (contained in the third e-mail, see screenshot)

Note that you must change the password the first time you successfully log on to i-DOS. Pay attention to the rules for creating secure passwords: The password must have at least 8 characters and must contain at least one uppercase letter (A-Z), one lowercase letter (a to z), one digit (0 to 9) and one of the following special characters: #?!@\$%^&*-

Antworten Allen antworten Weiterleiten

Mi 25.09.2019 10:37



Paychex Deutschland GmbH <info@paychex.de>
Your login details to the Digital HR-Office

An

Aufbewahrungsrichtlinie 7-year Retention (7 Jahre)

Läuft ab 23.09.2026

Welcome to the Digital HR-Office

Your login details



Hello,

You have successfully activated your access to the Digital HR-Office!

Please log in with the following login details as soon as possible at mein.paychex.de.

The included one-time password is only valid for 7 days. If you are not able to register until later, please follow the forgot-password procedure at mein.paychex.de to request another valid one-time password.

Your login details are as follows:

Username: TestE
Password: luah4Tpi%

Please note:

When you log in for the first time, you must enter a new password in your user profile.

Our rules for creating secure passwords require:

- at least 8 characters, of which
- at least one is a capital letter (A-Z),
- a lower case letter (a to z),
- a number (0 to 9)
- and has one of the following special characters: #?!@\$%^&*-

After successfully changing the password and clicking the 'Save' button, you will be taken to the i-DOS dashboard of the Digital HR-Office.

If you do not receive one or any of the e-mail messages described above and / or should experience other problems registering, our support is happy to help. Please open a ticket at our Service Desk.

1.2. First steps in the Digital Personalbüro

As Main User with admin rights, you are the first user to be set up in the Digital Personalbüro. The first task that you will have to perform is to set up the Data Protection Policy in your Client. Providing a Data Protection Policy is required by law.

In the next step you can activate your employees (who have already been uploaded into the system).

Step 1.: Modify the provided Data Protection Policy template, or add your own Data Protection Policy

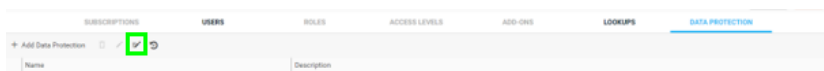
Step 2: Activate your employees

Here is a step by step guide how to set up the Data Protection Policy:

Go to Admin / Client and click on „Data Protection“:

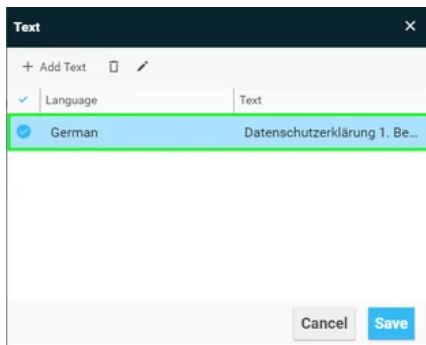


Click on the black pen icon:

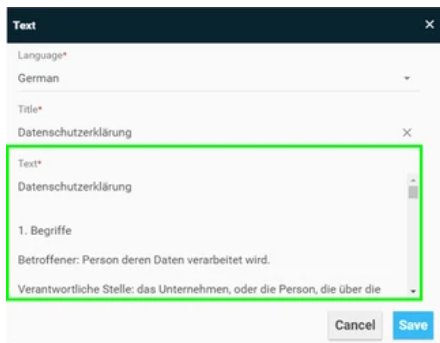


In the screen that now opens click on „Data Protection“ to complete the template,

or go to „Add Text“ if you would like to add your own Data Protection Policy:



Go to the Text and complete the marked passages, or draft your own policy:



① Here you can check the complete Data Protection Policy template. Please overwrite the passages that are marked by a green border and delete the passages that are marked in red in your Digital Personalbüro Client

> [Template Privacy Police](#)

Datenschutzerklärung

1. Begriffe

Betroffener: Person deren Daten verarbeitet wird.

Verantwortliche Stelle: das Unternehmen, oder die Person, die über die Zwecke und Mittel der Verarbeitung von personenbezogenen Daten entscheidet.

> Wenn der Hauptbenutzer ein Vertreter des Arbeitgebers ist, dann ist dies der Arbeitgeber.

> Wenn der Hauptbenutzer ein Vertreter des Steuerberaters ist, dann ist dies der Steuerberater.

Auftragsverarbeiter: Verarbeitet personenbezogene Daten im Auftrag der verantwortlichen Stelle.

2. Verantwortliche Stelle

Name der verantwortlichen Stelle

Wenn vorhanden: Link zur Homepage der verantwortlichen Stelle

Der Hauptbenutzer dieses Clients des Digitalen Personalbüros ist gehalten - vor Eröffnung weiterer Benutzerzugänge auf diesem Client - die oben stehenden Angaben zu ergänzen und diesen und die folgenden Hinweis- und Hilfetexte (bis zur Ziffer 3.) zu löschen.

Sollten die Angaben zur Verantwortlichen Stelle an dieser Stelle noch nicht eingetragen sein, erfragen Sie diese bitte beim Hauptbenutzer dieses Clients des Digitalen Personalbüros und bitten in diesem Zuge die hier zu veröffentlichenden Angaben zu vervollständigen.

Hilfestellung für Nutzer, die nicht erkennen können, welche Person der Hauptbenutzer dieses Clients des Digitalen Personalbüros ist:

Der Hauptbenutzer eines Clients des Digitalen Personalbüros ist in der Regel der Geschäftsführer, die für die Entgeltabrechnung in einem Unternehmen ausführende Person oder eventuell auch eine mit der praktischen Durchführung der Entgeltabrechnung betraute externe Person (Steuerberater, Buchhaltungsbüro).

Sollten Sie Schwierigkeiten haben, diese Person zu identifizieren, können Sie sich an den Support zum Digitalen Personalbüro wenden.

3. Zwecke der Verarbeitung

Ihre personenbezogenen Daten werden zur Informationsweitergabe und -ablage auf dem Digitalen Personalbüro bereitgehalten.

Über das Digitale Personalbüro kann eine Vielzahl von Prozessen abgebildet werden, bei denen personenbezogene Daten gespeichert und verarbeitet werden. Mögliche Funktionen sind beispielsweise:

Dokumente

> Dokumente verwalten

> Dokumente drucken

> Dokumente herunterladen

Zusammenarbeit mit Paychex (Auftragsverarbeiter zur Durchführung der Entgeltabrechnung)

> Nachrichten an Paychex übermitteln

> Nachrichten von Paychex erhalten

> Meldungen / Online-Formulare von Paychex nutzen

Verwalten

> e-Lohnschein (epayslip) einrichten

> Abrechnung für Mitarbeiter freigeben

Archivieren

> Eigene Dokumente im Personalordner ablegen

Zusammenarbeit mit dem Steuerberater

> Dokumente mit dem Steuerberater teilen

> Zugang für den Steuerberater freigeben

Zusammenarbeit zwischen Arbeitgeber und Mitarbeitern

> Dokumente finden

> Nachricht von Mitarbeiter an Arbeitgeber

4. Rechtsgrundlage der Verarbeitung

Die Rechtsgrundlagen der Verarbeitungen sind:

> Art. 6 Abs. 1 lit. a der Datenschutzgrundverordnung (DSGVO): Einwilligung durch den Betroffenen.

> Art. 6 Abs. 1 lit. b DSGVO: Vertrag mit dem Verantwortlichen.

> Art. 6 Abs. 1 lit. c DSGVO: rechtliche Verpflichtung des Verantwortlichen (Beschäftigungsverhältnis mit Betroffenen).

> Art. 6 Abs. 1 lit. f DSGVO: Wahrung der Interessen des Verantwortlichen (papierloses Büro, unbürokratische Bereitstellung von Informationen).

5. Empfänger der personenbezogenen Daten

Die Empfänger der personenbezogenen Daten entsprechen den verantwortlichen Stellen (s.o.). Die Verantwortlichen Stellen sind nach Art. 13 und 14 DSGVO verpflichtet die betroffenen Personen über die Empfänger der personenbezogenen Daten zu informieren.

Bereitstellung der Funktionalität des digitalen Personalbüros und Auftragsverarbeiter für die verantwortliche Stelle:

Paychex Deutschland GmbH

Holstenkamp 1

22525 Hamburg

<https://www.paychex.de/info/impressum.html>

Zusätzliche Empfänger, um die Funktionalität des digitalen Personalbüros aufrechtzuerhalten sind:

Technische Umsetzung und Hosting:

aov IT.Services GmbH

Bartholomäusweg 32

33334 Gütersloh

6. Aufbewahrungsfristen

Wir halten uns an die Grundsätze der Datenvermeidung und Datensparsamkeit. Wir speichern Ihre personenbezogenen Daten daher nur so lange, wie dies zur Erreichung der hier genannten Zwecke erforderlich ist oder wie es die vom Gesetzgeber vorgesehenen vielfältigen Speicherfristen vorsehen. Nach Fortfall des jeweiligen Zweckes bzw. Ablauf dieser Fristen werden die entsprechenden Daten routinemäßig und entsprechend den gesetzlichen Vorschriften gesperrt oder gelöscht.

Die Regelaufbewahrungsfrist beträgt 6 Jahre für Lohnunterlagen. Im Fall, dass die Daten für den Jahresabschluss benötigt werden, verlängert sich die Aufbewahrungsfrist auf 10 Jahre (§ 147 AO). Der Beginn der jeweiligen Aufbewahrungsfrist ist der Schluss des Kalenderjahres, in welchem die letzte Eintragung in den Jahresabschluss oder den Lagebericht erfolgt ist. Dadurch verlängern sich die Aufbewahrungsfristen um jeweils ein Jahr.

Diese Löschrfristen sind für folgende Unterlagen im Digitalen Personalbüro seitens Paychex fest eingerichtet:

- > Alle Unterlagen aus der Entgeltabrechnung, die Paychex der verantwortlichen Stelle im Typ Entgeltabrechnung des Digitalen Personalbüros bereitstellt (je nach Dokument / Datei 6 oder 10 Jahre),
- > Übermittlungs-Quittungen im Typ Austausch mit Paychex (nach 10 Jahren).

Auskünfte zur fristgerechten Löschung von Dokumenten, die die verantwortlichen Stelle oder andere von der verantwortlichen Stelle dazu befähigte Nutzer im Dokumentenmanagement-System ablegen, sind – sofern nicht im Folgenden ergänzt - bei der verantwortlichen Stelle zu erfragen:

bitte verantwortliche Stelle eintragen

7. Ihre Rechte als Betroffener – diese Rechte sind gegenüber dem Verantwortlichen geltend zu machen

- > Auskunft über Ihre gespeicherten Daten und deren Verarbeitung,
- > Berichtigung unrichtiger personenbezogener Daten,
- > Löschung Ihrer gespeicherten Daten,
- > Einschränkung der Datenverarbeitung, sofern Ihre Daten aufgrund gesetzlicher Pflichten noch nicht gelöscht dürfen,
- > Widerspruch gegen die Verarbeitung Ihrer Daten und
- > Datenübertragbarkeit, sofern Sie in die Datenverarbeitung eingewilligt haben oder einen Vertrag zur Verarbeitung abgeschlossen haben.

Wenn Sie Ihre Daten für die Einrichtung des Benutzer-Accounts nicht bereitstellen möchten, können Sie das Digitale Personalbüro nicht nutzen.

Sofern Sie für die Verarbeitung eine Einwilligung erteilt haben, können Sie diese jederzeit mit Wirkung für die Zukunft widerrufen.

Sie können sich jederzeit mit einer Beschwerde an die für Sie zuständige Aufsichtsbehörde wenden. Ihre zuständige Aufsichtsbehörde richtet sich nach dem Bundesland Ihres Wohnsitzes, Ihrer Arbeit oder der mutmaßlichen Verletzung. Eine Liste der Aufsichtsbehörden (für den nichtöffentlichen Bereich) mit Anschrift finden Sie unter: https://www.bfdi.bund.de/DE/Infothek/Anschriften_Links/anschriften_links-node.html

8. Kontaktdaten des Datenschutz-Beauftragten

Bei Fragen zum Datenschutz können Sie sich an den Datenschutzbeauftragten der verantwortlichen Stelle richten. Diese sind:

bitte verantwortliche Stelle eintragen

Sollten die Kontaktdaten des Datenschutzbeauftragten der verantwortlichen Stelle hier noch nicht hinterlegt sein, erfragen Sie diese bitte bei der verantwortlichen Stelle und bitten um Ergänzung.

9. Zusatzangaben bei der Indirekterhebung

Falls Ihre Daten nicht direkt bei Ihnen erhoben wurden und Ihr Zugang durch Ihren Steuerberater, oder Arbeitgeber eingerichtet wurde.

Folgende Daten bzw. die Datenkategorien werden im digitalen Personalbüro verarbeitet:

a) Kategorie / Art der Daten:

Bewegungsdaten (Beruf)

(wöchentliche Arbeitszeit, geleistete Arbeits-stunden sowie Fehlzeiten aufgrund von Krankheit und Urlaub, Ein-/Austrittsdatum)

Art und Zweck der Datenverarbeitung:

Entgeltabrechnung/Sofortmeldung

Kategorien betroffener Personen:

Mitarbeiter, Auftraggeber

b) Kategorie / Art der Daten:

Finanzdaten

(Bankverbindung, Krankenversicherungsart und –kasse, Lohnpfändungen, Güterstand)

Art und Zweck der Datenverarbeitung:

Entgeltabrechnung

Kategorien betroffener Personen:

Auftraggeber/Mitarbeiter, Auftraggeber

c) Kategorie / Art der Daten:

Gesundheitsdaten

(Schwerbehinderung, Gesundheitsdaten soweit zur Erledigung des Auftrags oder zur Vertragsabwicklung erforderlich)

Art und Zweck der Datenverarbeitung:

Entgeltabrechnung

Kategorien betroffener Personen:

Mitarbeiter, Auftraggeber

d) Kategorie / Art der Daten:

Haushaltszusammensetzung

(Kinderfreibetrag, Steuerklasse inkl. etwaiger Kinderfreibeträge; Familienstand)

Art und Zweck der Datenverarbeitung:

Entgeltabrechnung

Kategorien betroffener Personen:

Mitarbeiter, Auftraggeber

- e) Kategorie / Art der Daten:
 Identifikationsdaten
 (Name und Anschrift Mitarbeiter, Steuernummer, Umsatzsteuer-Identifikationsnummern, Sozialversicherungsnummer)
 Art und Zweck der Datenverarbeitung:
 Entgeltabrechnung/Zuordnung
 Kategorien betroffener Personen:
 Auftraggeber/Mitarbeiter, Auftraggeber
- f) Kategorie / Art der Daten:
 Lohndaten
 (vereinbarter Bruttolohn, Zahlungen und Abzüge, Provisionen, Boni, Gratifikationen, Vergünstigungen, Arbeitsverhältnis)
 Art und Zweck der Datenverarbeitung:
 Entgeltabrechnung
 Kategorien betroffener Personen:
 Mitarbeiter, Auftraggeber
- g) Kategorie / Art der Daten:
 Persönliche Merkmale
 (Religionszugehörigkeit, Staatsangehörigkeit, Arbeitsurlaubnis, Geburtsdatum/ -Ort/ -Land)
 Art und Zweck der Datenverarbeitung:
 Entgeltabrechnung/Zuordnung
 Kategorien betroffener Personen:
 Mitarbeiter, Auftraggeber
- h) Kategorie / Art der Daten:
 Steuerungsdaten
 (Zuordnungsdaten Kunde)
 Art und Zweck der Datenverarbeitung:
 Entgeltabrechnung
 Kategorien betroffener Personen:
 Auftraggeber/Mitarbeiter, Auftraggeber
- i) Kategorie / Art der Daten:
 Sonstiges <bei Bedarf zu ergänzen / konkretisieren durch die verantwortliche Stelle>
 (Hochladen von Dokumenten durch die verantwortliche Stelle)
 Art und Zweck der Datenverarbeitung:
 Sonstiges/nicht bestimmbar
 Kategorien betroffener Personen:
 Sonstige/nicht bestimmbar

10. Sonstiges

Die verantwortliche Stelle behält sich vor, diese Datenschutzerklärung anzupassen, damit sie stets den aktuellen rechtlichen Anforderungen entspricht oder um Änderungen der Leistungen in der Datenschutzerklärung umzusetzen, z.B. bei der Einführung neuer Arbeitsweisen oder Services. Für Ihren erneuten Besuch gilt dann die neue Datenschutzerklärung.

Please note that for the time being the provided Data Protection template is only available in German language.

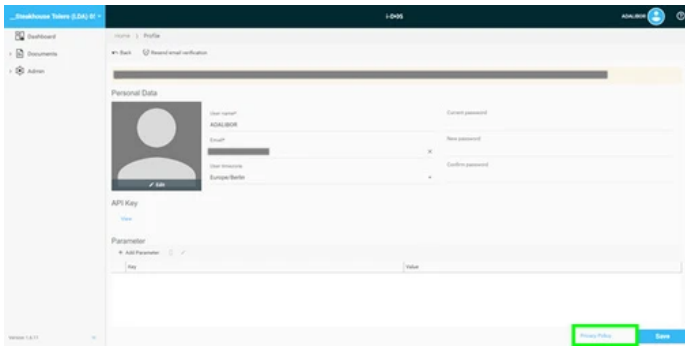
Then please save the Data Protection Policy:

The screenshot shows a 'Text' dialog box with the following fields and content:

- Language***: German
- Title***: Datenschutzerklärung
- Text***: Datenschutzerklärung
- 1. Begriffe**: Betroffener: Person deren Daten verarbeitet wird.
- Verantwortliche Stelle:** das Unternehmen, oder die Person, die über die

Buttons for 'Cancel' and 'Save' are visible at the bottom right.

You can check if your Data Protection Policy has been correctly saved by going to the Profile Screen and clicking on „Privacy Policy“ in the right hand bottom corner of the page:



In the next step you can activate your employees.

For further information how to manage the Digital Personalbüro as an Administrator, please read: Chapter 4. Working as administrator in the Digital Personalbüro (DPB)

2. Your documents from the current payroll

All Data and documents that you have previously received from Paychex as hardcopy or zip-file are now being imported and saved in the Digital Personabüro. Please learn more about how to efficiently search for documents in the following chapters.

- [2.1. Where do you find your documents](#)
 - [2.1.1. List of main reports PAYCHEX \(PAYX\)](#)
- [2.2. How to search efficiently](#)
- [2.3. Examples how to search](#)

2.1. Where do you find your documents

The archive has a clearly defined structure to ensure that you can quickly find and work with your documents. The parent folders form the categories that are defined in the "Type".

Here you can find all predefined Types and their usage → [Document Types](#)

The defining Document Type for the payslips is: "Payroll". Here you can find all Paychex generated and imported payroll related documents and reports.

In order to quickly find your payroll related reports, please check the following table that lists the Category for each report.

2.1.1. List of main reports PAYCHEX (PAYX)

**Main reports
PAYCHEX
(PAYX) / Type
Payroll**

German name of report / sample report	Name in English	Category
AN-Barzahlung.pdf	Employee Cash Payments	Bank
AN-Bescheinigung_SoKa.pdf	Construction Social Insurance Fund Employee Certificate	Bank
AN-Zahlungsliste.pdf	Employee Payment List	Bank
Arbeitgeberkosten.pdf	Employer Costs	Mandant
bAV-Übersicht.pdf	Company Pension Plan Account Summary	Mandant
Be-Abzugsarten-Liste.pdf	Payments and Deductions Type List	Mandant
Be-Abzugsarten-Liste_kompakt.pdf	Payments and Deductions Type List Condensed	Mandant
BN-Übersichten.pdf	Statement of Health Insurance Contributions Summary	Sozialversicherung
Buchungsbeleg.pdf	Booking Note	Sozialversicherung
BV-Liste.pdf	Professionals Pension Plan	Mandant
DMS-Daten.zip		Mandant
FiBu_Export.csv		Finanzbuchhaltung
Jahres-Lohnjournal.pdf	Payroll Journal Year End	Mandant
Jahres-Lohnkonto.pdf	Year End Payroll Account	Mandant
Kostenstellenliste.pdf	Cost Center List	Finanzbuchhaltung
Kostenstellenliste_mit_Personal.pdf	Cost Center List with Personnel	Finanzbuchhaltung
Kostentraegerliste.pdf	Funder List	Finanzbuchhaltung
Kostentraegerliste_mit_Personal.pdf	Funder List with Personnel	Finanzbuchhaltung
Lohnarten_Export		Mandant
Lohnarten-Liste.pdf	Wage Types List	Mandant
Lohnjournal1.pdf	Payroll Journal	Mandant
Lohnschein.pdf	Payslip	Personal
Lohnsteueranmeldung1.pdf	Income Tax Registration Annual	Finanzamt

German name of report / sample report	Name in English	Category
Mandantenbenachrichtigung.pdf	Client Notifications Tax and Official Authorities	Mandant
Mitarbeiter-Information		Mandant
Mitarbeiteruebersicht.jpg	Employee Overview	Mandant
Monatslisten__SoKa.pdf	Monthly list SOKA (social insurance fund)	Sozialversicherung
Paychex-Kalender.jpg	Paychex Calendar	Mandant
Paychex_Report		Mandant
P-N_nach_FIBU-Konten.pdf	Prima Nota by General Ledger Accounts	Finanzbuchhaltung
P-N_nach_Kostenstellen.pdf	Prima Nota by Cost Centers	Finanzbuchhaltung
PrintCenterDateien		Mandant
Prüflisten_Umlageverfahren.pdf	Checklists Apportionment Method	Mandant
Saison-KUG-Listen_Arbeitsagentur.pdf	Seasonal Short-time Working Benefit Employment Agency List	Mandant
SEPA_Bestaetigungsfax.jpg	SEPA Confirmation	Mandant
SEPA_PPS-Report		Bank
SEPA_Zahlungsliste.jpg	SEPA Payment List	Mandant
SoKa-Beitragsliste.pdf	Construction Social Insurance Fund Contributions List	Sozialversicherung
SoKa-Meldeliste.pdf	Construction Social Insurance Fund Reporting List	Sozialversicherung
SVU_und_Beschäftigungs-Übersichten.pdf	CSR (Corporate Social Responsibility) and Employment Summary	Mandant
Urlaubs-Übersichten.pdf	Vacation Summary	Mandant
Zahlungsdatei		Bank
ZV-Ausgabe.pdf	Funds Transfer Expenses	Bank

 There are more reports available than the ones listed. Missing reports will be added gradually.

2.2. How to search efficiently

 Learn here how to find your documents with the help of various search criteria

Filtering by category

Each file / document is assigned to a specific category.

For example, under document type "Payroll" you will find the following categories:

- Mandant (Client)
- Personal (Personnel)
- Bank (Banking)
- Finanzamt (Tax Office)
- Sozialversicherung (Social Insurance)
- Finanzbuchhaltung (Financial Accounting)

You choose one of the options from the dropdown menu in the field "Category" and start the search.

The tabulation overview [2.1.1. List of main reports PAYCHEX \(PAYX\)](#) lists the proper category for each report.

Filtering by Document / File name

If you know the name of the document you can enter it in the field "Document / File" and start the search.

Filtering by Year / Month


With this filter you will get an overview of all reports created for the selected month / accounting year.

Of course you can use multiple search criteria to reduce the list of results.

Filtering by Employee

With this filter you will get an overview of all reports created for the selected employee.

Enter the initial or the first part of the employee's last name followed by an asterisk " * " - e.g. E* or Exam*.

 Please note that the proper format for the complete name entry is:
Lastname, Firstname - Personnel number (Example, Edward - 10)

Sorting the list

After you have specified your search using the filter, you will receive a list of documents matching your search criteria. You can sort the list by clicking on one of the criteria fields in the header. E.g. clicking on the field "Month", you can sort the months in ascending or descending order.

Preview function

After you have selected one of the documents by clicking on it, a preview of the document will open.

2.3. Examples how to search

Example 1 in category "Client" Vacation Schedule

You would like to see the vacation schedules from the year 2017 but you don't know the category where it is stored in the archive.

Enter the name of the document and the year and click on "search".

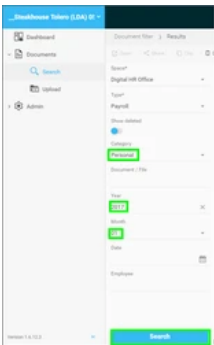
>>>>> screenshot

You will receive a list of files matching the document/file name entered. You will see that the correct category for your file is the category "Client". Now you click on the required document.

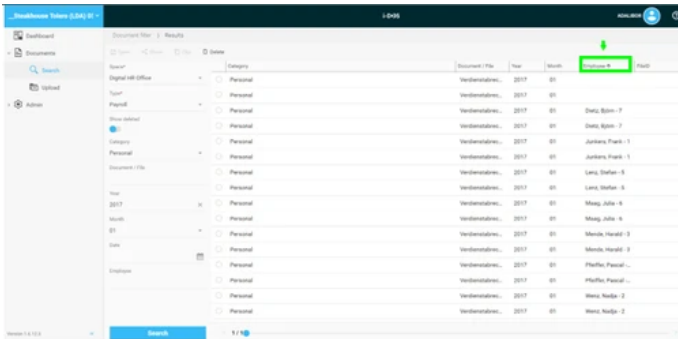
>>>>> screenshot

Example 2 in category "Personnel" > Payslip

When searching in category "Personnel" for payslips from January 2017, you will receive the payslips of all employees from the requested month/year.



You can sort the list by clicking on one of the criteria in the header. E.g. clicking on "Employee", you can sort the last names in ascending or descending order.



Employee	Document Title	Year	Month	Field
Personnel	Verdensstatistik	2017	01	
Personnel	Verdensstatistik	2017	01	
Personnel	Verdensstatistik	2017	01	Chris Egan - 7
Personnel	Verdensstatistik	2017	01	Chris Egan - 7
Personnel	Verdensstatistik	2017	01	Juditha Frank - 1
Personnel	Verdensstatistik	2017	01	Juditha Frank - 1
Personnel	Verdensstatistik	2017	01	Lars Steffen - 8
Personnel	Verdensstatistik	2017	01	Lars Steffen - 8
Personnel	Verdensstatistik	2017	01	Matsy Julia - 6
Personnel	Verdensstatistik	2017	01	Matsy Julia - 6
Personnel	Verdensstatistik	2017	01	Merete Harald - 9
Personnel	Verdensstatistik	2017	01	Merete Harald - 9
Personnel	Verdensstatistik	2017	01	Plaffel Pascal - 2
Personnel	Verdensstatistik	2017	01	Plaffel Pascal - 2
Personnel	Verdensstatistik	2017	01	Wenig Nadja - 2
Personnel	Verdensstatistik	2017	01	Wenig Nadja - 2

Example 3 in category "Bank" > Employee Payment List

When searching in type "Payroll" / category "Bank" / Year for all Payment-Transaction forms, you will receive a list of all available reports of the requested year stored in your archive.

The screenshot shows a software interface with a sidebar on the left containing navigation options like 'Dashboard', 'Documents', 'Admin', and 'Users'. The main area displays a table of documents. The table has columns for 'Dokument/Datei', 'Year', 'Month', 'Description', and 'Status'. The 'Dokument/Datei' column header is highlighted with a green box, and a green arrow points to it from above. The table contains 18 rows of data, all with 'Bank' in the 'Dokument/Datei' column and 'Zahlung Abrechn...' in the 'Description' column. The 'Year' column shows values from 2017 to 2019, and the 'Month' column shows values from 02 to 12.

Dokument/Datei	Year	Month	Description	Status
Bank	2017	02	Zahlung Abrechn...	
Bank	2017	02	Zahlung Abrechn...	
Bank	2017	03	Zahlung Abrechn...	
Bank	2017	06	Zahlung Abrechn...	
Bank	2017	07	Zahlung Abrechn...	
Bank	2017	09	Zahlung Abrechn...	
Bank	2017	11	Zahlung Abrechn...	
Bank	2017	01	Zahlung Abrechn...	
Bank	2017	01	Zahlung Abrechn...	
Bank	2017	04	Zahlung Abrechn...	
Bank	2017	05	Zahlung Abrechn...	
Bank	2017	06	Zahlung Abrechn...	
Bank	2017	08	Zahlung Abrechn...	
Bank	2017	10	Zahlung Abrechn...	
Bank	2017	12	Zahlung Abrechn...	
Bank	2017	02	Zahlung Abrechn...	
Bank	2017	02	Zahlung Abrechn...	

Now you can sort the list in either ascending or descending order by clicking on "Dokument/File" in the header .


3. Working with your documents in the archive

One of the main features in our Digital Personalbüro is the upload and save functionality of your own locally saved documents into the document-management-system of the Archive. After the upload your documents are stored in the secure environment of the Digital Personalbüro Client.

In order to easily find the documents, they must be indexed.

The archived documents can be shared with other active users.

Documents that have been shared with you via the Digital Personalbüro can be saved into the Archive.

 On the following pages please find information regarding the various document types.

- [3.1. How to transmit data to Paychex](#)
- [3.2. How to transmit data to your employees](#)
- [3.4. How to transmit data to your employer](#)
- [3.5. How to receive data from your employer](#)
- [3.6. How to access your epayslip as employee](#)
- [3.7. How to transmit data to your tax consultant](#)
- [3.9. Use of type "not related to personnel" for your archival storage](#)

3.1. How to transmit data to Paychex


With the Digital Personalbüro (DPB) you can transmit Data (documents/photos) to Paychex for processing.

The audit-proof transmission and storage is done by Type "Exchange with Paychex". The receipt will be confirmed with date and time in the status-field of the document. Additionally, you will receive a separate receipt that you can find in the folder "Exchange with Paychex"/Quittung (receipt).

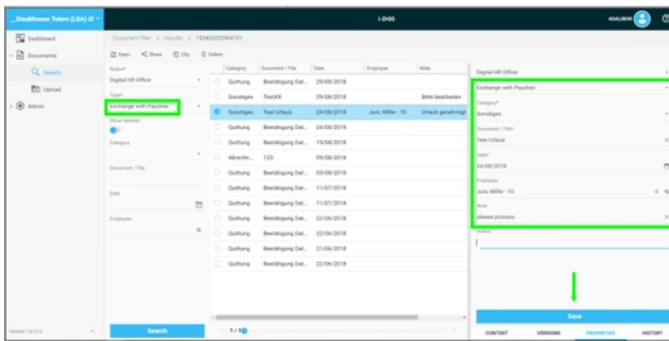
Via the Share functionality you can transfer documents also from other Types (i.e. Personnel Files) to Paychex. You will receive a receipt in the folder "Exchange with Paychex"/Quittung (receipt), but no confirmation in the status-field of the document. Under "[Reports](#)" you can retrieve a list of all the documents that you have shared.

You will need to perform the following steps:

1. [Upload the document](#)
2. [Index the document in Type "Exchange with Paychex"](#)
3. [Share the document with Paychex](#)

 **These are the steps in detail:**

1. Upload the document that you would like to submit to Paychex for processing.
2. Then index the document in Document Type "Exchange with Paychex"

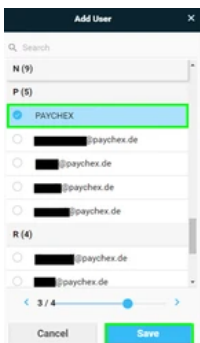


The following properties (fields) are available for indexing:

– **Category*** / **Document/File*** / **Date*** / **Employee** / **Note**

* With asterisk marked fields are mandatory for indexing

3. Now search for the document that you would like to share with Paychex in the Document-Filter.
4. Select "Paychex" from the list of recipients and save.



Now you have submitted your document/assignment to us.

Now you will see the date and time of receipt in the field "Status" of the document property.

3.2. How to transmit data to your employees

The Digital Personalbüro (DPB) allows the encrypted exchange of data as part of HR-Processes that are not permitted to be viewed by third parties.

Possible usage could be

- Transmission of written approvals (i.e. Leave Applications)
- Transmission of certificates / confirmations
- Keeping templates for processing purpose and make them available to employees

👉 In principle, you can use this type freely and as needed. However, please name your documents/files clearly and categorise them meaningful and consistently.

Use Document Type "Exchange with Employee" or "Templates" to submit documents to your employees. Under "Reports" you can retrieve a list of all the documents that you have shared.

The following steps need to be done:

1. [Upload the document](#)
2. [Index the document in Type "Exchange with Employee" or "Templates"](#)
3. [Share the document with your employee](#)

⚠️ Please do not use this Document Type to send your employees Payslips, Employment Tax Statements or Social Insurance reports. For those please assign your employees the "Employee (only own payroll documents)" role.

💡 **These are the steps in detail:**

1. Upload the document that you wish to send to your employee.
2. Then index the document in Document Type "Exchange with Employee".

The screenshot shows a web interface for document management. At the top, there are tabs for 'Dateiname', 'Fortschritt', and 'Preview'. The 'Fortschritt' tab is active, showing '100 %' completion. Below this, a message states: 'Eine Vorschau des Dokuments ist nicht möglich. Bitte laden Sie das Dokument zunächst herunter und öffnen Sie es dann.' The main area is a large grey rectangle. On the right side, there is a form with the following fields: 'Arbeitsbereich*' (set to 'Digitales Personalbüro'), 'Typ*' (set to 'Austausch mit Mitarbeitern'), 'Kategorie*' (set to 'Urlaubsantrag'), 'Dokument/Datei*' (set to 'Urlaub 2018'), 'Datum*' (set to '06.04.2018'), 'Mitarbeiter: Wenz_Nadja*' (set to 'Wenz_Nadja'), and 'Notiz'. A green box highlights these fields. Below the form is a blue button labeled 'Ausgewählte speichern' with a green arrow pointing down to it.

The following properties (fields) are available for indexing:

– **Category*** / **Document/File*** / **Date*** / **Employee*** / **Note**

* With asterisk marked fields are mandatory for indexing

⚠️ Please be mindful when selecting the employee. If you by accident select an incorrect employee, they may have access to sensitive / confidential information that they are not entitled to view.

📌 Please be mindful when indexing your documents to ensure that you can easily find them later. -> [5.3. Tips how to clearly index your documents / files](#)

3. Now you submit the document to your employee via the Share Functionality.

Your employee will receive an Email to notify them that a shared document is available in the Portal-Archive.

3.4. How to transmit data to your employer

You can transmit data (documents / photos) via the Digital Personalbüro (DPB) to your employer.

Possible usage could be

- Submit Leave Applications
- Receipts, Travel Expense Reports
- Sick notes
- Time Sheets
- Certificates / Confirmations

👍 In principle, you can use this type freely and as needed. However, please name your documents/files clearly and categorise them meaningful and consistently.

Use Document Type "Upload to Employer" to submit documents from the employee to the employer (or personnel office).

The following steps need to be done:

1. [Dokument hochladen](#) - Upload the document
2. [Dokument im Typ "Upload an Arbeitgeber" indexieren](#) - Index the document in Type "Upload to Employer"
3. inform your employer (or personnel office).

⚠ Important Note

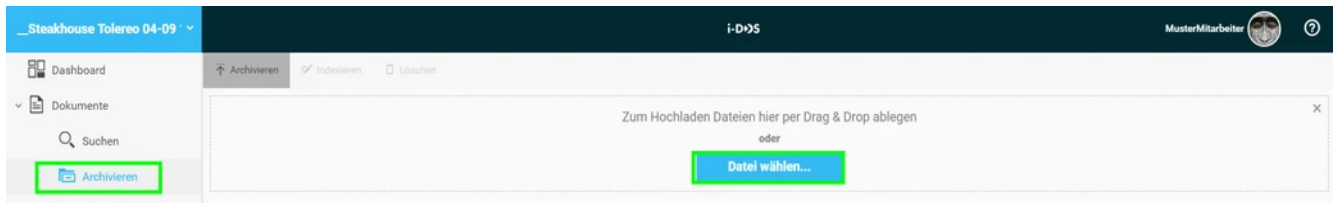
Please note that only your employer (or personnel office) can access the documents that you have indexed as "Upload to Employer".

This feature works similar to a letter box that you put a letter (a document) in, and only your employer / personnel office has the key to this letter box.

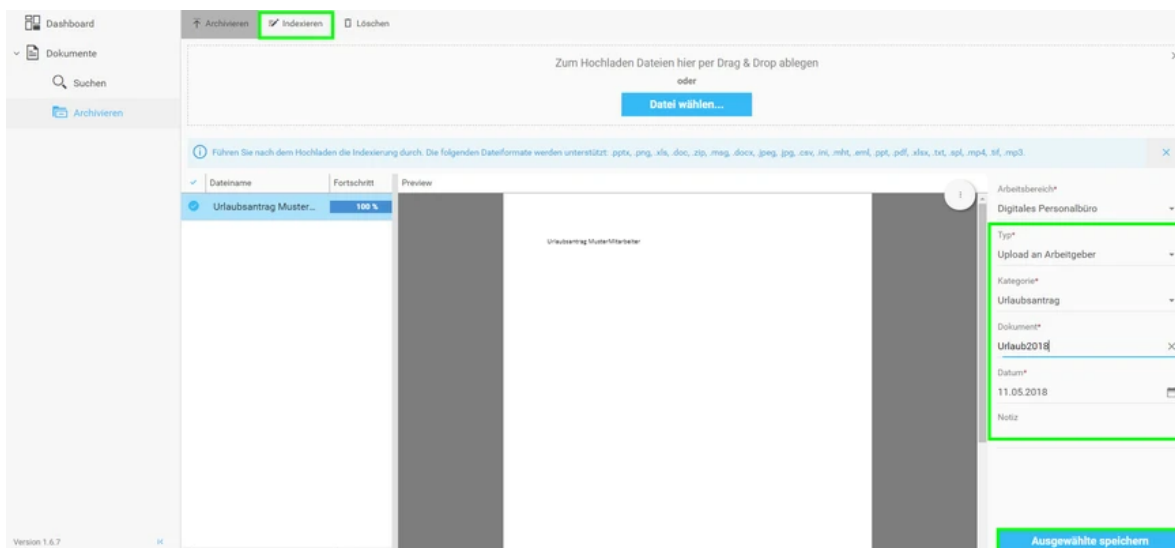
Please also note that your employer will not receive an automated notification after you have used the "Upload to Employer" feature. Therefore, please inform your employer in a telephone call or Email.

💡 These are the steps in detail:

1. You upload the document or photo that you wish to transmit to your employer:



2. Then you index the document in Document Type "Upload to Employer":



The following properties (fields) are available for indexing:

→ **Category*** / **Document/File*** / **Date*** / **Note**

* With asterisk marked fields are mandatory for indexing

3. Click on "Save selected". Now you have transmitted the document to your employer.

3.5. How to receive data from your employer

With the Digital Personalbüro (DPB) your employer can transmit data (documents / photos) to you.

Possible usage could be

- Approvals (i. e. for Leave Applications)
- Certificates / Confirmations
- Templates

How to collect documents that have been transmitted by your employer

When your employer has transmitted a document to you, you will receive an automated notification.

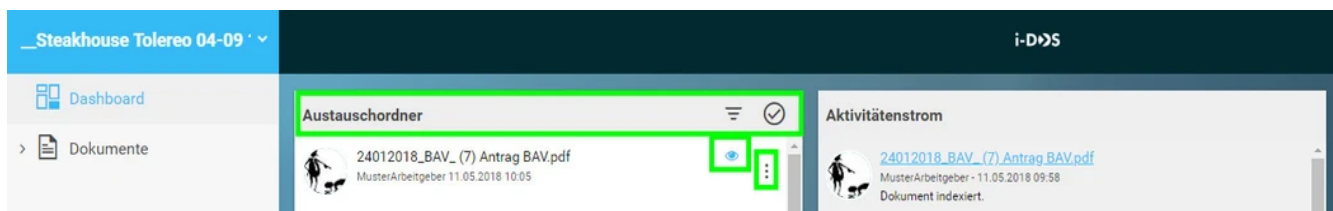
The document will be made available to you via "Exchange with Employee" or "Templates"

The following steps need to be done:

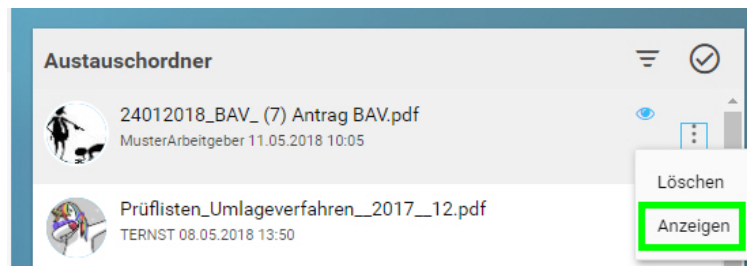
1. You will find the document in your "Shared" tile ("Shared" folder).
2. open the document with a double-click.
3. Download the document.

💡 These are the steps in detail:

1. Search for the document in your "Shared" tile ("Shared" folder). New documents are marked with an "eye":



2. Open the menu by clicking on the 3 vertical dots and select "Details":



3. Click on the blue link in the field "Documents".

Teilen ✕

Name*
24012018_BAV_ (7) Antrag BAV.pdf

Beschreibung

Dokumente

24012018_BAV_ (7) Antrag BAV.pdf ✕

Empfänger

+ Hinzufügen Benutzer

MusterMitarbeiter ✓ ✕

Leseberechtigung

Erlauben bis* 11.06.2018 📅

Abbrechen Speichern

4. The document will open, and you can copy it into your "Clipboard" tile ("Clipboard" folder) or download it onto your computer.

3.6. How to access your payslip as employee

As an employee you have access to your own Payroll documents in the Digital HR-Office if your employer has activated you as a user.

The following documents are available in the archive:

- Payslips
- Social Insurance Certificates (DEÜV-Entgeltnachweise)
- ELStAM Certificates
- Electronic Income Tax Certificates
- other Certificates

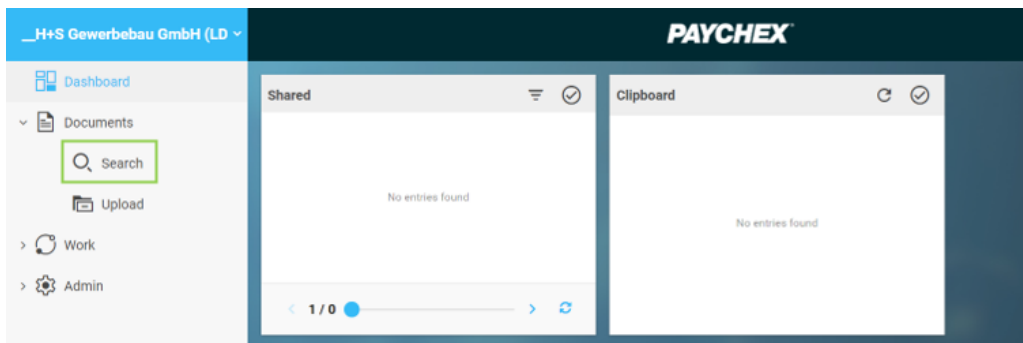
💡 Please see below how you can find your payslips

Log into the Digital HR-Office at <https://mein.paychex.de> with your user name and password.

(When you log in for the first time, please use your user name and the temporary password that was sent to you via email. You have to change that password before you can continue to search for your documents.)

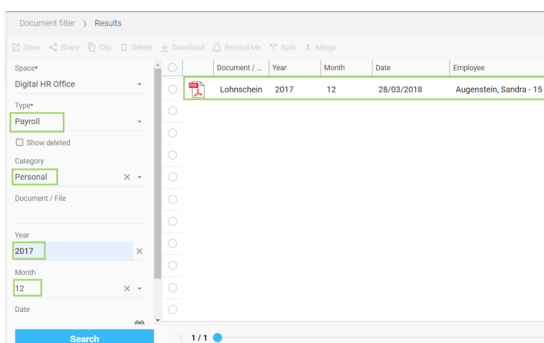


Now go to Documents > Search:



In Type "Payroll" select the Category "Personal". If for example you are looking for your payslip for December 2017, type in the year and select the month. Then click on "Search":

Now you see your payslip for 12/2017:



3.7. How to transmit data to your tax consultant

With the Digital Personalbüro (DPB) you can transmit Data (documents/photos) to your tax consultant for processing.

Use Document Type "Exchange with CPA" to submit documents to your tax consultant. Under "[Reports](#)" you can retrieve a list of all the documents that you have shared.

You will need to perform the following steps:

1. [Upload the document](#)
2. [Index the document in Type "Exchange with CPA"](#)
3. [Share the document with your CPA](#)

3.9. Use of type "not related to personnel" for your archival storage

Here you can archive company related Data/Documents without personnel reference, like:

- Company Master Data
- Tax Office Documents
- Health Insurance Documents
- Trade Association Documents

Your advantages:

- Usage as company internal archive
- Easily accessible Data/Documents - i.e. for filling out forms to share with Paychex or to exchange with your CPA

4. Working as administrator in the Digital Personnel office (DPB)

As User with Admin rights you have access to all User data and settings. You administer the roles and permissions of all Users and are first contact for all your Users.

Besides the User Administration you can adjust certain settings in the Parameter, if required.

Please read on the following pages how to administer your Digital Personnel Office.

- 4.1. Roles and authorisations
 - 4.1.0. Administrator
 - 4.1.1. Full access (Main user) / PRESETTING
 - 4.1.2. Basic access (Main user)
 - 4.1.3. Employee full access / PRESETTING
 - 4.1.4. Employee (epayslip) / Employee (Templates) / Employee (Exchange with Employer)
 - 4.1.5. CPA Basic access
 - 4.1.6. CPA Full access
 - 4.1.7. Controller
 - 4.1.8. Auditor
 - 4.1.9. HR without payroll - full access
 - 4.1.10. Portal User
- 4.2. Enabling portal access for other users of your Digital HR Office
- 4.3. User administration
 - 4.3.1. Set up a new user
 - 4.3.2. To access multiple Clients with one User-Login
 - 4.3.4. How to manually set up an account for an employee when the user has been deleted
- 4.4. How to activate an employee for data exchange and ePayslip
- 4.5. How to activate an employee for "epayslip"

4.1. Roles and authorisations

The enabling and access-rights are controlled by roles. Here it is defined which user group has which rights and who can grant access rights for other users.

Authorisations are assigned by roles.

The following functionalities are activated or deactivated, depending on the role:

- Uploading
- Indexing
- Reading
- Deleting

On the following pages you will find an overview of authorisations for each role.

4.1.0. Administrator

This role grants full access to all documents to the Administrator (Managing Director or employee responsible for the payroll), including the Document Type 'Personnel Files' and 'Not Related to Personnel'.

Assigned Administration rights enable the Administrator to administer the User dates and certain settings in the system. The Administrator can also assign a second Administrator role, if required.

At initial set-up, only the dedicated Main User (Full Access) has Administration rights.

Document Type / Rights	Upload	Index	Read	Delete
Payroll	⊖	⊖	✓	⊖
Templates	⊖	✓ *	✓	✓ *
Exchange with Paychex	⊖	✓	✓	✓
Upload to Employer	⊖	✓	✓	✓
Exchange with Employees	⊖	✓	✓	✓
Exchange with CPA	⊖	✓	✓	✓
Personnel File	⊖	✓	✓	✓
Not related to Personnel	⊖	✓	✓	✓

*= Templates from editor PAYCHEX cannot be indexed or deleted
































Information

The following Administrator roles are currently inactive: Admin Business Role, Admin Security Role, Admin Full Role

4.1.1. Full access (Main user) / PRESETTING

This role grants full access to all documents to the main user (Managing Director or employee responsible for the payroll), including the Document Type 'Personnel Files' and 'Not Related to Personnel'.

At initial set-up, only the dedicated Main User (Full Access) has Administration rights and can access the Paychex Portal.

Document Type / Rights	Upload	Index	Read	Delete
Payroll				
Invoices				
Templates				
Exchange with Paychex				
Upload to Employer				
Exchange with Employees				
Exchange with CPA				
Personnel File				
Not related to Personnel				
Portal & Template Forms				

*= Templates from editor PAYCHEX cannot be indexed or deleted

4.1.2. Basic access (Main user)

This role grants access to documents, except Document Type 'Personnel Files' and 'Not Related to Personnel'.

















Document Type / Rights	Upload	Index	Read	Delete
Payroll	⊖	⊖	✓	⊖
Invoices	⊖	⊖	⊖	⊖
Templates	✓	✓ *	✓	✓ *
Exchange with Paychex	✓	✓	✓	✓
Upload to Employer	✓	✓	✓	✓
Exchange with Employees	✓	✓	✓	✓
Exchange with CPA	✓	✓	✓	✓
Personnel File	⊖	⊖	⊖	⊖
Not related to Personnel	⊖	⊖	⊖	⊖
Portal & Template Forms	Portal Access is currently not active for this role, but can be requested by opening a Support ticket for: "Request: Portal sharing function"			

*= Templates from editor PAYCHEX cannot be indexed or deleted

4.1.3. Employee full access / PRESETTING

This role gives the employee reading rights to their own payroll related documents (epayslip) and internal Employer Templates.

The employee can also submit documents to their employer.

Document Type / Rights	Upload	Index	Read	Delete
Payroll				
Templates				
Upload to Employer				
Exchange with Employees				

*Only own payslips, own Social Insurance, Tax related- and other general certificates.

**Only Editor "internal"

4.1.4. Employee (epayslip) / Employee (Templates) / Employee (Exchange with Employer)

Employee (epayslip)

This role gives the employee reading rights to their own payroll related documents (epayslip).

Document Type / Rights	Upload	Index	Read	Delete
Payroll	-	-	✓*	-

*Only own payslips, own Social Insurance, Tax related- and other general certificates.

Employee (Templates)

This role gives the employee permission to read and download Employer Templates.

Document Type / Rights	Upload	Index	Read	Delete
Templates	-	-	✓*	-

*Only Editor "internal"

Employee (Exchange with Employer)

This role gives the employee permission to upload and index documents in Type „Upload to Employer“ as well as reading rights to documents issued by the Employer.













Document Type / Rights	Upload	Index	Read	Delete
Upload to Employer	✓	✓	-	-
Exchange with Employees	-	-	✓*	-

*Only documents with own Personnel Number / Employee Identification

4.1.5. CPA Basic access

This role grants reading rights to booking receipts, Financial Accounting exports and monthly and yearly Payroll Journals from the current Paychex payroll. This role has also access to internal Templates in Department 'for CPA'.

Furthermore, the Exchange-Folder can be used for co-operation.

Document Type / Rights	Upload	Index	Read	Delete
Payroll			 *	
Templates			 **	
Exchange with CPA				













For Paychex-Clients:

*Only booking receipts, Payroll Journals, Primanota by Financial Accounting accounts, Primanota by Cost Centers

**Only Editor 'Internal' and Department 'for CPA'.

4.1.6. CPA Full access

This role grants full reading access of all documents in Type 'Payroll'. This role has also access to internal Templates in Department 'for CPA'. Furthermore, the Exchange-Folder can be used for co-operation.









Document Type / Rights	Upload	Index	Read	Delete
Payroll				
Templates				
Exchange with CPA				

*Only Editor 'Internal' and Department 'for CPA'.

4.1.7. Controller

This role grants readings-rights to relevant documents from the Type 'Payroll'.

Furthermore is the Upload and Indexing of own documents (i. e. audit results) for transfer to the employer activated.

Document Type / Rights	Upload	Index	Read	Delete
Payroll				
Upload to Employer				

For Paychex-Clients:

*Only booking receipts, Payroll Journals, Primanota by Financial Accounting accounts, Primanota by Cost Centers

4.1.8. Auditor

This role can be assigned to external Social Security- or Wage Tax Auditors.

The role grants reading-rights on documents of the Type "Payroll" that are relevant to auditing. Furthermore, the Upload and Indexing of own documents (i. e. audit results) to employer is permitted.

Document Type / Rights	Upload	Index	Read	Delete
Payroll	⊖	⊖	✓*	⊖
Upload to Employer	✓	✓	⊖	⊖

Für Paychex-Clients:

*Only Payroll Journals, Income Tax Registration, Social Insurance Registration, Health Insurance reports, booking receipts,

Primanota by Financial Accounting accounts, Primanota by Cost Centers

4.1.9. HR without payroll - full access

This role grants access to documents in the Personnel file and HR templates, **without** Payroll related documents.


Document Type / Rights	Upload	Index	Read	Delete
Payroll	⊖	⊖	⊖	⊖
Templates	✓*	✓*	✓*	✓*
Exchange with Paychex	⊖	⊖	⊖	⊖
Upload to Employer	⊖	✓	✓	⊖
Exchange with Employees	✓	✓	✓	✓
Exchange with CPA	⊖	⊖	⊖	⊖
Personnel File	✓	✓	✓	✓
Not related to Personnel	⊖	⊖	⊖	⊖
Portal & Template Forms		⊖		

*Only Editor "internal" and Department "Personnel"

4.1.10. Portal User

Part of the Digital Personnel Office is the Paychex Portal. In the Paychex Portal you can communicate and exchange data and pre-defined forms with Paychex.

At initial set-up, only the dedicated Main User (Full Access) has Administration rights and can access the Paychex Portal. However, the activation of additional Portal users can be requested by opening a Support ticket for: "Request: Portal sharing function"

Document Type / Rights	Upload	Index	Read	Delete
Open Portal & Templates				

4.2. Enabling portal access for other users of your Digital HR Office

Your Digital HR Office. You also know that our application comprises two components.

1. Your user login takes you to the dashboard of the i-DOS archive. In this part of the application, your work is file-based and, in particular, you can access your documents from the current payroll accounting (Documents > Search).
2. Via the "Paychex Portal" tile, you can open a connection to our online forms and the portal messages. These allow for a very flexible, secure exchange of information with your payroll specialist.

For reasons of confidentiality, until today only the primary main user had access to the Paychex Portal, which was configured during the setup of your Digital HR office. We previously announced that we would also permit other users to have access in the future.

We can now grant access upon request to the portal of your Digital HR office to other users. You can then use notifications and messages in the Paychex Portal as a group function.

Please note: As soon as your Digital HR office has been activated for multiple portal users, each user has access to the portal under one of the following roles that you have assigned in the i-DOS user administration:

- Main user (full access)
- Main user (basic access)
- Portal-User

In the portal itself, each user then has the same read and edit rights on all processes. This means that every user can read all messages and process messages that have also been written, received, or created by other users.

In addition, when there are new operations in the system, every user receives all the notifications from the first time they call up the portal.

Before you activate your digital personnel office, please check the roles of the users you have already activated in the user administration. Adjust these roles as necessary so that there is no unwanted access to the features of the portal.

Hint: In our default setting, only the primary main user from the initial setup had a role that permitted portal access. If you have not yet made any changes in the i-DOS administration, you do not need to do anything else.

To activate the group function of your portal, please open a ticket after checking the permissions in the "Gruppenfunktion für Portal" case group at our [Service Desk](#).

Please note: We can only carry out your request if you create the ticket as the primary main user with your e-mail address specified at the initial setup. If this is not possible in exceptional cases, please indicate this in the ticket and state the reasons. Our support team will then contact you to resolve your request.

4.3. User administration

As User with Admin rights you have access to all User data and settings. You administer the roles and permissions of all Users and are first contact for all your Users.

You can administer the following settings:

- activate / deactivate Users
- add new external Users (if their payroll is not processed by Paychex - i. e. an Accountant)
- add / remove roles
- re-link name old / new with the Personnel ID when there is a name change
- create new Parameter for Users with a name change

4.3.1. Set up a new user

As Administrator you have access to the User Admin and therefore can add new Users. For example, this can be an auditor or an accountant who needs access to certain data or documents.

The primary User and employees that are being processed by Paychex Payroll will be imported automatically via the payroll and don't need to be added as users.

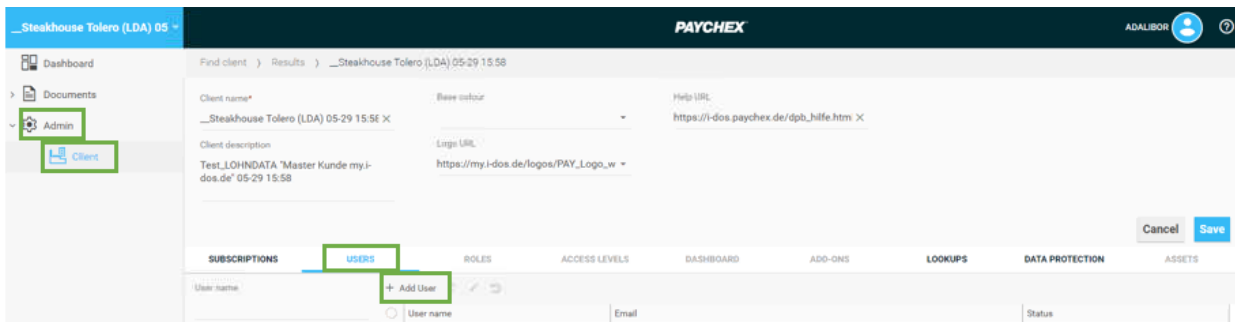
These are the steps to add a new User:

1. click on "Admin" and then on "Client"
2. click on "Users" and then on "+ Add User"
3. enter the Email-address of the User
4. enter the User name
5. add a role
6. save

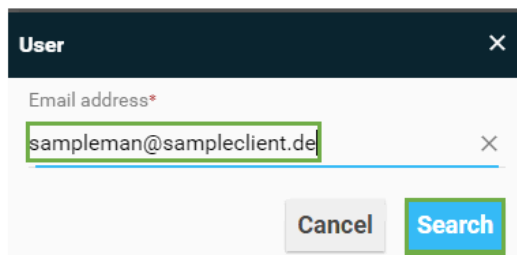


Here we show you the steps in detail:

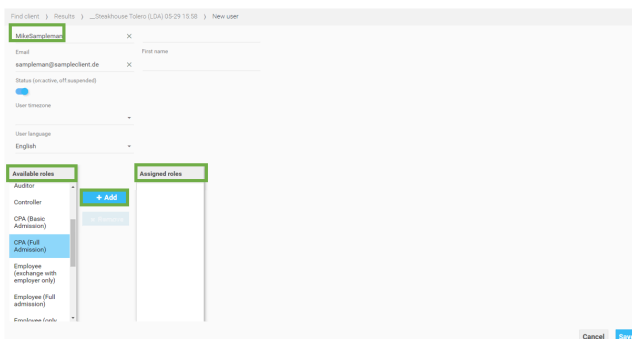
Click on "Admin" > "Client" > "Users" > "+ Add User"



On the page that will open enter the Email-Address of the new User and click on "Search":

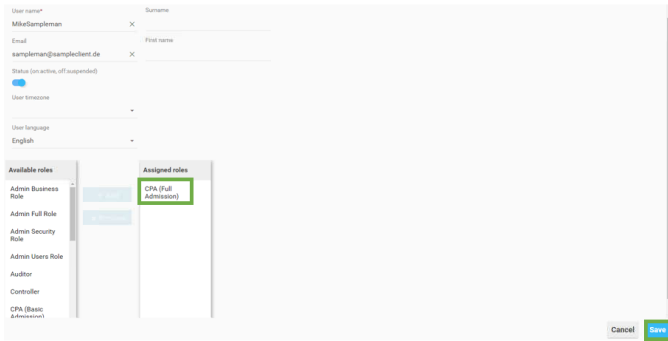


On the following page enter the User name and add one or multiple roles, as per your business requirements:



The selected role is now visible under "Assigned Roles".

Then click on "Save".



The newly added User will now show in the list of Users.

The User will receive an automatically generated Email with a verification link to inform him/her about the activation of the new account.

Important
By clicking on the Verification link in the Email, the User confirms his/her identity.

After successful verification, the User will receive another Email with their personal Login Data.

i Please note the link to the Digital Personnel Office Login Screen:

<https://mein.paychex.de>

4.3.2. To access multiple Clients with one User-Login

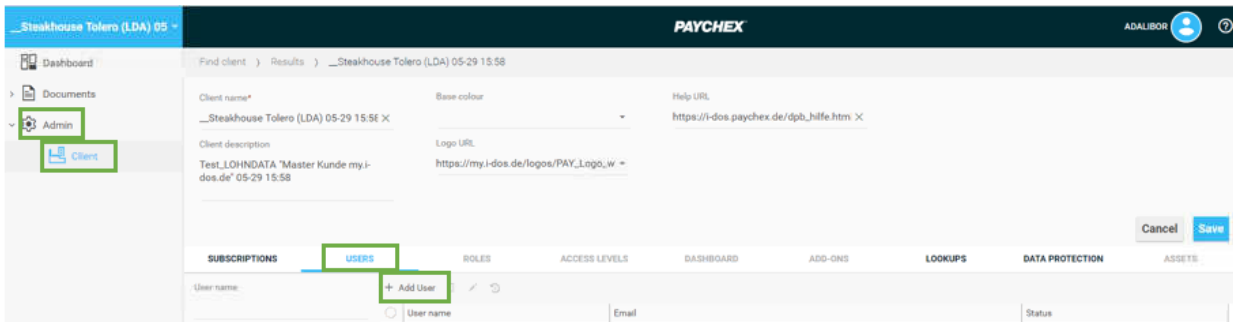
If an already active User needs access to additional Clients, it is possible to assign multiple Clients to that User, so that the User will conveniently only need one Login.

All the Clients that the User has been assigned to will be listed in the top left corner, and the User can change between Clients as needed.

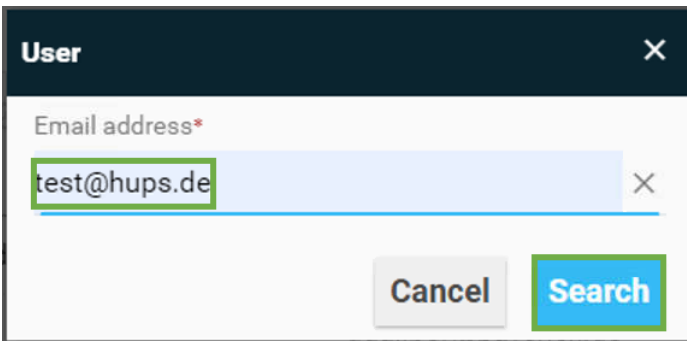
Here we describe

- how you can check if the User has already an active User Account for the Digital Personnel Office
- how you can add one or more additional Clients to an active User

Click on "Admin" > "Client" > "Users" > "+ Add User":

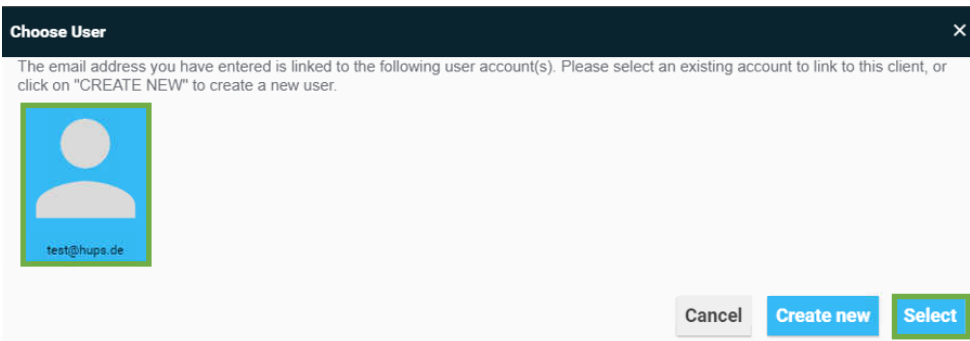


On the page that now opens, enter the E-Mail-Address of the User and click on "Search":



If the User is already active under the same E-Mail-Address, then the appropriate Profile will be displayed on the following page.

Click on the Pprofile and then click on "Select":

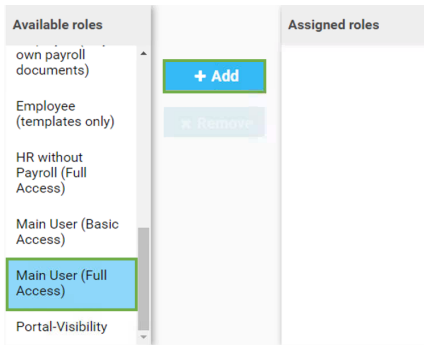


Now the system has linked the new Client with the selected User.

Then add one or multiple roles to the User (as per your business needs):

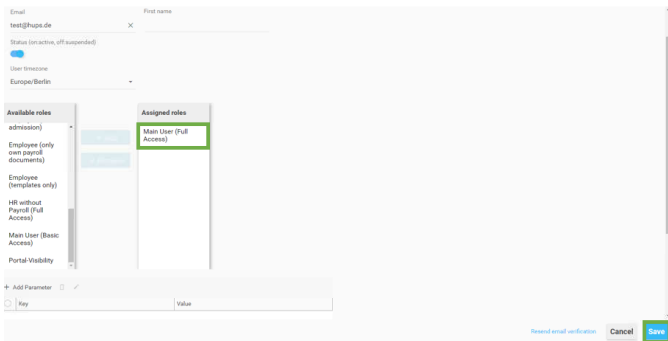


by clicking on the role and then on "+ Add":



You will now see the selected role under "Assigned Roles".

Then save the page:



You will now find the User in the list of Users for this Client:

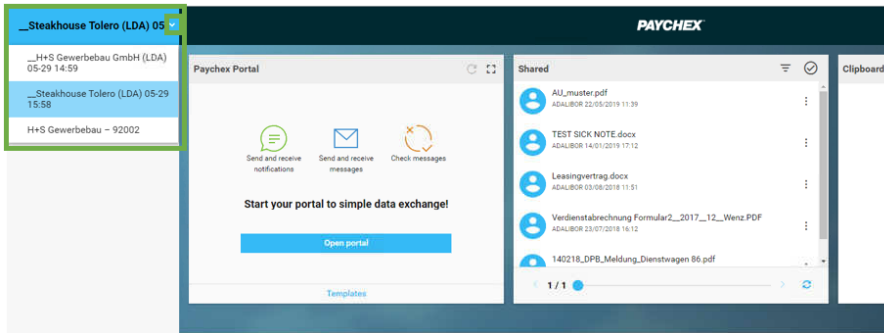
SUBSCRIPTIONS		USERS	ROLES	ACCESS LEVELS	DASHBOARD	ADD-ONS	LOOKUPS	DATA PROTECTION
User name		+ Add User						
Email		User name		Email		Status		
Status		All						
		test@hups.de		test@hups.de		Active		

The User can now access the documents and date of the Client (depending on the role that you have assigned).

Please note that the User will not receive a new Verification Email or new Login Data.

Important
Please inform the User that you have activated him/her for a new client. The User will not automatically be notified by the system about this activation, as no new Login Data are required.

The newly added User can access the new Client with the Client-changer in the top left corner:




4.3.4. How to manually set up an account for an employee when the user has been deleted

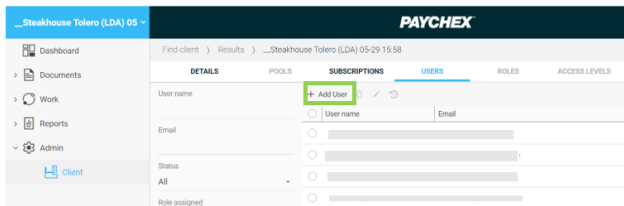
If a user has not logged into the Digital Personnel Office for an extended time period (approx two years), the account will be automatically deleted. However, before deletion of the account, the user will receive an Email asking them to please log into the Digital Personnel Office to prevent their account from getting deleted.

If the deleted user is an employee with access only to their own payroll-documents, the Administrator can add them again, but need to link them to their personal Employee Number in the Parameter.

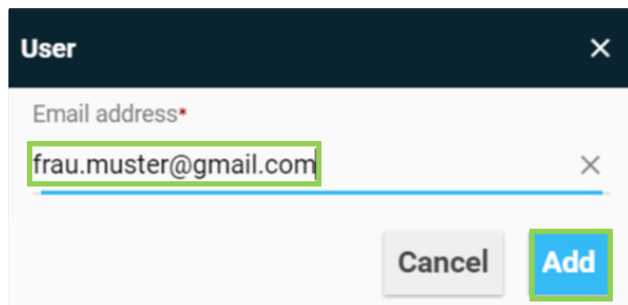
Please be mindful when linking an employee with their Employee Number! Linking a user with an incorrect Employee Number may result in the employee having access to another employee's payslips.

 **Below we describe how to add a new User and link them with their personal Employee Number via the Parameter:** 

Go to Admin > Client > Users > +Add User



Type in the employee's E-Mail-Address and click on "Add"



Now type in the User name that you wish to assign to the User. If you leave this field blank, the system automatically assigns the Email-Address as User name.

Please ensure that the Status-Button is pushed to the right (active)

Select the role "Employee Full admission" and click on "+Add"

Find client > Results > ___Steakhouse Tolero (LDA) 05-29 15:58 > New user

User name* Surname

Email First name

Status (on:active, off:suspended)

User timezone

User language

Available roles

- Controller
- CPA (Basic Admission)
- CPA (Full Admission)
- Employee (exchange with employer only)
- Employee (Full admission)
- Employee (only own payroll documents)

Assigned roles

+ Add

x Remove

Save your entry

Find client > Results > ___Steakhouse Tolero (LDA) 05-29 15:58 > New user

User name* Surname

Email First name

Status (on:active, off:suspended)

User timezone

User language

Available roles

- Controller
- CPA (Basic Admission)

Assigned roles

- Employee (Full admission)

Cancel Save

Now change to the "Lookups" Section

___Steakhouse Tolero (LDA) 05-29 15:58 PAYCHEX

Dashboard | Find client > Results > ___Steakhouse Tolero (LDA) 05-29 15:58

POOLS | SUBSCRIPTIONS | **USERS** | ROLES | ACCESS LEVELS | DASHBOARD | ADD ORG | LOOKUPS

Search + Add Lookup

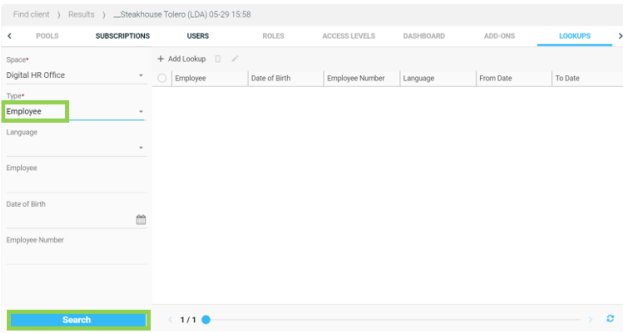
Type: Language: To Date

Category Exchange with CPA

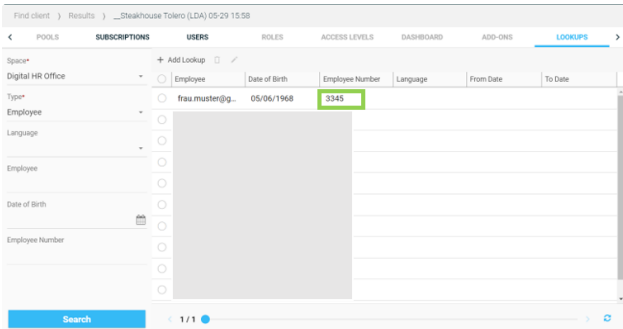
Language

Category

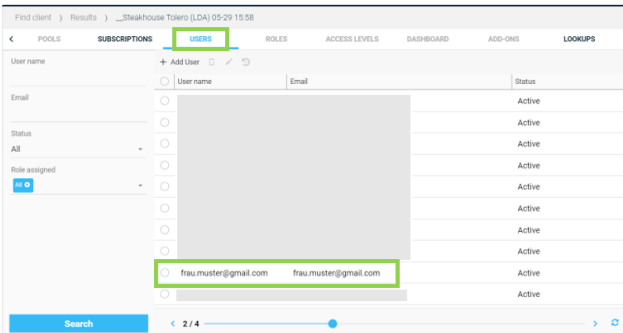
In the "Type" field select the value "Employee" and click on "Search"



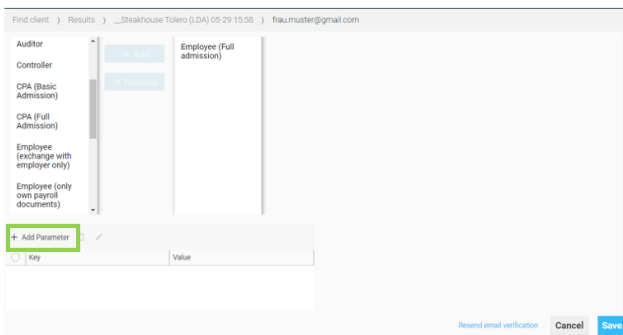
Find the appropriate employee and note the Employee Number



Now change back to the "Users" section and open the appropriate employee with a double-click



Scroll down to the Parameter section and click on "+Add Parameter"



In the "Key" field type in the word: Personalnummer and in the "Value" field type in the Employee ID that you have noted in the previous step. Then click on "Save"

Parameter ✕

Key*

Personalnummer ✕

Value (Dates in ISO format - yyyy-MM-ddThh:mm:ss)*

3345 ✕

Cancel
Save

Save the page. Now the User has access to his/her own Payroll-documents via the Employee Number that you have entered.

Steakhouse Tilens (LDA) OS
PAYCHEX [User Profile]

Dashboard
Results
Steakhouse Tilens (LDA) OS 15:58
truu.musten@gmail.com

- Documents
- Work
- Reports
- Admin
- Client

Available roles	Assigned roles
Auditor	Employee (Full admission)
Controller	
CFA (Basic Admission)	
CFA (Full Admission)	
Employee (exchange with employer only)	
Employee (only own payroll documents)	

+ Add Parameter ✕

Key	Value
<input type="checkbox"/> Personalnummer	3345

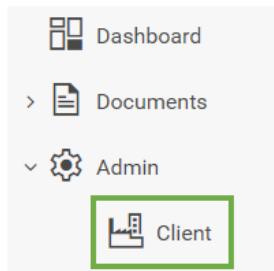
Resend email verification
Cancel
Save

4.4. How to activate an employee for data exchange and ePayslip

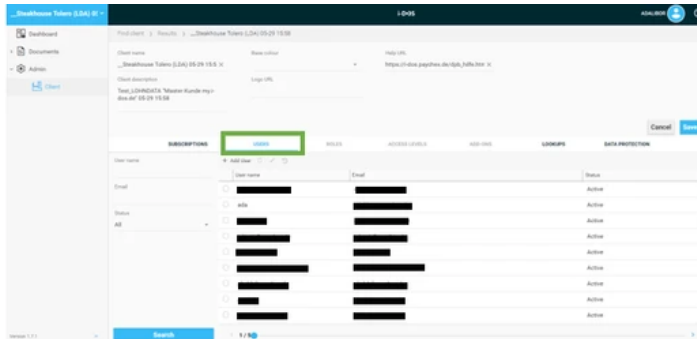
In our Digital Personnel Office you can activate your employees to exchange data and to view their own e-payslips.

Here we show you the steps how to activate your employees:

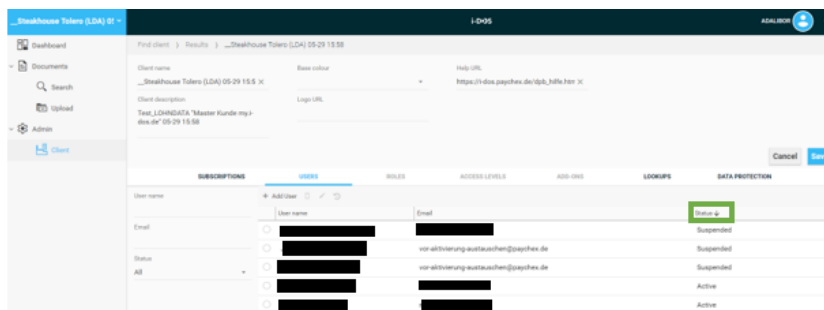
Click on Admin and then on "Client":



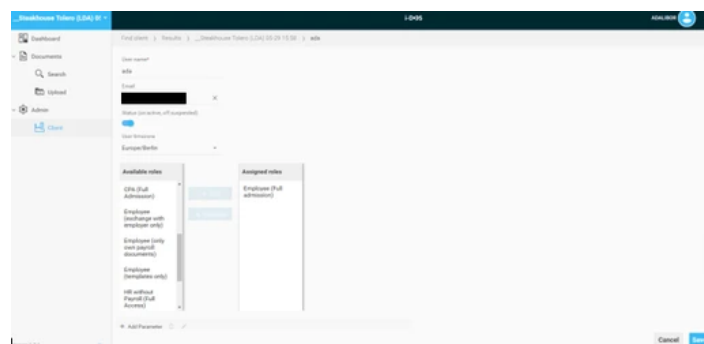
Click on "Users" which will open a list of User names:



You can sort the list by status to check which employees have already been activated (status=active) und those that are still inactive:



A double-click on the appropriate User name will open the screen to change the status or to add or remove roles:



Now you can prepare to activate the employee.

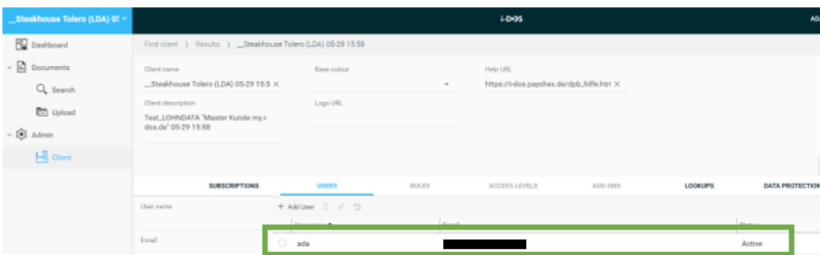
At first please overwrite the Email address field with the Email address of the employee. Then push the Status pushbutton to the right:



Important: Please ensure that you have overwritten the Email address before saving the page!

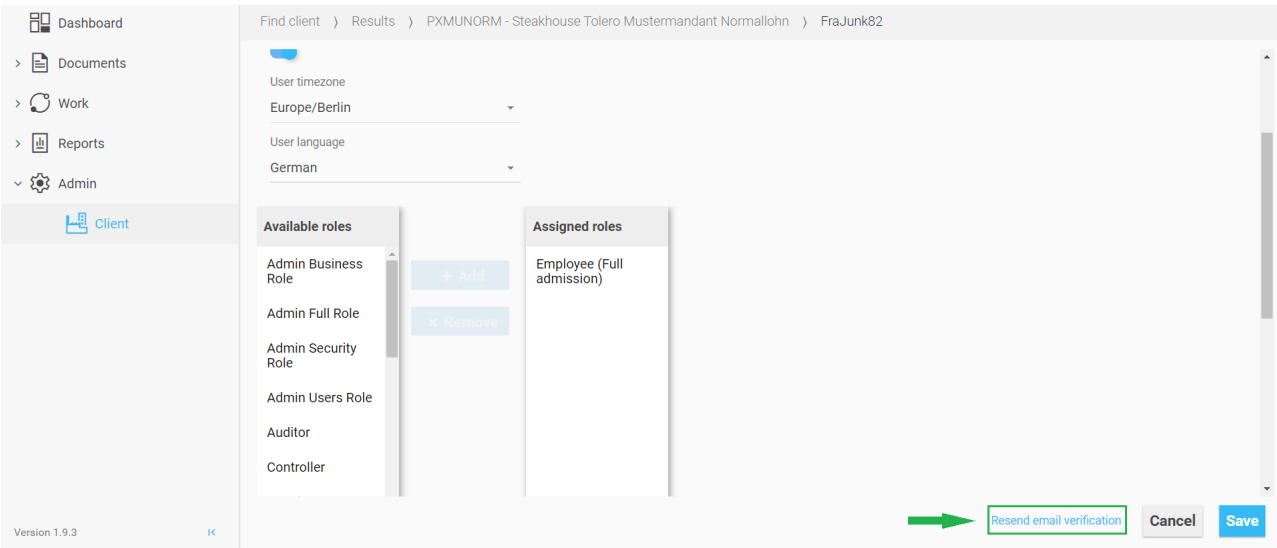
Now scroll down and click on "Save".

Once the system has processed the data, you will see that the employee is now "active" and the Email address was updated:



Your employee will now receive an Email confirming that their account was created.

In case the verification-mail has not been received you can resend it clicking on "Resend email verification".



Important: By clicking on the verification link in the Email, your employee confirms their identity.

After successful verification, your employee will receive another Email with their login data (user name and temporary password) and is now activated for digital data exchange.

i Please forward the following Login-page link to your employees:

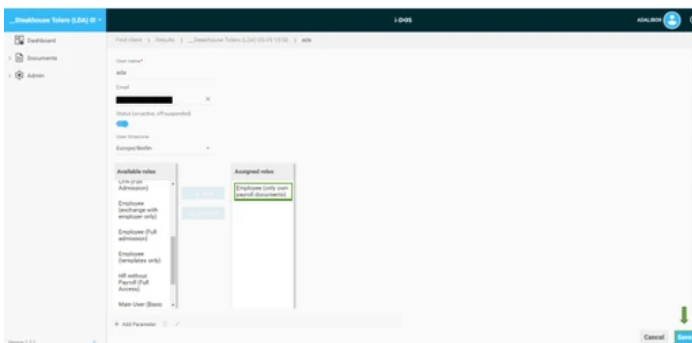
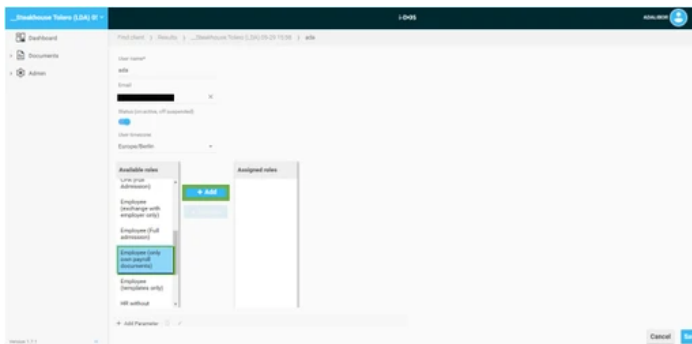
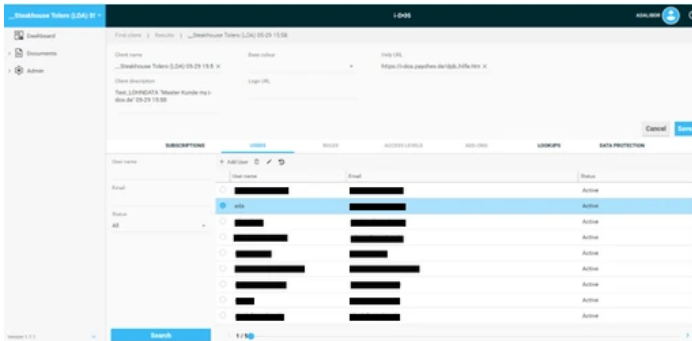
<https://mein.paychex.de>

👍 Your employee can now access their e-payslips in the Digital Personnel Office.

4.5. How to activate an employee for "epayslip"

With the Employee (only own payroll documents) role you can grant your employees access to their own payslips, Employment Tax- and Social Security statements.

If your employee has already been activated as a user, you just add the role "Employee (only own payroll documents)". Upon saving, this functionality is active.



If your employee is still inactive as a user, please activate them as described in Chapter 4.4

5. Functions / general descriptions

- [5.1. Download of files / documents](#)
- [5.2. Indexing downloaded documents - properties/fields to fill in](#)
- [5.3. Tips how to clearly index your documents / files](#)
- [5.6. Create assignments/declarations with pdf-forms from the template forms - Aufträge/Meldungen mit pdf-Formularen aus den Formularvorlagen erstellen](#)

5.1. Download of files / documents

In our Application you can download documents and save them locally. This works for individually as well as for multiple marked documents.

- [5.1.1. Download and print of single files / documents](#)
- [5.1.2. Multiple Download and Multiple Print](#)

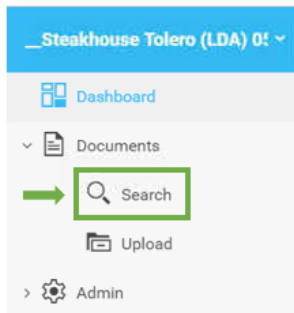
5.1.1. Download and print of single files / documents

In our application you can download and print files/documents and store them locally on your PC.

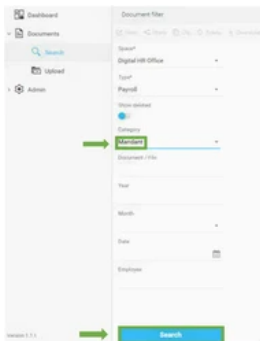
💡 Please see here how it is done:

Download

Click on the field "search" in the navigation bar on the left side:



In the document filter select the category, e.g. "Mandant" and click on "search":



Unfortunately the "Category" Dropdown values cannot be translated in the system. Therefore, here is a translation of the values:

Mandant = Client

Personal = Personnel

Bank = Bank

Finanzamt = Tax Office

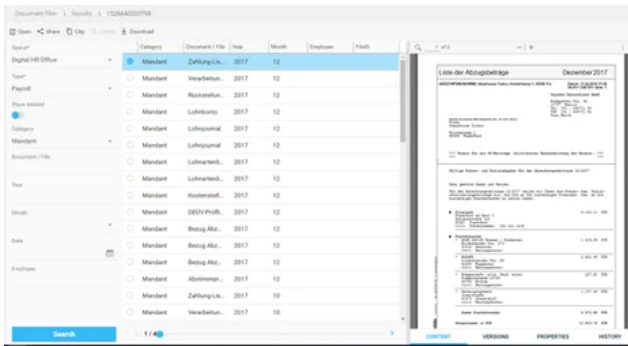
Sozialversicherung = Social Insurance

Finanzbuchhaltung = Financial Accounting

In the list of results click on the document that you wish to download:

Space*	Category	Document / File	Year	Month	Employee
Digital HR Office	<input type="radio"/> Mandant	Zahlung-Liste der Abzugsbeträge	2017	12	
Type*	<input type="radio"/> Mandant	Verarbeitungshinweise	2017	12	
Payroll	<input type="radio"/> Mandant	Rückstellung Anzahl der Mitarbe...	2017	12	
Show deleted	<input type="radio"/> Mandant	Lohnkonto	2017	12	
Category	<input type="radio"/> Mandant	Lohnjournal	2017	12	
Mandant	<input type="radio"/> Mandant	Lohnjournal	2017	12	

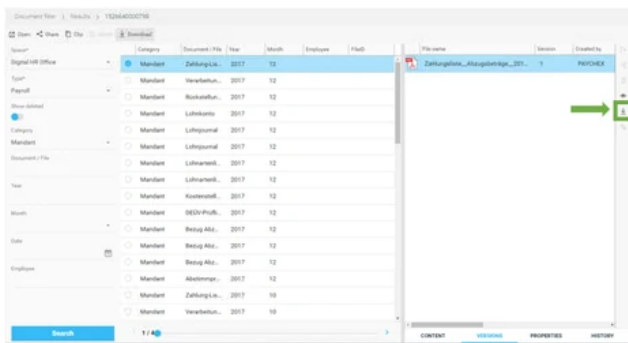
The preview of the document will open:



Now click on "Versions".

Click on the file name of the document: It is now marked in blue, and a toolbar will open on the right side.

Click now on the download symbol with the descending arrow:

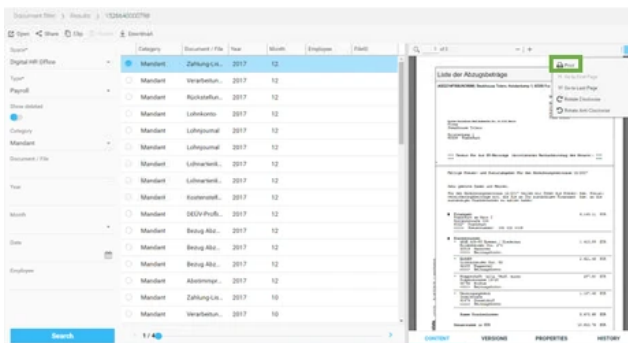


Depending on your browser settings, the file will open directly, or you will see a download indicator window at the bottom of your screen from where you can open the document.

You can also store the document locally on your PC.

Print

Select the appropriate document, click on the Toolbar (the three vertical dots in the top right corner) and select option "Print". This opens your print menu:



5.1.2. Multiple Download and Multiple Print

You would like to download or print more than one document all at once? This functionality is now available.

💡 See the detailed steps below:

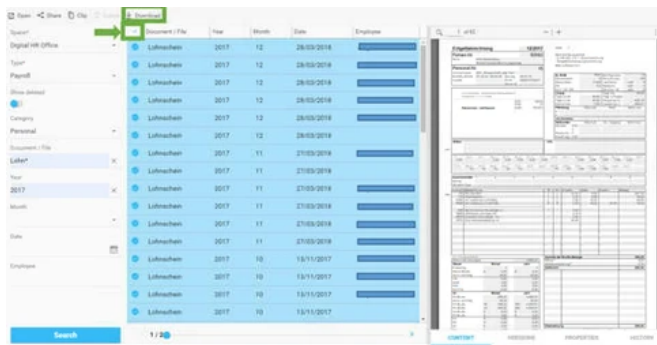
Download

Go to the Document Search to display all available documents.

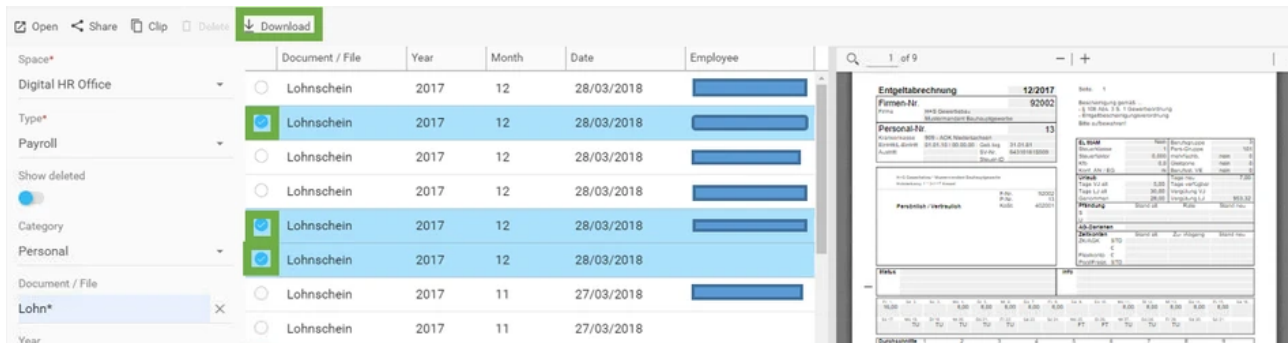
If you would like to download *all* documents, click on the blank field left of the "Document / File" column header.

All documents have been marked in blue.

Then you click on "Download". All documents will be downloaded and parallelly displayed in the Document Preview:



If you would like to download selected documents at once, mark these accordingly and click on "Download". The documents will be downloaded and parallelly displayed in the Document Preview:



Print

Go to the Document Search to display all available documents.

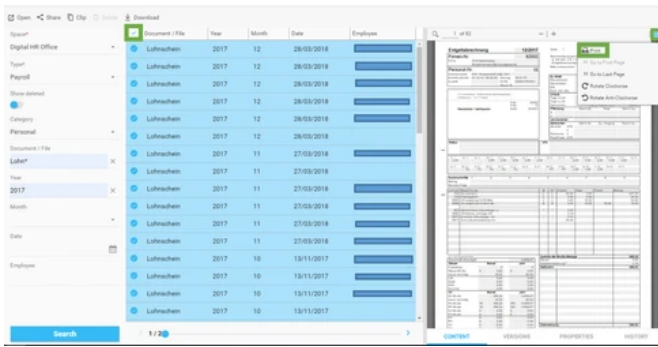
If you would like to print *all* documents, click on the blank field left of the "Document / File" column header.

All documents have been marked in blue.

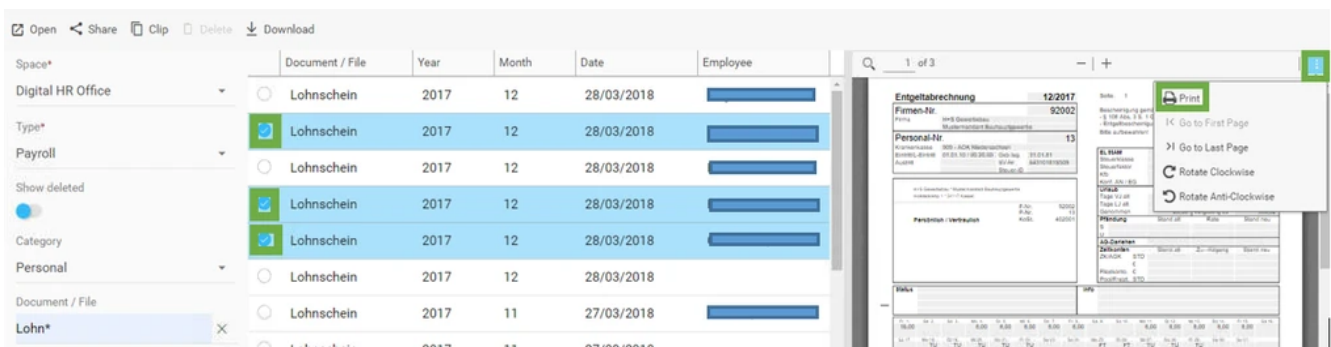
Then click on the Toolbar (the three vertical dots in the top right corner) and select option "Print".

The selected documents will be displayed in the Document Preview.

The print menu will open.



If you would like to print selected documents at once, mark these accordingly and click on "Print".
 Click on the Toolbar (the three vertical dots in the top right corner) and select option "Print".
 The selected documents will be displayed in the Document Preview.
 The print menu will open.



5.2. Indexing downloaded documents - properties/fields to fill in

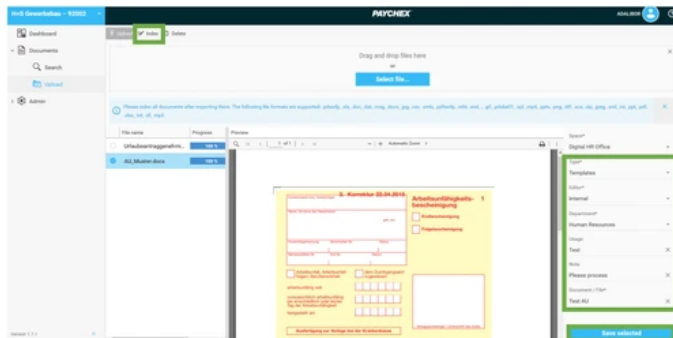
To quickly find your documents in the archive, a precise allocation is necessary. This happens with the help of indexing.

💡 Below you will see how to index your uploaded file/document.

As first step you select the document and click on "Index"

Fill in the fields on the right side. For example, select the Type "Templates" and fill in the next fields with the required information.

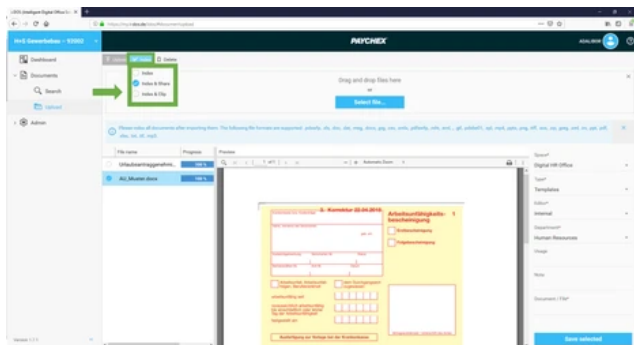
Then click on "Save selected".



Now your file/document is indexed and stored in the archive under the chosen properties.

Ihr Dokument ist nun indexiert und mit den hinterlegten Merkmalen eindeutig in Ihrem Archiv abgelegt.

In Version 1.7, it is now possible to Index and Share or to Index and Clip onto the Clipboard in one single step. Clicking on "Index", you will see the appropriate options:



After Indexing, a "Share" window will open where you can select the recipient who you would like to share the document with.

5.3. Tips how to clearly index your documents / files

The Digital Personnel Office is a Data Management System (DMS) for digital filing of documents and files. A logical filing scheme is required to quickly find your documents and files in the DMS. The Digital Personnel Office has been developed to fulfill this requirement.

There are 4 different Folder-Types that differentiate depending on the purpose of use:

1. Storage Folder → for archiving of data (Personnel Files, Not Related to Personnel, Templates)
2. Exchange Folder → for sharing data with a defined user group (Exchange with Paychex, Exchange with Employee, Exchange with CPA)
3. Upload to Employer Folder → Data must be re-indexed for permanent storage in a Storage Folder
4. Payroll Folder → Please note that own data cannot be uploaded and indexed into this folder, and imported data from this folder cannot be transferred to another folder.

In order to quickly find your data, please consider the following when indexing:

- Clear naming of the documents
- Consistent categorising of documents of the same type
- Filling out as many of the indexing fields as possible
- Indexing of documents/files in Type "Upload to Employer" for data that you would like to permanently store in the Personnel File of an employee
- Re-indexing of documents that have previously been (intentionally or mistakenly) indexed differently.

5.6. Create assignments/declarations with pdf-forms from the template forms - Aufträge/Meldungen mit pdf-Formularen aus den Formularvorlagen erstellen

For current assignments / declarations we have pdf-forms in place that can be completed on the display screen. You can find the templates in the Paychex Portal in the space "open template forms". You can even work on the templates offline and transmit them after completion through the archive.

Für gängige Aufträge / Meldungen halten wir für Sie am Bildschirm ausfüllbare pdf-Formulare bereit. Diese finden Sie im Paychex Portal im Bereich "Formularvorlagen öffnen". Sie können die Vorlagen auch offline bearbeiten und uns nach Fertigstellung über das Archiv übermitteln.

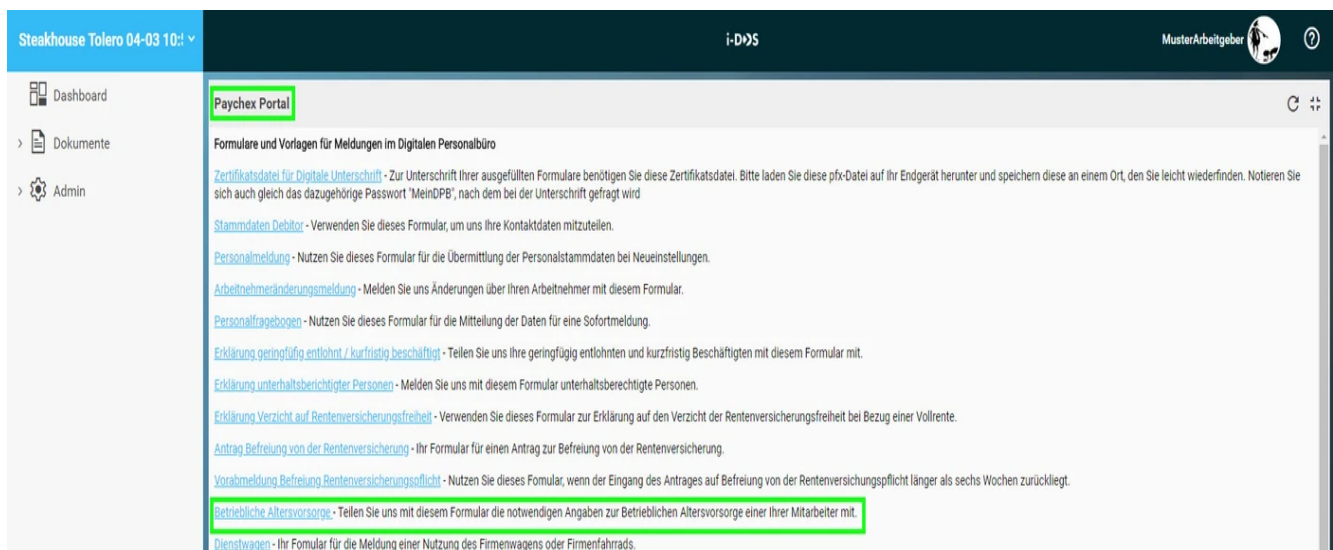
💡 Look at how to transmit assignments and declarations with the forms - Sehen Sie hier, wie Sie uns mit diesen Formularen eine Meldung übermitteln, bzw. einen Auftrag erteilen.

⚠ Requirements

- Acrobat Reader Version X (10) or higher - Einen Acrobat Reader Version X (10) oder höher.
- The digitale Paychex signature to make your feed in the forms unalterable (link [7.8.Zertifikat erstmalig in Acrobat Reader...einbinden](#)) - Die digitale Unterschriftendatei von Paychex um Ihre Formulareingaben für die Übermittlung unveränderbar zu machen. ([7.8. Zertifikat erstmalig in Acrobat Reader Version X \(10\) oder höher zum Unterschreiben von pdf-Dateien einbinden \(perspektivisch Version 11, DC\)](#))

Click in the space Paychex Portal on "open template forms". Select the required template form from the list.

Klicken Sie im Paychex Portal auf "Formularvorlagen öffnen". Wählen Sie das benötigte Formular aus der geöffneten Formular-Übersicht aus.



The screenshot shows the Paychex Portal interface. The top navigation bar includes 'Steakhouse Tolero 04-03 10:...' and 'i-DOS'. The left sidebar contains 'Dashboard', 'Dokumente', and 'Admin'. The main content area is titled 'Formulare und Vorlagen für Meldungen im Digitalen Personalbüro'. It lists several form templates with brief descriptions. A green box highlights the 'Betriebliche Altersvorsorge' form, which is described as: 'Teilen Sie uns mit diesem Formular die notwendigen Angaben zur Betrieblichen Altersvorsorge einer Ihrer Mitarbeiter mit.'

The form will be downloaded now. You can find it in your download folder.

Das Formular wird nun heruntergeladen. Sie finden es in Ihrem Download-Ordner.

⚠ Hint

Depending on the browser you work with, the space where to find the download folder may vary.

Wo sich Ihr Download-Ordner befindet, ist abhängig davon, mit welchem Browser Sie arbeiten.

Please save the downloaded file blank on your PC.

Bitte speichern Sie das heruntergeladene Dokument unausgefüllt lokal auf Ihrem Rechner.

Open now the form on your local PC drive.

Nun öffnen Sie das Formular aus Ihrem Speicher heraus.

Fill in the form - Formular ausfüllen

Complete the blank form, when needed you can save it from time to time.

Füllen Sie jetzt das Formular aus, dabei können Sie es auch zwischenspeichern.

Formulare – Förderung für bAV

Adressdaten	
Musterarbeitgeber	
Firma/ Mandant	
Mustermann, Max	
Arbeitnehmer	

Vertragsdaten	
<input checked="" type="radio"/> Änderungen für einen bestehenden Vertrag (Änderungen ab 01.01.2017) <input type="radio"/> Neuvertrag (ab 01.01.2018)	
BAV AG	12345 Berlin
Institution	Postleitzahl Ort
1.1.2018	123456789

Before transmitting it to Paychex you have to make the document unalterable.

Therefore you have to sign the form digitally in the row "signature".

Wenn Sie fertig sind, müssen Sie Ihre Eingaben vor der Übermittlung an Paychex unveränderbar machen. Dies geschieht, indem Sie das Formular im Unterschriften-Feld digital signieren.

Signing the form - Formular signieren

Before signing the form please make sure you have installed the Paychex certificate (link Kap.7.8.).

Click in the row "Signature" and the window "sign document" will open.

Select the digital ID "Paychex Digitales Personalbüro" and click on "WEITER".

Bevor Sie das Formular signieren, vergewissern Sie sich bitte, dass Sie das Paychex-Zertifikat installiert haben (link Kap.7.8).

Klicken Sie auf das Feld "Unterschrift" und es öffnet sich das Fenster "Dokument signieren".

Wählen Sie die Digital ID "Paychex Digitales Personalbüro" und klicken auf "WEITER".

Die Arbeitslohngrenze von 2.200 Euro brutto monatlich gilt unabhängig von einer ggf. reduzierten Arbeitszeit oder Teilmonat. Ausschließlich der laufende Arbeitslohn zählt und ist nicht hochzurechnen, dies gilt u.a. auch für Minijobber, pauschal besteuerte ArbNeh, beherrschende Gesellschafter Geschäftsführer u. Auszubildende.

Beim o.g. Vertrag handelt es sich um einen ungezillerten Vertrag.

Der bAV-Vertrag muss ein ungezillter Vertrag sein, d.h. die Versicherungsgebühren (Bearbeitungs-/ Verwaltungsgebühren) werden auf die gesamte Vertragslaufzeit verteilt, und nicht nur auf die ersten 5 Jahre nach Vertragsabschluss. **Vielmehr dürfen die Vertriebskosten nur als fester Anteil der laufenden Beiträge einbehalten werden. Bitte fordern Sie eine Bestätigung beim Versicherer eine Kopie für unsere Lohnunterlagen.**

Wir sind ein inländisches Unternehmen und zum

Voraussetzung der Anlageform wurde geprüft und Kapitalgedeckte bAV einer Direktversicherung, Pensions

Arbeitnehmer befindet sich in einem 1. Dienstverf Es wird kein andere Hauptbeschäftigung ausgeübt. Best

Es handelt sich nicht um eine reine Beitragszusatz zugerechneten Sicherheitsbeiträge, nicht seitens

Eventuelle Änderungen teile ich Ihnen umgehend mit.

6.4.2018
Datum

Unterschrift Kunde

lebenslanger Rente oder eines Auszahlungsplans.

Als die Lohnsteuer pauschal erhoben wird.

se den einzelnen Arbeitnehmern gutgeschrieben oder

Dokument signieren

Wählen Sie bitte Ihre digitale ID zum Signieren des Dokuments aus.

Digital-ID

Name: Paychex Digitales Personalbüro (Paych) Details...

Aussteller: Paychex Digitales Personalbüro

Altkennzeichen: 302381037 1247132 441700

Speicherort: Windows-Zertifizatspeicher Hinzufügen...

Passwort bestätigen:

Zeitstempel: (optional)

Abbrechen Weiter

PAYCHEX Deutschland GmbH | Holstenkamp 1, 22525 Hamburg
670 47 27 570 | info@paychex.de

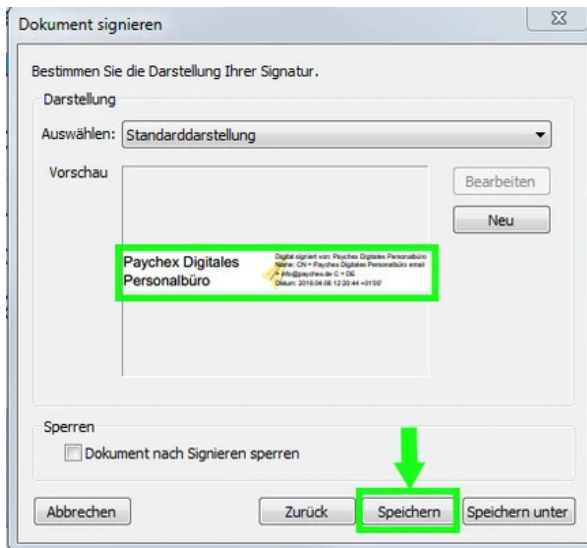
Lohndata | Budapester Str. 39, 10787 Berlin
Fax: (030) 262 80 87 | info@lohndata.de | (Budapester Str. 43 Besucherzugang)

Seite 1 von 1

BAV (Version: 01.04.2018)

In the next opening window you will see the signature. Click on "save" and it will be transferred into the form.

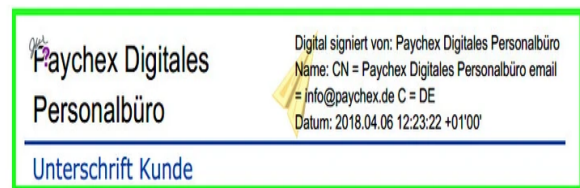
Die Signatur erscheint im nächsten sich öffnenden Fenster. Klicken Sie auf "Speichern" und die Signatur wird in Ihr Formular übernommen.



Eventuelle Änderungen teile ich Ihnen umgehend mit.

6.4.2018

Datum



Save the signed form on your PC,

1. load up the document into DPB (https://demo.i-dos.de/idos/help/de_DE/site/#hochladen)
2. index the document (8.2. Indexieren / Verschlagworten von heruntergeladenen Dokumenten - auszufüllende Merkmale/Felder)
3. and share it with Paychex (5.4. Dokumente mit einem anderen Benutzer teilen).

Herewith you have transmitted your assignment / declaration to Paychex.

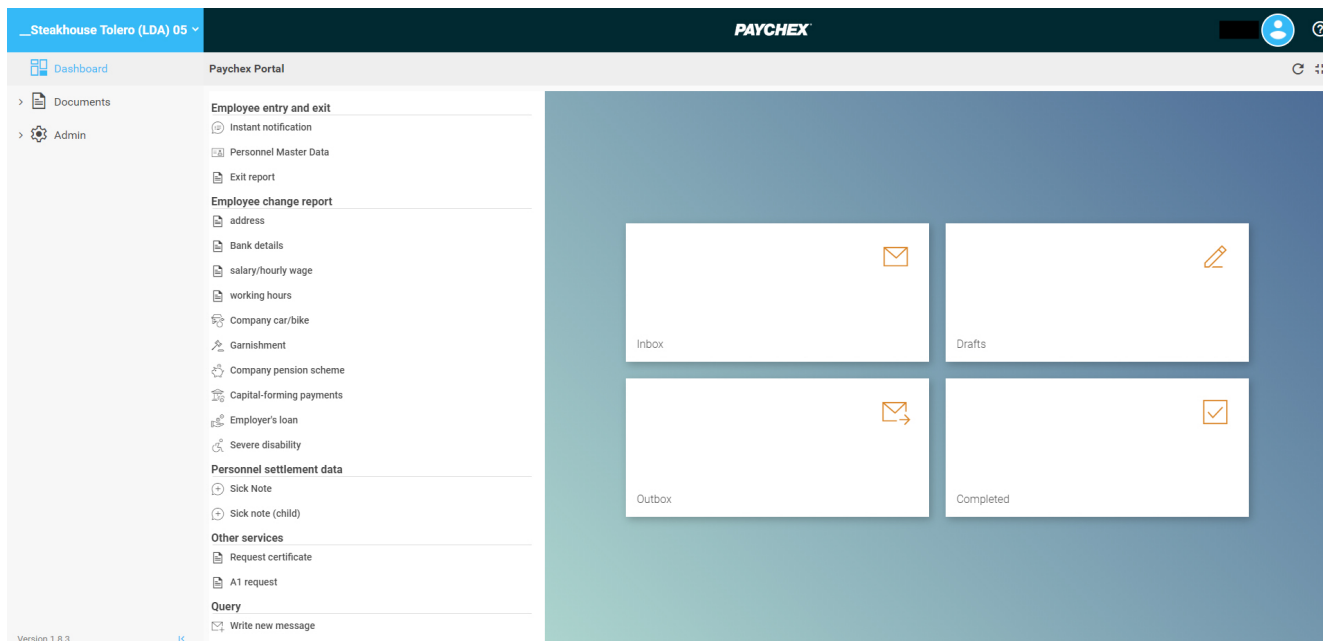
Jetzt speichern Sie das signierte Formular bei sich ab,

1. laden das Dokument in DPB hoch (https://demo.i-dos.de/idos/help/de_DE/site/#hochladen)
2. indexieren (8.2. Indexieren / Verschlagworten von heruntergeladenen Dokumenten - auszufüllende Merkmale/Felder)
3. und teilen es mit Paychex (5.4. Dokumente mit einem anderen Benutzer teilen).

Damit haben Sie uns Ihren Auftrag/Ihre Meldung übermittelt.

6. Working in the portal

- 6.2. Send and receive messages in the Portal



6.2. Send and receive messages in the Portal

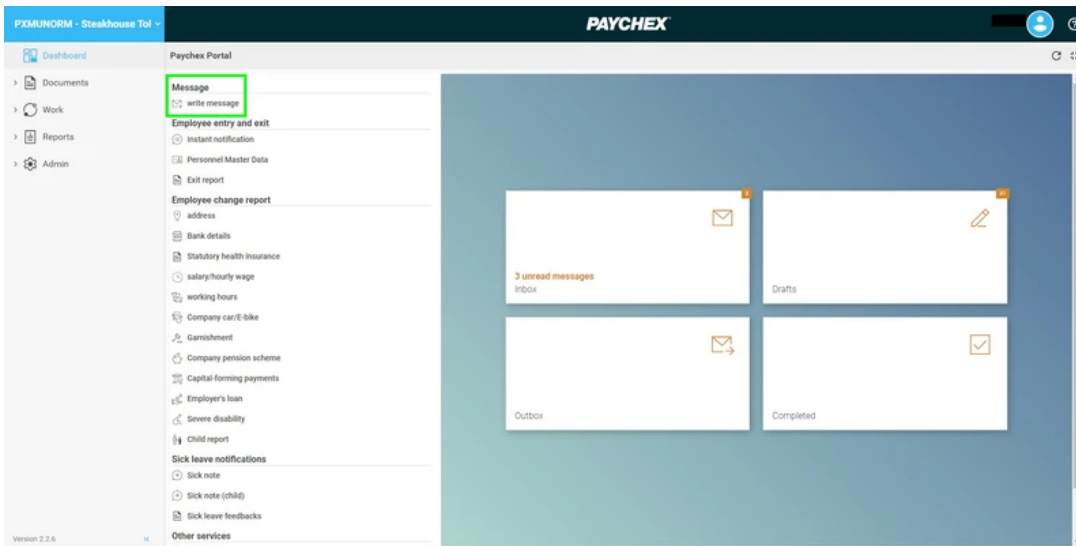
In the menu of the Paychex Portal you will find the "Write message" functionality, where you can securely communicate with Paychex.

The following four folders are available:

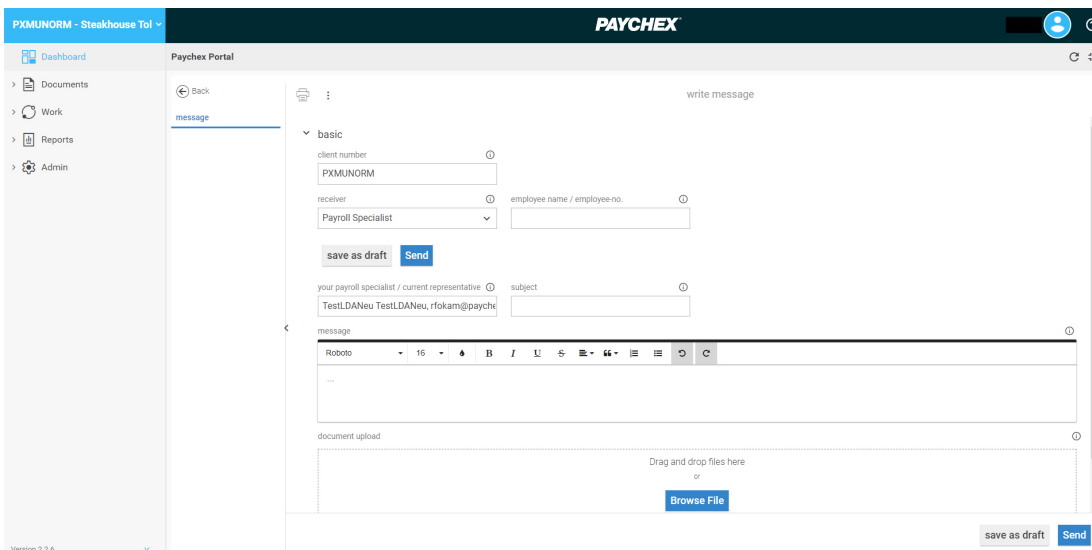
- Inbox
- Outbox
- Drafts
- Completed

ⓘ Please note that you can move messages from your Inbox to the "Completed" folder by clicking on the "Move to completed" button.

Main page of the Paychex Portal:



When you click on "Write a message", a new screen will open where you can write and send a message:



Under "document upload" you can attach one (or multiple) documents.

If you would like to save a message as a draft, then click on "save as draft". If you want to send the message, then click on "Send".

8. Data protection in the archive

We have developed the archive as part of the Digital Personell Office (DPB) to ensure the storage of all documents / files in a safe and data protected environment, The access to the system is limited to you as a company and users you have defined and added.

Where are the documents archived

All files / documents are stored at the data center of the AOV which has been TÜV ISO-certified in the year 2013. They run the center using state-of-the-art data fallback systems.

The back up for all systems takes place through a data protection system installed in a separate data center of the AOV. Files and data that are intended to be stored externally will be copied on additional tapes.

Who is "AOV"?

The AOV IT Services are based in Gütersloh and offer IT-services and products in the field of document management and archival storage. With their especially developed archive-system they have become well-known specialists.

Owner of the company are 13 german public services who do use the offered IT-services and products of AOV too.

DIN-Certification

DIN ISO/IEC 27001 is the international standard where the protection of internal company data and their confidentiality are defined. The data center where your archive is embedded has successfully been certified for this standard.

9. Privacy Policy to work with the Jira Service Desk

Paychex Deutschland GmbH provides this Service Desk to you using Jira software ([Atlassian.com](https://www.atlassian.com)). When you open a ticket, the system asks you for your e-mail address to which the notifications will be sent about the ticket's processing. To view your ticket later, you must register. If you wish, you can already familiarize yourself with the Jira privacy policy at <https://www.atlassian.com/legal/privacy-policy> and with general information for Jira Service Desk users at <https://www.atlassian.com/legal/jira-service-desk-notice-and-disclaimer>.

We process the provided data exclusively to respond to your request(s); the legal basis for this is your consent to data processing (Art. 6 para. 1 sentence 1 lit. a GDPR), the fulfilment of our performance obligations arising from the contract concluded with you (Art. 6 para. 1 lit. b GDPR) as well as our legitimate interest in assisting you in using the Digital Personnel Office and in answering your inquiry (Art. 6 para. 1 lit. f) GDPR).

The recipient of the data is

- Atlassian, Inc., 350 Bush Street, San Francisco, CA 94104, privacy@atlassian.com

and

- Atlassian Pty Ltd., Sydney, Australien, c/o Atlassian Inc., 350 Bush Street, San Francisco, CA 94104.

To the extent that personal data is processed outside the EU, this is done on the basis of the standard contractual clauses approved by the European Commission (2010/87/EU).

You can find further information on data protection at the Paychex website: <https://www.paychex.de/datenschutz/>.

DPB News Archive - News on the Digital HR Office



We issue the DPB News to keep all users of the Digital HR Office (in German: Digitales Personalbüro = DPB) informed about news, further developments, and important topics. The newsletter is sent out regularly to all Main Users.

On these pages you'll find all issues and topics of our newsletter for review.

[DPB News 12/2018](#)

[DPB News 03/2019](#)

[DPB News 09/2019](#)

[DPB News 07/2020](#)

News on the Digital HR Office



This leaflet kicks off our information series on the Digital HR Office. In the future, we will keep you regularly informed about news, further developments, and important topics.

We have developed the Digital HR Office – a new and comprehensive solution for digital communication and cooperation – in order to meet the new requirements of the General Data Protection Regulation (GDPR). You have had the chance to use this service since the middle of this year and we now have gathered our initial experiences from our day-to-day work.

We recognize that using the Digital HR Office entails considerable adjustments from the usual processes. Maybe it feels like you just moved into a new home? The rooms are not where they should be and they're not furnished according to your individual taste. Even the light switches are located in unusual places. We understand that this environment may feel a bit strange.

So rest assured: We will do everything we can to make sure that you feel comfortable in this new home.

Sincerely,

A handwritten signature in black ink, reading "D. Haase".

Dirk Stefan Haase, LL.M.
Managing Director

Always use DPB for data transmission: This will be mandatory from January 2019 onwards

We have noticed that some offices rarely log on to the application and do not transmit sensitive data to us via DPB in the designated secure manner.

A blind eye is still turned in urgent situations and data is accepted by other means in individual cases. We must ensure that a transmission is sufficiently secured against unauthorized access and that the processing order is documented. This means that we need to make an additional effort.

Please inform all employees of your company that from January 2019 we will only accept personal data or orders for data processing via DPB. Thank you.

Innovations in the Digital HR Office

1. [Improved printing and downloading of files](#)
2. [Simplified access to the Paychex Portal](#)
3. [Tips for browser settings](#)
4. [Zip archives in the future via portal message instead of by e-mail](#)
5. [Hints for registration](#)



Download new features as pdf file

Improved printing and downloading of files

Your hint: Printout quality is too poor, downloading of files is hidden and inconvenient.

Unsere Lösung: Since the new i-DOS version 1.6.14, documents can now be printed in good quality directly from the preview. The print result depends both on the print settings in the browser and those of the printer driver: For best results, use Chrome; Internet Explorer is not recommended. You can read more about the browser settings [here](#)).

Currently, it is possible to download files via the tab "Versions" in the document view. [How this works](#) is explained in our manual. In the next i-DOS version (1.7), it will be possible to print several documents from i-DOS at once. It will also then be possible to download several files as a zip archive. The download of individual documents will be accessible more quickly via an icon above the preview.

① **Function of an archive**

The i-DOS archive of the Digital HR Office is a document management system that centrally archives documents and makes them available to all authorized users in the currently valid version. Downloading and saving files locally leads to parallel file storage and should be avoided if possible.

Easier access to the Paychex Portal

Your hint: More than one contact person in the company should be able to access portal messages and online forms.

Our solution: The portal of your Digital HR Office can be activated for use as a group function. Please note that all users who have access to the portal have equal access to all processes and messages in the Digital HR Office.

Here's how it works: Please send us your [order for activation](#) via our Service Desk. Once the group function is enabled for your portal, any user can open the portal to which you assign one of the following roles in i-DOS user administration:

- Main user (full access)
- Main user (basic access)
- Portal visibility

Privacy

We realized that permissions to access the Paychex portal should be restricted. For many documents and processes in human resources, it is not desired that many people have access to them. Sometimes even strict confidentiality is required. Therefore, you should think carefully about who in your company should receive access.

Tips for browser settings

Your hint: With some browsers, there are problems with the display or the portal cannot be opened.

Our solution: Do not use Internet Explorer and check your cookie settings.

The DPB is a so-called cloud application that does not run locally on your computer, but can be accessed via the link mein.paychex.de over the Internet. The program you use to access the Internet – your browser – determines how well the application runs on your computer.

Notes on individual browsers:

- Do not use Internet Explorer. This browser is no longer being developed and display and function errors are known. The successor browser from Windows is Edge.
- The Chrome browser currently offers the best functionality. We recommend that you use this browser to access DPB.
- DPB also works well with Firefox, Edge, Opera, and Safari. Since i-DOS version 1.6.14, Safari on MacOS devices no longer have display errors in the archive.
- Launching the Paychex portal from the tile on the i-DOS home screen is detected by all browsers as a third-party application. Browsers with restrictive cookie settings (e.g. Safari in the default setting) cannot open the portal. You should therefore allow cookies to be set by <https://paychexportal.de>. This can be done via the browser's settings or – in the case of Safari – by directly opening the page: https://paychexportal.de/PXClientDataWeb/setCookie?locale=en_EN.

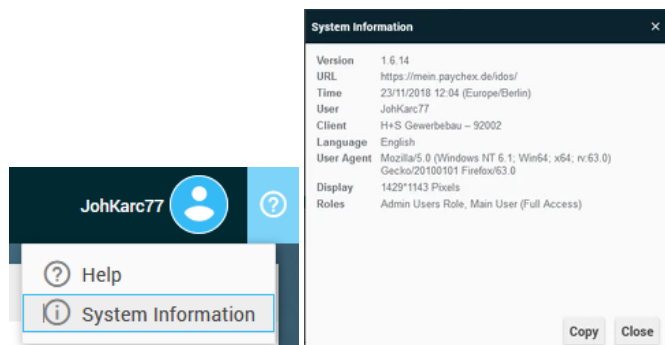
Browser Performance

All browsers are individual applications, which are continuously and independently developed. These updates can also result in changes in the display and functionality of the Digital HR Office at any time.

Tips to help (yourself)

If something does not work as it should, please try the following before contacting our [Service Desk](#): Reload the page by pressing the F5 key. If this does not help, start the application in an alternate browser.

If errors continue to occur, please report them to the [Service Desk](#) so that we can promptly help you. If possible, directly indicate your specific system information. You will find it under "System information" underneath small question mark in the top right-hand corner of DPB. Please copy this information into the ticket. This information makes it easier for us to answer your question and we can respond to you faster and more precisely. Thank you!



Zip archives as portal message in transition period

Your hint: Why don't we receive the payroll documents as a zip file, as we did before we started using the Digital HR Office?

Our solution: For a transition period, we will continue to make the zip archives that you previously received by e-mail available as portal messages. For our customers who are served by the payroll office in Hamburg, this functionality already largely exists. For customers who are served by our office in Berlin, it will be available soon.

Using Cloud Functionalities

Please bear in mind that locally storing files works against the idea of having a continuously updated archive. We therefore ask you to familiarize yourself with these features and their advantages in the near future and to make the most of the cloud's possibilities.

Information for the initial registration

Your hint: Activating system access and the initial login are difficult for users.

Our solution: We have optimized the process and revised our explanations for the initial registration.

A main problem with the registration early on was that the verification e-mail for activating the user accounts was not noticed due to the previously unknown sender address idos@aov.de or had landed in the spam folder. We have since improved the explanations in the e-mails and describe the process even before providing the verification e-mail.

Our request

If you want to [activate new user accounts in your DPB](#), inform your employees and colleagues beforehand about the initial registration procedure. In this way, you can ensure that this first step goes smoothly. You are encouraged to use our [leaflet with information on the initial registration_02_21](#) in the Digital HR Office.

DPB News 03/2019

News on the Digital HR Office



We are pleased that more and more customers are regularly using the Digital HR-Office (DPB). Your feedback and suggestions will help us to become even better. For this, we want to say "thank you." We have already implemented many improvements: See the [Released](#) section for details.

Under [Know-how](#) we have summarized tips and tricks that will make work in DPB easier. One example is how to securely store your personnel documents.

In the interview under [The DPB can do even more](#) you can read about the actual experiences of our customers with the Digital HR-Office.

Sincerely,

A handwritten signature in black ink, reading "D. Haase".

Dirk Stefan Haase, LL.M.
Geschäftsführer

Our Topics

1. [Released](#) – improvements since the last DPB News
2. [Know-how](#) – tips and tricks for working in DPB
3. [Three powerful tools for collaborating with your employees](#)
4. [The DPB can do even more: Digital storage for your HR department](#)



download all topics in DPB News 03/2019 in a pdf-file (1,3 MB)

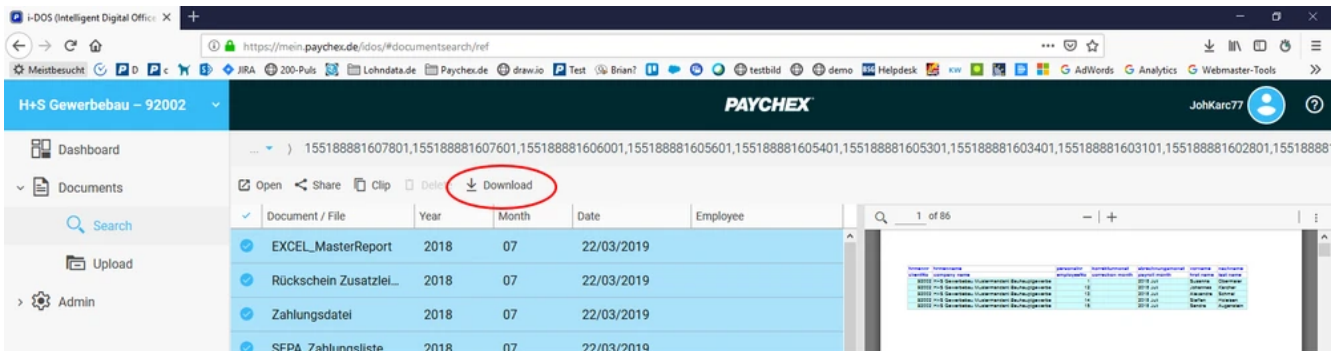
Released – improvements since the last DPB News

In this chapter:

1. Easy download of documents from the i-DOS archive
2. Print multiple documents from the i-DOS archive
3. Solve confidentiality issues – customizable compilation of reports
4. Answer portal messages in an organized way
5. New A1 application form

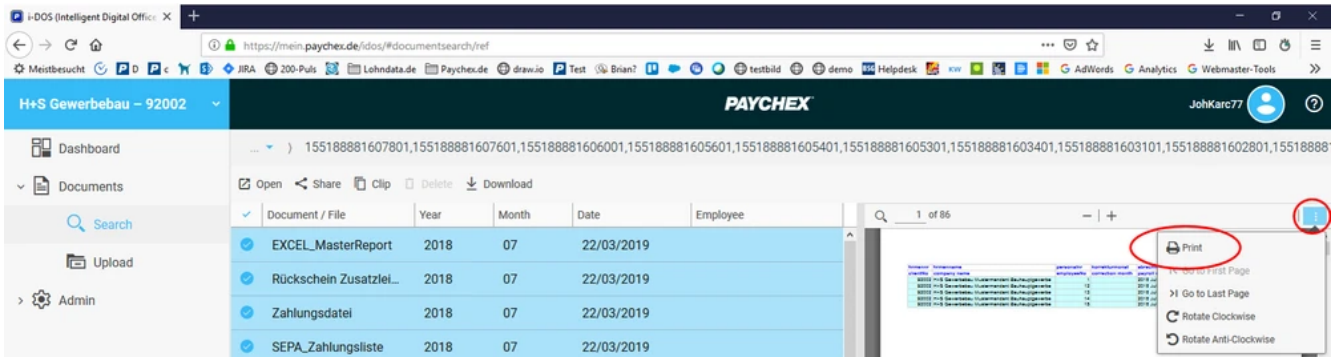
Easy download of documents from the i-DOS archive

Several documents can now be downloaded with one click: Select the documents from the search list and download them as a zip archive by clicking on the download icon. For example, all the files of a payroll run can be searched for in the archive and saved locally. Read our [tips and tricks](#) to learn how you can select the matches from a search all at once.



Print multiple documents from the i-DOS archive

If several documents are selected from a search list, they can be sent to the printer by clicking on the print icon in the PDF viewer menu.



Please note:

Only files that i-DOS can preview will be printed. Files that cannot be previewed (such as payment lists in xml format or the zip file containing the print center data) are sorted out during the print compilation.

Solve confidentiality issues – customizable compilation of reports

DPB main users can have files and reports of the current settlement sent to them as a zip-file attachment to a portal message. The procedure is also suitable for obtaining individual compilations of files from a payroll run: With the zip portal messaging procedure, the payroll administrator can configure a separate compilation of reports for each active main user in the Paychex portal. These zip files can be downloaded from the portal, edited, and distributed.

Contact us if you have any questions about confidentiality: Our [support team](#) is happy to help you find a solution.

Answer portal messages in an organized way

A portal message is urgently needed if personal data must be exchanged in compliance with the DSGVO. Keeping track of portal messages is now easier: The content of an answered portal message remains visible after the "Reply" button has been clicked. The text of the answered message is now included in the reply for editing and quoting.

New A1 application form

Did you know that employees must carry with them an A1 certificate for customer appointments in other EU countries? This applies even if an employee only drives across the border to refuel the company car. The policy is currently being monitored more intensely (for more details, see our [Lohn-Update vom Dezember](#) (in German)).

As of this year, the certificate can only be applied for electronically. With the new form "A1-Antrag" (A1 application), we offer you a simple tool to apply for A1 certificates for your employees via Paychex. Simply enter the required data and click send – Paychex takes care of the digital transmission to the health insurance provider and sends you the confirmation via the Paychex portal once we receive it.

The screenshot shows a web browser window with the URL <https://mein.paychex.de/idos/#dashboard>. The page title is "H+S Gewerbebau – 92002" and the user is logged in as "JohKarc77". The main content area is titled "PAYCHEX" and "A1 Antrag".

Warning: Hinweis! Die Bearbeitung und Übermittlung des A1 Antrags durch PAYCHEX ist eine zusätzliche Dienstleistung, welche mit 49,50 Euro zzgl. MwSt berechnet wird.

Form Fields:

- Kundennummer: 92002
- Personalnummer: [Empty]
- Geschlecht: -Bitte auswählen-
- Nachname: [Empty]
- Vorname: [Empty]
- Geburtsname: [Empty]
- Geburtsdatum: [Empty]
- Geburtsort: [Empty]
- Deutsche Rentenversicherungsnummer: [Empty]
- Staatsangehörigkeit: -Bitte auswählen-

Additional Sections:

- Adresse
- Sonstige Kontaktadresse der Person
- Zusatz nur bei Versand an Rentenversicherung/ABV

Buttons: Speichern, Absenden, Help Desk

Please note
The form A1 Antrag is not yet available in English. Please ask your payroll specialist if you need assistance filling it.

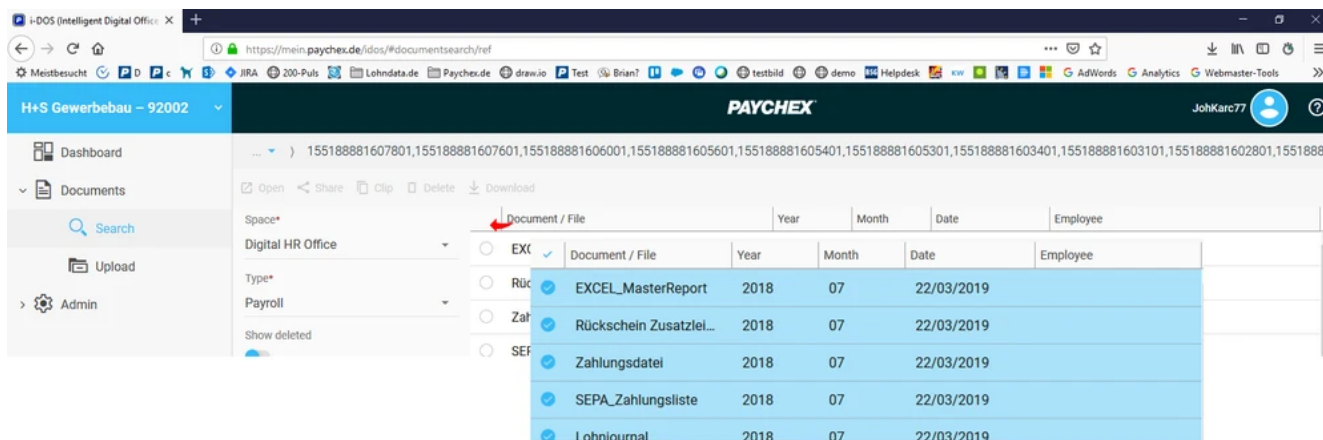
Know-how – tips and tricks for working in DPB

In this chapter:

1. Select all in one result list
2. Clipboard – quick selection with shortcut
3. Taming drop-downs in the document search
4. Quickly solve browser problems by yourself

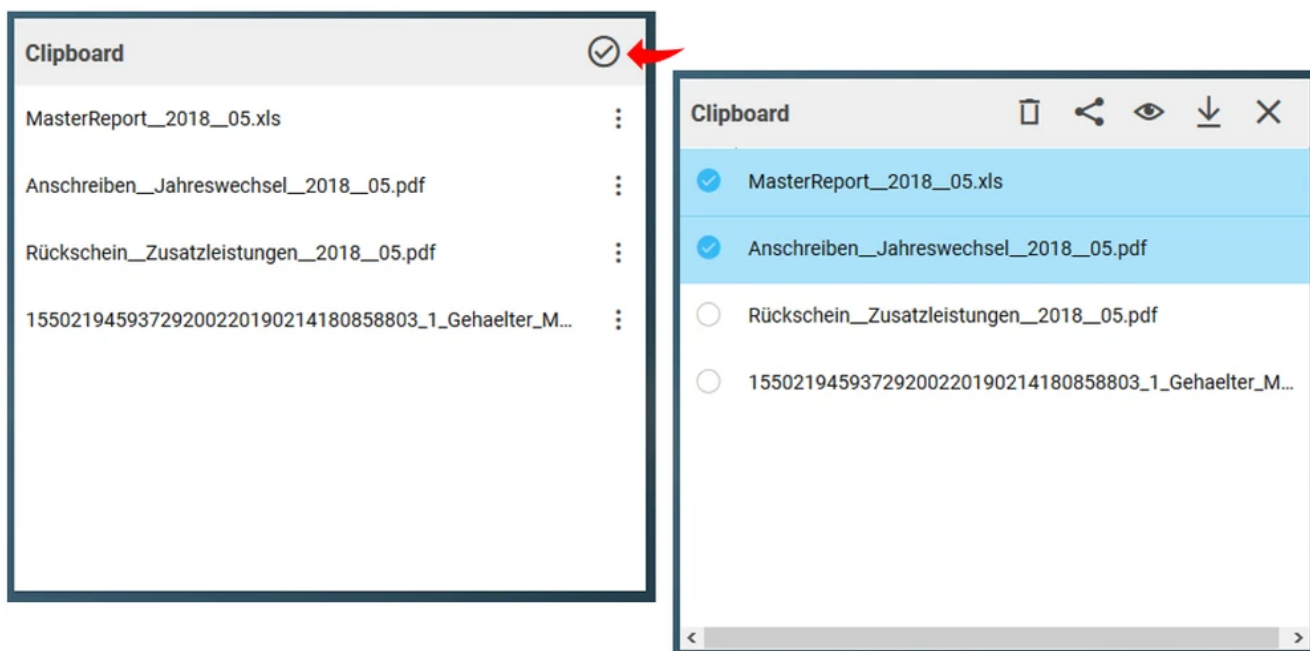
Select all in one result list

All entries can be selected with one click from a filtered result list in the i-DOS archive, e.g. all files for the respective payroll month. This option, though, is slightly hidden: In the small empty area above the round selection fields and to the left of Document / File, there is a button for selecting all the filtered entries on page 1 of the result list.



Clipboard – quick selection with shortcut

The Clipboard tile on the i-DOS dashboard can be used, for example, to combine up to 15 files from different document types from different searches into one list. By clicking on the checkmark at the top right, you can select which of the documents should be included in a further action - e.g. download or share with another user. Multiple selection is also available here, though it is also somewhat hidden: Select a document with a click, then select CTRL+A and all documents on the clipboard are selected.



Taming drop-downs in the document search

After a document search in which you have selected individual documents e.g. via the drop-down "Category," the selection in the drop-down may remain for a subsequent search. This can make the new search more difficult. You can reset the drop-down by selecting the white area above the first entry. We are currently working on making this option easier to recognize. Alternatively, you can prevent disruptive drop-downs by reloading the page with the F5 key.

Quickly solve browser problems by yourself

Our application runs reliably in Chrome, Edge, Firefox and Opera, and we do not recommend any browsers in particular. While Safari on iOS is also reliable, Safari on MacOS might still have issues.

Nevertheless, as browsers are constantly being further developed, something may not function for a short period of time. The important thing for you to remember as a user: If something doesn't work in one browser, try it again in different browser. You then won't need to open a support ticket and can quickly continue working.

Of course, we appreciate your observations and feedback on different browsers, since this is the only way we can promptly resolve any issues. (See at the end of the linked page on [how to collect system on opening a ticket and easily.](#))

Three powerful tools for collaborating with your employees

The files in the i-DOS archive of the Digital HR-Office are organized into so-called document types. While you will find all Paychex work results in type Payroll, we have provided 3 document types in DPB that allow you to digitally organize and simplify your collaboration with your employees.

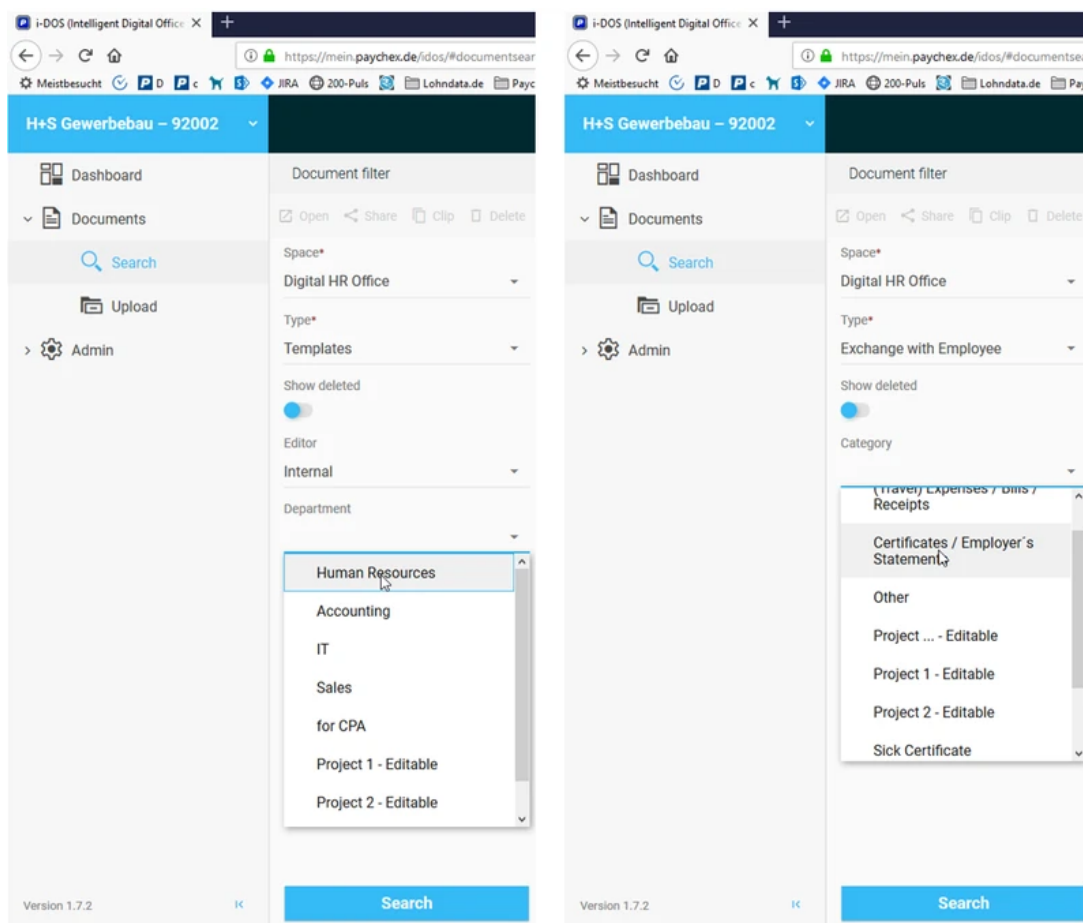
In diesem Kapitel:

1. Use Templates
2. Exchange with employees
3. A digital mailbox
4. Simply activate for testing purposes

Use Templates

In the document type Templates, you can make forms, applications, or information sheets available to your employees in a central location. Because DPB runs in the cloud, your employees can access these templates from anywhere.

The templates can be organized according to different issuers and areas. For your internal templates, we have already provided a structure for some departments, which you can adapt yourself in the administration.

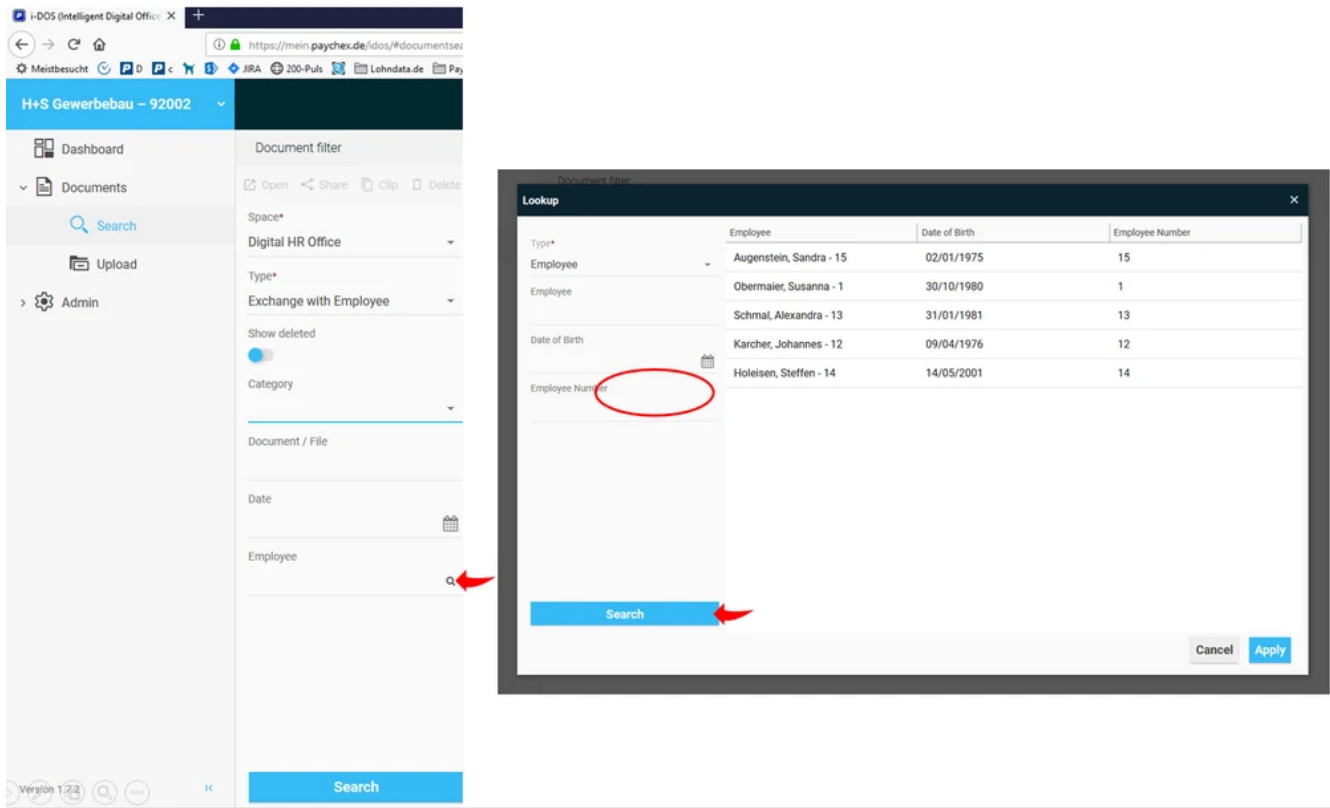


① The document types "Templates" and "Exchange with Employees" come prepared with a structure to enable storing and working with your files. You can customize this structure via Admin > Lookups to your demand (see below).

Exchange with Employees

You can use this document type to make documents available to individual employees in your Digital HR-Office. For example, you could send approved leave requests back to the employee or offer project documents for access and download.

Use the entries in the "Employee values list" so that the file in this type can be retrieved only by the desired employee.



① You'll find entries for all of your staff members for which Paychex is doing the payroll processing in the lookup "Employee". Please only edit this list when asked to do so by our support team and following the instructions given by them.

A digital mailbox

The document type "Upload to employer" is a mailbox that permits your employees to send you files quickly and securely.

Example - Notification of illness: Your employee can safely upload a mobile-phone picture of their medical certificate. They first select the type "Upload to Employer." In the drop-down "Category," you will find suggestions, which you can customize yourself via Admin > Lookups.

Space*	Digital HR Office	Space*	Digital HR Office
Type*	Upload to Employer	Type*	Upload to Employer
Category	(Travel) Expenses / Bills / Receipts	Category	Sick Certificate
Date*	19/02/2019	Date*	19/02/2019
Note	timeframe February 1st - 15th, MW	Note	until wednesday included
Document / File*	application for refund	Document / File*	certificate
Save selected		Save selected	

You only have to retrieve the file from the document type Upload to employer and change the index so it gets filed in type Personnel Files. This function is particularly useful when your employees work in branch offices or travel a lot.

Simply activate for testing purposes

Simply activate the prepared user access for one of your employees under Admin > Users. They are provided in the default setting with the Employee (Full admission) role. This means that all of the above document types can be used. In addition, the employee sees his relevant documents from payroll processing in the document type Payroll - the so-called E-Lohnschein.

Are you only interested in particular functions? No problem – the following roles can also be used individually and in the desired combination:

- Employee (only own payroll documents) > View of individual payroll documents in the type Payroll.
- Employees (templates only) > Access to files of type Templates, indexed as "internal"
- Employees (exchange with employer only) > Use of types Upload to Employer and Exchange with Employee

More information on roles and permissions can be found in [chapter 3](#) and [chapter 4](#) of our [User Manual](#).

The DPB can do even more: Digital storage for your HR department

In this chapter:

1. Digital storage for your HR department: make space in your office
2. That's just how it can work! - Interview with Claudia Frania, SI US Instruments

Digital storage for your HR department: make space in your office

Application documents, contracts, assessments, certificates – do you still store all this in paper files? Are the documents that are no longer required disposed of correctly? Are the documents adequately secured against unauthorized access? Do you quickly and accurately find what you are looking for?

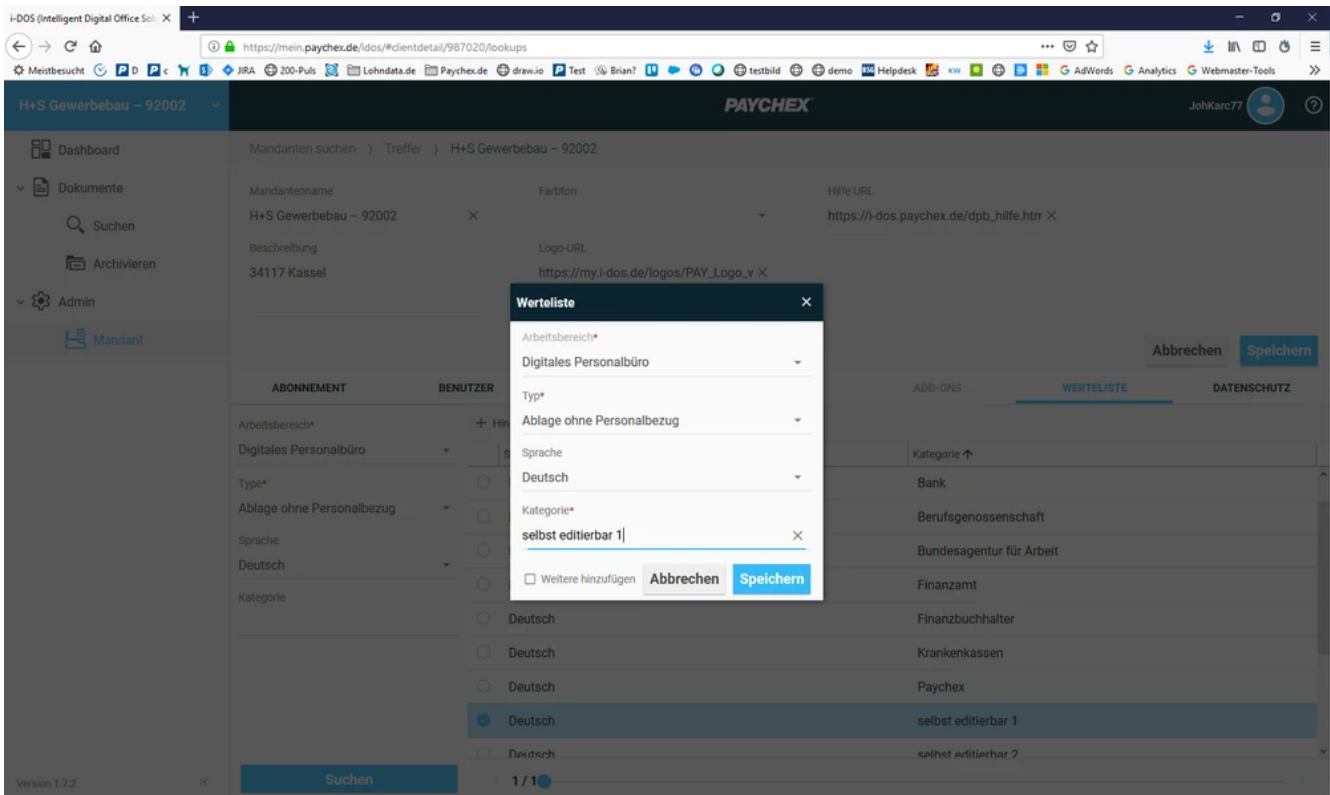
With a digital personnel file, you no longer have to worry about any of this. The document type "Personnel Files" provides everything for digital and audit-proof archiving of personnel documents.

The screenshot shows the PAYCHEX web interface for digital personnel files. The left sidebar contains navigation options: Dashboard, Dokumente, Suchen, Archivieren, and Admin. The main content area displays search results for 'Augenstein, Sandra - 15'. The results are organized into a table with columns for 'Mitarbeiter', 'Kategorie', 'Dokument/Datei', 'Datum', and 'Notiz'. The table lists various documents such as 'Personalbogen', 'Aus- und Weiterbildungsvertrag', 'Berufsschule', 'Bewerbungen', 'Testunterlagen', 'Ausbildungszeugnisse', 'Arbeitsvertrag', 'Vertrag', 'Berufsschule', 'Prüfungsergebnisse', 'Entgelt', 'VL-Vertrag', and 'Antrag auf Elternzeit'.

Arbeitsbereich*	Mitarbeiter	Kategorie	Dokument/Datei	Datum	Notiz
Digitales Personalbüro	Augenstein, Sandra - 15	Personalstammdaten	Personalbogen	12.08.2003	
Type*	Augenstein, Sandra - 15	Aus- und Weiterbildung	Ausbildungsvertrag	01.09.2003	
Ablage Personalakten	Augenstein, Sandra - 15	Aus- und Weiterbildung	Berufsschule	03.11.2003	Anschreiben Klärung Rück...
Gelöschte anzeigen	Augenstein, Sandra - 15	Bewerbungsunterlagen	Bewerbungen	03.08.2003	
Mitarbeiter : Augenstein, Sandra - 15	Augenstein, Sandra - 15	Bewerbungsunterlagen	Testunterlagen	14.08.2003	
Augenstein, Sandra - 15	Augenstein, Sandra - 15	Beurteilungen / Zeugnisse	Ausbildungszeugnisse	30.08.2006	
Kategorie	Augenstein, Sandra - 15	Arbeitsvertrag	Vertrag	01.09.2006	
Dokument/Datei	Augenstein, Sandra - 15	Aus- und Weiterbildung	Berufsschule	15.08.2006	Prüfungsergebnisse
Datum	Augenstein, Sandra - 15	Entgelt	VL-Vertrag	01.09.2006	
	Augenstein, Sandra - 15	Mutterschutz / Elternzeit	Antrag auf Elternzeit	03.09.2008	

In the document type "Not related to Personnel", you can archive all documents that have no specific reference to an employee, such as clarifications with banks, the tax office, or employers' liability insurance associations.

In the drop-downs "Category" and "Document/file" (only type "Personnel Files") we have already deposited an initial structure for you, which you can adapt and extend to your individual needs in the administration in the "Lookups" menu.



That's just how it can work!

Our customer, Si Us Instruments GmbH, founded in 2013 and headquartered in Berlin, Germany, manufactures individually sterile, disposable surgical steel instruments as well as complete surgical sets, with or without drapes and accessories – depending on the needs of its customers. The 30-person company sells its products through partners in Europe, Asia, and Africa.

Si Us Instruments GmbH has started to use the digital personnel file and seen encouraging results. Mrs. **Claudia Franja**, head of the quality assurance department, describes her experience so far.



How do you use the personnel file?

Since January 1, 2019, we have mainly been archiving certificates of illness, vacation requests, health insurance information, and employee certificates. Application and contract documents are expected to follow, but here we have to coordinate our work practices even more closely.

What do you like about it?

We're happy that Paychex has provided us with a cloud-based document management system that is DSGVO-compliant and which allows us to gain initial experience in digitizing our workflows. We had been looking at DMS systems for quite some time, but still hadn't find the right one for us. In addition, there are also considerable costs in some cases.

We especially see great benefit in the fact that our employees can access their wage documents themselves and that we can exchange documents digitally.

How might the personnel file become even more valuable for you – what could be improved about it?

It would be nice if we could simply put our documents into the system.

For me, searching for documents is not yet as intuitive as it should be, but we clearly still have to gain more experience with the system.

It would be great if the most important HR workflows were supported even more clearly. For example, if the approving colleague would be notified after an incoming vacation request and the employee would be informed again after approval has been granted. Or think about the processes involved in applications.

Would you have come up with the idea of keeping your HR records digital without Paychex's DPB?

Yes, our documents were already digitized on our servers. However, we're currently switching to a cloud and here in human resources we're encountering many questions about DSGVO-compliant implementation. Paychex's offer therefore came at the right time.

How would you sum up your experience with Paychex's DPB?

The DPB is a simple, well-structured, and user-friendly product. I look forward to seeing how we will continue to use it.

News on the Digital HR Office



Dear Users of the Digital HR Office,

the latest edition of DPB News is here! First of all, we would like to take this opportunity to thank the large number of participants in our survey. As promised, we planted a new tree for every completed survey, resulting in a total of 289 trees. Thank you!

Your feedback has given us an even better impression of your experiences and preferences. The results clearly show how important the further development of our Digital HR Office is for our work together and our joint success.

We have already had in-depth discussions about this and other findings from the survey at our company. You can find out more in the interview.

Along with the results of the survey and the interview, DPB News once again provides a wealth of information on innovations and improvements in the Digital HR Office.

Have fun reading!



Dirk Stefan Haase, LL.M.
Managing Director

All Topics at a glance

- [1. Released – improvements since the last DPB News](#)
- [2. Know-how – tips and tricks for working in DPB](#)
- [3. Survey on the Digital HR Office](#)
- [4. Effective searching in the Digital HR Office](#)
- [5. Faster and more effective: The online forms in the Paychex Portal](#)



download all topics in DPB News 09/2019 in a pdf-file (3,1 MB)

Released – Improvements

In our latest DPB News, we'd like to inform you again about the innovations and improvements in the Digital HR Office. We also want to express our gratitude to everyone who participated in our survey. Your feedback has given us a better understanding of your preferences, which we're happy to take into account whenever possible.

You can now take advantage of the following improvements:

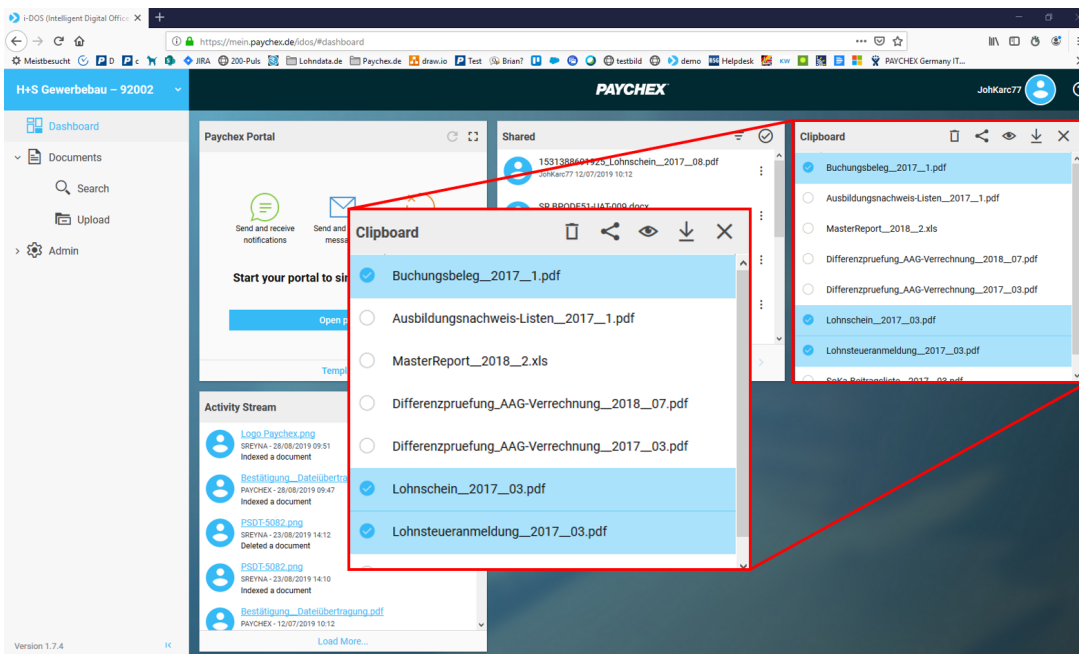
1. Management of your documents in the clipboard
2. "Activity stream" function
3. Drop-down menu in document search
4. Improved print function from i-DOS archive
5. Locating help texts
6. Portal notifications for portal forms
7. Payment files

Management of your documents in the clipboard

The clipboard tile on the dashboard can help you simplify working with files in the i-DOS archive:

- Set your favorites for quick access
- Collection folder: Create a selection of files in the archive that you can then share or download with another user in a single step

With the last update, we increased the number of possible documents in the clipboard from 15 to 50.



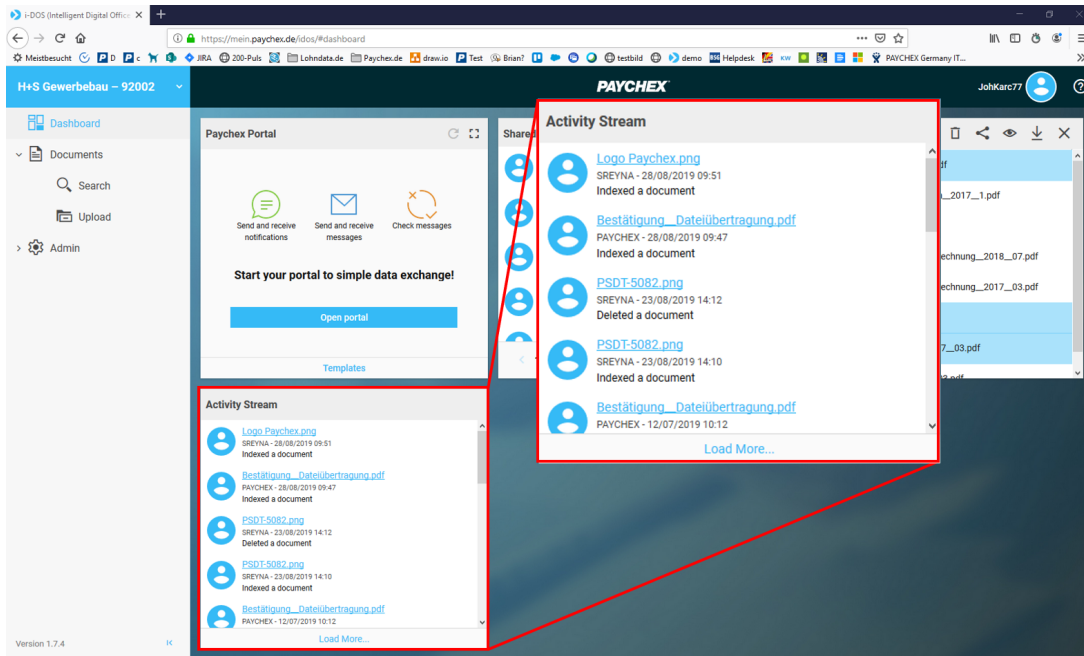
For more information on how to easily select multiple files for further processing, go [here](#).

"Activity stream" function

Within your dashboard, you will find the tile "Activity stream." This functionality gives you a quick overview of the latest activities in the application.

You're not comfortable with targeted search for documents? Because of your feedback, we have adjusted the position of the search in the dashboard.

In i-DOS version 1.8, which we have announced for September 2019, the "Activity stream" function will initially be deactivated by default.

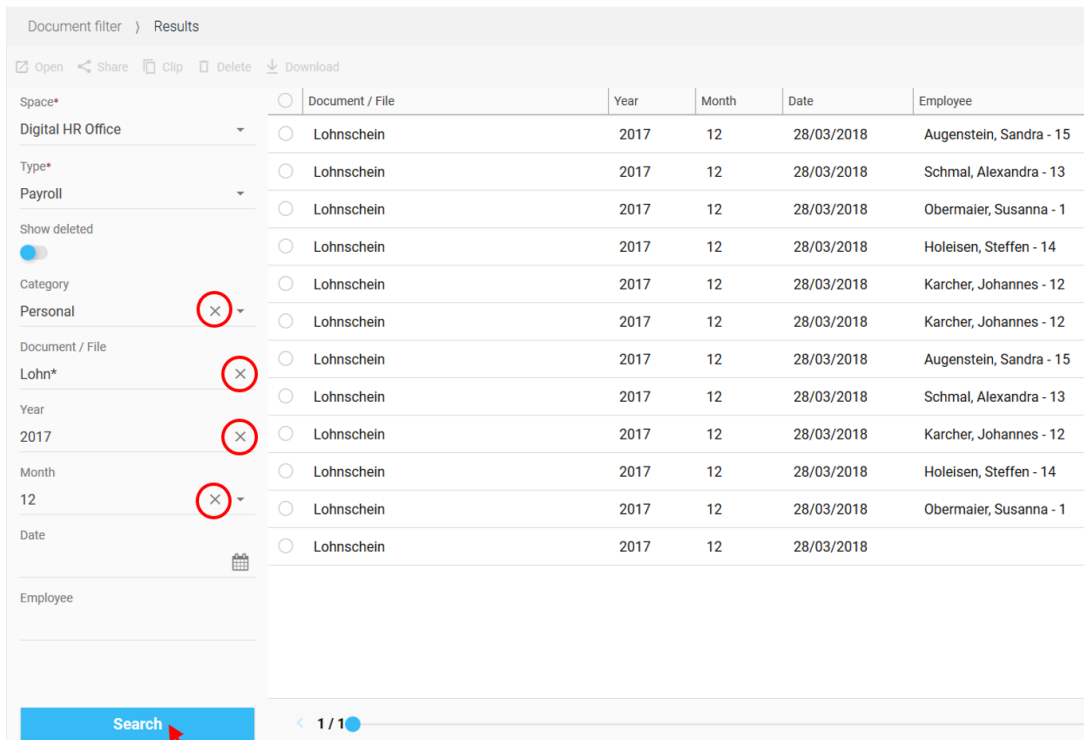


You can also learn how to conduct a targeted search for files and documents in the Digital HR Office in this issue under [Effective searching in the Digital HR Office](#).

Drop-down menu in document search

Another improvement is the greater convenience of the drop-down menus within the document search.

Since the release of i-DOS version 1.7.3, drop-downs and other fields of the document search that are filtered for can be reset by clicking on the respective **X** field. You can change the results list by clicking again on the "Search" button.



Improved print function from i-DOS archive

Over the past few months, we have continued to work with our i-DOS development partner to improve the ability to print documents from the i-DOS archive.

With i-DOS version 1.7.1, it is now possible to **send not only individual documents to the printer, but also multiple documents from a search**.

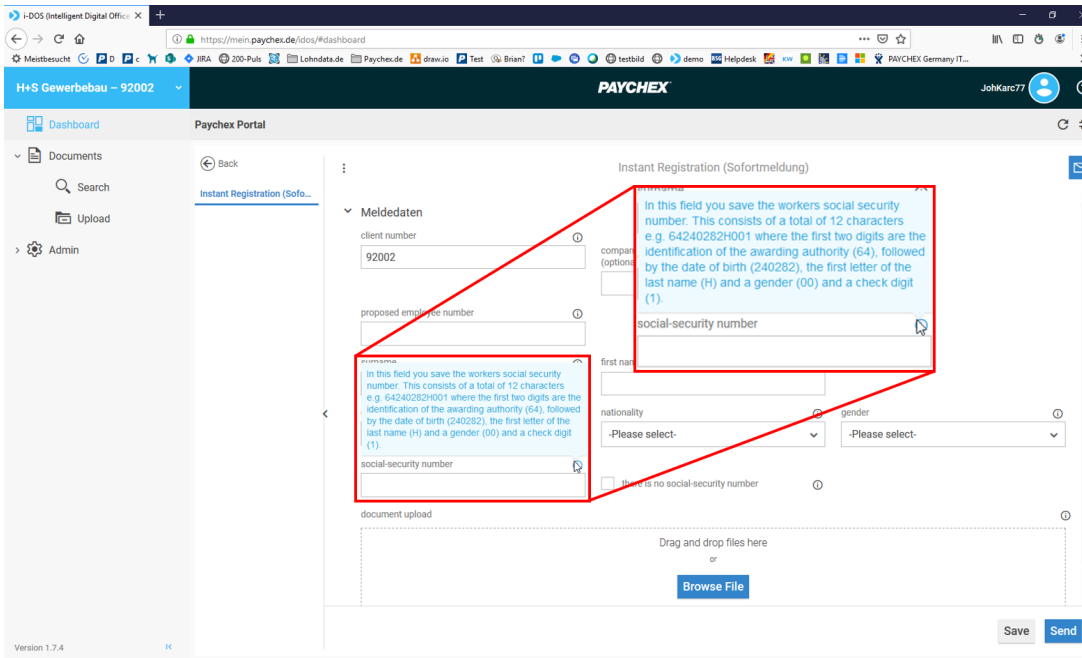
Important tips & tricks for document printing:

1. Browser selection: Printout results for cloud applications depend greatly on the browser you are using. Please note that the best results are currently achieved with Chrome.
2. Optimum printing result: Problems such as incorrectly rotated pages (which can occur due to a mixture of portrait and landscape formatting) can often be avoided if the first selected document is a report in portrait format (i.e. page 1 in the print preview).

We will continue to work on improving the print function from i-DOS for other browsers as well. Of course, we will keep you up to date on any further innovations and developments.

Locating help texts

In the Paychex portal, you will now find the help texts for each field of the online forms when you move over the  symbol with your mouse cursor.




Portal notifications for portal forms

Portal notifications inform you by e-mail that new files or documents are available in your Digital HR Office. Previously, you were alerted when your payroll specialist sent you a portal message or new documents were placed in your archive.

Now, you also receive a portal notification by e-mail if your payroll specialist has a follow-up question about an online form that you sent. For instance, an addition, correction, or clarification might be required. You would then find the portal form in your inbox. For more information on when there is a need for clarification, refer to the "Remarks" field.

For portal users who serve several clients in the Digital HR Office, the subject of your message is now supplemented with the customer number. This allows you quick and easy access to the right HR office.

 **Outlook portal notifications**
Our developers are currently working on implementing individual user settings for the portal notifications (number and frequency of portal messages).

Payment files

Many of our customers use our prepared payment files to make the necessary payments to employees, tax authorities, health insurance companies quickly and easily via their online banking. To make it easier to distinguish between the existing payment files without the preview function, the files are now indexed with extensions and labelled in the i-DOS archive.

The files are now designated as follows in the case of all customers settled with SBS:

- Zahlungsdatei_Gehaelter.xml
- Zahlungsdatei_SoKa-Bau.xml
- Zahlungsdatei_AN-Vertraege.xml
- Zahlungsdatei_Finanzamt.xml
- Zahlungsdatei_Krankenkassen.xml
- Zahlungsdatei_RV-SoKa.xml

H+S Gewerbebau – 92002 PAYC

Dashboard Documents Search Upload

Document filter Results

Open Share Clip Delete Download

Space*	Document / File
Digital HR Office	Zahlungsdatei_Gehaelter
Type*	Zahlungsdatei_SoKa-Bau

For customers settled with LohnAs, the payment files are supplemented with the following abbreviations. Several of the abbreviations can also be combined in a single payment file:

LG	Lohn und Gehalt (Wages and salaries)
KK	Krankenkassen (Health insurance companies)
VWL	Vermögenswirksame Leistungen (Capital formation benefits)
BAU	Sozialkassen (Social insurance funds – construction payroll)
FA	Finanzamt (Tax office)
OED	Öffentlicher Dienst (Civil service)
AVO	Altersvorsorge (Retirement provision)
ZUE	Zusätzliche Überweisungen (Additional bank transfers)
PF	Pfändungen (Garnishments)

Werk Dach und Fassadenbau - PAYCHEX

Dashboard Documents Search Upload Admin

Document filter Results

Open Share Clip Delete Download

Space*	Document / File	Year	Month
Digital HR Office	SEPA-Datei_FA	2019	04
Type*	SEPA-Datei_KK	2019	04
Payroll	SEPA-Datei_LG	2019	04
Show deleted	SEPA-Datei_LG-VWL-AVO	2019	04

Know-how – tips & tricks for working in DPB

In this chapter:

1. Search with wildcard * for better searches
2. Correctly setting up access permissions for the portal
3. Advantages of pre-defined access for your employees

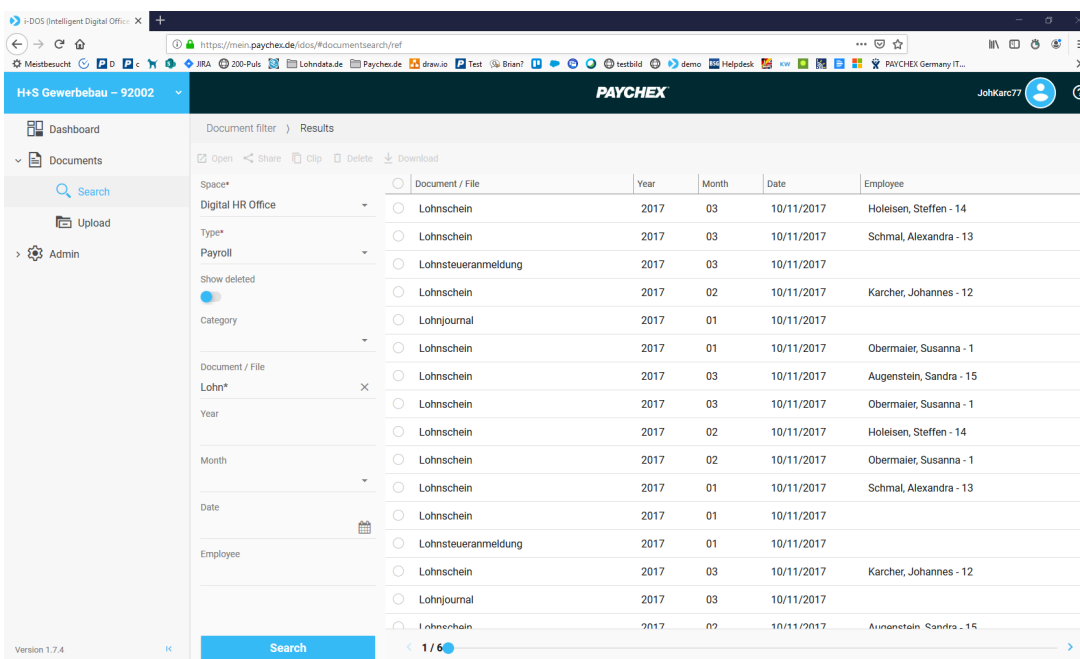
Search with wildcard * for better searches

Sometimes you may not be quite sure what a report is actually called or what you named a particular file. In this case, the so-called wildcard * can help you with your search.

For example, if you search within the document type "Payroll" field "Document/File," you can enter "Fi*" and click Search to find all documents that begin with the letters "Fi" (e.g. FiBu_Exporte).

A search for "*ex*" calls up all files in the results list that contain the letter sequence "ex," e.g. "FiBu_Export" or "Excel_MasterReport."

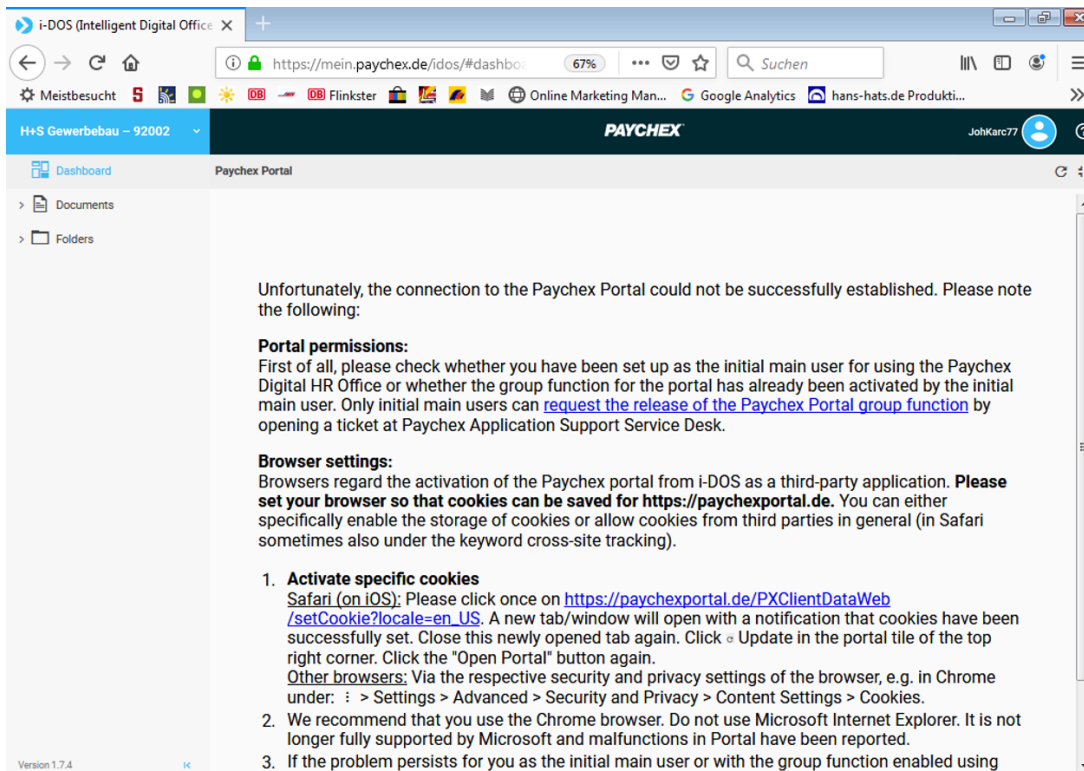
And a search for "*report" retrieves all documents that end in "report."



Upper/lower case when searching
When searching in text fields of the i-DOS archive, it doesn't matter whether you use upper or lower case letters.

Correctly setting up access permissions for the portal

Your employee wants to work with the Paychex portal at DPB, but sees the following screen?



After you have set up your Digital HR Office, only the initially created main user can access the Paychex portal for confidentiality reasons.

To enable other employees to work in the DPB Paychex portal, you must activate the **group function** of the Paychex portal.

Once the group function has been activated, all users to whom you have assigned one of the following roles in i-DOS user administration will have access to the portal:

- Main user (full access)
- Main user (basic access)
- Portal visibility

It should be noted that every user in the portal has the same read and edit rights for all files. This means that every user with portal access can read and edit all messages, even if they have been written, received, or created by other users.

To activate the group function of your portal, please open a ticket after checking the permissions via the Service Desk. This is done in the "Group function for portal" case group at our **Service Desk**. You can find more information about this topic in our **user manual**.

ⓘ Check permissions before activating




Before you activate portal group function in your Digital HR Office, please check the roles of the users you have already activated in the user administration. Adjust these roles as necessary so that there is no unwanted access to the features of the portal.

Advantages of pre-defined access for your employees

After setting up your Digital HR Office, we will provide the application to you with only one active main user, i.e. the person you named in your return form to set up the Digital HR Office. This user also receives rights for user administration and can grant other persons access to the application. So that you can optimally use the activation of additional accounts as administrator, note the following tips:

Administrators have the following options to open additional accounts:

1. Activation of predefined employee user accounts (recommended for employees)
2. Add new user accounts (recommended for external users)

+ Add User   		
<input type="radio"/> User name	Email	Status
<input type="radio"/> PAYCHEX	emc@paychex.de	Active
<input type="radio"/> SanAuge77	██████████@paychex.de	Active
<input type="radio"/> ████████	██████@paychex.de	Active
<input type="radio"/> ████████	██████████paychex.de	Active
<input type="radio"/> STBBasis	██████████@lohndata.de	Active
<input type="radio"/> SteHole77	██████████@paychex.de	Active
<input type="radio"/> steuerberater@stb.de	steuerberater@stb.de	Active
<input type="radio"/> SusOber77	vor-aktivierung-austauschen@paychex.de	Suspended

For all employees whose pay slips are created by Paychex, user accounts are already prepared in DPB in such a way that the administrator only has to enter an e-mail address of the employee and **activate the account**.

You can recognize these accounts in the user administration by the status "inactive" and by the dummy e-mail address "vor-aktivierung-austauschen@paychex.de." User names usually consist of the first three letters of the first name and the first four letters of the last name, plus a sequence of digits.

The role "Employee (full access)" is stored in these accounts, which provides the employee with digital access to their documents from payroll accounting (wage accounting, SV reports, annual payroll tax reports) as well as further opportunities for collaboration and data exchange with their employer. We reported on this in the last issue of DPB News under the title: **3 powerful tools for your employees** There is no reason however why you should not adapt these roles to your needs before activating them.

The advantage of these accounts is that there is already a record in the user profiles that is required to check the authorization to access the personal documents for payroll accounting (E-Lohnschein). Even if you currently do not want to give your employee access to their payslips, we recommend that you always activate the prepared accounts for employees. This gives you the option to make the E-Lohnschein usable later on simply by assigning the corresponding role.

Adding new user accounts via the "Add user" button, on the other hand, should only be done if the person to whom you want to grant access is not an employee.

Survey on the Digital HR Office

In our last DPB News, we asked you to take part in a survey on the Digital HR Office.

We would like to take this opportunity to thank the large number of participants in our survey. Thanks to you, 289 trees will now be planted in Zambia.

Your feedback is also very important to us. Your user experience helps us to further improve and develop the application. Thank you!

Before turning to the survey's results, here's an exclusive interview with our managing director.

-
1. Interview with Dirk Stefan Haase, Managing Director of Paychex Deutschland GmbH
 2. Summary of the results
-

Interview with Dirk Stefan Haase, Managing Director of Paychex Deutschland GmbH

Question: *The digitization of business processes is progressing at a rapid pace. With the introduction of the new General Data Protection Regulation (GDPR), Paychex has provided its customers with the Digital HR Office and thus created a solution for secure data exchange and the most convenient communication possible. Paychex has been working on implementing the application for over two years. Looking back on the introduction of the Digital HR Office, what was your experience in the beginning?*

Answer: We're delighted that DPB was activated in time before the GDPR entered into force. We have now created a legally sound solution for secure data exchange – for us and for our customers.

With the development of this cloud application, we entered entirely new territory. As a practical matter, it was apparent that an enormous amount of time would be needed to complete an extensive software project such as the Digital HR Office. Our considerable experience and know-how were critical to helping us achieve good results. But adoption comes after implementation, which is why our work at the Digital HR Office is not yet finished. We continue to do everything we can for our customers to develop the application further and to improve it according to feedback from our community of users.

Question: *The Digital HR Office seems to be a challenge for some users, especially when starting out. Some customers felt things were getting more complicated and that they were losing touch with their personal contact. Can you briefly explain why the Digital HR Office is important and why it makes processes simpler, not more complex?*

Answer: The law changed! The repercussions for employers and payroll accounting have been dramatic. No longer is it up to the employer to decide whether to take the concern about employee data very seriously or only seriously. Complying with the new law has made the transmission of personal data and settlement orders via the new platform indispensable.

Paychex cannot avoid this requirement, nor does it want to. We are also taking our customers on this journey with us for their own protection. We intended to continue to simplify and support the operation and user experience. Among other things, we are working on free additional services such as user webinars and other topic-specific introductory videos.

Here's a short look ahead at upcoming developments: We'll be giving users more online forms so that you write fewer portal messages. This should further improve usability. The only thing we ask customers is what is specifically needed for their company. At the same time, we automatically check the content for correctness and completeness before the form is sent. Not only does this reduce the expenditure of time, but the customer's personal contact will benefit as well. Our customers will thus be served more quickly.

Question: *Some customers say they cannot easily find the documents in the archive. Can you give us an idea of future developments for the use of the archive?*

Answer: We've received a lot of interesting suggestions from our customers. We have taken a closer look at the various settings and checked the functions. Search criteria can be improved so that documents can be located even faster. Also, if a particular document is available in different versions, we should be able to indicate this more clearly. In general, we want to make it easier and faster for you to find what you are looking for. Of course, we keep our customers up to date on any further developments and improvements.

Question: *Are the days numbered for the traditional payroll specialist? Has everything now gone digital? For what kinds of requests can our customers continue to use the more personal "direct route" via telephone and e-mail?*

Answer: Personal, reliable, and knowledgeable service remains our hallmark. Your beloved e-mail and the simple fax are the only things that now belong to the past technologically for transmitting personal data. As always, our employees can be reached by telephone. In this respect, nothing's changed. Your contacts have also kept their personal e-mail address. However, when it comes to the data of the employees of our customers, the details can only be exchanged in writing via DPB. This is what the law requires.

For urgent issues, DPB has another big advantage over traditional e-mail. When you use the DPB, your message always reaches the responsible employee. If the customer's payroll specialist is not available, the message will go directly to the representative – 100% of the time. Traditional e-mail, on the other hand, was often left unnoticed in the inbox, sometimes for several days during the employee's absence.

Question: *In the [product video](#), you speak of greater simplicity. For some users, though, there is still room for improvement in this area. Could you also give us some insight into what measures have been planned to increase simplicity and reduce complexity?*

Answer: Along with the free training and workshops mentioned earlier, we're also working on the following technical developments:

- Improved indexing in the archive
- Simplification of tasks/process lists in the portal
- Improvement of authorization structures

Question: *DPB can actually do much more than just exchange messages with the payroll specialist and search for documents in the archive. For example, there's the creation your own digital personnel file, E-Lohnschein for employees, the collaboration and secure file exchange with employees, tax consultants or other external service providers. The survey shows us there is still relatively low utilization. Do you think it's because there is a lack of need, or is there rather a lack of familiarity?*

Answer: We will gradually demonstrate using application examples which features are available to users and how they can benefit from them. For this purpose we're increasing the number of videos and also offering targeted training. We look forward to continuing with our customers along this path of understanding the new possibilities.

Summary of the results

Current usage behavior

- More than half of the respondents use the Digital HR Office once a month to securely transmit data to Paychex via the portal or to research the available payroll documents. Almost one-fifth of the respondents already use the Paychex portal several times a week; almost 10% of the respondents state this for use of the archive.
- The Digital HR Office is currently used by about one-fifth of respondents to store their own files in the archive or to provide employees access to them.

Assessment

- More than half of the respondents see the Digital HR Office as a useful application for ensuring that their own payroll is processed securely and in compliance with data protection regulations. Less than one-fourth of respondents consider this statement to be incorrect.
- 17% of respondents found cooperating with Paychex has become much easier through DPB. Half of the respondents disagree with this statement.
- 25% of the respondents stated that the payroll documents are clearly stored in the DPB archive. Almost half of the respondents see potential for improvement here.
- Just over one-fourth of respondents like to use portal forms because they are simple and easy to use. 43% are still unfamiliar with the use of portal forms.
- So far, around 20% of those surveyed recognize the potential to archive their own documents in the Digital HR Office or to use DPB for cooperating and exchanging files with employees or tax consultants.

Overall satisfaction with the Digital HR Office

- 34% of the respondents are very satisfied or satisfied with the DPB; 39% of the participants see room for improvement in terms of their overall satisfaction.
- Challenges here lie, above all, in the application's perceived complexity. This is frequently explicitly stated in reference to the storage of the documents in the archive (20%) and for working with portal messaging functionality (15%). With regard to support for getting familiarized with the application, users favor more extensive content, documentation, and training opportunities. Unfortunately, for 13% of those surveyed, personal contact with Paychex payroll specialist or contact persons has deteriorated somewhat.
- Among the 60 reasons users gave for their satisfaction with the application, the view prevails that the application simplifies the process (cited in 32% of the reasons for the user's satisfaction), while 22% of users mention ease of use. Other reasons for satisfaction are the digital availability of the documents (13%), the possibility for structured, lossless, and secure communication (12%), and GDPR compliance (8%).

Willingness to recommend

- When asked "On a scale of 0 (not likely at all) to 10 (very likely), how likely is it that you will recommend Paychex to a friend or colleague looking for a payroll provider?" 41% of participants gave us generally positive feedback with ratings of 7 to 10. We're delighted to hear this! Customers who would not currently recommend the portal to others mostly reference the issues listed above about user dissatisfaction with the portal. Here, we also thank respondents for their honest feedback. Your experiences are critical to helping us further improve the portal and our service.

Effective searching in the Digital HR Office

To simplify the user experience and the search within the portal, we offer you the following step-by-step instructions and tips and tricks for quick and successful document searches. They're ideal for new users wanting to learn the essentials of the system.

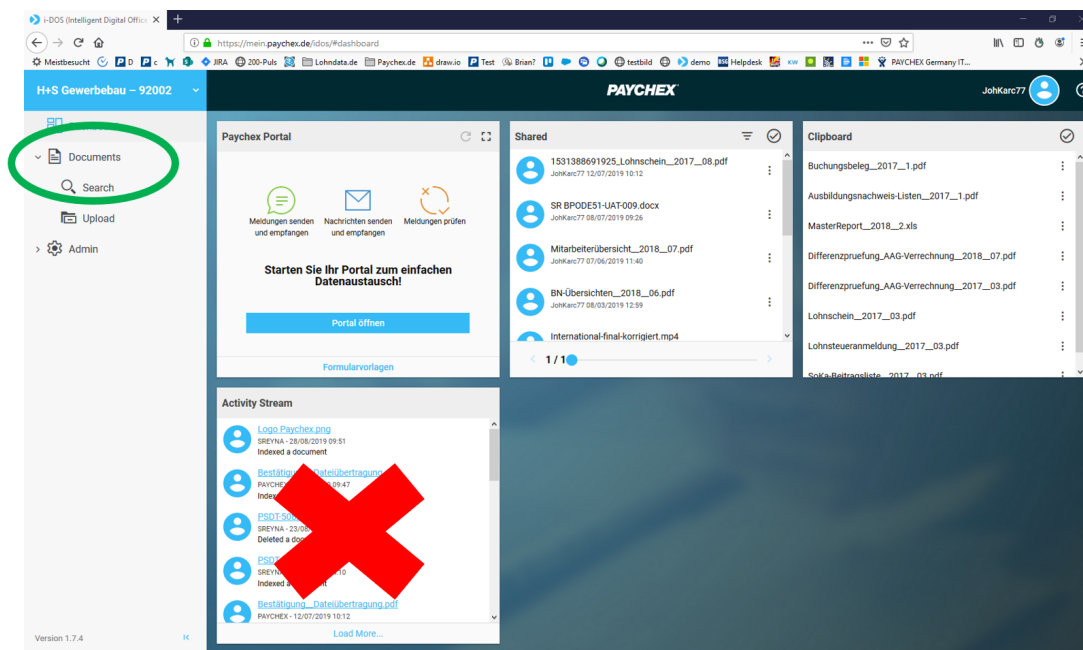
In this chapter:

1. Why the "activity stream" is not suitable for search
2. How to find your documents
3. FAQ - How to quickly locate what you're looking for

Why the "activity stream" is not suitable for search

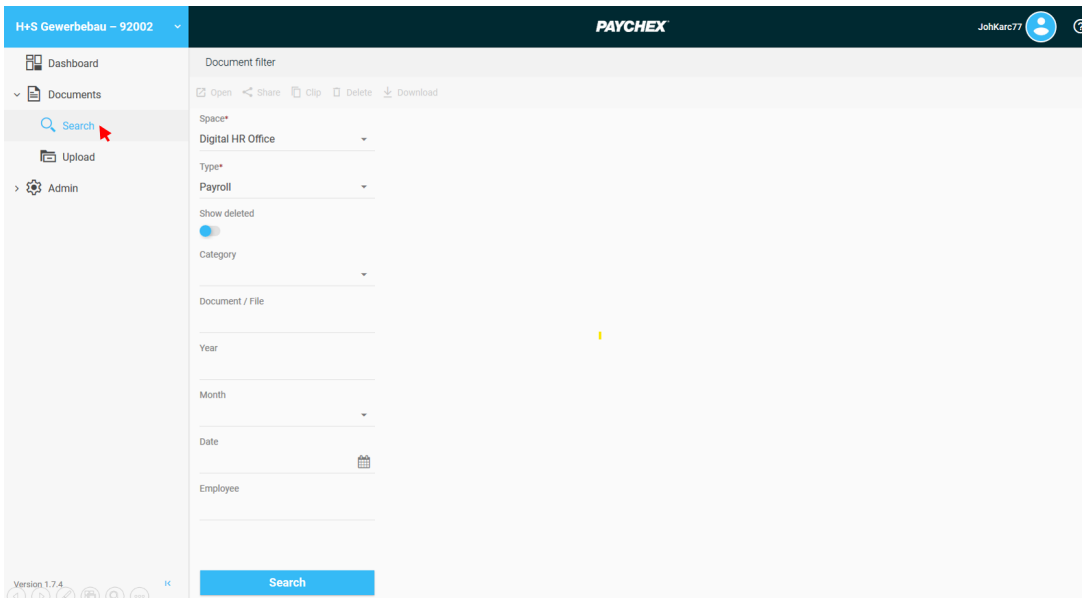
For starters, it's important to realize that the activity stream is not suitable for searching. To search for document, please instead use the search function in the archive.

The activity stream is an i-DOS feature designed to give users a quick overview of the latest activities in the application. The module is not appropriate as a search function. For [more information on the activity stream](#), see the "Released" section.

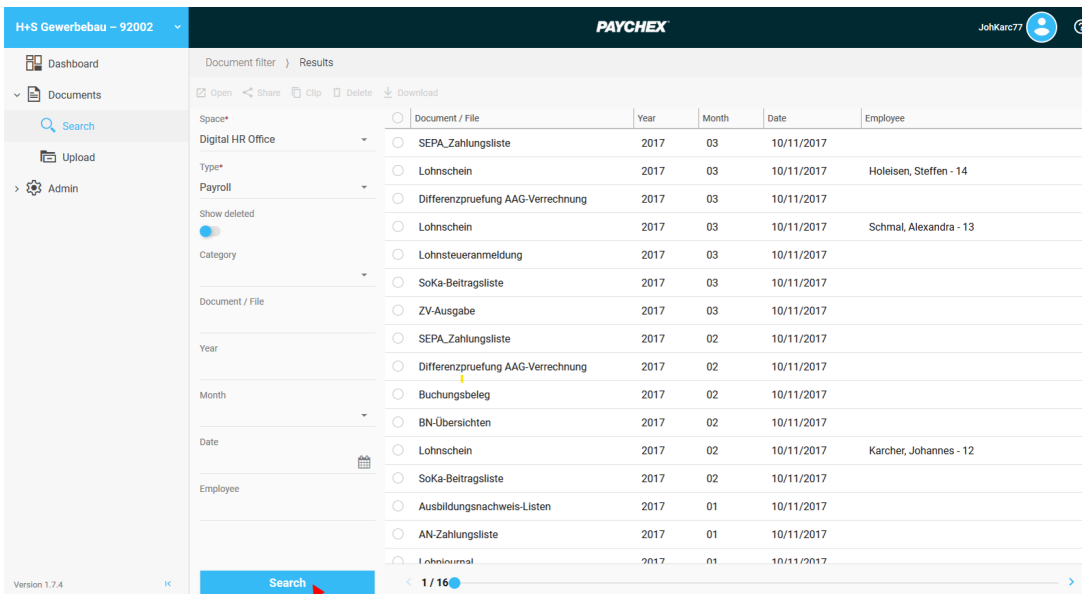


How to find your documents

You start your search by clicking on "Search" in the menu item "Documents." Your files and documents from the current payroll accounting are made available to you in the document type "Payroll" This document type is the system default setting (DropDown Type*).



By clicking on the blue "Search" button below, the system displays a results list of the previous 50 files stored in this document type. At the bottom of the screen, you have the option of scrolling to other results list pages.



Filter by the current year and the last month to get a better overview of the reports stored in the archive in the last payroll run.

Are you looking for a specific document? Sort the results list according to the name by clicking on the "Document/File" column heading. (Note: If the names are not completely legible, you can also drag the width of the column.)

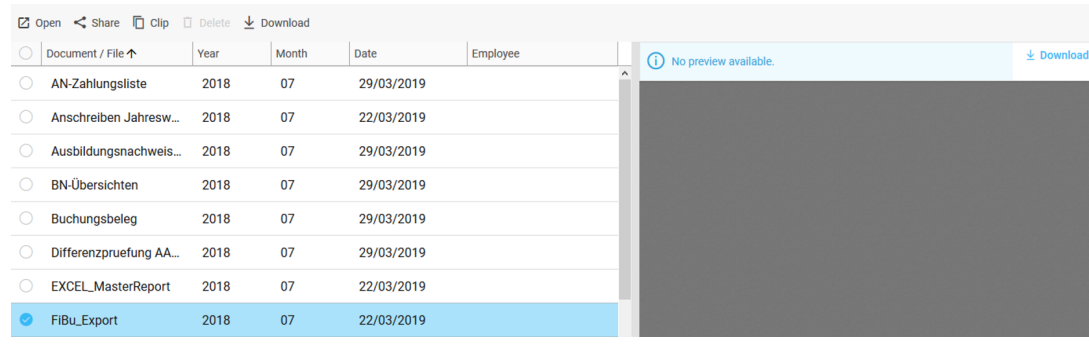
DOWNLOAD

Document / File ↑	Year	Month	Date
AN-Zahlungsliste	2018	07	29/03/2019
Anschreiben Jahreswechsel	2018	07	22/03/2019
Ausbildungsnachweis-Listen	2018	07	29/03/2019
BN-Übersichten	2018	07	29/03/2019
Buchunasbelea	2018	07	29/03/2019

Click on the document you are looking for in the list. In the preview, you can get a glance at what is hidden behind the document name. We have also compiled the most important reports in our online manual. The names currently differ depending on whether your payroll is settled in SBS (locations Hamburg, Itzehoe, Lünen -

[click here for the SBS Reports table in the manual](#)) or LohnAs (locations Berlin, Dresden - [click here for the LohnAs Reports table in the manual](#)).

Familiarize yourself with the names of the documents by previewing all the documents with different names one by one. You may notice that some documents (e.g. xml-files, csv-files), although few, cannot be displayed in the preview. To check the contents of these files, please use the "Download" button to display the files locally on your system.



The screenshot shows a document management interface. At the top, there are navigation buttons: Open, Share, Clip, Delete, and Download. Below this is a table with columns: Document / File, Year, Month, Date, and Employee. The table contains several rows of document entries. The last row, 'FiBu_Export', is selected. To the right of the table is a preview pane. The preview pane has a blue header with an information icon and the text 'No preview available.' and a 'Download' button. The main area of the preview pane is a dark grey rectangle, indicating that the document content is not visible.

Document / File	Year	Month	Date	Employee
AN-Zahlungsliste	2018	07	29/03/2019	
Anschreiben Jahresw...	2018	07	22/03/2019	
Ausbildungsnachweis...	2018	07	29/03/2019	
BN-Übersichten	2018	07	29/03/2019	
Buchungsbeleg	2018	07	29/03/2019	
Differenzpruefung AA...	2018	07	29/03/2019	
EXCEL_MasterReport	2018	07	22/03/2019	
FiBu_Export	2018	07	22/03/2019	

FAQ - How to quickly locate what you're looking for

You don't know what the report you are looking for in the Digital HR Office is called? Before wasting your time, take a look at our [listings in the online manual](#) or [open a support ticket](#). We are happy to help you.

You have a good idea of what a report is called? Enter a distinctive part of the name using wildcards in the "Document/File" filter field and click Search. For example, you can use *fi* to find FiBu_Export file or *lo* to find Lohnjournale (payroll journals), Lohnscheine (payroll documents) and Lohnsteueranmeldungen (wage-tax returns). ([You can find more information on searching with wildcards in the section "Know How"](#)).

Are you looking for a document related to an employee? Search in the filter field "Employees" with wildcards for part of the name or even the personnel number. For example, schm* displays the documents that refer to Mrs. Schmal, personnel number 13 as quickly as the search with *13. (schm*, though, would also show the documents of Mr. Schmidt; to narrow the results, use the personnel number).

You don't know the name of a document, but can classify it according to its use? Use the "Category" filter. Employee-related documents can be found under the category Personnel, documents on payment transactions under Bank, documents on social insurance under ... you guessed it!

You no longer know the settlement month, but approximately when the document was created? Use the "Date" filter field. You can also specify time periods. The creation date of the document is decisive, not the payroll month for which it was created.

Still can't find what you're looking for? Please [send a request to our support](#), who will be happy to assist you.

Faster and more effective: The online forms in the Paychex Portal

The Paychex portal of the Digital HR Office ensures the confidential transmission of

- your instructions and
- all the data we need to execute your current payroll.

Users of the portal currently have two different reporting channels at their disposal for placing orders and transferring data: Portal messages and the portal notifications (online forms).

In this section, we discuss the differences and advantages of the two reporting channels in more detail.

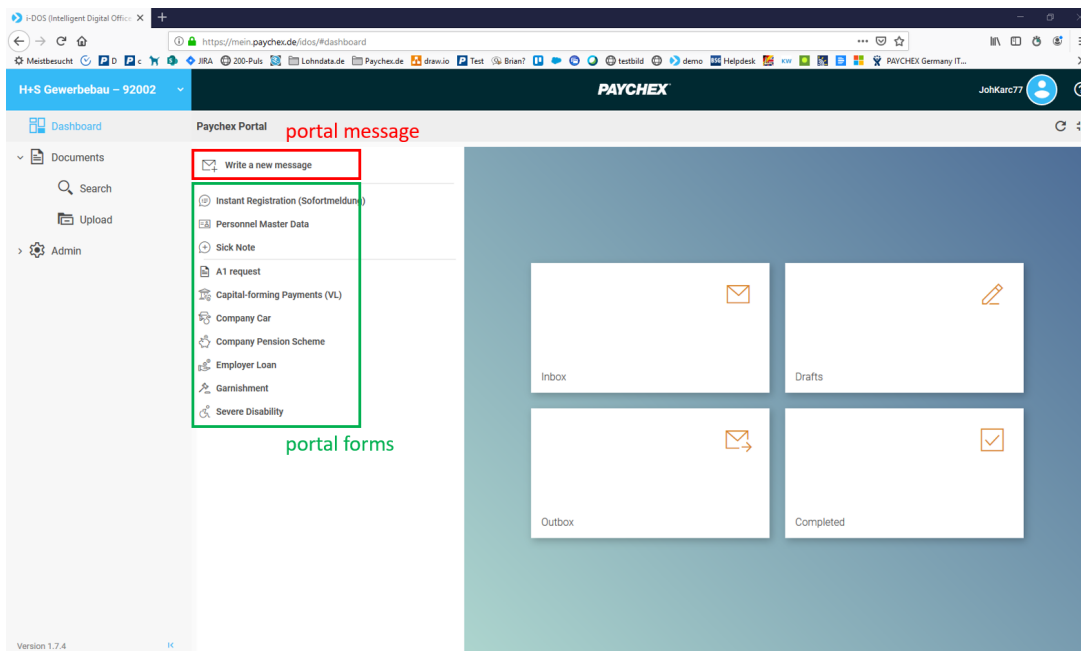
Read more about:

1. Differences between portal notifications and portal messages
2. What forms are available?
3. Portal notifications are the future

Differences between portal notifications and portal messages

Portal forms support the assignment and execution of a specific task (e.g. personnel notification, notification of sick leave, setting up a garnishment, etc.). In the respective form, all required information is queried, checked for completeness before the transmission and - where possible - input errors are detected and marked for verification. We are thus able to quickly transmit the complete and correctly transferred data to our accounting systems without transmission errors. As time-consuming inquiries or corrections are avoided, you benefit from faster processing times. You can immediately see when we processed the notification (the notification then appears on your list of completed files) and always have an up-to-date and detailed overview of all notifications sent to us.

Portal messages can be used flexibly, support textual clarifications, and are similar to e-mail. While they can be used for a specific data transmission, but are much less suitable for this purpose.



Let's look at the example of the registration of a new employee. We are notified by a portal message with a scanned handwritten registration form as an attachment:

- Is the subject line clearly worded? Only then will you or our payroll specialist be able to quickly identify or find the file later
- The recording of handwritten information can be incorrect (illegibility, writing errors) and much more frequently involves corrections
- When filling out a paper form, information is often neglected or not sufficiently clarified before it is submitted to us. This results in delays and corrections
- Typing errors or faulty insertions cannot be checked or corrected during entry - for example, if the social insurance number is missing a digit

As a result, your personnel report may be processed much more slowly, leading to avoidable additional work for you and our company.

We therefore ask you to use portal messages whenever possible if there is not yet an online form for the transmission of the task. Of course, you are also welcome to use portal messages if there are open questions regarding the procedure of a specific task and personal data are being provided. The portal messages are also suitable for clarifying details or necessary preliminary work.

What forms are available?

We currently offer portal notifications for the following specific tasks:

- Instant notification (required before starting work in certain industries)

- Personnel Master Data (registration of a new employee for ongoing payroll accounting, transfer of all required master data and information on remuneration)
 - Sick Note (illness of an employee to be taken into account in the current payroll run)
 - A1 request (request for an A1 certificate for planned assignment of an employee in an EU country other than Germany)
 - Capital-forming benefits (notification of a VWL contract to be taken into account in the current payroll run)
 - Company Car (notification of provision to an employee to be taken into account in the current payroll run)
 - Employer Loan (notification of employee's non-cash benefits to be taken into account in the current payroll run)
 - Company Pension Scheme (notification of a BAV contract to be taken into account in the current payroll run)
 - Garnishment (setting up a wage garnishment for an employee)
 - Severely Disability (notification of severely handicapped employee)
-

Portal notifications are the future

Due to the described advantages, we are going to expand the possibilities for the specific notification / ordering of services in the coming months.

In particular, we intend simplify the following areas:

- Change notifications for personnel and company master data
- The transfer of flexible remuneration (variable salary, hourly wage, bonuses)
- The ordering of certificates

News on the Digital HR Office



Dear Users of the Digital HR Office,

good afternoon! In this current DPB News, we again bring you up to speed on the most relevant developments around the Digital HR Office.

In the "New releases" section, you'll learn about the new and already implemented improvements since the last issue of DPB News.

In the "Coming soon" section, we present new functions in the i-DOS Archive, which will be available to you by the end of July with version 1.9.2.

Under "Tips and Tricks," we show you how you can grant an employee the ability to securely transfer data to Paychex, even without existing access to the portal or the billing documents.

We wish continued success with the Digital HR Office – and stay healthy!



Dirk Stefan Haase, LL.M.
Geschäftsführer

Unsere Themen

1. New releases – improvements since the last DPB News
2. Coming soon- new features in i-DOS 1.9
3. Good to know – tips & tricks for working in DPB



download all topics of the DPB News 07/2020 in a pdf file (1,6 MB)

New releases – improvements since the last DPB News

With our latest DPB News we want to inform you about innovations and improvements in our Digital HR Office.

The following innovations have been made available:

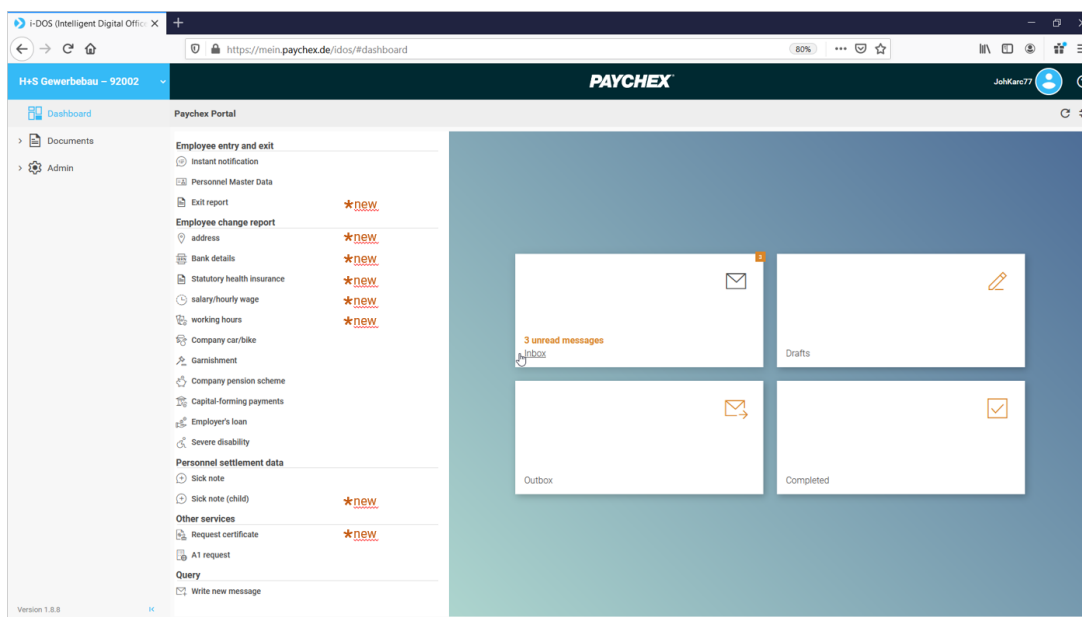
1. New forms in the Paychex portal
2. More functionality with the i-DOS clipboard
3. Easier sharing

New forms in the Paychex portal

We constantly strive to make the secure and precise transmission of your payroll-relevant employee information even easier.

That's why we have revised our existing forms. You now can use the following portal notifications:

- **Exit report** (employee entry and exit): Notify us of the termination of a staff member. You can directly request the creation of a certificate of employment.
- **Address** (employee change report): Send us the new address of your employee.
- **Bank details** (employee change report): Send us the new account details of your employee.
- **Statutory Health Insurance** (employee change report): Notify us if one of your employees changes his health insurance company.
- **Salary/hourly wage** (employee change report): Notify us if there is an upcoming change in the fixed salary or hourly wage for one of your employees.
- **Working hours** (employee change report): Report changes in the weekly working time or the distribution of hours over the weekdays.
- **Sick note (child)** (personnel settlement data): Notify us if your employee is unable to work because of the care of a sick child. Also let us know whether wages or salary should continue to be paid. We have greatly simplified the existing form for notification of illness.
- **Request certificate** (other services): Use this form to order a certificate.



Using these portal notifications offers the following advantages:

All the necessary information is requested for each notification. Before transmission, the data is checked for completeness and – whenever possible – input errors are detected and marked for verification. This allows us to quickly transmit the complete and correctly transferred data to our accounting systems without transmission errors. You, in turn, benefit from faster processing times.

Time-consuming enquiries or corrections are avoided. At any time, you have both an overview of the current processing status of the individual notifications (the notification will then appear on your list of completed transactions), as well as a current and detailed overview of all notifications made to us.

The portal notification to your personal payroll administrator is now found below under **Write new message** (Query).

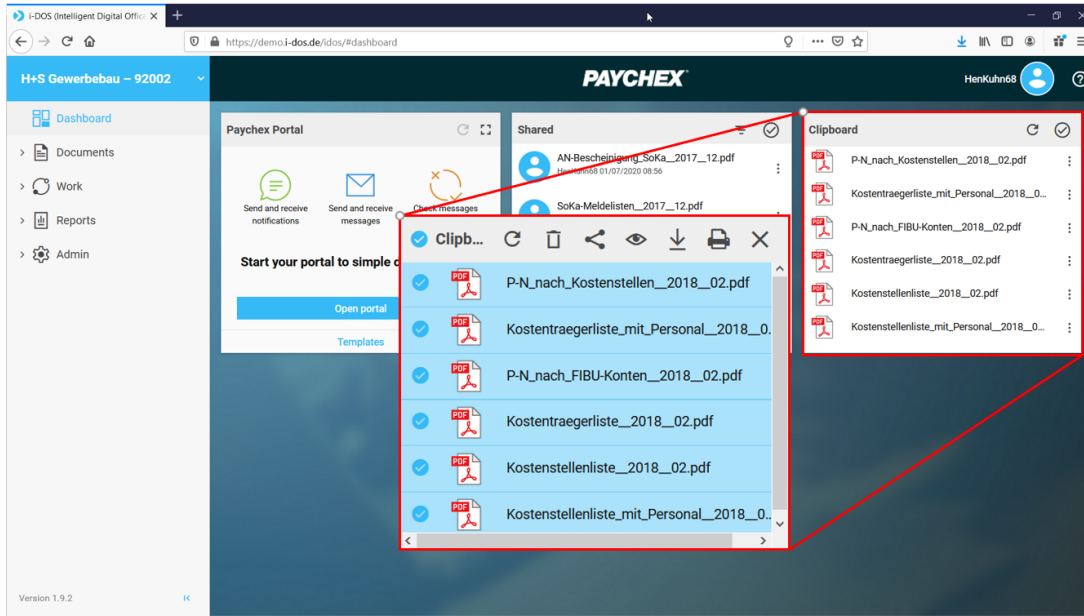
More functionality with the i-DOS clipboard

Working with the clipboard tile on the dashboard of the i-DOS archive is getting to be more convenient.

You can use this feature to compile files from different document searches, which you can then:

- download,
- view,
- share with other users and

Starting with i-DOS version 1.9, you will also be able to select all the files on the clipboard tile with a single click. This is currently only possible when you mark a file with a click and then use the key combination CTRL+a.

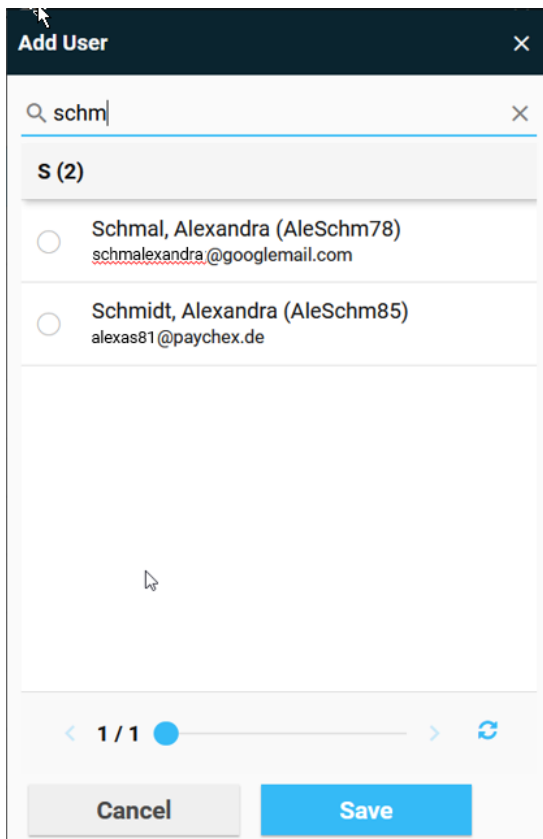


Easier sharing

When sharing documents, it was not easy initially to select the right user for sharing your documents, especially if there were multiple users. Making a selection via user name could also be difficult: Is it "AleSchm78" or "AleSchm85"?

Now, every user of i-DOS is required to enter first names and surnames on their user profile. This data is also currently displayed in the "Select User" dialog box when sharing documents. This makes selection much easier.

Moreover, endless scrolling through the user lists is also a thing of the past. In the filter field at the top of the dialog box, just enter a string of characters that is included in the name, email address, or user name and press Enter. You will then be shown all matching users in a filtered list.



Coming soon- new features in i-DOS 1.9 (available end of July)

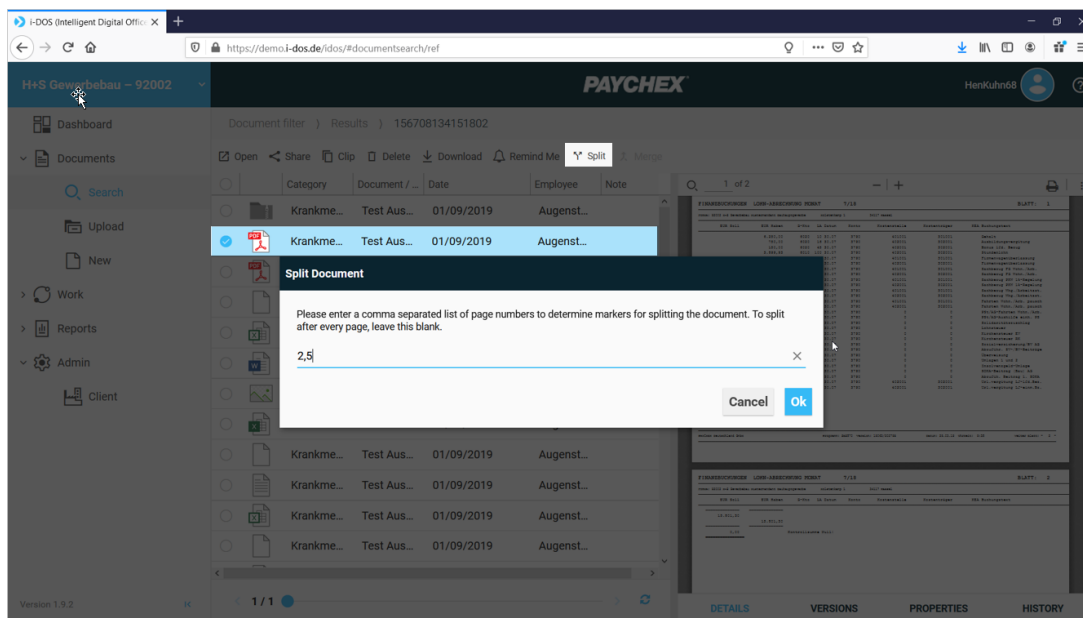
The development of the new features in version 1.9 of the i-DOS archive was successfully completed. Following final application testing, version 1.9.2 should be available to users by the end of July. After the enhancements in version 1.8 focused on usability and user interfaces, i-DOS is now beginning to tackle workflows with the introduction of resubmissions for documents. We believe this will deliver significant benefits. Here are the most important new functions:

1. Split & merge PDF documents
2. Resubmissions for documents
3. More transparency: Who is sharing what with whom?
4. Better user administration

Split & merge PDF documents

The "Split Documents" function is very handy if you want to archive multi-page scans in i-DOS or, for example, if your customers return various contract documents in one document that they want to store in a structured manner.

With the "Split" button, you can separate a multi-page PDF document into single documents. In the subsequent dialog box, you can define what pages should be split. If no entry is made, all pages will be generated as individual documents (files). The initial indexing of the created documents is based on the original document. Therefore, please do not forget to index the newly created documents in a meaningful way and to use the correct document type so that you can quickly find them again later with the search function.

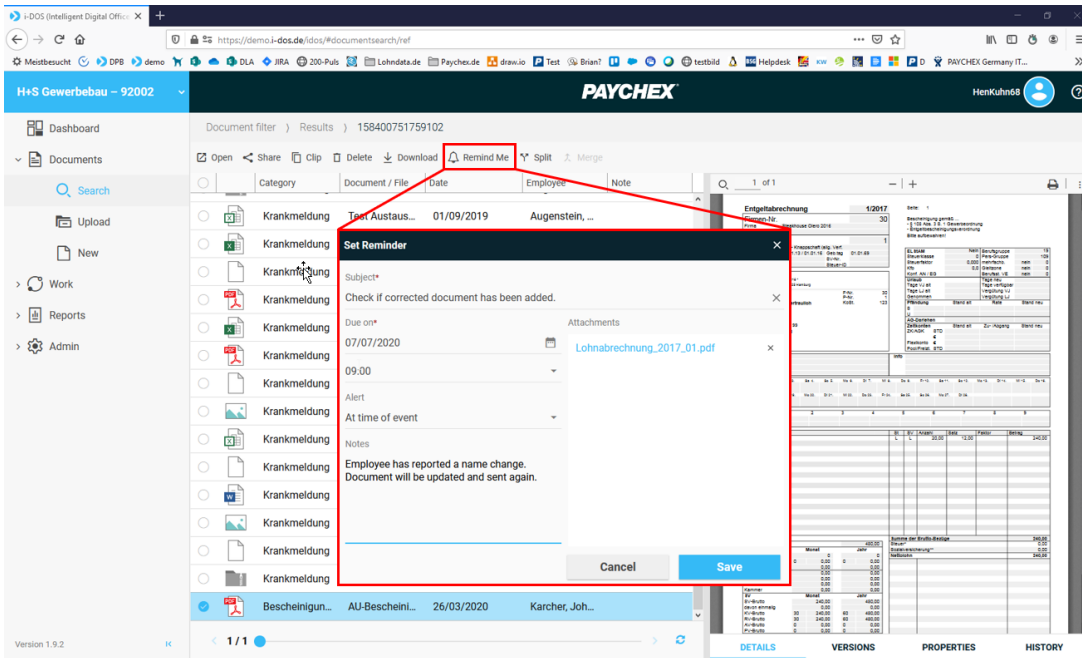


You can use the "Merge" button to merge several individual PDF files into one file directly in i-DOS. Bear in mind that the order of the pages in the merged document depends on the order in which you have selected the individual documents for editing. The merged document is stored in i-DOS with the indexing of the first selected individual document.

Resubmissions for documents

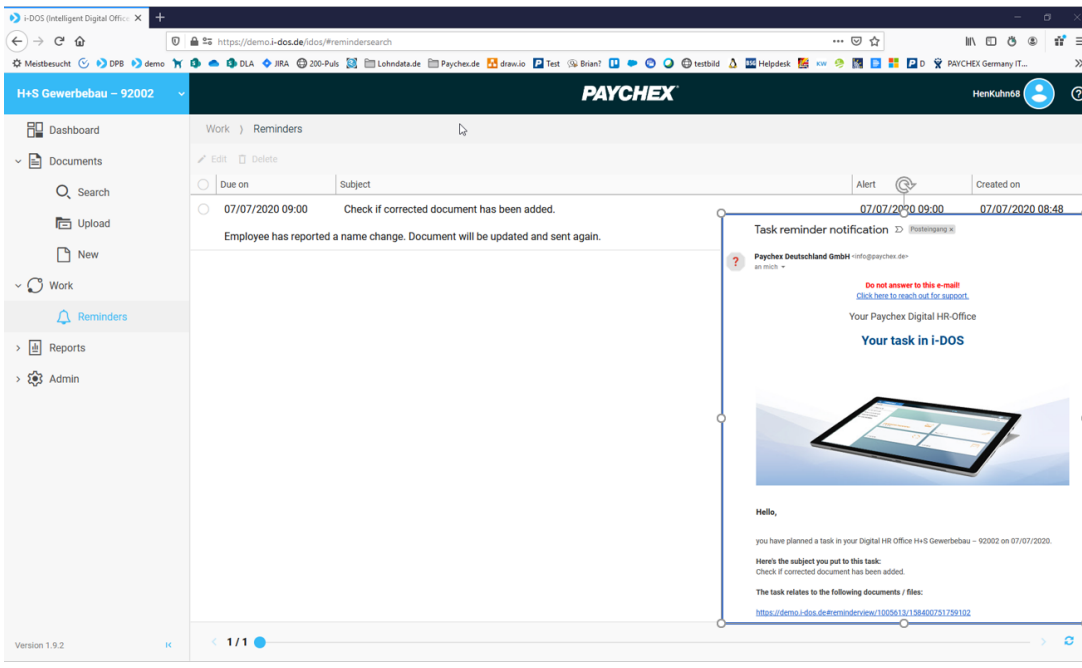
It's a simple tool, but a big help. Soon, you'll be able to create and manage document-related resubmissions directly in i-DOS. Create your own work and task list. Or get a reminder if a document needs to be edited or checked again at a later date. Here's how it works:

1. Select one or more documents from the document search
2. Click on the "Download" button
3. Enter a name for the resubmission
4. Select a time for resubmission and indicate whether you want to be reminded by e-mail
5. If you like, you can enter additional information in the "Comments" field
6. Save your resubmission



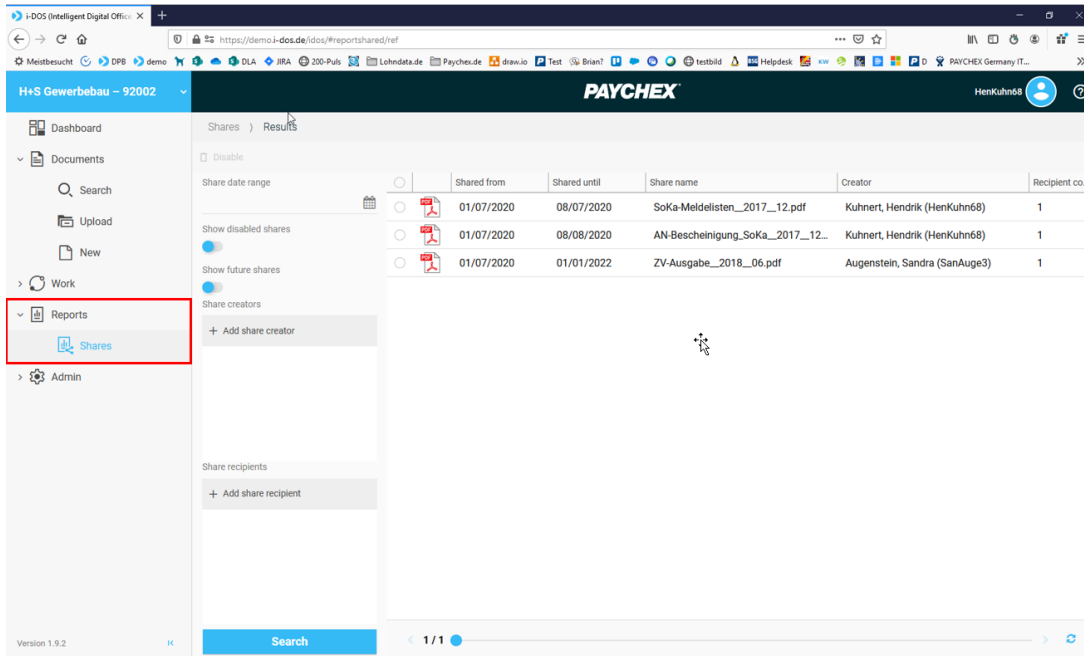
Via the pull-down menu "Tasks > Resubmissions," you can check and manage your resubmissions. You can use this list view like a task list. The list can be sorted using the column headers. You can edit and delete created resubmissions.

If you have activated a reminder on a resubmission, i-DOS will send you an e-mail at the selected time with all the details about your task.



More transparency: Who is sharing what with whom?

The main users of a DPB i-DOS archive will now have an overview of which users have granted other users access rights to files.

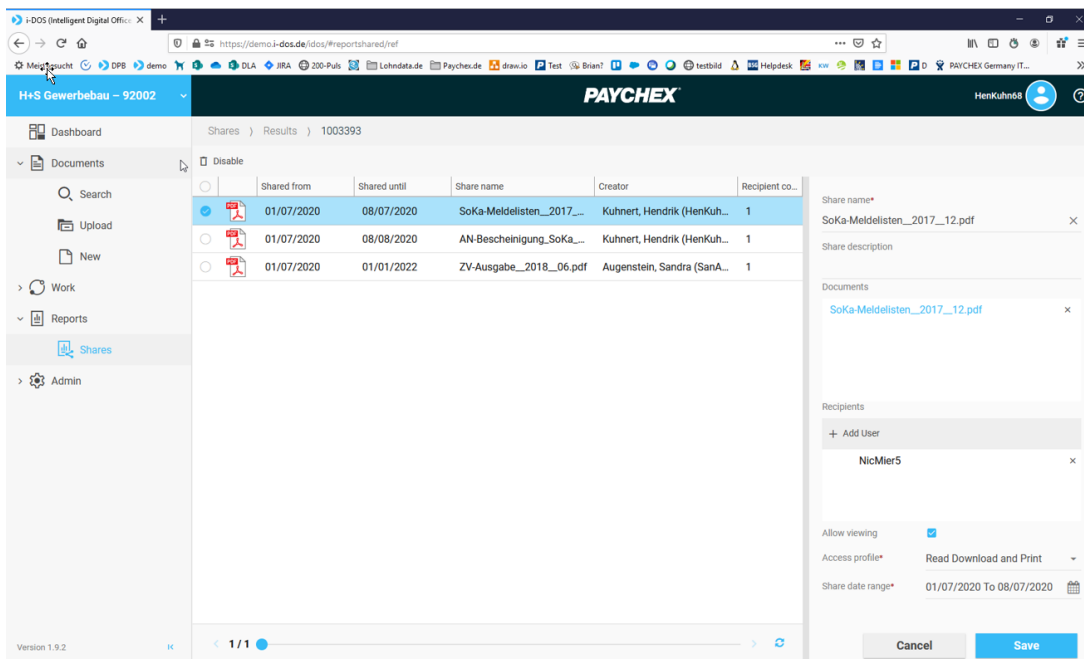


In the new "Reports" section, "Shared Content" can be accessed via the navigation menu on the left. After clicking on "Search," all currently active permissions are listed in the i-DOS Client.

Via the filters

- Share date range
- Share Creators
- Share Recipients

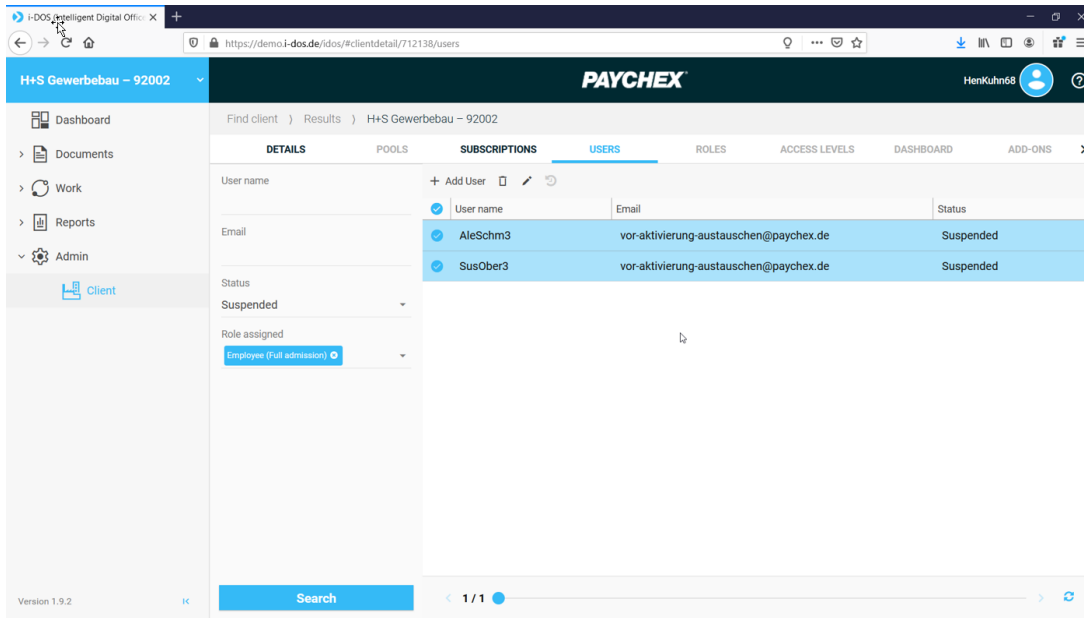
It is possible to do a precise search for existing permissions. With the "Show Deactivated Permissions" button, permissions can be displayed which are now inactive. The "Show Scheduled Permissions" button also displays permissions that have been set in the system for a period in the future.



By selecting a list entry, the main user can view the permission details on the right-hand side and modify any necessary settings.

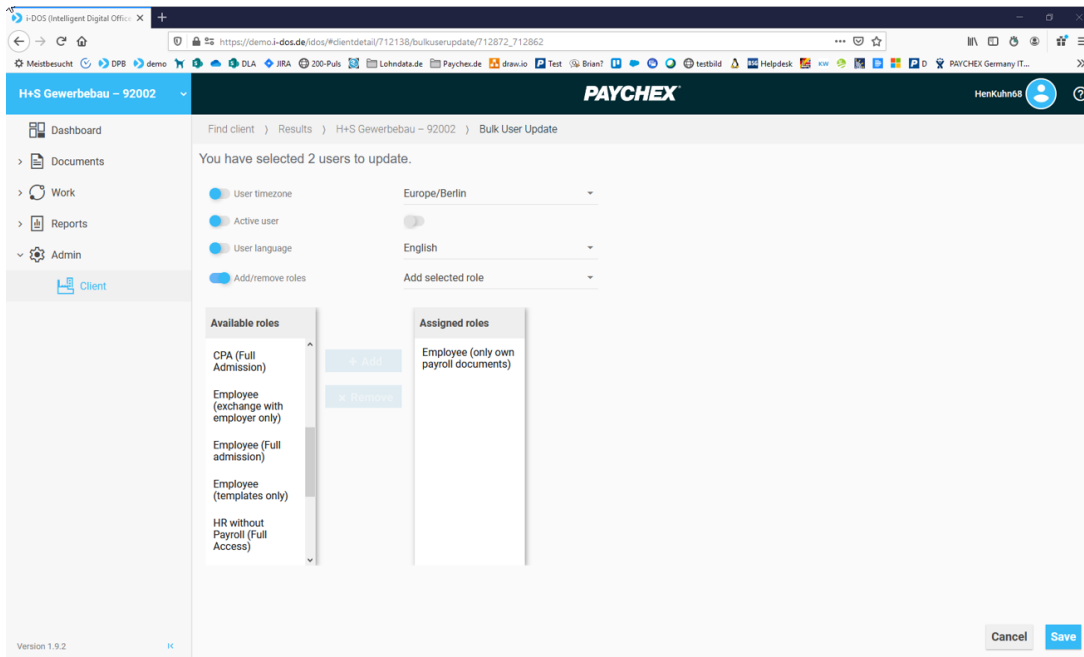
Better user administration

i-DOS version 1.9 improves the management of user access. In the user administration, not only can you filter for active or inactive users as before, but you can also search for users based on their role(s).



It is also possible to select several accounts and to perform the following actions for them in a single processing step:

- Enable / disable user accounts
- Change roles (or selectively add or remove roles)
- Switch user language
- Switch time zone



Usage examples:

You'd like to deactivate several user accounts except yours for a short period of time and then reactivate them after some time (e.g. after modifying the roles).

- Filter and select the user accounts to be deactivated via the list view and click on the "Edit" button.
- In the editing view that follows, change the status to inactive.
- Click save.

You want to give your employees access to their payroll documents. However, you don't want to use the default setting Employee (Full admission) for this, but only assign the role Employee (only own payroll documents).

- In the list view, filter out your still inactivated employee accounts by role and status.
- Enter the user's e-mail address for the employee accounts that you want to activate.
- Select the employee accounts to be modified and activated with regard to the role and go to "Edit."
- In the subsequent editing view, change the role and set the status to active.
- Click save.

Good to know – tips & tricks for working in DPB

Data transmission to Paychex from i-DOS (without Paychex portal)

Our support staff reports that several users have asked the following question:

My employee needs to be able to send Paychex the data necessary for regular payroll. However, they should NOT have access to all accounting documents. They are also NOT allowed to use the Paychex portal (where there are likewise processes and documents that they are not allowed to view). What should I do?

Unfortunately, user permissions in DPB are not yet as versatile as we would like. We are working on finding better solutions. Nevertheless, there is already a workaround for this:

Activate the access of the employee who is to perform this task for you and set the roles

HR without payroll accounting (full access) and

Employee (only communication with employer)

In this setting, there is no access to documents of the type "Payroll accounting" nor can the user access the Paychex portal.

The user can however – like any user who is able to share documents in i-DOS – transmit files directly to his Paychex payroll clerk.

The related functionality is called "document retrieval" and was originally designed as a backup for file transfer via the Paychex portal.

In this video, we show you how [file transfer works without portal access](#) (in German language only).