

PayChoice Online Import Guide

The following guide will walk users through the process of importing specifically formatted .txt or .csv file into PayChoice Online (for .txt and .csv import specs, access the Import Pay Data link under the Payroll link on your PayChoice Online main menu). The import process not only saves time but also reduces the possibility of keystroke errors.

1. Prepare PayChoice Online for the data import by confirming your data has been refreshed (this can usually be done by confirming that your pay period dates are correct on the "Welcome" screen) and then by performing any required employee maintenance under the Employees section from the main menu.
2. Once that is done, click the Payroll link on the main menu.

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America's Choice for Payroll

SALES DEMO
PAYCHOICE ONLINE

Welcome, SALES DEMO PAYCHOICE ONLINE
Your Current Pay Period is: **1/15/1998 - 2/7/2004**

Use the left menu to access company info

Employees Payroll Reports Logout Help

Today is Tuesday, March 24, 2009

Take Note...

- ▶ To reach us... (574)389-5200 phone (574)295-3932 payroll processing dept fax ...[\[more\]](#)
- ▶ New Manual Check Calculator Now Available! This feature has been enhanced to make the process easie...[\[more\]](#)
- ▶ New Custom Report Feature Now Available! Choose from pre-built reports or create your own and export...[\[more\]](#)
- ▶ New Enhancements: Ability to add a check stub message for a specific employee via the Pay Detail sc...[\[more\]](#)

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PayChoice
ONLINE

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Contact Us
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ELKHART PROCESSING
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Payroll Links
• [IRS website](#)

LIVE SUPPORT ONLINE
CLICK FOR HELP

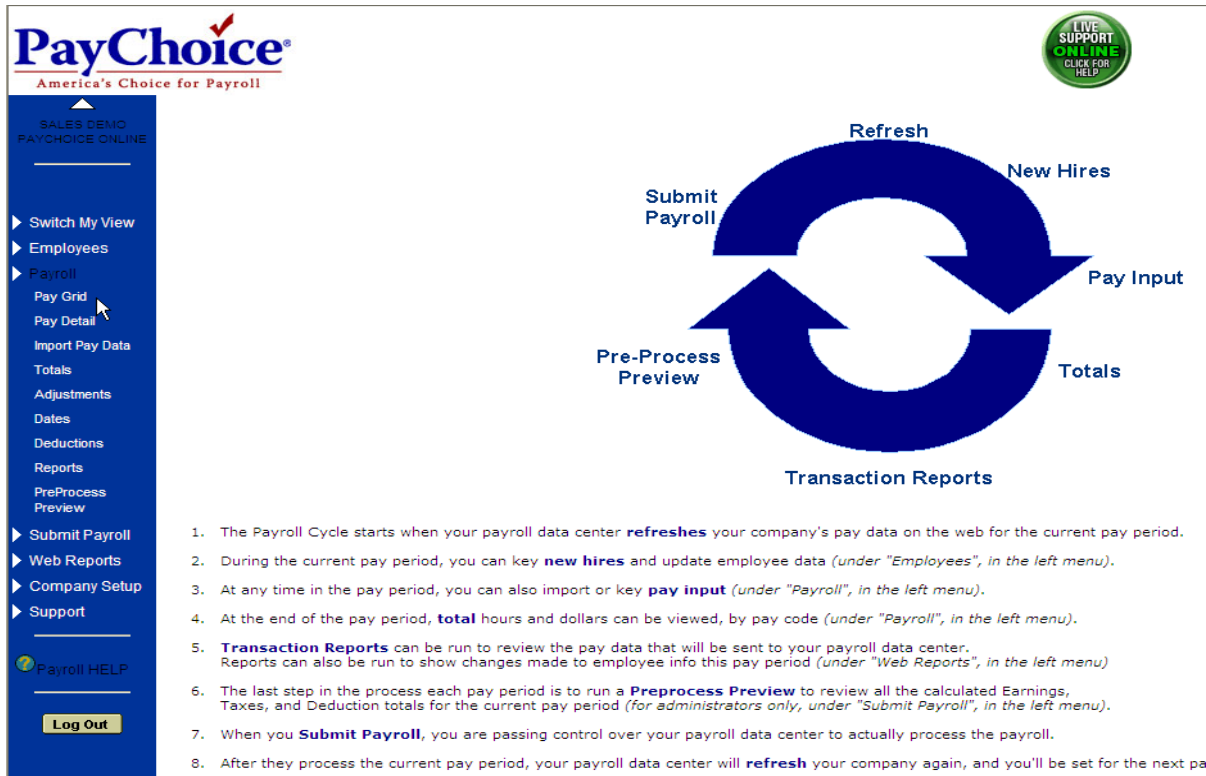
Switch My View
Employees
Payroll
Submit Payroll
Web Reports
Company Setup
Support
Payroll HELP
Log Out

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3. Under the Payroll link that expands out from your main menu, click on the Pay Grid link.



The screenshot shows the PayChoice online interface. On the left is a blue navigation menu with the following items: SALES DEMO, PAYCHOICE ONLINE, Switch My View, Employees, Payroll (expanded), Pay Grid (highlighted with a red arrow), Pay Detail, Import Pay Data, Totals, Adjustments, Dates, Deductions, Reports, PreProcess Preview, Submit Payroll, Web Reports, Company Setup, Support, Payroll HELP, and Log Out. On the right is a circular diagram of the payroll cycle with the following steps: Refresh, New Hires, Pay Input, Totals, Transaction Reports, Pre-Process Preview, and Submit Payroll. Below the diagram is a list of 8 numbered steps describing the payroll cycle.

Transaction Reports

1. The Payroll Cycle starts when your payroll data center **refreshes** your company's pay data on the web for the current pay period.
2. During the current pay period, you can key **new hires** and update employee data (under "Employees", in the left menu).
3. At any time in the pay period, you can also import or key **pay input** (under "Payroll", in the left menu).
4. At the end of the pay period, **total** hours and dollars can be viewed, by pay code (under "Payroll", in the left menu).
5. **Transaction Reports** can be run to review the pay data that will be sent to your payroll data center. Reports can also be run to show changes made to employee info this pay period (under "Web Reports", in the left menu).
6. The last step in the process each pay period is to run a **Preprocess Preview** to review all the calculated Earnings, Taxes, and Deduction totals for the current pay period (for administrators only, under "Submit Payroll", in the left menu).
7. When you **Submit Payroll**, you are passing control over your payroll data center to actually process the payroll.
8. After they process the current pay period, your payroll data center will **refresh** your company again, and you'll be set for the next pa

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- When the Pay Grid opens, click the Pay All link at the top of the Pay Grid to generate pay for salaried employees. Once that is done, click the Save These Pay Changes button at the top of the screen, then click Back to Menu arrow to return to the main menu.

Pav	Emp #	Name	Rate	Temp & Rate	REGULAR HRS	O/TIME HRS	SALARY \$	COMM 1 \$	BONUS \$	VACTION \$	CLEANIN \$
✓-N	0021	ANDERSON, JOHN M					750.00				
✓-N	0020	ANDERSON, KELLY					1620.89				
✓	0001	BRICK, LINDA J					2000.00				
✓	0002	CHOMAN, KAREN M					1300.00				
✓	0005	CIBMAN, JOHN T					2000.00				
✓	0013	FORTMAN, KATHLEEN M									
✓	0011	GANYAN, CURT W					1500.00				
✓	0006	HARTFORD, TIMOTHY B					2000.00				
✓	0018	MILLER, LAURA L									
✓	0012	PIPPEN, KATRINA J									
✓	0017	SCHUMAN, CATHERINE F									
✓	0004	SMITH, STEVEN E					425.00				
✓	0019	WILLINGHAM, TYRONE									
✓	0009	WILLMAN, LYNN A					1760.00				
✓	0003	WYMAN, MICHAEL T					2300.00				

- From the PayChoice Online main menu, click on the Import Pay Data link to begin the import process.

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- SALES DEMO
- PAYCHOICE ONLINE
- Switch My View
- Employees
- Payroll
 - Pay Grid
 - Pay Detail
 - Import Pay Data
 - Totals
 - Adjustments
 - Dates
 - Deductions
 - Reports
 - PreProcess Preview
- Submit Payroll
- Web Reports
- Company Setup
- Support
- Payroll HELP
- Log Out



- The Payroll Cycle starts when your payroll data center **refreshes** your company's pay data on the web for the current pay period.
- During the current pay period, you can key **new hires** and update employee data (under "Employees", in the left menu).
- At any time in the pay period, you can also import or key **pay input** (under "Payroll", in the left menu).
- At the end of the pay period, **total** hours and dollars can be viewed, by pay code (under "Payroll", in the left menu).
- Transaction Reports** can be run to review the pay data that will be sent to your payroll data center. Reports can also be run to show changes made to employee info this pay period (under "Web Reports", in the left menu)
- The last step in the process each pay period is to run a **Preprocess Preview** to review all the calculated Earnings, Taxes, and Deduction totals for the current pay period (for administrators only, under "Submit Payroll", in the left menu).
- When you **Submit Payroll**, you are passing control over your payroll data center to actually process the payroll.
- After they process the current pay period, your payroll data center will **refresh** your company again, and you'll be set for the next pa

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6. Once you are at the Import Pay Data screen, you have the ability to browse to your specifically formatted .txt or .csv file to import into PayChoice Online. Click the Browse button to locate your import file. Once located, highlight the file and click the Open button. This will bring you back to the Import Pay Data screen as shown below. Then click the Upload File button.

Payroll - Importing Pay Data Company Code: WEBD

If you use .txt files, you are currently set up to import timesheets based on **SSN**.
If this is incorrect, click *Company Setup*, in the left menu, and reset your Company Option - "Emp ID for Timesheet Imports".

Please identify the **.csv** or **.txt** file that contains employee pay data for this pay period.

[Importing a .txt file? Click here for more help.](#)

[Importing a .csv file? Click here for more help.](#)

This will initiate the import process. When the file has successfully imported, you will see the screen below:

Payroll - Importing Pay Data Company Code: WEBD

1. Reading import file... **Completed.**
2. Validating file format and uploading data... **Completed.**
3. Validating import data against employee data... **Completed.**
4. Saving imported pay data... **Completed.**

The word **Completed** at the end of all four steps indicates that the file imported successfully. You can now click the Continue button and proceed to the step 7. If the file does not import successfully for any reason, you will see the following screen:

Payroll - Importing Pay Data Company Code: WEBD

1. Reading import file... **Completed.**
2. Validating file format and uploading data...

Errors were encountered during the import.
Click **CONTINUE** to see a description of the errors.



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The red message on the previous page indicates that an error occurred on the previous step, in this case, step 2. If an import file fails to import for whatever reason, it is safe to assume that nothing from that file has imported. If a file fails to import, it will not import part of the information from that file. To proceed, whatever is causing that import file to fail to import will need to be resolved before you should attempt the import process again. By clicking the Continue button, you will be taken to a screen that will show you where the import file errored out. This should be used to assist you or PayChoice Technical Payroll Services in correcting the issue. Please have this information ready or remain on this screen if you contact PayChoice Technical Payroll Services to expedite resolution. Once the import file has been corrected, you can attempt to import the file again.

7. Once the import file has successfully imported, make any additional payroll changes as needed and continue on with your normal PayChoice Online procedures as defined in the PayChoice Online User Manual.