PAYDATA
WORKFORCE SOLUTIONS

CLIENT CONTACT CHANGE FORM

COMPANY #: _____ **COMPANY NAME:** _____

REMOVE CONTACTS: **Inactivate Logins: (Circle all that apply):**

Name: _____ Effective Date: _____   **Evolution Remote Access**   **EvoClock**   **VMR Reports**

Name: _____ Effective Date: _____   **Evolution Remote Access**   **EvoClock**   **VMR Reports**

ADD/CHANGE CONTACTS:

Primary Contact: **Authorization Level: (Circle one option for each)**

_____   **Employee Information:**   None   Full w/ Rates   Full w/o Rates
Full Name

_____   *Fax:* _____   **Company Information:**   None   Full   Inquiry only
Title

Phone: _____ Ext: _____ Alt Phone: _____   **Assign Software User Rights:**   YES   NO

E-mail:_____ Add E-mail for VMR Reports: YES   NO

Second Contact: **Authorization Level: (Circle one option for each)**

_____   **Employee Information:**   None   Full w/ Rates   Full w/o Rates
Full Name

_____   *Fax:* _____   **Company Information:**   None   Full   Inquiry only
Title

Phone: _____ Ext: _____ Alt Phone: _____   **Assign Software User Rights:**   YES   NO

E-mail:_____ Add E-mail for VMR Reports: YES   NO

Third Contact: **Authorization Level: (Circle one option for each)**

_____   **Employee Information:**   None   Full w/ Rates   Full w/o Rates
Full Name

_____   *Fax:* _____   **Company Information:**   None   Full   Inquiry only
Title

Phone: _____ Ext: _____ Alt Phone: _____   **Assign Software User Rights:**   YES   NO

E-mail:_____ Add E-mail for VMR Reports: YES   NO

Delivery Attention:_____

_____   _____

Client Signature – MUST be a Current Contact   **Date**

PayData Use Only

CSR Initials: _____ **Date:** _____

☐ **CRM** ☐ **e-mail** ☐ **Folder** ☐ **Screen**

Purple Form to Processing:
☐ **VMR** ☐ **Del Attn.**

CLIENT CONTACT CHANGE FORM

Information Sheet

The Client Contact Change Form defines who is able to contact PayData's team. This form specifies the rights the individual has when contacting PayData regarding your account.

***Please do not confuse the Contact Change Form with the Evolution Remote User Set up Form. The Evolution Remote User Set up Form defines the field access rights the individual has within the Evolution Payroll /HR application.**

<u>Limit 3 Contacts per Company*</u> to ensure the highest standard of customer service and to maintain confidentiality, PayData limits the number of **contacts per company to (3) Three***.

<u>PayData requires that each company have either an owner or member of the executive staff listed as a contact.</u> We understand that this person may not be directly involved with the payroll process. PayData will only use this information in the event the primary and secondary payroll contacts cannot be reached when dealing with a time sensitive matter.

*PayData's EvoHR subscribers are allowed one additional contact.

PayData encourages each company to have a backup person for payroll processing. As much as we would like to be able to assist you during vacations or unexpected events our ability to do so is limited. We will gladly assist contacts to overcome any payroll processing obstacles.

Contact Rights:
Employee Information
- <u>None</u> – an individual would not be able to obtain any employee related information from PayData.
- <u>Full w/Rates</u> – an individual would be able to contact PayData to receive any and all employee information including rates of pay and authorize any changes to an employee record.
- <u>Full w/o Rates</u> – an individual would be able to contact PayData to receive or authorize changes to an employee record **EXCEPT** employee rates of pay.

Company Information
- <u>None</u> – an individual would not be able to obtain any company related information from PayData.
- <u>Full</u> – an individual would be able to contact PayData to review or authorize changes to any company related payroll items. Such items might include new or changes to earning or deduction codes, new or restructuring of general ledger detail, new or changes to the branch/department structure, new or changes to time off accrual, new or changes to state set ups, etc.
- <u>Inquiry only</u> – an individual would be able to discuss the existing information on file related to your company payroll; however, they would be restricted from making any changes.

Assign Software Users Rights (Evolution Payroll /HR Remote Clients Only)
- Yes –This individual may add additional software users and instruct PayData on the level of access for users. Changes to user's rights require an Evolution Remote User Set up Form.
- No – This individual may not assign or change software user's rights.

<u>Delivery Attention:</u> Who you would like packages addressed to when we mail or ship something out from our office.