

CLIENT INFORMATION

Effective Date of Change:
Client ID:
Requestor's Name:
Client Name:
Client Phone:

CONTACT CHANGE REQUEST

Add New Contact Name:
 Remove Current Contact Name:

CONTACT INFORMATION / WORK LOCATION ADDRESS

Job Title:
Email Address:
Work Phone: Cell Phone: Home Phone:

Best Form of Communication (other than Work Phone): Cell Phone Home Phone Email
This will be used in the case of questions regarding a payroll or if there is an amount that needs to be verified – in the event they cannot be reached on their work phone.

Street Address:
City: State: Zip Code:

PERMISSION INFORMATION

Contact Type: **Choose Contact Type.**
Permission Level: **Choose a Permission.** Payroll / Paygroup:
Access to HR Support Center, if applicable: **Choose Access Type.**

Notes:

Select one:

Access to Payroll Rates or Restricted from Payroll Rates
 Access to Editing or Restricted to Viewing Access Only

Select all that apply:

Billing Invoice Contact *(only check if the individual should receive a copy of the billing invoice)*
 Payroll Processing Reminders: Reminder to Process Payroll Reports Available in Online Reports
 Online Learning
 Reports & Analytics:
 Full Access View Pay Detail View Employee SSN View EE Personal Info View Employee Status View Employee Learning

Access to additional services (if applicable):

Time & Attendance

Perform HR Benefits

ACA

Onboarding

E-Verify

SECURITY MANAGEMENT ACCESS

Authorized for Full Access

Payroll Administrator

Reporting Administrator

HR Administrator

PAYROLL REPORTING OPTIONS

All Reports

Or select specific reports:

401(k) Reports

Benefit Notifications

Blended OT

Cash Requirement

COBRA Credit

Deductions Report

Deductions Not Take

Direct Deposit Report

401(k)

Electronic GL

Employee Profile Change Report

Employee Rate Change

Employee Verification Report

Employee Missing SSN

General Ledger

Input Worksheet

Labor Distribution Monthly

Labor Distribution

Missing Tax ID Nos

Net Pay Report

New Hire Filing Report

Online Check Stubs & Advices

Online Employer W2s / 1099

Online Tax Reports

Organizational Summary

Outstanding Checks Report

Payables Journal

Payroll Journal

SOCER Exemption

Tax Shortfall Report

Workers Comp Monthly

Workers Comp Semi Annual

Year End Verification – 3PS

YTP List

DELIVERY METHOD & PAPER REPORTS

Only required if the contact will be receiving paper report delivery.

Delivery to Contact: **Choose a Method.**

Signature Required

Receive Paper Reports

Receive Paper Advices

Receive Paper Tax Reports

Tax Packet

W2

Authorized Signature:

Date: