paylocity

Welcome to Paylocity! We are happy to be able to provide you with all the tools needed to be able to successfully utilize all the features Web Pay has to offer. **Within this New Hire Packet, you will find basic guides that will help you to:**

🔴 **Access the Web Pay Software**

🔴 **Utilize the Self Service Portal to view or edit your payroll and HR information**

🔴 **Learn how to award Impressions to colleagues for a job well done**

🔴 **Access and explore your company's Directory and organizational structure**

🔴 **Submit time off requests**

🔴 **Review and download your paystubs and tax forms**

🔴 **Setup your Direct Deposit account(s) within the Web Pay system**
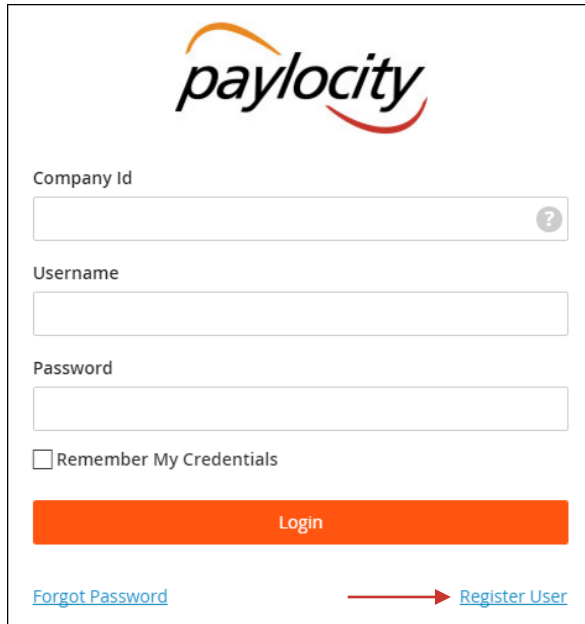
Let's Get Started!

> 🔔 **Smart Tip**
> Note that each company will customize the display of information. Users may not have access to all the information displayed within this guide.
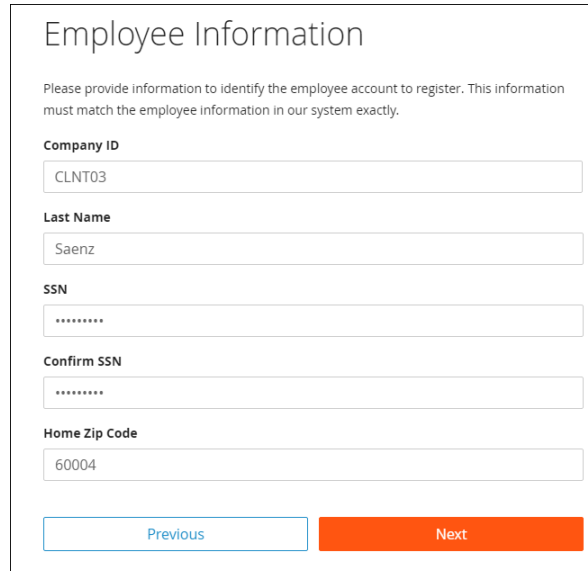
Web Pay Registration

1 Access Web Pay at
https://login.paylocity.com.

2 Click **Register User** to create a new
User Name and confidential Password.

Company Id

Username

Password

☐ Remember My Credentials
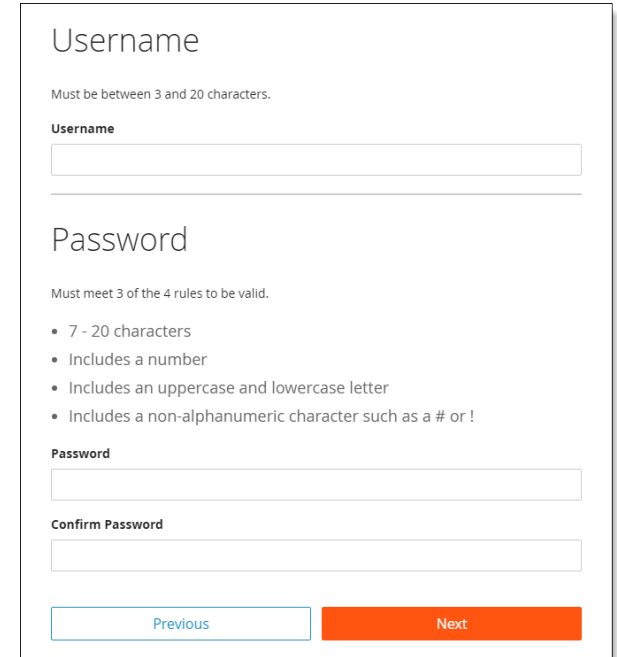
Login

Forgot Password → Register User

3 In the Register User Screen, type in the
Image Text shown. Click **Next**.

4 Enter the Paylocity assigned Company
Id and your Last Name.

5 Enter your nine digit Social Security
number (SSN); enter your SSN a
second time in the Confirm SSN field.

6 Enter your Home Zip Code and click
Next.

Employee Information

Please provide information to identify the employee account to register. This information
must match the employee information in our system exactly.

Company ID

CLNT03

Last Name

Saenz

SSN

••••••••

Confirm SSN

••••••••

Home Zip Code

60004

Previous | Next

7 Enter the User Name and Password
you would like to use when accessing
this account, taking into account
specific requirements as noted.

8 Enter your password a second time in
the Confirm Password field and click
Next.

Username

Must be between 3 and 20 characters.

Username

Password

Must meet 3 of the 4 rules to be valid.

- 7 - 20 characters
- Includes a number
- Includes an uppercase and lowercase letter
- Includes a non-alphanumeric character such as a # or !

Password

Confirm Password

Previous | Next

🔅 **Smart Tip**
Selected **Username** and **Password**
must meet the rules noted in order to
be valid.

Web Pay Registration

9 Select login challenge questions from the Question 1, Question 2, and Question 3 drop downs and enter answers.

10 Click **Next**.

Challenge Questions

Welcome to your Challenge Questions setup. Please select 3 unique questions and provide answers for them. The challenge questions must be answered while performing tasks such as password resets.

Question 1
-- Select --

Answer 1

Question 2
-- Select --

Answer 2

Question 3
-- Select --

Answer 3

Previous | Next

Smart Tip
There is an 80 character limit for **Answer** fields.

11 Select an image from the Select Security Image drop down.

12 Enter a personal Security Phrase (*128 character limit*) and click **Next**.

Security Image

Please select a security image to see on login.

Select Security Image

SecurityImage

Please provide a security phrase

Previous | Next

Smart Tip
The image and phrase selected will appear on the login screen once the **Company Id** and **Username** are entered.

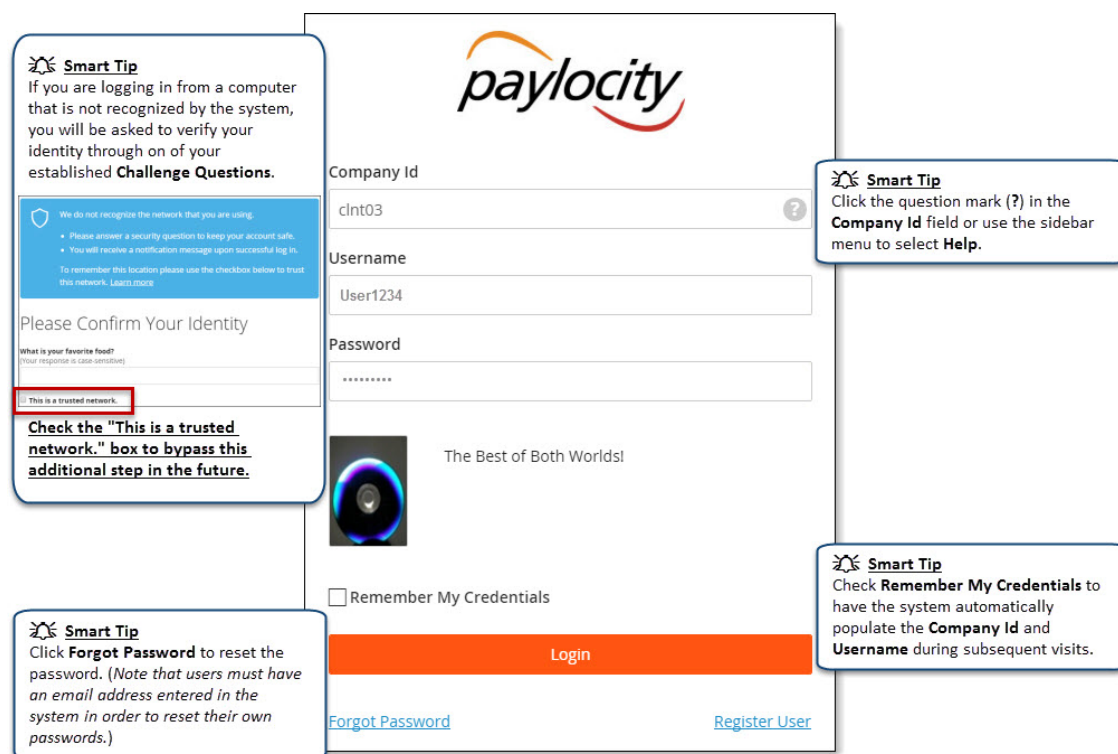**13** Verify all registration information is correct.

14 Click **Finish** to create the new user account and enter Web Pay.

REMINDERS:

- Online videos are available to show you how to register a user.

- Once the user account is created, users may log in through the main screen by entering the Company Id, User Name, and Password selected during registration.

- In order to maintain confidentiality, employees must contact their Company Administrator with questions. Paylocity is not authorized to speak directly with employees.

Web Pay Login

1 Access Web Pay at https://login.paylocity.com.

2 Enter the Paylocity assigned **Company Id**.

3 Enter the **Username** (not case-sensitive).

4 Enter the **Password** (case-sensitive and 7 to 20 characters).

5 Click **Login** to enter Web Pay.

Smart Tip
If you are logging in from a computer that is not recognized by the system, you will be asked to verify your identity through on of your established **Challenge Questions**.

We do not recognize the network that you are using.
- Please answer a security question to keep your account safe.
- You will receive a notification message upon successful log in.
To remember this location please use the checkbox below to trust this network. Learn more

Please Confirm Your Identity

What is your favorite food?
(Your response is case-sensitive)

☐ This is a trusted network.

Check the "This is a trusted network." box to bypass this additional step in the future.

paylocity

Company Id
clnt03   (?)

Username
User1234

Password
•••••••••

The Best of Both Worlds!

☐ Remember My Credentials

Login

Forgot Password   Register User

Smart Tip
Click the question mark (**?**) in the **Company Id** field or use the sidebar menu to select **Help**.

Smart Tip
Check **Remember My Credentials** to have the system automatically populate the **Company Id** and **Username** during subsequent visits.

Smart Tip
Click **Forgot Password** to reset the password. (*Note that users must have an email address entered in the system in order to reset their own passwords.*)

REMINDERS:

- Click **Register User** to register for the first time.

- In order to maintain confidentiality, employees must contact their Company Administrator with questions. Paylocity is not authorized to speak directly with employees.

Self Service Portal

web pay · paylocity

Hi, Emily!

Congratulations! You have been awarded:

Thanks
You are appreciated, thank you!
Emily Alba - 3/7/2016

[View Employee Profile]   Less

View Employee Profile
Public Profile
Demographics
Dependents
Emergency Contacts

News

Please return your enrollment packets by Friday!

Microsoft Case Study on Paylocity
Microsoft has written a few case studies on Paylocity. "Hosted Solution Provider Achieves 99.99 Percent Uptime While Supporting Rapid Growth" You may find the case study list more...

Congratulations, Emily Alba!
Thanks
You are appreciated, thank you!
Emily Alba - 3/7/2016

Congratulations, Isabella Guzman!
Thanks
You are appreciated, thank you!
Emily Alba - 3/7/2016

Congratulations, Jeremy Pennington!
Thanks
You are appreciated, thank you!
Emily Alba - 3/7/2016

Congratulations, Benjamin Cal!
Thanks
You are appreciated, thank you!
Emily Alba - 3/7/2016

Congratulations, Emma Frost!
Thanks
You are appreciated, thank you!
Emily Alba - 3/7/2016

Company

$ Pay

[View Checks]

Date	Check #	Net Amount ☑	Dir Dep
01/01/2016	104284	hidden	✔
12/24/2015	104270	hidden	✔
12/18/2015	104256	hidden	✔
12/11/2015	104242	hidden	✔

Less

Direct Deposit Accounts
Change Federal or State Tax Exemptions
View Checks
Tax Forms
Check Calculator
Rates
Taxes
Earnings
Deductions
Direct Deposit
Labor Allocation

Time Off

[Request Time Off]

Type	Balance	Used	Availa
PERS - Personal	32.00 Hours	0.00 Hours	32.00
SICK - Sick	40.00 Hours	0.00 Hours	40.00
VAC - Vacation	224.00 Hours	0.00 Hours	224.00

[Time Off History]   Less

Submit Time Off Request
Setup & Balance
Time Off History
Leave Tracking
Time Off Request History
Time Off Documents

♡ Benefits

YTD Compensation

[Manage my Benefits]   Less

Deduction Amounts
Dependents
Retirement Plans
Insurance Plans
Benefits Setup
Benefits

Career

Apply for Open Position
Advanced HR Reviews
Skills
Education
Reviews

Employment

Employee Status
Dept / Position
Work Location
Eligibility
Authorization Tracking
Previous Employment
Employment History
Events
Company Property
Handbook

Application

Configure Self Service Portal
User Preferences
Employee Training Documents
Administrator Training Documents
Whats New
About
Glossary

Smart Tip
Use the Self Service Portal to manage Web Pay information.

Smart Tips
- Click the heading icon to expand or collapse the section.
- Click **Less** to hide information in the section.
- Click **More** to display all information.

Smart Tip
Click the boxes or hyperlinks to access associated Web Pay screens.

Smart Tip
Note that each company will customize the display of information. Users may not have access to all the information displayed.

Self Service Portal

web pay *paylocity*

⌂ Hi, Emily! ∧

Congratulations! You have been awarded:

🍎 **Thanks**
You are appreciated, thank you!
Emily Alba - 3/7/2016

[View Employee Profile]   Less

View Employee Profile
Public Profile
Demographics
Dependents
Emergency Contacts

Smart Tip

Within the "Welcome" tab, you can:
- Complete Events assigned to you
- Edit personal information
- Customize your employee profile
- View recently awarded impressions

$ Pay

Smart Tip
From the "$ Pay" tab, view recent pay history. Click the **Net Amount** icon to hide or display check amounts.

[View Checks]

Date	Check #	Net Amount ☑	Dir Dep
01/01/2016	104284	hidden	✔
12/24/2015	104270	hidden	✔
12/18/2015	104256	hidden	✔
12/11/2015	104242	hidden	✔

Less

Direct Deposit Accounts
Change Federal or State Tax Exemptions
View Checks
Tax Forms
Check Calculator
Rates
Taxes
Earnings
Deductions
Direct Deposit
Labor Allocation

♡ Benefits ∧

[donut chart]

[YTD Compensation]

[Manage my Benefits]   Less

Deduction Amounts
Dependents
Retirement Plans
Insurance Plans
Benefits Setup
Benefits

Smart Tip
View year-to-date compensation information and manage your benefits from the "Benefits" tab.

⌁ Career ∧

Apply for Open Position
Advanced HR Reviews
Skills
Education
Reviews

Smart Tip
View and apply for open positions from the "Career" tab.

Self Service Portal

web pay
paylocity

News

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You are appreciated, thank you!
Emily Alba - 3/7/2016

Congratulations, Isabella Guzman!

Thanks
You are appreciated, thank you!
Emily Alba - 3/7/2016

Time Off

Request Time Off

Type	Balance	Used	Availa
PERS - Personal	32.00 Hours	0.00 Hours	32.00
SICK - Sick	40.00 Hours	0.00 Hours	40.00
VAC - Vacation	224.00 Hours	0.00 Hours	224.00

Time Off History   Less

Submit Time Off Request
Setup & Balance
Time Off History
Leave Tracking
Time Off Request History
Time Off Documents

Employment

Employee Status
Dept / Position
Work Location
Eligibility
Authorization Tracking
Previous Employment
Employment History
Events
Company Property
Handbook

Application

Configure Self Service Portal
User Preferences
Employee Training Documents
Administrator Training Documents
Whats New
About
Glossary

Smart Tip
View employment information and your own job/work history from the "Employment" tab.

Smart Tip
In "News", view the latest company-specific news items and see who has been awarded an impression most recently.

Smart Tip
The "Time Off" tab allows you to view available time off options and submit time off requests.

Self Service Portal – Directory

Use the Directory to view a listing of employees within your company.

GARNER GROUP	Home	Directory	Impressions	Teams		Search 🔍 ▼	

|◄ ◄ **1** 2 3 4 5 6 7 8 9 10 … ► ►| 1 - 5 of 107 items

Filter: Last Name   **All** A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Employee	Contact Info	Actions
MA **Marie Adams** Customer Support Representative	phone: (847) 956-4850 5355 email: madams@garnergroup.com	Profile Team Impression
Emily Alba Vice President of Human Resources	phone: (847) 956-4850 5087 email: ealba@garnergroup.com	Profile Team Impression
SA **Sheppard Allerdyce** Fulfillment Specialist	phone: (847) 956-4850 9213 email: sallerdyce@garnergroup.com	Profile Team Impression
RA **Robert April** Sales Representative	phone: (847) 956-4850 7254 email: rapril@garnergroup.com	Profile Team Impression
Robert Arselan Client Trainer	phone: (847) 956-4850 3274 email: rarslean@garnergroup.com	Profile Team Impression

⚎ **Smart Tips**

- View the employee's profile.
- View the employee's team.
- Award an impression badge for the employee.
- Users may also access their own self service portal.
- Use the search filters to expand or limit the display of employees.

Self Service Portal – Profile

Use your Employee Profile to share information about yourself.

> **Smart Tip**
> Coworkers who view your profile may email you directly by clicking the **email address** link on your Profile page.

> **Smart Tip**
> Coworkers may submit an impression badge for you by clicking **Add Impression**, or view your team by clicking **View Team**.

Directory > Employee Profile

☆ Add Impression

Emily Alba

Vice President of Human Resources | (847) 956-4850-5087 | ealba@garnergroup.com

My Resumé

Home Phone
(847) 956-4850

Mobile Phone
(847) 956-4850

Supervisor
FROST, EMMA

Division
600 - Southwest

Branch
101 - Executive

About Me
I love the summer. I enjoy coming to work and enjoying the nice weather and look forward to the weekends with my family.

Interests

Billiards   Comedy Mov-ies   Painting

> **Smart Tip**
> Coworkers will able to view your interests, education, skills, and other information you choose to share.

Marie Adams recognized Emily Alba for Outstanding on 09/30/2015

Outstanding
You do outstanding work--going above and beyond!

|◄ ◄ **1** ► ►| 1 - 2 of 2 items

Self Service Portal – Profile

Edit your profile to choose what information you would like your coworkers to view.

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Smart Tip
Upload your personal image.

Smart Tip
Once all information has been entered, click **Save Profile Changes**.

Smart Tip
Link social media account(s) to your employee profile.

Mary Adams

Save Profile Changes
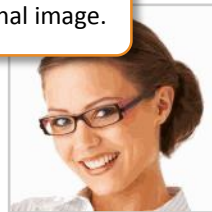
Click to Change

Resume

My Resumé ✕

Upload Resume

Employee Profile   Personal Information   User Preferences

in f g+ ♥

About Me

Characters remaining 1999   ABC

Schools / Education

Search Schools / Education   **Add**

Skills & Expertise

Search Skills & Expertise   **Add**

Accounting ✕   Microsoft Excel ✕   Payroll ✕

Interests

Activities/Fitness   Hobbies   Travel   Music   Movies/TV   Sports Teams

◄ Travel Type | Travel Destination ►

☐ Adventure   ☐ Family Friendly   ☐ Shopping
☐ All-Inclusive   ☐ History & Culture   ☐ Skiing
☐ Beach   ☐ Luxury   ☐ Spa
☐ Casino   ☐ Rail Vacation   ☐ Volunteer
☐ Cruise   ☐ Resort   ☐ Wine Tour
☐ Exotic   ☐ Road Trip

Smart Tip
Enter information about yourself in the **About Me** section.

Smart Tip
Upload your resume.

Smart Tip
Enter your education information and skills/expertise.

Smart Tip
Select various categories in the Interests section and check the boxes adjacent to your personal interest(s).

Self Service Portal – Teams

Select Teams to view the company's team structure and move up and down the team structure.

> ⚞ **Smart Tip**
> Click the **up arrow icon** to move up the team structure.

Export

> ⚞ **Smart Tip**
> You can **Export** the displayed team to a PDF file for downloading.

Emma Frost
Manager

Direct Reports: 101

Benjamin Cal
Manager

Direct Reports: 1

+

Julian Atwood
Divisional Vice President

LE Lydia Eddings
Financial Analyst

BP Bruce Palencia
Design Engineer

SB Stan Baker
Sales Representative

JP Jeremy Pennington
Accountant

> ⚞ **Smart Tip**
> Click the plus sign (**+**) to expand and display direct reports.

Self Service Portal – Time Off

From the Self Service Portal, click the View Checks button to access the Checks screen.

Submit Time Off Request

Select Time Off Request Type

● Request Type   -- Select -- ▼

Optionally Enter Employee Comments

Employee Comments

[Save and Add New]   [Save and Close]

Discard changes and go to the Time Off Request History

Select one or more days and Hours Per Day / Start Time for all requested days

○ Single Day ○ Multiple Days ☐ Include Weekends?

● Start Date   [   ] 📅

End Date   [   ] 📅

● Hours Per Day   [8.00]

Start Time   [AM ▼]

> ☼ **Smart Tip**
> Check the **Include Weekends?** box if the time off request will include weekend days and the time off balance should be affected by the weekend hours.

> ☼ **Smart Tip**
> To cancel the Time Off Request, click **Discard changes and go to the Time Off Request History** link.

> ☼ **Smart Tip**
> Download Paylocity's mobile app to submit Time Off Requests and view your Time Off Balance Information on any mobile device!

Self Service Portal – Direct Deposits

Set up and manage your direct deposit accounts.

> ☼ **Smart Tips**
> • *Select **Direct Deposit** from the Pay section of the self service portal to access this screen.*
> • *Use this single screen to set up one or more direct deposit accounts.*
> • *Users who do not establish a main account may receive a live check.*

Direct Deposit Accounts

Add New Direct Deposit Account ▼

I hereby authorize my employer to deposit or adjust any amounts owed to me by initiating entries to my account at the financial institution(s) updated here within.

Bank Account

● Account Type: Checking ▼

● Routing Number: [   ]

● Account Number: [   ]

Bank Name

● Name on Account: Emily I. Alba

Name should match the name on file with your banking institution

Mary S. Smith   1234
123 Main Street
Your Town, IL 61000

PAY TO THE   Date _____
ORDER OF _____ $ [   ]
                                    DOLLARS

Your Bank
Your Town, IL 61000
MEMO _____

⑆123456789⑆   ⑈1234567⑈   1234
Routing Number Account Number Check Number
                                (don't use)

NON-NEGOTIABLE THIS IS NOT A CHECK

Additional Deposit Account ☐

● Amount Type: -- Select -- ▼

● Amount: [   ]

[Save] [Save and Close] [Delete]

Main Account - Your net check will go here

Additional Deposit Account(s)

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Add Direct Deposit Accounts

Direct Deposit Accounts

Add New Direct Deposit Account ▼

I hereby authorize my employer to deposit or adjust any amounts owed to me by initiating entries to my account at the financial institution(s) updated here within.

Bank Account

- Account Type — Checking ▼
- Routing Number
- Account Number

Bank Name

- Name on Account — Emily I. Alba

Name should match the

Additional Deposit Account ☐

- Amount Type — -- Select -- ▼
- Amount

Save   Save and Close   Delete

Main Account - Your net check will go here

Additional Deposit Account(s)

> ⚡ **Smart Tip**
> From the drop down, select **Add New Direct Deposit Account**.

> ⚡ **Smart Tip**
> Select Checking, Savings, or Pay Card as the **Account Type**.

> ⚡ **Smart Tip**
> Enter the **Routing Number** and **Account Number** without spaces, dashes, or symbols. Make sure to verify the **Name on the Account**.

> ⚡ **Smart Tips**
> - Bank **Routing Numbers** are typically nine digit numbers. The system will not allow saving of an incorrect **Routing Number**.
> - Note that bank deposit slips may display the bank's internal routing and transmit numbers which to not accept direct deposits.

Mary S. Smith   1234
123 Main Street
Your Town, IL 61000

Date

PAY TO THE
ORDER OF _____ $ _____

_____ DOLLARS

Your Bank
Your Town, IL 61000

MEMO _____

⑆123456789⑆   ⑈1234567⑈   1234

Routing Number   Account Number   Check Number (don't use)

NON-NEGOTIABLE THIS IS NOT A CHECK

Self Service Portal – Direct Deposits

Manage Direct Deposit Accounts

Smart Tip
To edit or delete an existing account, select the account from the drop down.

Direct Deposit Accounts

Add New Direct Deposit Account ▼

I hereby authorize my employer to deposit or adjust any amounts owed to me by initiating entries to my account at the financial institution(s) updated here within.

Bank Account

● Account Type	Checking ▼
● Routing Number	

Smart Tip
To add an additional account, check the **Additional Deposit Account** box ; select the **Amount Type** and enter the **Amount.**

...ch the name on file with your banking institution

Mary S. Smith
123 Main Street
Your Town, IL 61000
Date
PAY TO THE
ORDER OF
$
DOLLARS
Your Bank
Your Town, IL 61000
MEMO
NON-NEGOTIABLE THIS IS NOT A CHECK
1234
1:123456789: 1:1234567: 1234
Routing Number   Account Number   Check Number
(don't use)

Additional Deposit Account ☐

● Amount Type	-- Select -- ▼
● Amount	

[Save] [Save and Close] [Delete]

Smart Tips
- If the **Amount Type** is Flat, enter the dollar amount to be deposited in the **Amount** field.
- If the **Amount Type** is Percent, enter the percentage as a whole number.
- If the **Amount Type** is Net Minus, enter the dollar amount to be paid on a live check with the balance directly deposited into the main account.

Main Account - Your net check will go here

Routing	Account	Type	Bank Name
071000013	3678	Checking	Jpmorgan Chase Bank, NA

Additional Deposit Account(s)

⬆⬇	Routing	Account	Type	Bank Name
⦿	071000013	2653	Savings	Jpmorgan Chase Bank, NA
○	071000013	12312	Checking	Jpmorgan Chase Bank, NA

Smart Tip
To change the order in which money is deposited into additional deposit accounts, select the radio button adjacent to the applicable account and click the blue up or down arrow to move the account.

Self Service Portal – Pay

From the $ Pay tab, click the View Checks button to access the Checks screen.

Smart Tip
Click **Download Paystub** to download a PDF of the selected check(s).

⬇ Download Paystub

< Pay

| Checks | Tax Forms |

Smart Tip
Utilize the available date filters by clicking the filter icon (▽).

Your Check	Taxes	Deductions
$1,080.54	$515.46	$204.00

☑ **December 24, 2015** $1,080.54
V104270 - Regular

☐ **December 18, 2015** $1,080.54
V104256 - Regular

☐ **December 11, 2015** $1,080.54
V104242 - Regular

☐ **December 4, 2015** $1,080.50
V104228 - Regular

☐ **November 27, 2015** $1,080.53
V104214 - Regular

☐ **November 20, 2015** $1,080.54
V104200 - Regular

☐ **November 13, 2015** $1,080.54
V104186 - Regular

☐ **November 6, 2015** $1,080.54
V104172 - Regular

☐ **October 30, 2015** $1,080.54
V104158 - Regular

☐ **October 23, 2015** $1,080.53
V104144 - Regular

Your Check
$1,080.54

Gross Pay
$2,090.00

Earnings Breakdown for 12/13/2015 - 12/19/2015

Description	Hours	YTD	Rate	Amount	YTD
401K MATCH	0.00	0.00	$0.00	$90.00	$4,814.50
BONUS		0.00			$5,000.00
Employer Paid Dental	0.00	0.00	$0.00	$20.00	$1,060.00
Employer Paid HMO	0.00	0.00	$0.00	$180.00	$9,540.00
⌄ REGULAR	0.00	0.00		$1,800.00	$96,290.00
Totals	**0.00**	**0.00**		**$2,090.00**	**$116,704.50**

Direct Deposits

Bank	Account	Type	Amount	YTD
Jpmorgan Chase Bank, NA	...2312	Checking	$25.00	$1,325.00
Jpmorgan Chase Bank, NA	2653	Savings	$54.03	$3,028.31
Jpmorgan Chase Bank, NA	3678	Checking	$1,001.51	$56,212.45
Totals			**$1,080.54**	**$60,565.76**

Time Off

Personal	Sick
–	–
–	40.00 hours

Vacation
8.00 hours
221.69 hours

Smart Tip
Select multiple checks to view the cumulative pay information for all checks selected.

Smart Tip
Download Paylocity's mobile app to access your pay information and tax forms on any mobile device!

Self Service Portal – Pay

From the Checks screen, you can click on Tax Forms to see your available tax forms.

☼ **Smart Tip**
Click **Download W-2** to download a PDF of the selected W-2 form.

↧ Download W-2

‹ Pay

| Checks | Tax Forms |

| W-2 | 2012 |
| W-2 | 2011 |

W2 Online Preview   2012

To securely access a full copy, download your W2 above.

a. Employee social security number	c. Employer's name, address, and zip code
578-98-7458	DOC02
b. Employer identification number (EIN)	3850 N Wilke Rd
00-5554442	Arlington Heights, IL 60004

d. Control number
DOC02 16

f. Employee's address and zip code
117 Bayview Circle
Hermosa Beach, CA 90254

e. Employee's Name
Emily I Alba

1. Wages, tips, other compensation	2. Federal income tax withheld
40268.00	6740.06
3. Social security wages	4. Social security tax withheld
42698.00	1793.33
5. Medicare wages and tips	6. Medicare tax withheld
42698.00	619.12
7. Social security tips	8. Allocated tips
–	–
9. Advance EIC payment	10. Dependent care benefits
–	–

11. Nonqualified plans
–

| 12a. | | 12b. | | 12c. | | 12d. | |
| D | 2430.00 | DD | 11032.00 | – | – | – | – |

13.
Statutory Employee ☐ Retirement Plan ☑ Third-Party Sick Pay ☐

14.
–

15. ST | Employer's state ID number	16. State wages, tips, etc.	17. State income tax
IL 0000000000000	40268.00	2013.40
18. Local wages, tips, etc.	19. Local income tax	20. Locality name
–	–	–

Paylocity | 3850 N. Wilke Road Arlington Heights, Illinois 60004
www.paylocity.com

June 2016