Paycor

Broker Care: Client Authorization Form

To be completed by the Broker (Section 1): Complete Section 1 with the broker's information who requires access. Paycor Credentials will be provided to this user. Once complete, please send the form to the client to complete and submit to Paycor.

Reminder: We can only accept authorization forms submitted by the client.

Broker Contact Name	
Brokerage Firm Name	
Firm Type	☐ Benefits ☐ Retirement ☐ Property & Casualty
Primary Address	
Phone Number	
Email Address	

To be completed by the Client (Section 2): Complete Section 2 to authorize access for the broker. Scan and send the completed form to brokercare@paycor.com for setup.

Client ID(s)*	
Client Company Names	
Client Contact Authorizing Access	
Check the User Roles you would like to provide the Broker access to.	☐ Reporting Admin Role (Reports & Analytics)
	☐ Configure ACA IRS Filing Role (ACA + Reports & Analytics Reports)
	☐ HR Admin Role (Perform Benefits)
	☐ View Company & Employee Tax Documents/View Payroll Settings (W2s)
	☐ Full Access (Includes ALL Roles listed + the Full Access Role)
	☐ Online Reporting (Standard Payroll Reports)
	☐ Workflow Notifications
	☐ Benefits Advisor: Benefit Changes
	☐ Benefits Advisor: View Only, No Benefit Changes
	☐ Partner Integration (To assist with the API/File/180/360 integration ONLY, NO access)

*Broker will only be provided access to the Client IDs listed on this form.

Please scan and send to Broker Care at: brokercare@paycor.com. Setups are completed within 5 days. Your broker will be notified once access is available and provided everything they need to get started. Please notify your Payroll Consultant or Broker Care if you wish to remove Broker Access.