REDEFINING THE WORLD OF PAYROLL + HR

Revised 4/29/2016

# WEB PAY EMPLOYEE GUIDE

## Client Resource

WWW.PAYLOCITY.COM

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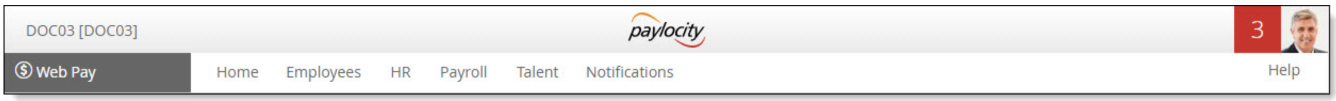
## WEB PAY

Use Web Pay self service and social collaboration to manage information and network with coworkers.

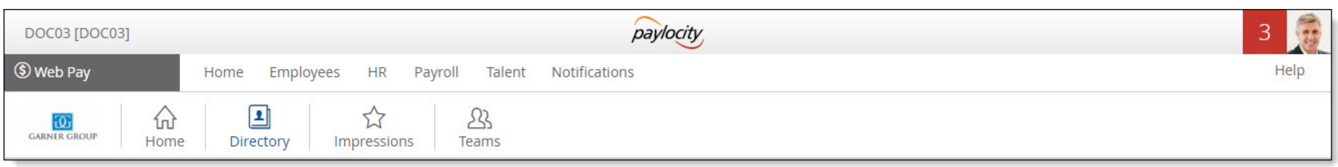
Users may not have access to all of the options described in this guide. Each company determines which options are available and each user's security group determines the display of information.

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

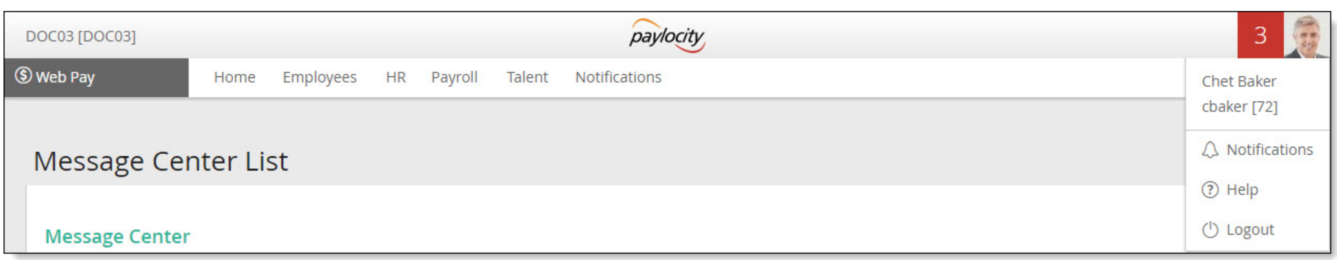
- Click the Paylocity logo in the middle of the header to return to the default home page.
- Access messages in the header section of the screen. The bell indicates there are no messages. When there are messages, the red box displays the number of messages.
- Click **Help** to view help text for each screen.




- Use the self service portal or the menus across the top of the application to navigate through Web Pay.
- Select **Self Service Portal** from the Applications menu.
- Select **Home** to access the self service portal.
- Select Directory to view all employees.
- Select Impressions to view impression badges received by employees.
- Select Teams to view the company's team structure.



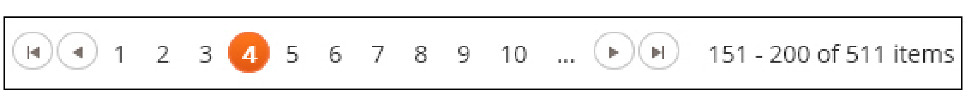

- Select **Log Out** from the Account Profile to log out of the application.




### *Multiple Pages of Information*

When there are multiple pages of information, use the page numbers and arrow keys to view all available information.

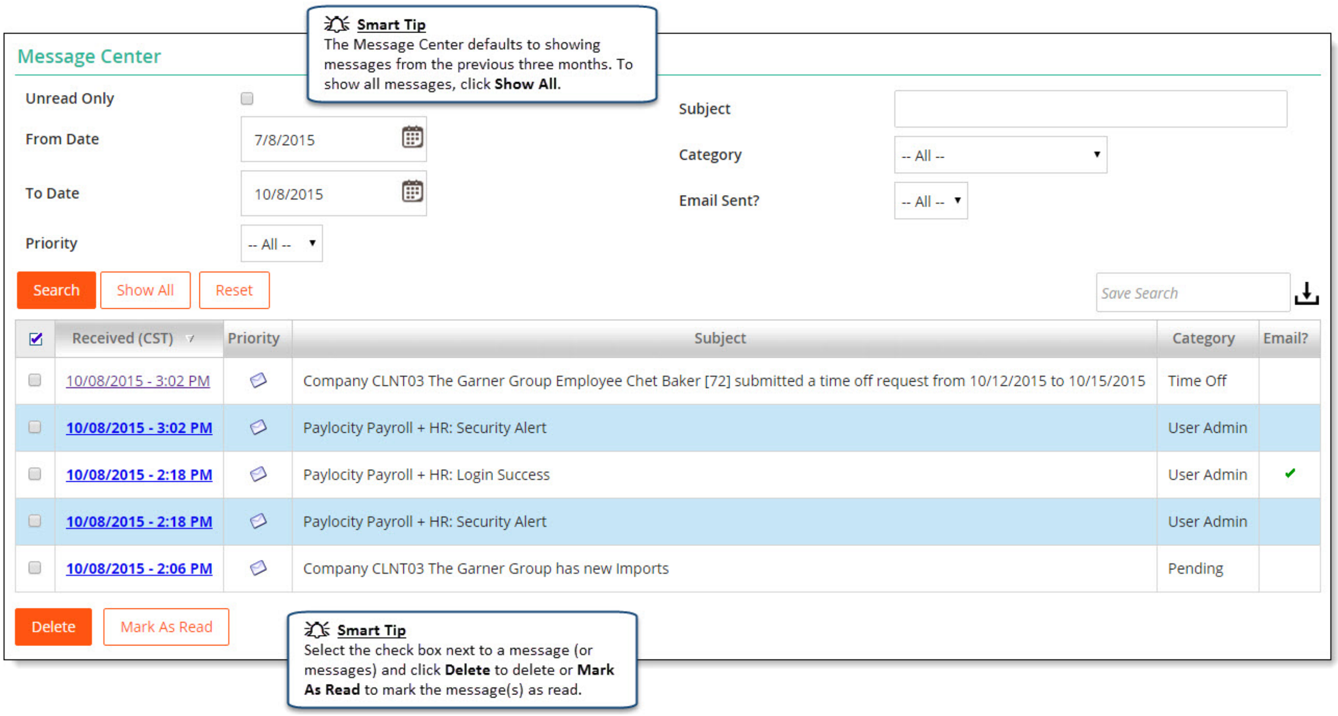
- Click the back arrow with an adjacent vertical line to access the first page.
- Click the multiple back arrows with an adjacent vertical line to access the prior set of pages.
- Click the back arrow to access the prior page.
- Click a page number to select a specific page.
- Click the forward arrow to access the next page.
- Click the multiple forward arrows with an adjacent vertical line to access the next set of pages.
- Click the forward arrow with an adjacent vertical line to access the last page.



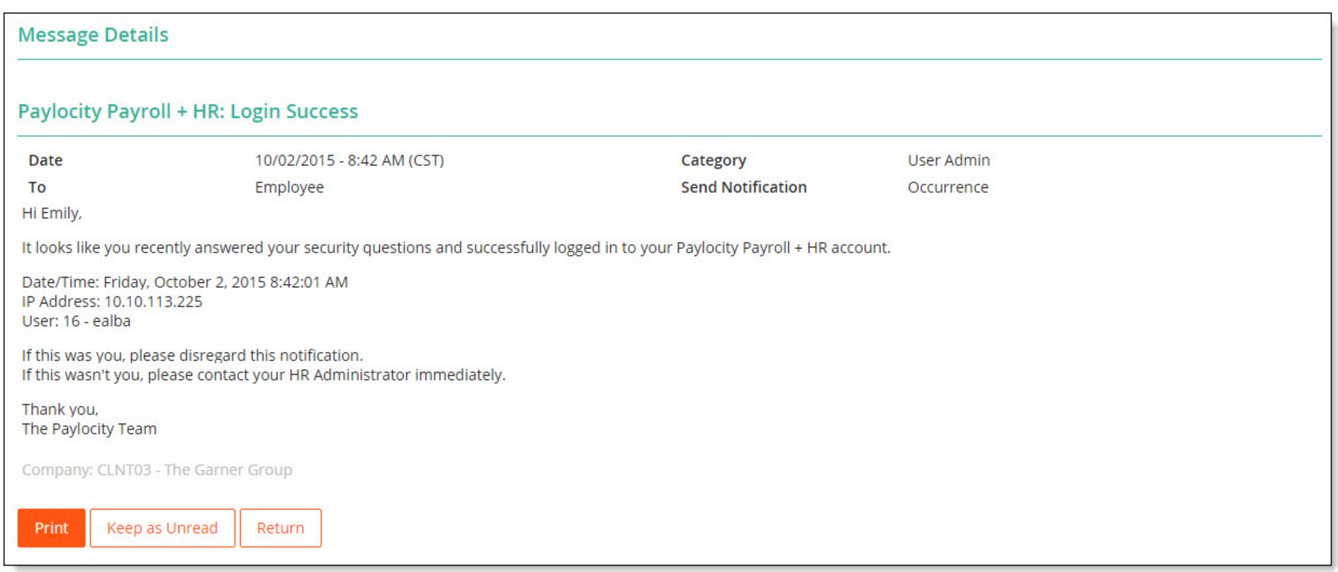
## *MESSAGE CENTER*

View or delete messages.

- Click the **Received** link to view the message details.
- Check the box adjacent to the message and click **Delete** to delete the message.

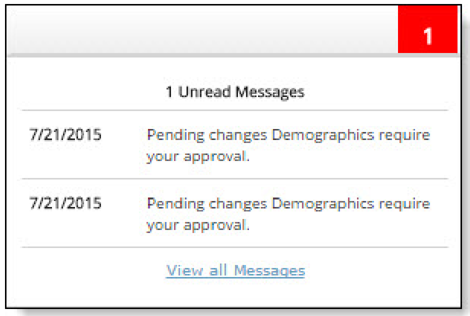



- Click the link to view additional details.
- Click **Print** to print the message.
- Click **Keep As Unread** to keep the message marked as an unread message.
- Click **Return** to return to the previous screen.



## *MESSAGES*

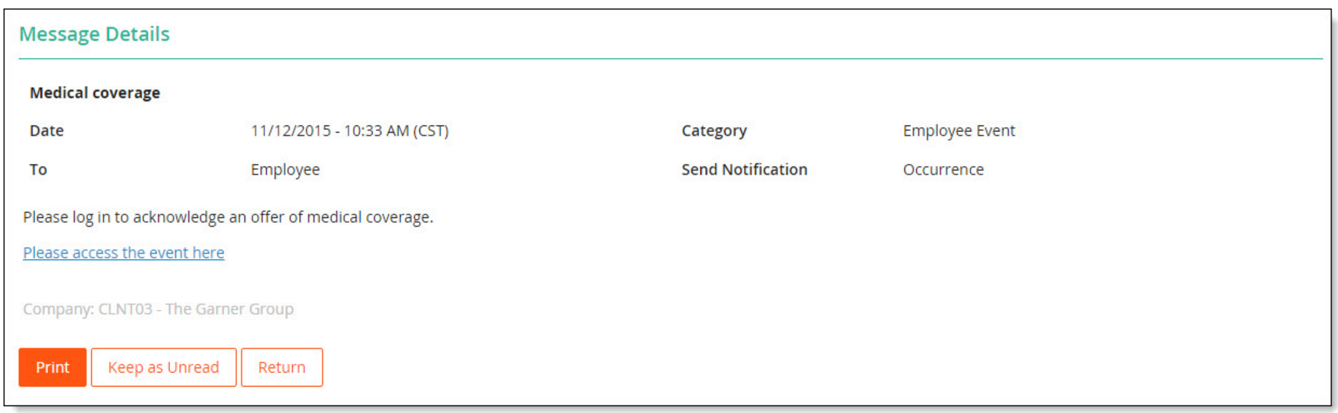
- View messages.
- Click **View all Messages** to access the Message Center.



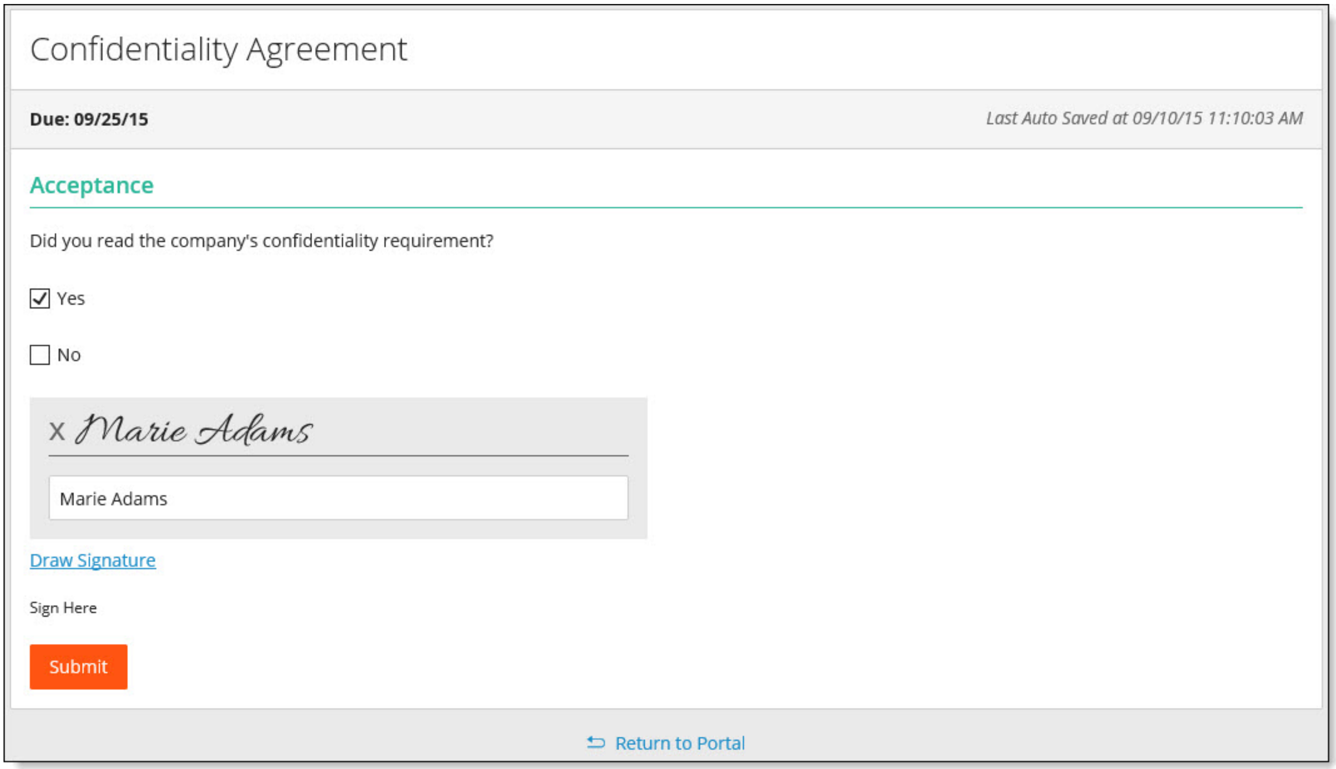

## *EVENT NOTIFICATION*

When an Administrator launches an Event, the selected employee will receive a notification about the Event for completion.

- Click the **Please access the event here** link to display the Event.

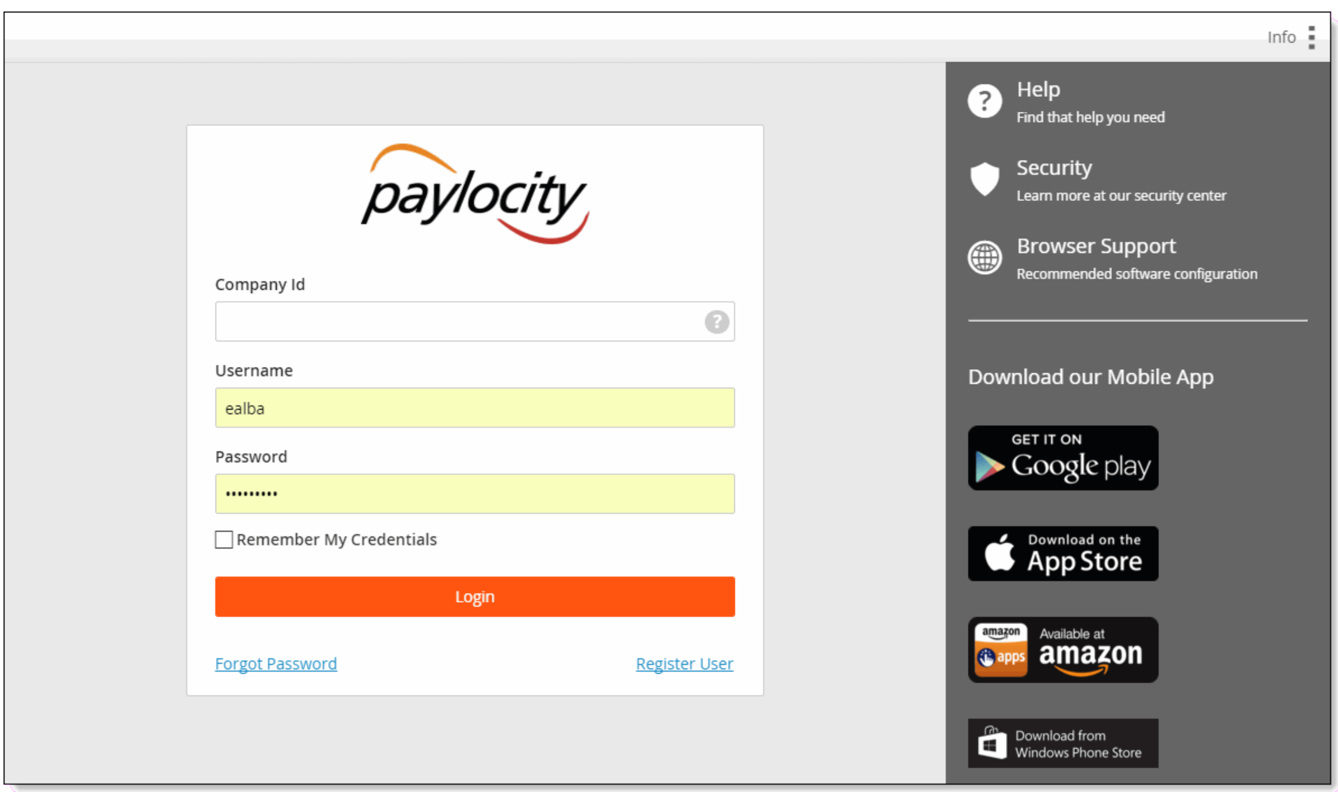



1. Fill out the required information within the Event.
2. Click **Submit**.




## *SIDEBAR MENU*

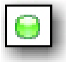
Use the sidebar menu to access help or download mobile applications. Select **Security** to learn more about how Paylocity protects information.

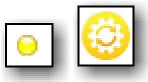


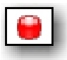
## *CHANGING INFORMATION*

Users may be able to edit certain fields in Web Pay. All fields with a green icon adjacent to the field name or a green title are required and must be populated in order to save information in a screen.

Many of the changes made by employees are pending changes that will not take effect until a Company Administrator approves them.

Pending addition 

Pending change 

Pending deletion 

### ***Saving Information***

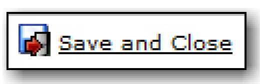
When finished entering information, use one of the save options to save the information.

Save the updated information and remain on the current screen.


Save the updated information and open a new screen to add additional information.


Save the updated information and return to the previous screen.

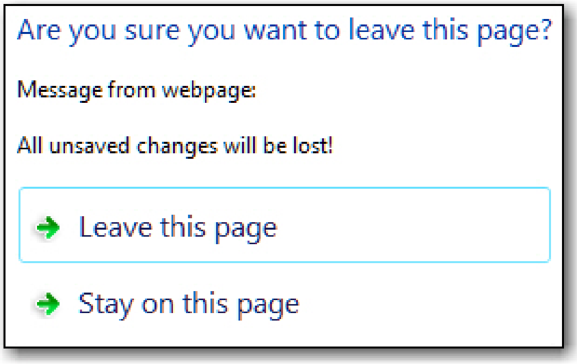

Save the updated information and close the current screen

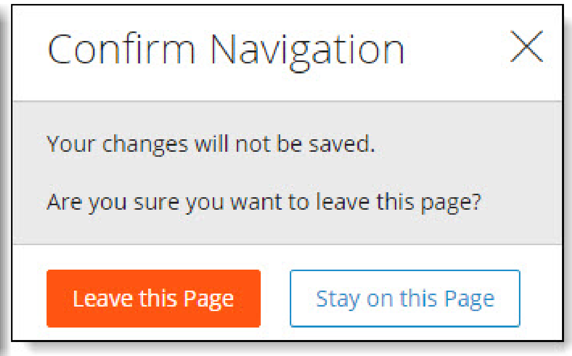



Discard the changes and return to the previous screen.


Return to the previous screen.

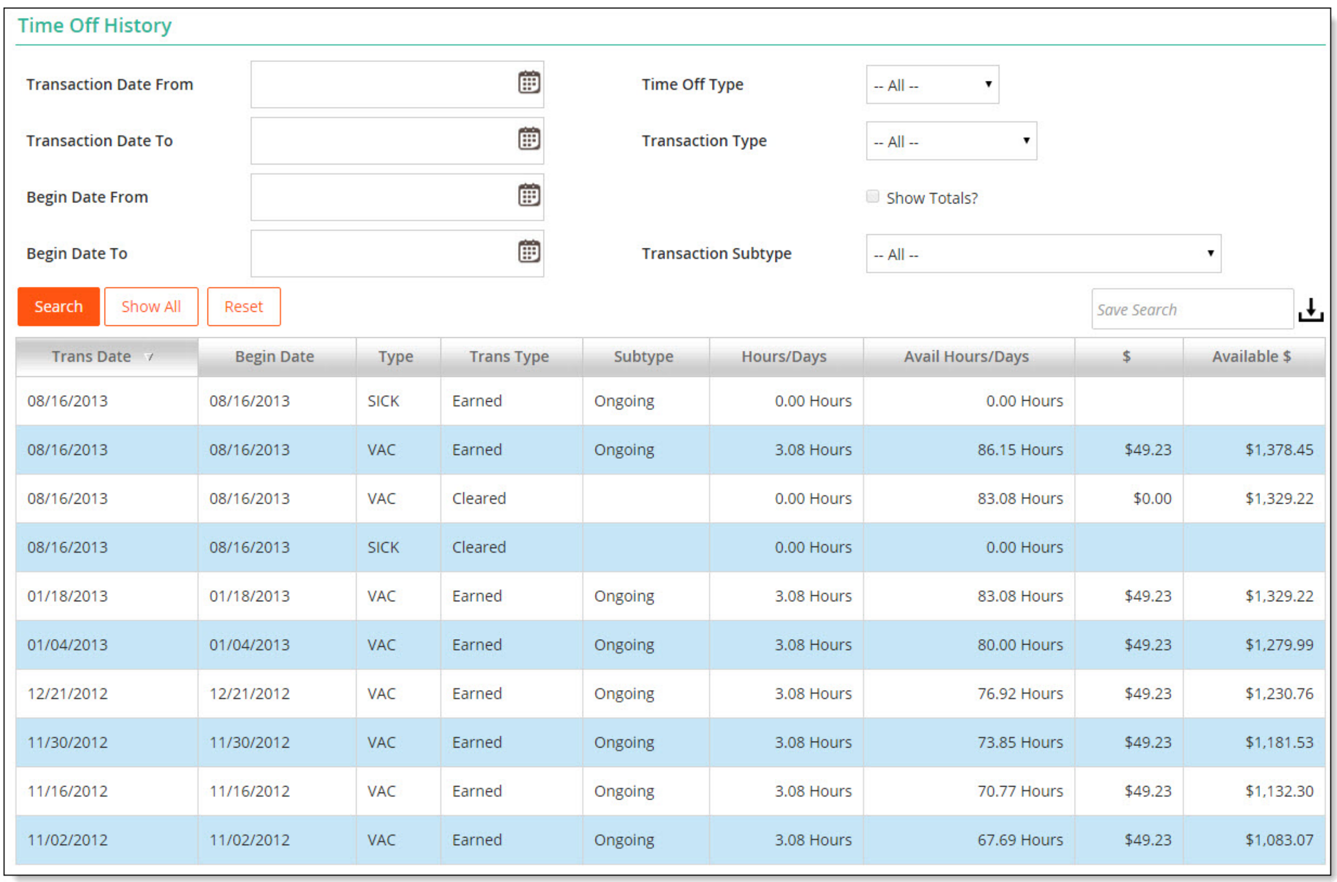
A warning will appear when navigating away from a screen where changes have been made but not saved.




## *SORTING*

List pages display information in columns that can be sorted. There will be a triangle adjacent to the column heading by which the system is sorting the information. The triangle will show the direction of the current sort.




| Trans Date | Begin Date | Type | Trans Type | Subtype | Hours/Days | Avail Hours/Days | $ | Available $ |
|---|---|---|---|---|---|---|---|---|
| 08/16/2013 | 08/16/2013 | SICK | Earned | Ongoing | 0.00 Hours | 0.00 Hours | | |
| 08/16/2013 | 08/16/2013 | VAC | Earned | Ongoing | 3.08 Hours | 86.15 Hours | $49.23 | $1,378.45 |
| 08/16/2013 | 08/16/2013 | VAC | Cleared | | 0.00 Hours | 83.08 Hours | $0.00 | $1,329.22 |
| 08/16/2013 | 08/16/2013 | SICK | Cleared | | 0.00 Hours | 0.00 Hours | | |
| 01/18/2013 | 01/18/2013 | VAC | Earned | Ongoing | 3.08 Hours | 83.08 Hours | $49.23 | $1,329.22 |
| 01/04/2013 | 01/04/2013 | VAC | Earned | Ongoing | 3.08 Hours | 80.00 Hours | $49.23 | $1,279.99 |
| 12/21/2012 | 12/21/2012 | VAC | Earned | Ongoing | 3.08 Hours | 76.92 Hours | $49.23 | $1,230.76 |
| 11/30/2012 | 11/30/2012 | VAC | Earned | Ongoing | 3.08 Hours | 73.85 Hours | $49.23 | $1,181.53 |
| 11/16/2012 | 11/16/2012 | VAC | Earned | Ongoing | 3.08 Hours | 70.77 Hours | $49.23 | $1,132.30 |
| 11/02/2012 | 11/02/2012 | VAC | Earned | Ongoing | 3.08 Hours | 67.69 Hours | $49.23 | $1,083.07 |

To change the sorting of displayed information, click the applicable column heading.

## Time Off History

Transaction Date From

Transaction Date To

Begin Date From

Begin Date To

Time Off Type: -- All --

Transaction Type: -- All --

Show Totals?

Transaction Subtype: -- All --

Search | Show All | Reset

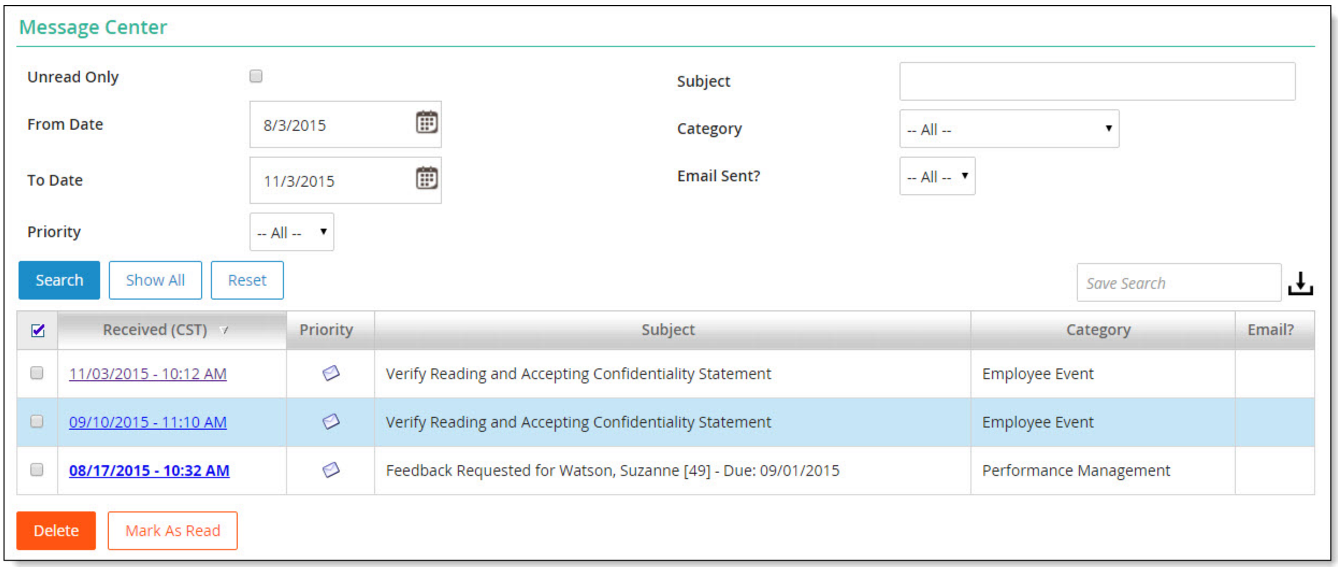
Save Search

| Trans Date | Begin Date | Type | Trans Type | Subtype | Hours/Days | Avail Hours/Days | $ | Available $ |
|---|---|---|---|---|---|---|---|---|
| 08/16/2013 | 08/16/2013 | VAC | Earned | Ongoing | 3.08 Hours | 86.15 Hours | $49.23 | $1,378.45 |
| 01/18/2013 | 01/18/2013 | VAC | Earned | Ongoing | 3.08 Hours | 83.08 Hours | $49.23 | $1,329.22 |
| 08/16/2013 | 08/16/2013 | VAC | Cleared | | 0.00 Hours | 83.08 Hours | $0.00 | $1,329.22 |
| 01/04/2013 | 01/04/2013 | VAC | Earned | Ongoing | 3.08 Hours | 80.00 Hours | $49.23 | $1,279.99 |
| 12/21/2012 | 12/21/2012 | VAC | Earned | Ongoing | 3.08 Hours | 76.92 Hours | $49.23 | $1,230.76 |
| 11/30/2012 | 11/30/2012 | VAC | Earned | Ongoing | 3.08 Hours | 73.85 Hours | $49.23 | $1,181.53 |
| 11/16/2012 | 11/16/2012 | VAC | Earned | Ongoing | 3.08 Hours | 70.77 Hours | $49.23 | $1,132.30 |
| 11/02/2012 | 11/02/2012 | VAC | Earned | Ongoing | 3.08 Hours | 67.69 Hours | $49.23 | $1,083.07 |
| 10/19/2012 | 10/19/2012 | VAC | Earned | Ongoing | 3.08 Hours | 64.61 Hours | $49.23 | $1,033.84 |
| 10/05/2012 | 10/05/2012 | VAC | Earned | Ongoing | 3.08 Hours | 61.54 Hours | $49.23 | $984.61 |

## *SEARCH FILTERS*

Search options are available to expand or limit the amount of information displayed.

- Select or enter the required criteria in one or more fields.
- Click the **Search** button to display all information that matches the required criteria.
- Verify the results in the display section.
- To save the search results for future use, enter a name for the search in the **Save Search** field and click the **Save** icon.
- Once the search has been saved, users can select the saved search from the **Select Saved Search** drop down.
- To delete the saved search, select the saved search from the drop down and click the **Delete** icon.
- Click **Show All** to display all information.



## SELF SERVICE PORTAL

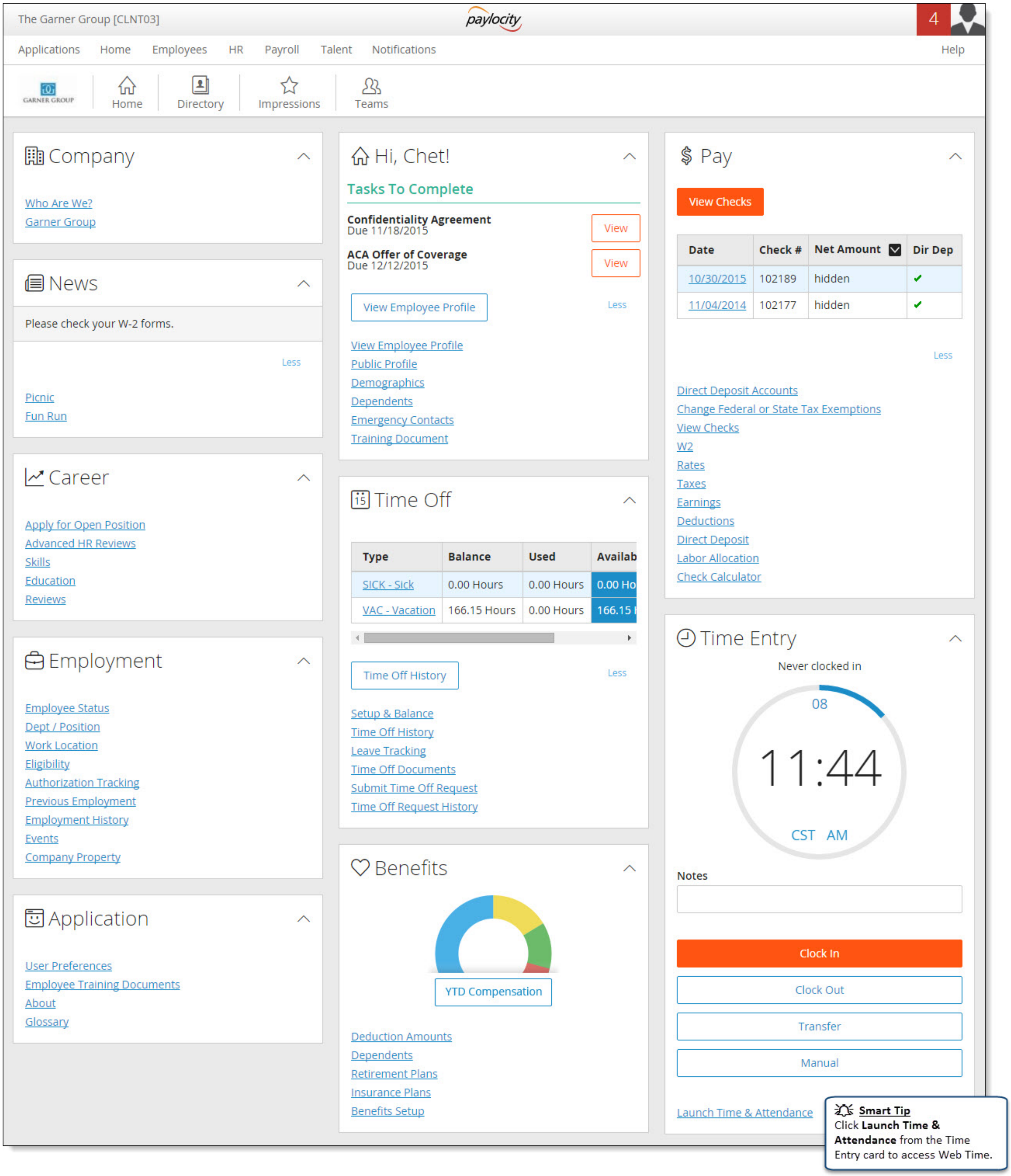
### *SELF SERVICE PORTAL*

Self service portal information is organized into tablet-friendly cards. Each company may configure their own display and access.

- Click the icon to expand or collapse the card.
- Click **Less** to hide information in the card.
- Click **More** to display all information.

Use the self service portal to manage Web Pay information.

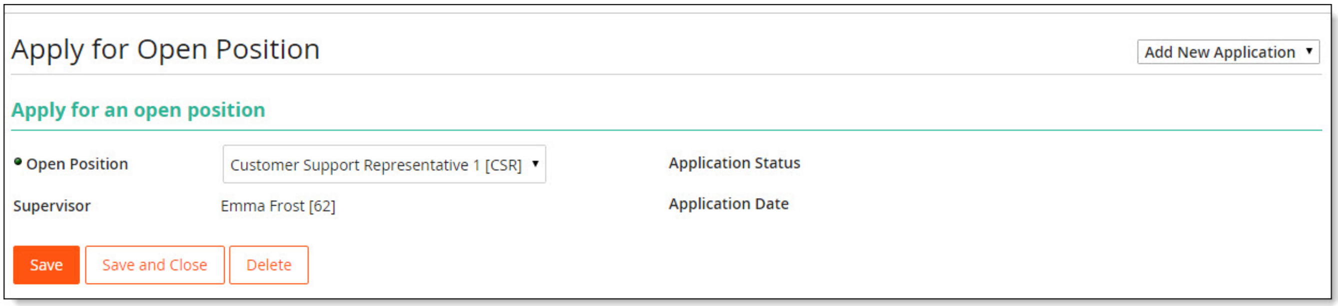
- Click the boxes or the links to access associated Web Pay screens.


The Garner Group [CLNT03]
paylocity
4
Applications
Home
Employees
HR
Payroll
Talent
Notifications
Help
Home
Directory
Impressions
Teams
Company
Who Are We?
Garner Group
News
Please check your W-2 forms.
Less
Picnic
Fun Run
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
Application
User Preferences
Employee Training Documents
About
Glossary
Hi, Chet!
Tasks To Complete
Confidentiality Agreement
Due 11/18/2015
View
ACA Offer of Coverage
Due 12/12/2015
View
View Employee Profile
Less
View Employee Profile
Public Profile
Demographics
Dependents
Emergency Contacts
Training Document
Time Off
Type
Balance
Used
Availab
SICK - Sick
0.00 Hours
0.00 Hours
0.00 Ho
VAC - Vacation
166.15 Hours
0.00 Hours
166.15
Time Off History
Less
Setup & Balance
Time Off History
Leave Tracking
Time Off Documents
Submit Time Off Request
Time Off Request History
Benefits
YTD Compensation
Deduction Amounts
Dependents
Retirement Plans
Insurance Plans
Benefits Setup
Pay
View Checks
Date
Check #
Net Amount
Dir Dep
10/30/2015
102189
hidden
11/04/2014
102177
hidden
Less
Direct Deposit Accounts
Change Federal or State Tax Exemptions
View Checks
W2
Rates
Taxes
Earnings
Deductions
Direct Deposit
Labor Allocation
Check Calculator
Time Entry
Never clocked in
08
11:44
CST AM
Notes
Clock In
Clock Out
Transfer
Manual
Launch Time & Attendance
Smart Tip
Click Launch Time & Attendance from the Time Entry card to access Web Time.

## *APPLY FOR AN OPEN POSITION*

Apply for an open position in the company. Click the **X** in the top-right corner of your screen to close this screen and return to the self service portal.

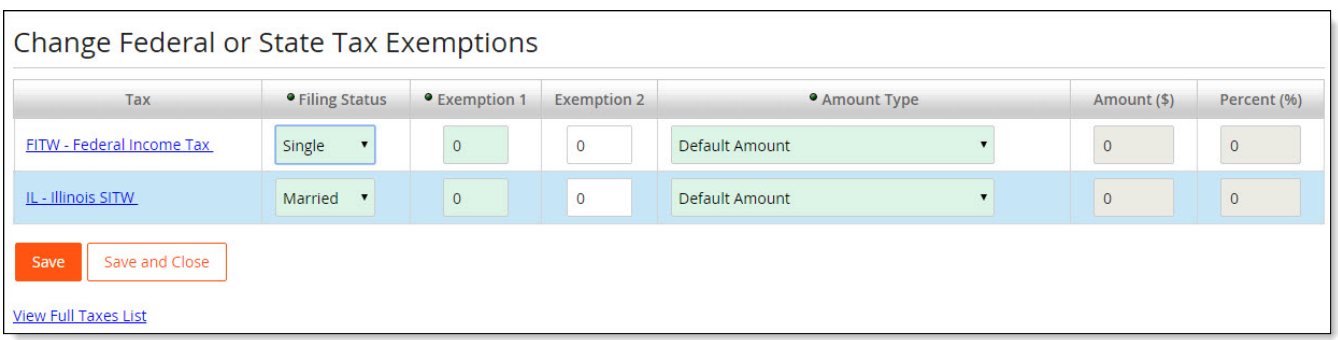
1. Select the Open Position from the **Open Position** drop down.
2. Click **Save and Close** to save the open position application and return to the main screen.




## *CHANGE FEDERAL OR STATE TAX EXEMPTIONS*

View or change tax exemptions. Click the **Tax** link or **View Full Taxes List** to navigate to the Taxes screen. Click the **X** in the top-right corner of your screen to close this screen and return to the self service portal.

1. Select a **Filing Status** from the drop down.
2. Enter the number of exemptions in the **Exemption 1** field and in the **Exemption 2** field (*if applicable*).
3. The **Amount Type** defaults to Default Amount. If applicable, select another Amount Type from the drop down.
4. Enter an **Amount (S)**. This field is enabled when a dollar Amount Type is selected from the drop down.
5. Enter a **Percent (%)** as a whole number not as a decimal, (e.g., 10% should be entered as 10.00 instead of 0.10).
6. **Save** the updated information.

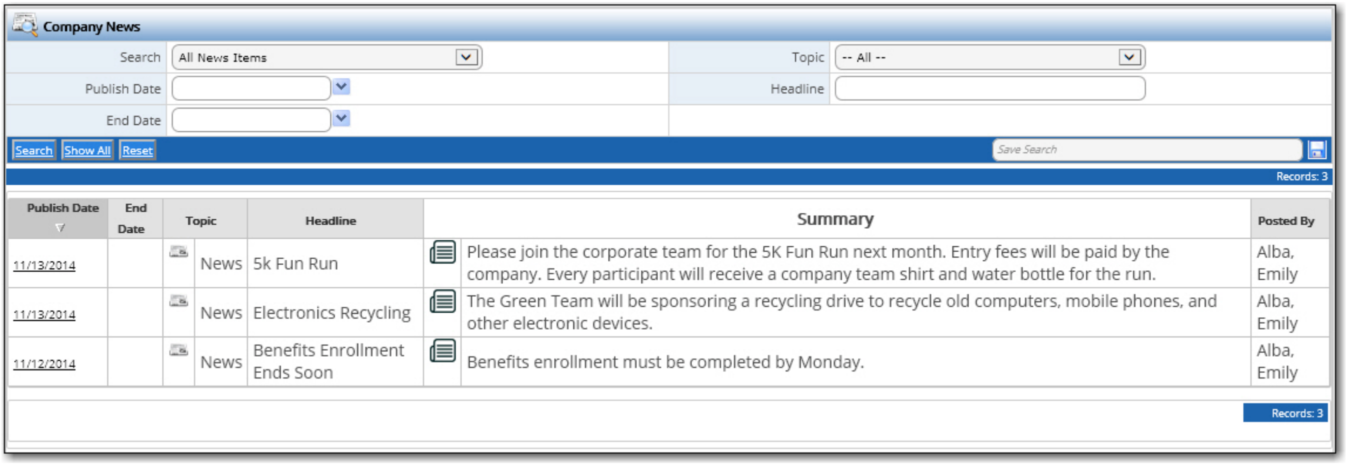



### *Important Notes*

- The portal window displays federal and state tax information. Click the View Full Taxes List link to view or modify local taxes.

## *COMPANY NEWS ITEMS*

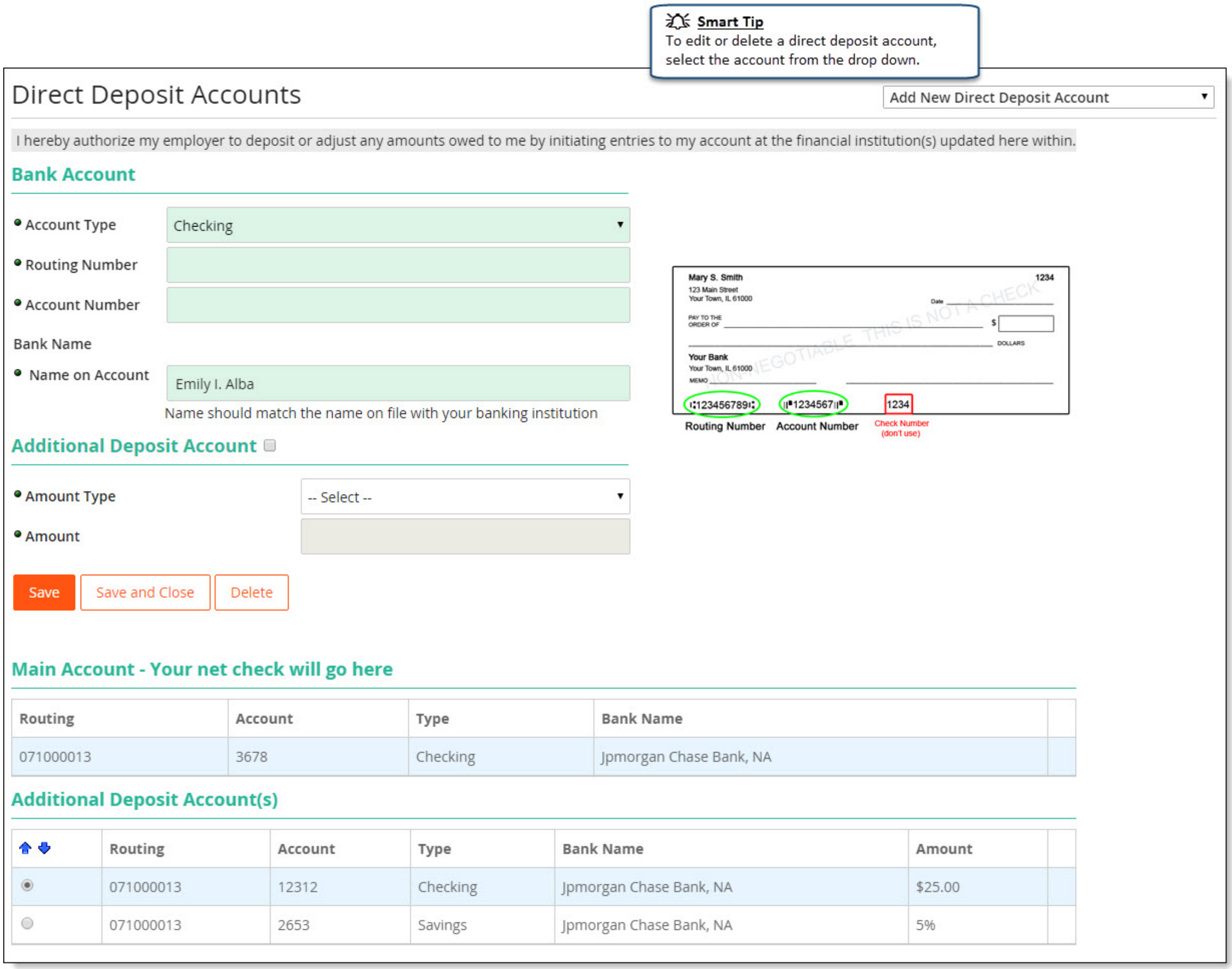
View all company news items. Click the **Publish Date** link to view the details.




## *DIRECT DEPOSIT ACCOUNT*

Add, edit, or delete direct deposit account information. Click the **X** in the top-right corner of your screen to close this screen and return to the self service portal.

1. To add a new direct deposit account, select **Add New Direct Deposit Account** from the drop down.
2. Select the applicable **Account Type** (Checking, Savings, or Pay Card) from the drop down.
3. Enter the nine digit ABA Transit **Routing Number** without dashes or spaces.
4. Enter the **Account Number** without spaces or symbols (17 character limit).
5. Enter the **Name on Account** (30 character limit).
6. If this is the main account, **Save** the updated information to deposit the entire paycheck to this main account. If this is an additional account, check the **Additional Deposit Account** box.
7. Select the **Amount Type** from the drop down to indicate whether the numeric value in the **Amount** field should be a Flat dollar amount, Percent, or Net Minus. Selecting Net Minus will issue a live check for the dollar amount entered into the **Amount** field with the balance being deposited into the corresponding bank account.
8. Enter the **Amount** based on the **Amount Type**.
9. **Save** the updated information. The specified amount will be deposited in each additional account listed and the net check will be deposited into the main account.




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

## Direct Deposit Accounts

Add New Direct Deposit Account

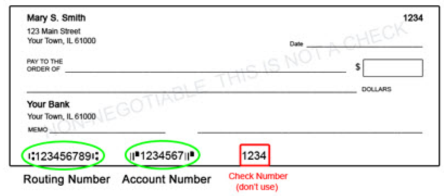
Direct Deposit Account order successfully changed!

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




### Additional Deposit Account

- Amount Type: -- Select --
- Amount

Save | Save and Close | Delete

### Main Account - Your net check will go here

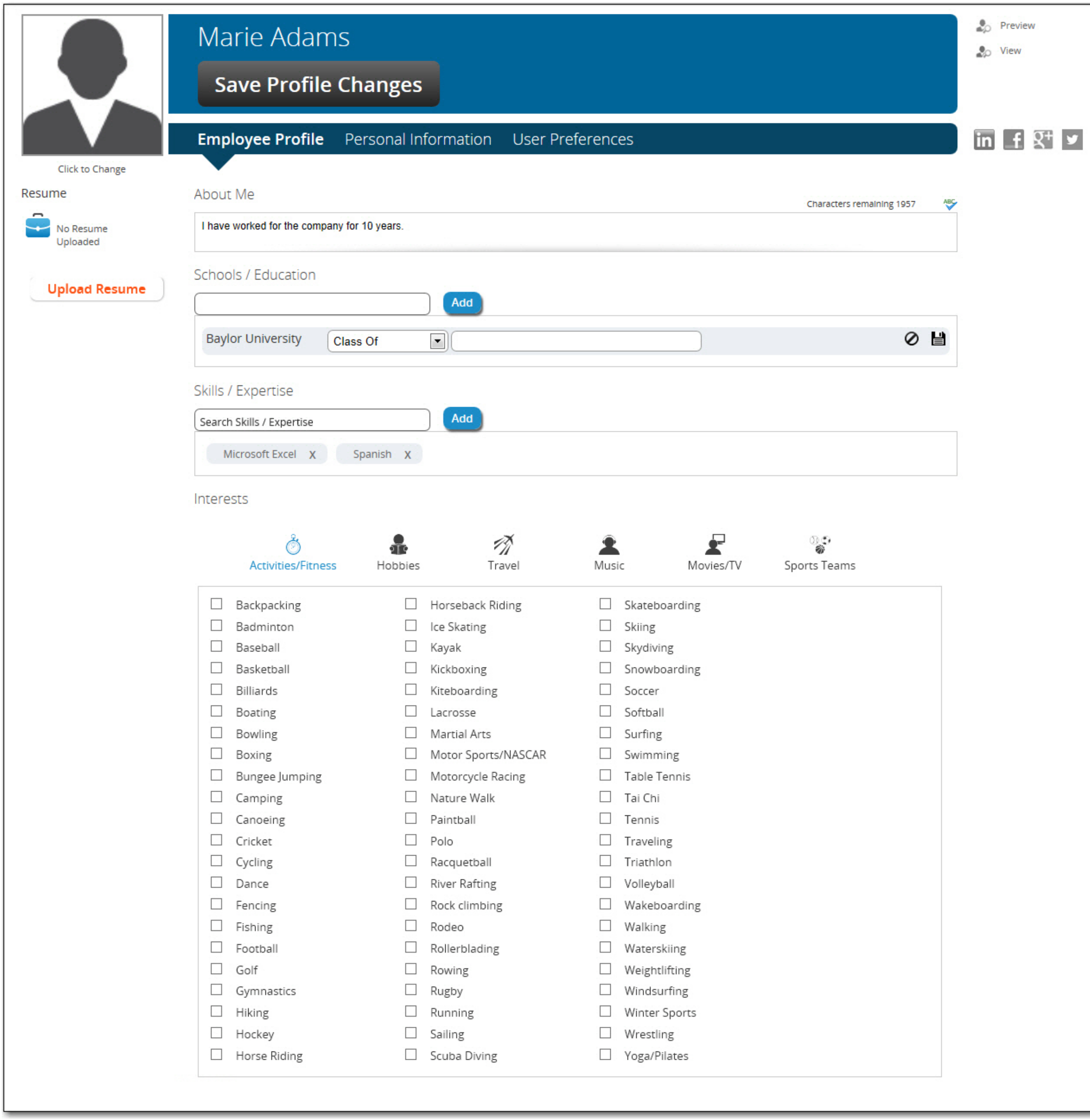
| Routing | Account | Type | Bank Name |
|---|---|---|---|
| 071000013 | 3678 | Checking | Jpmorgan Chase Bank, NA |

### Additional Deposit Account(s)

| | Routing | Account | Type | Bank Name | Amount |
|---|---|---|---|---|---|
| ◉ | 071000013 | 2653 | Savings | Jpmorgan Chase Bank, NA | 5% |
| ○ | 071000013 | 12312 | Checking | Jpmorgan Chase Bank, NA | $25.00 |

## *EDIT EMPLOYEE PROFILE*

- Click the image to upload a new profile image. Select **Use Default Image** to return to the default image.
- Click **Preview** to preview the profile.
- Click **View** to view the profile that appears when users click Profile.
- Click the applicable icon to link a LinkedIn, Facebook, Google+, or Twitter profile to the employee profile.
- Click **Upload Resume** to upload a resume.
- Enter personal information in the **About Me** field. Click the spell check icon to check the spelling.
- Enter information in the **Schools/Education** search field to select an education option or enter education information in the field and click **Add** to add the education information to the employee profile. Make a selection from the **Class Of** drop down and enter additional information in the comments field. Users may edit, save, or delete education information by clicking the applicable icon.
- Enter information in the **Skills/Expertise** search field to select a skill or expertise or enter skills or expertise information in the field and click **Add** to add the information to the employee profile. Click the **X** to delete information.
- Check the box adjacent to those **Interests** that apply. Click the applicable section icon to add interests from the selected section.
- Click **Save Profile Changes** to save the updated information.




***Important Notes***

- When users add a new education option to their employee profile, the option will be available to every user in the company.
- When users add a new skill or expertise to their employee profile, the option will be available to every user in the company.

## *HIDE OR DISPLAY THE NET AMOUNT*

Click the **Net Amoun**t icon to hide or display the **Net Amount** in the Compensation section of the self service portal.

| Date | Check # | Net Amount | Dir Dep |
|---|---|---|---|
| 11/14/2014 | 103006 | $615.08 | ✔ |
| 11/07/2014 | 102992 | $615.07 | ✔ |

| Date | Check # | Net Amount | Dir Dep |
|---|---|---|---|
| 11/14/2014 | 103006 | hidden | ✔ |
| 11/07/2014 | 102992 | hidden | ✔ |

## *NEWS ITEM*

View the company news item. Click the **X** in the top-right corner of your screen to close this screen and return to the previous screen.

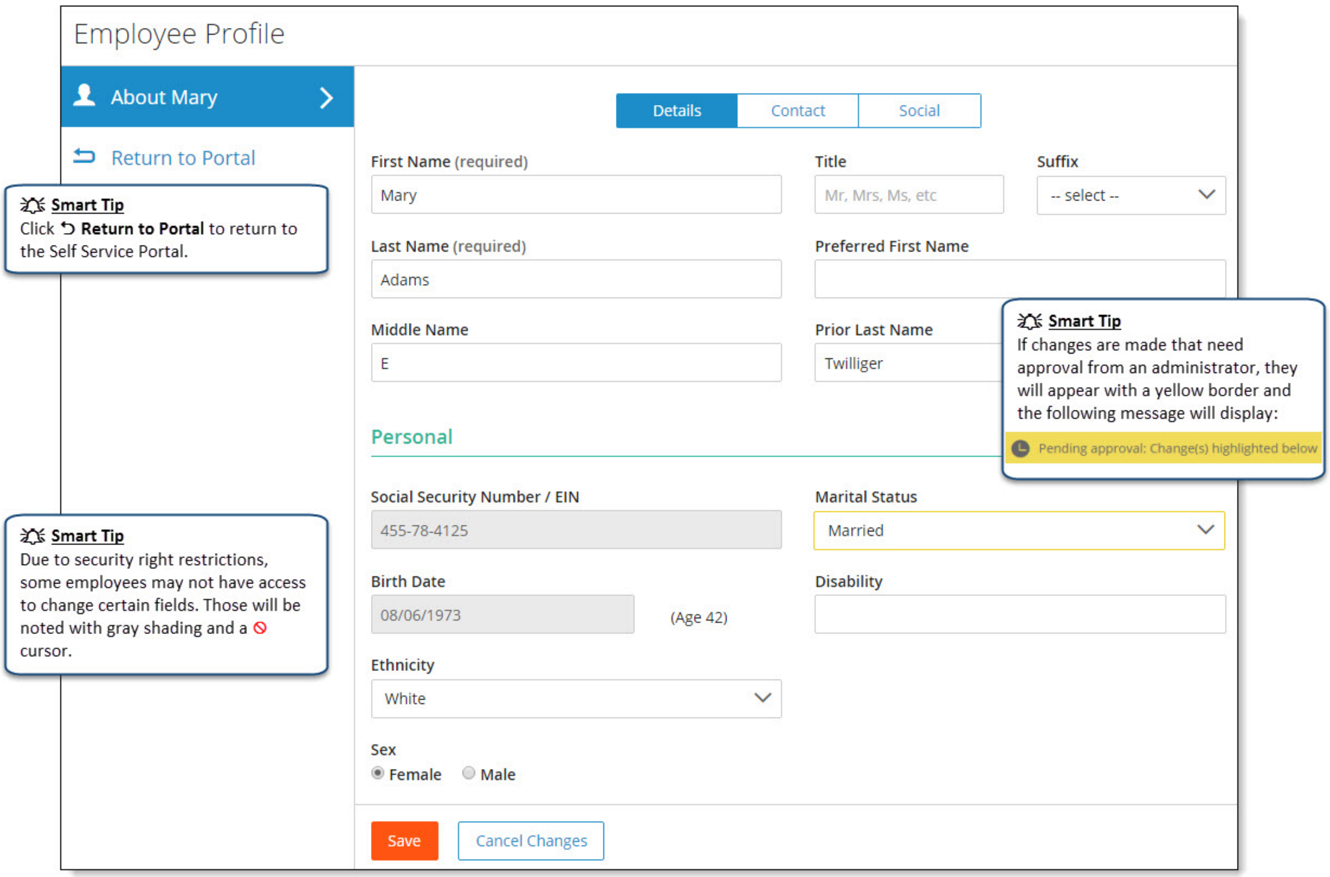
- Use the arrows adjacent to the drop down to navigate from one news item to the next or select a specific news item from the drop down.
- Click the search icon located below the **X** to view a summary list of news items.

## *PERSONAL INFORMATION*

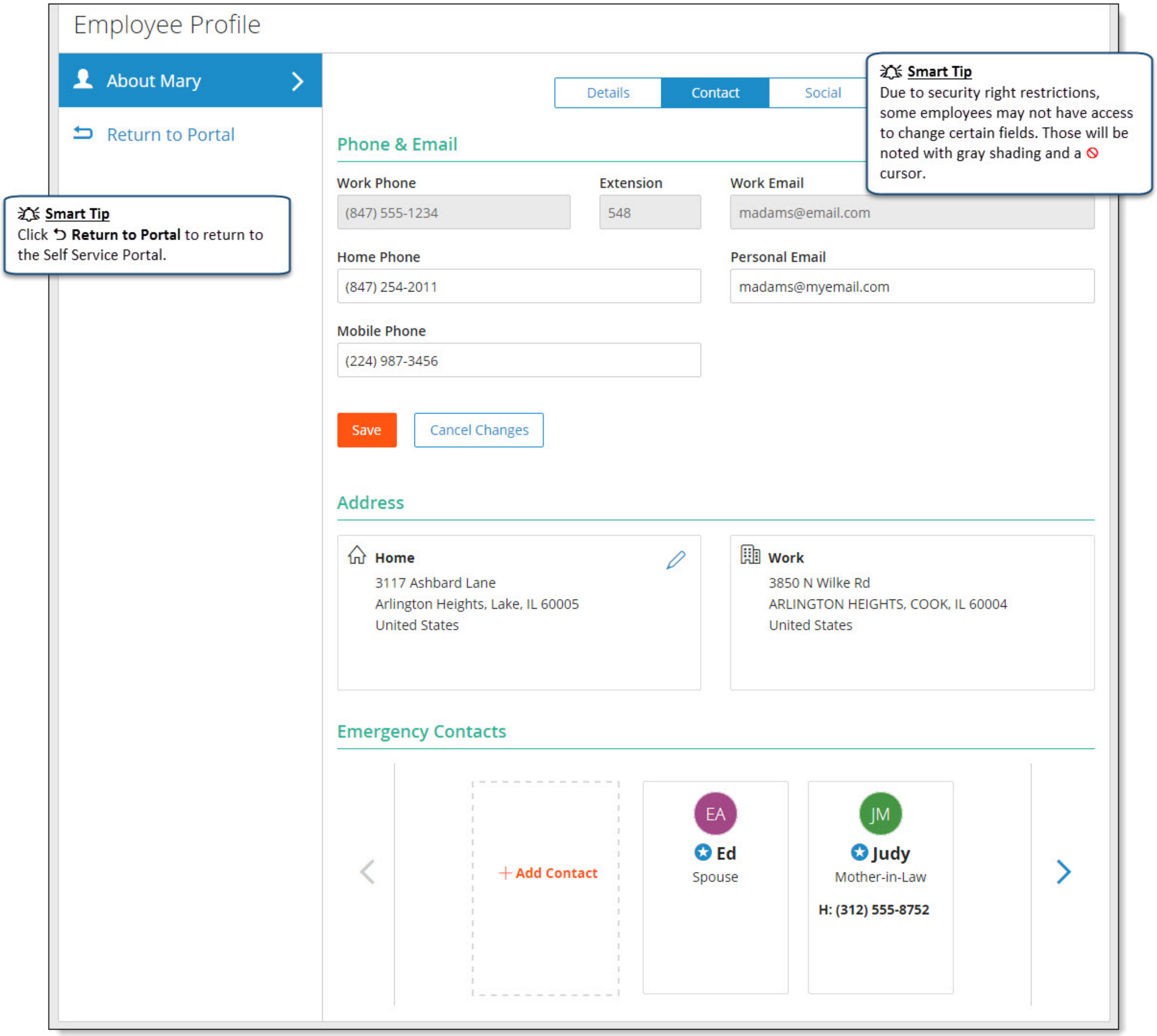
Click **Personal Information** to add or edit personal information from three available tabs:

- Details

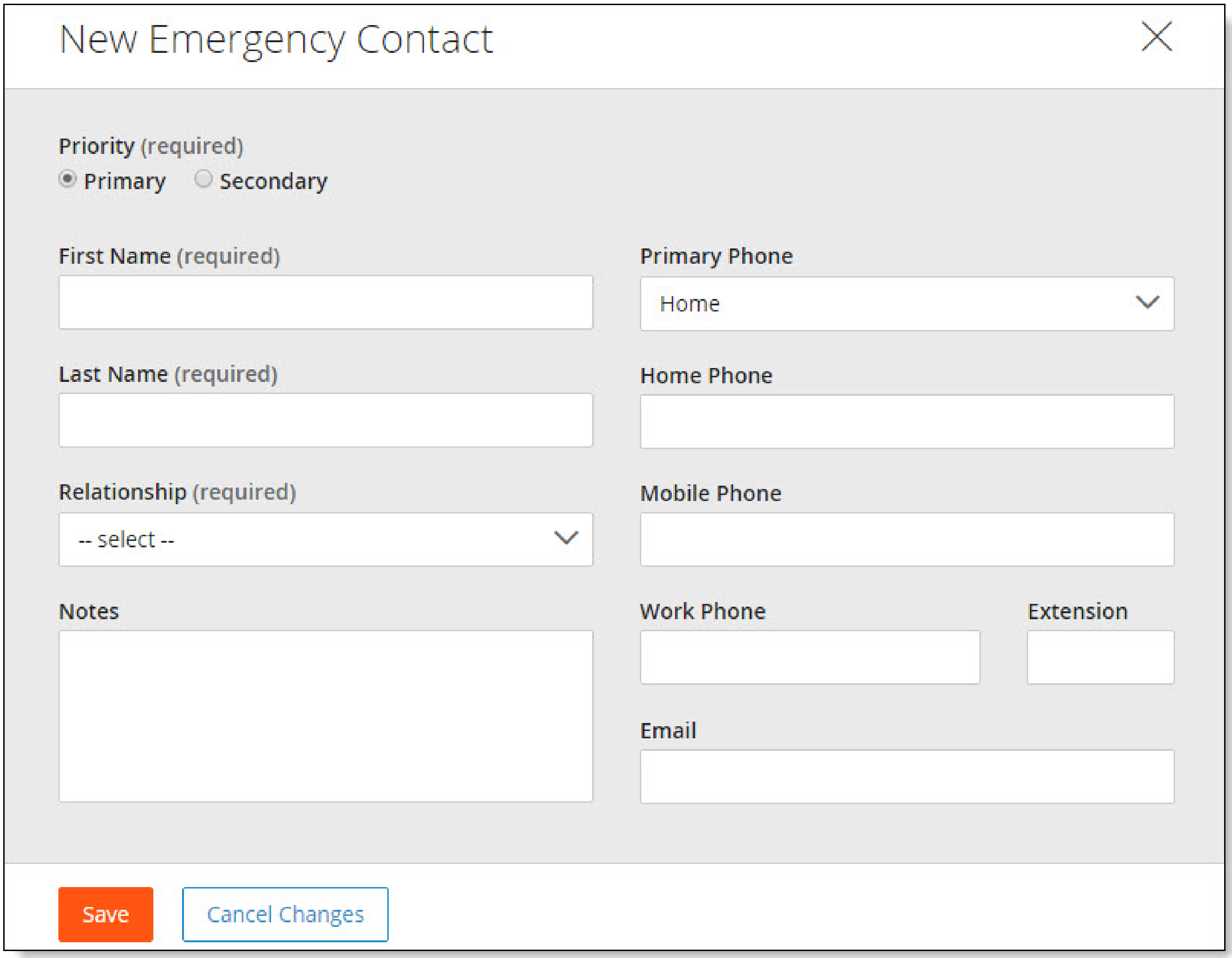
1. Enter your **First Name**, **Last Name**, and **Middle Name**.
2. Enter your preferred **Title** and select an applicable **Suffix**.
3. Enter a **Preferred First Name** and **Prior Last Name**.
4. In the Personal section, enter your **Social Security Number**, **Marital Status**, **Birth Date**, possible **Disability**, **Ethnicity**, and **Sex.**
5. To continue, click **Save**.



- Contact

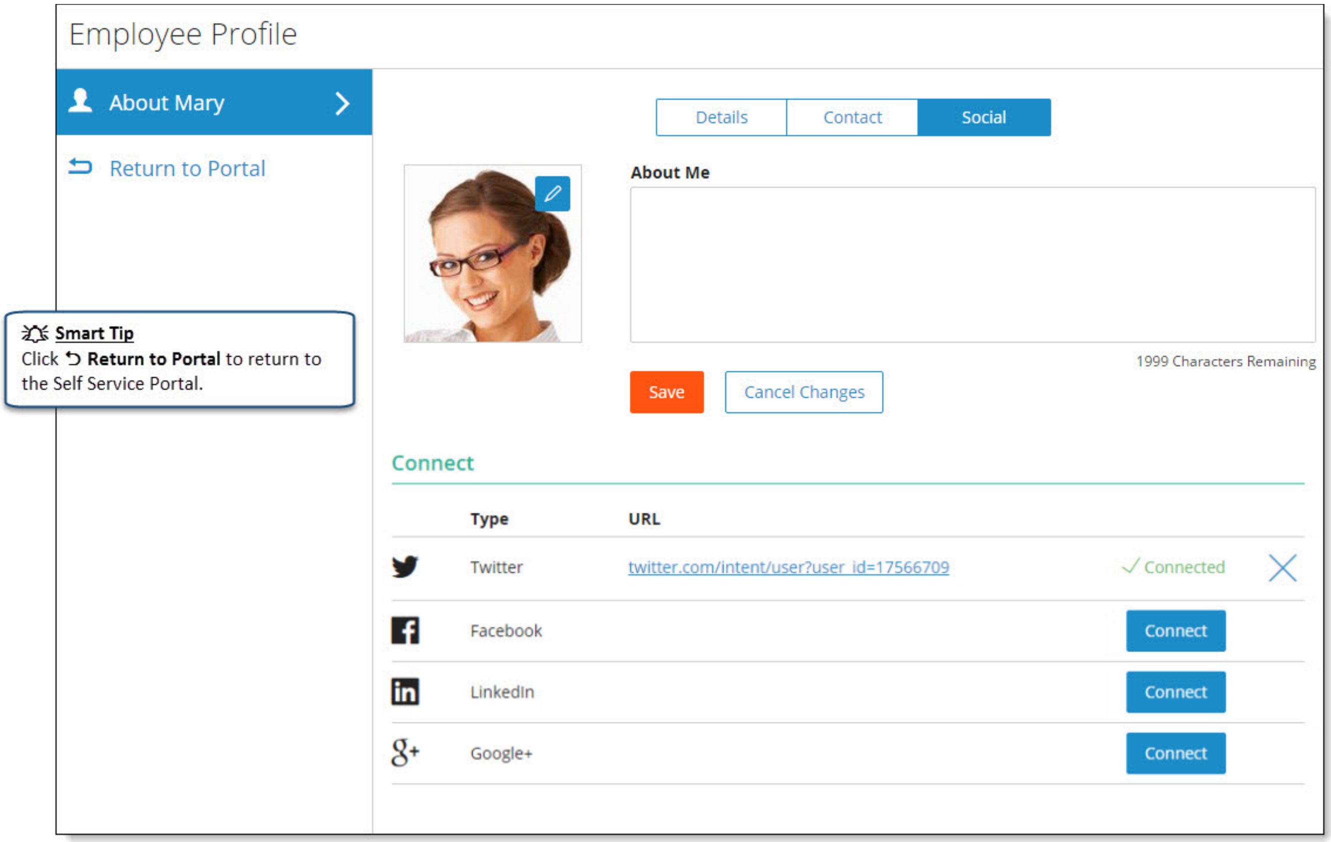



1. Enter applicable **Phone** and **Email**.
2. To edit an **Address**, click the Edit icon (🖉).
3. From the Emergency Contact area, you are able to:
   a. Click the **+ Add Contact** link to add an Emergency Contact.
   b. Click the contact's **Name** to edit an existing Emergency Contact.
4. Click **Save** when done editing.




- Social

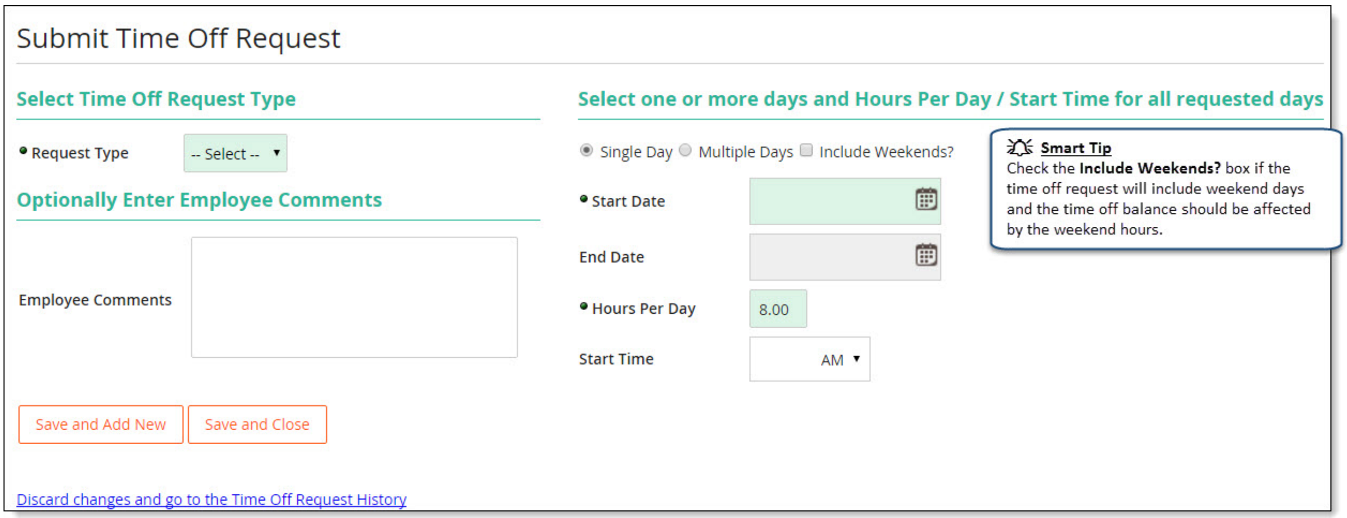
1. Update your Personal Image.
2. Enter information in the **About Me** section.
3. Click **Save** when done editing.
4. Click **Connect** to connect your Employee Profile with your social media accounts.


Employee Profile
About Mary
Return to Portal
Details
Contact
Social
About Me
1999 Characters Remaining
Save
Cancel Changes
Connect
Type
URL
Twitter
twitter.com/intent/user?user_id=17566709
Connected
Facebook
Connect
LinkedIn
Connect
Google+
Connect
Smart Tip
Click Return to Portal to return to the Self Service Portal.

## *SUBMIT TIME OFF REQUESTS*

Submit time off requests. Click the **X** in the top-right corner of your screen to close this screen and return to the self service portal.

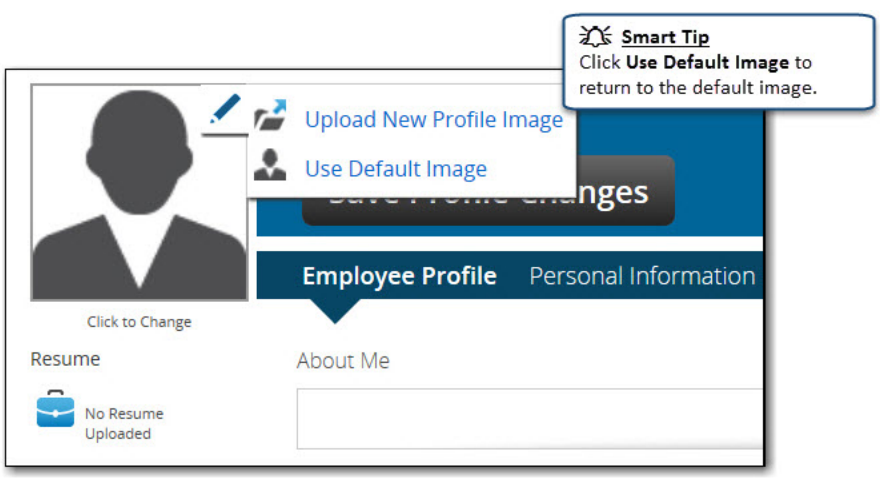
1. Select a **Request Type** from the drop down.
2. Enter additional information in the **Employee Comments** field.
3. Select the **Single Day** or **Multiple Days** radio button.
4. Select or enter the **Start Date**.
5. Select or enter the **End Date**.
6. Enter the **Hours Per Day**.
7. Enter the applicable **Start Time**.
8. Click **Save and Close** to submit the time off request.




For additional detail, click **Discard changes and go to the Time Off Request History** to access the Time Off Requests screen.

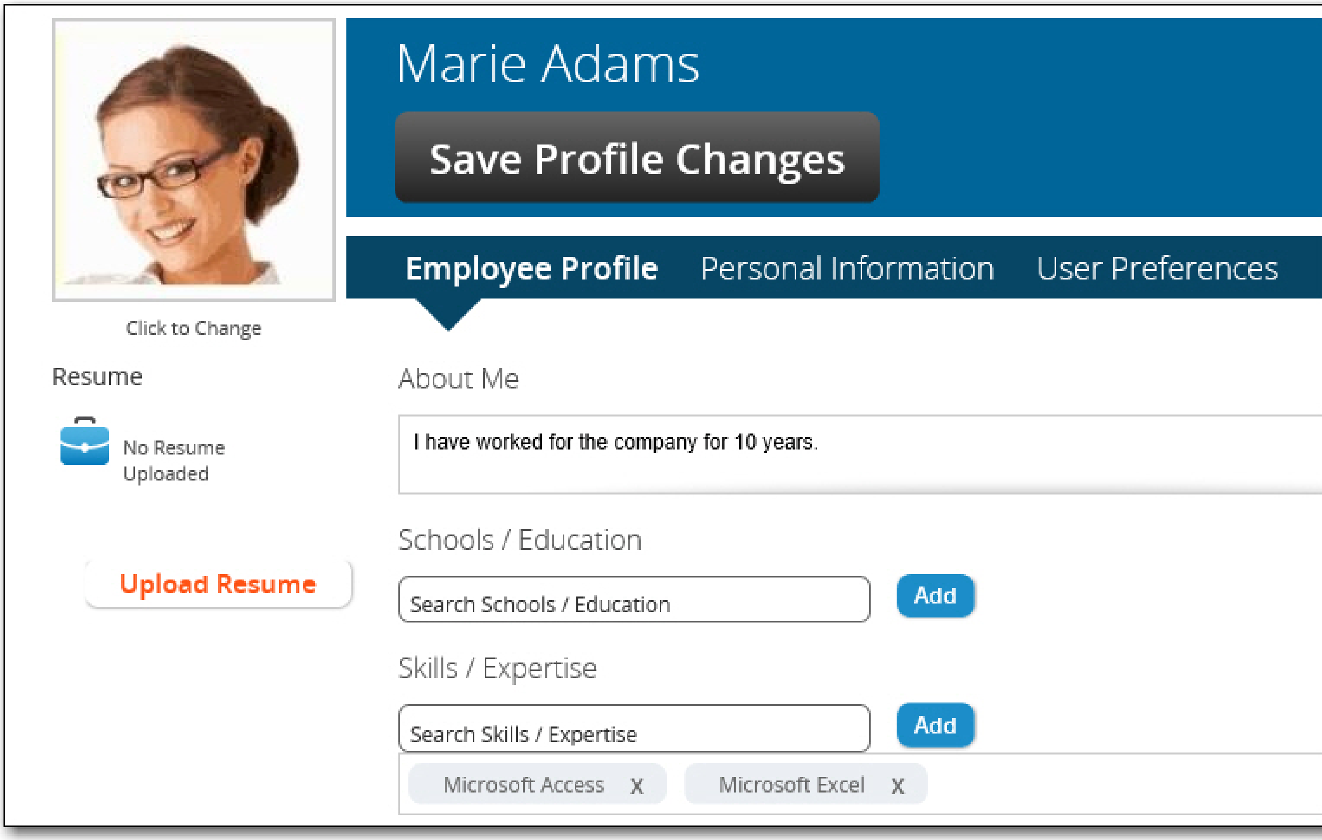
## *UPLOAD NEW PROFILE IMAGE*

1. Click **Upload New Profile** Image.
2. Click **Select** to find the image.
3. Select the image and click **Open** to upload the image.

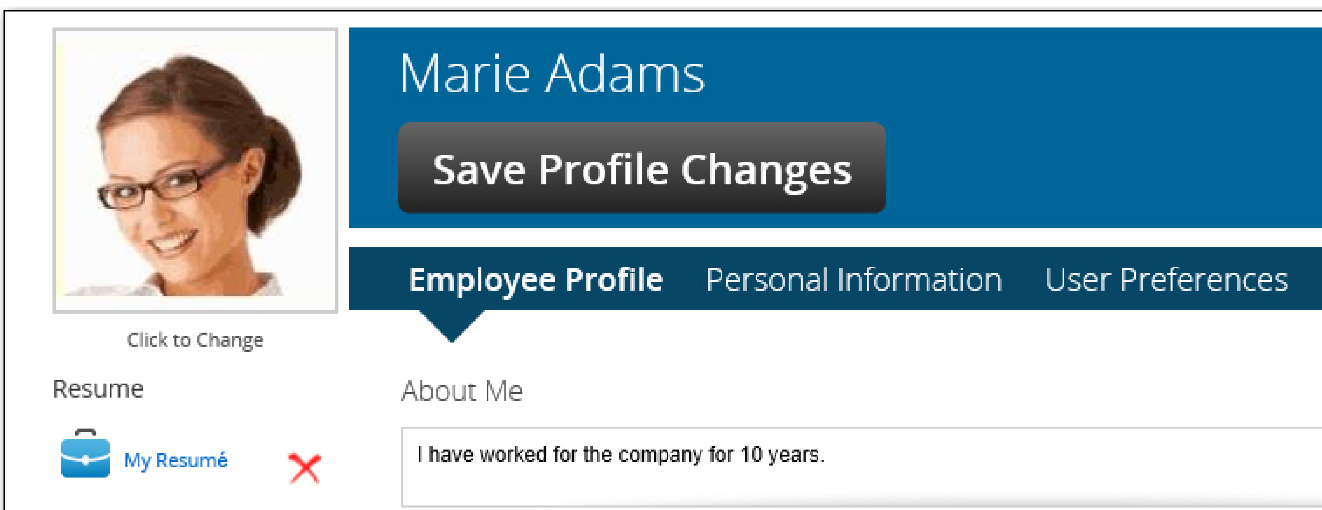


## *UPLOAD RESUME*

1. Click **Upload Resume** to find the document.
2. Select the resume and click **Open** to upload the document.



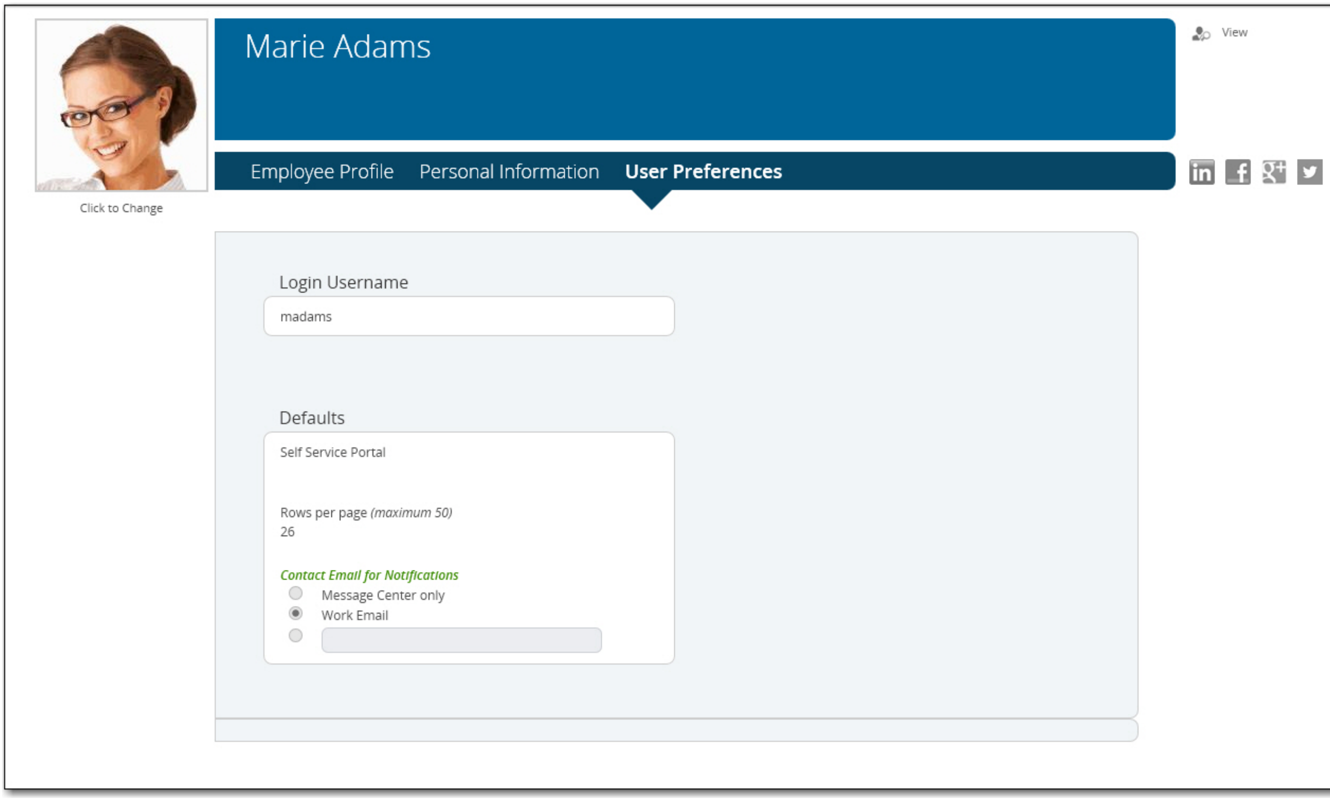

- Click **My Resume** to display the resume.
- Click the red **X** to delete the resume.



## *USER PREFERENCES*

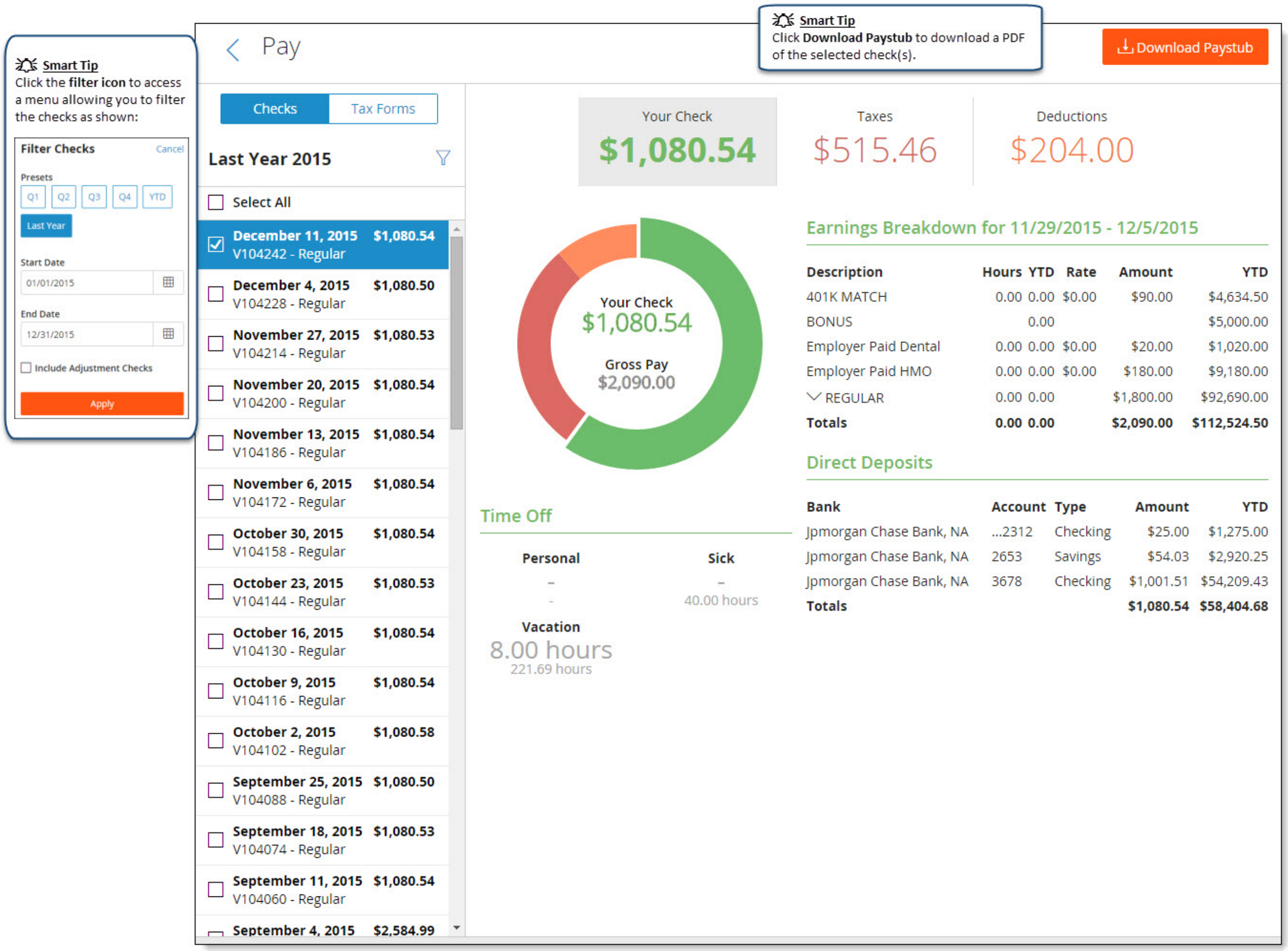
View preferences. Add or edit profile information.

- Click the image to upload a personal image. Select **Use Default Image** to return to the default image.
- Click **View** to view the profile that appears when users click Profile in the Directory.
- Click the applicable icon to link a LinkedIn, Facebook, Google+, or Twitter profile to the employee profile.



## *VIEW CHECKS*

Under the **$ Pay** heading, you can select to **View Checks**. From there you have the option to view **Checks** and **Tax Forms**.



Pay

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

Download W-2

Checks | Tax Forms

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

# W2 Online Preview

**2012**

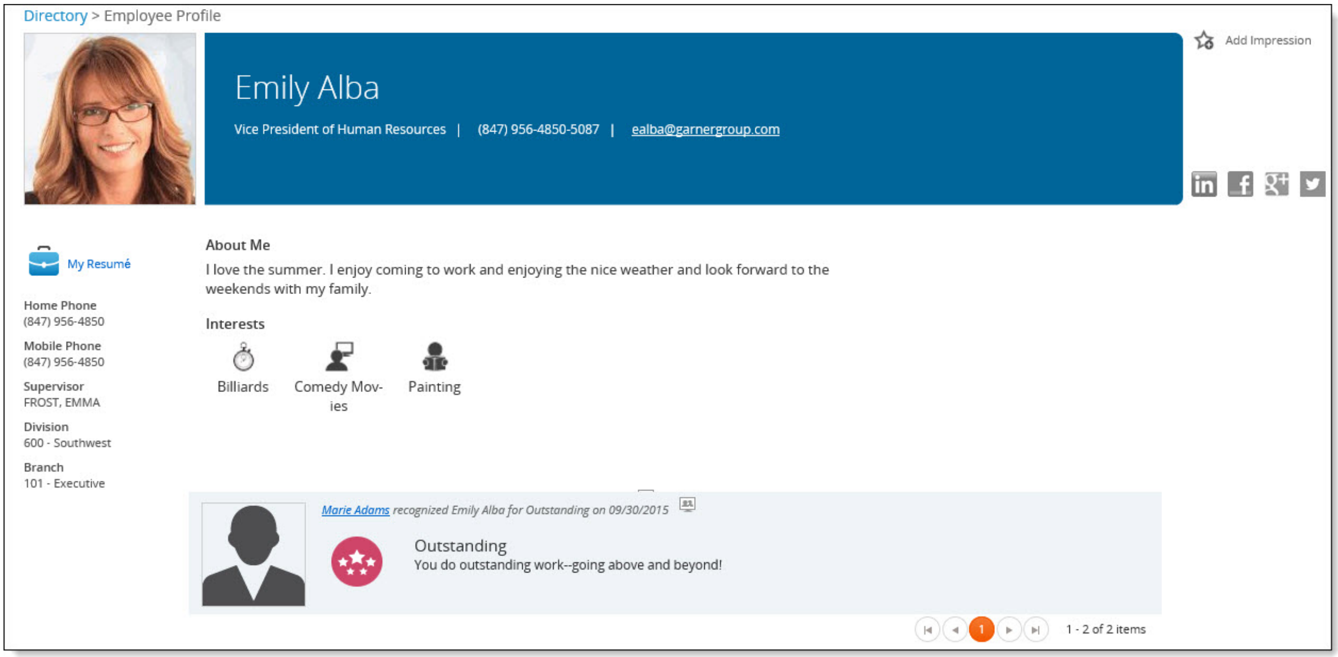
To securely access a full copy, download your W2 above.

| | |
|---|---|
| **a. Employee social security number** 578-98-7458 | **c. Employer's name, address, and zip code** DOC02<br>3850 N Wilke Rd<br>Arlington Heights, IL 60004 |
| **b. Employer identification number (EIN)** 00-5554442 | |
| **d. Control number** DOC02 16 | **f. Employee's address and zip code** 117 Bayview Circle<br>Hermosa Beach, CA 90254 |
| **e. Employee's Name** Emily I Alba | |
| **1. Wages, tips, other compensation** 40268.00 | **2. Federal income tax withheld** 6740.06 |
| **3. Social security wages** 42698.00 | **4. Social security tax withheld** 1793.33 |
| **5. Medicare wages and tips** 42698.00 | **6. Medicare tax withheld** 619.12 |
| **7. Social security tips** – | **8. Allocated tips** – |
| **9. Advance EIC payment** – | **10. Dependent care benefits** – |
| **11. Nonqualified plans** – | |
| **12a.** D 2430.00 | **12b.** DD 11032.00 |
| **12c.** – – | **12d.** – – |
| **13.** Statutory Employee ☐ Retirement Plan ☑ Third-Party Sick Pay ☐ | **14.** – |
| **15. ST \| Employer's state ID number** IL 0000000000000 | **16. State wages, tips, etc.** 40268.00 |
| **17. State income tax** 2013.40 | |
| **18. Local wages, tips, etc.** – | **19. Local income tax** – |
| **20. Locality name** – | |

## ***VIEW PROFILE***

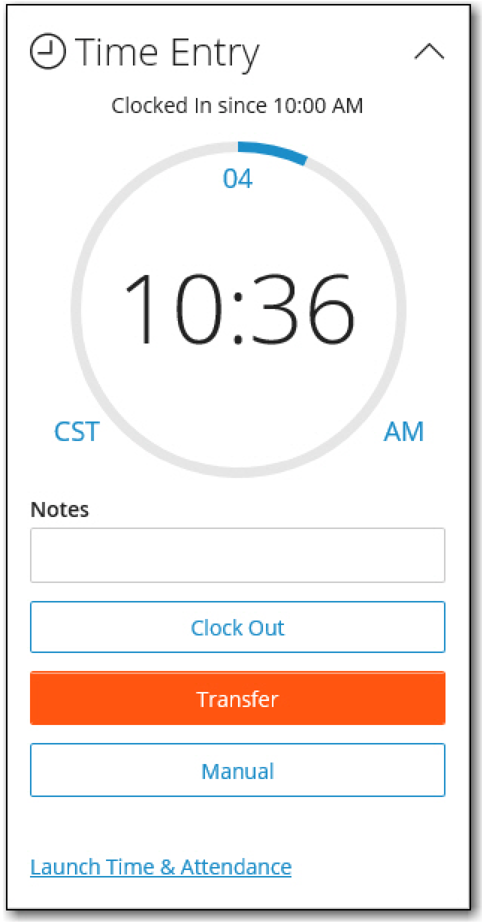
View the employee profile.

- Click the email link to send an email to the employee.
- Click **Add Impression** to award an impression badge for the employee.
- Click **View Team** to view the employee's team.
- Click **My Resume** to view the employee's resume.

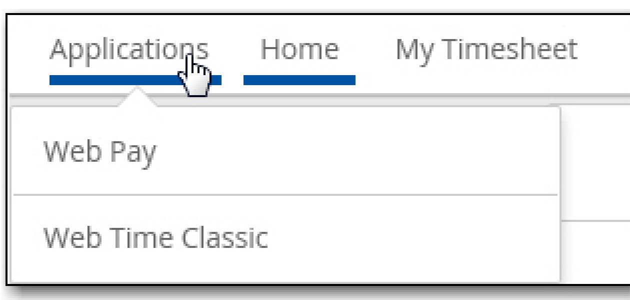


## *WEB TIME*

- Select Web Time from the **Applications** menu or select **Launch Time & Attendance** in the Time Entry section of the self service portal.
- Clock in and out from the self service portal.



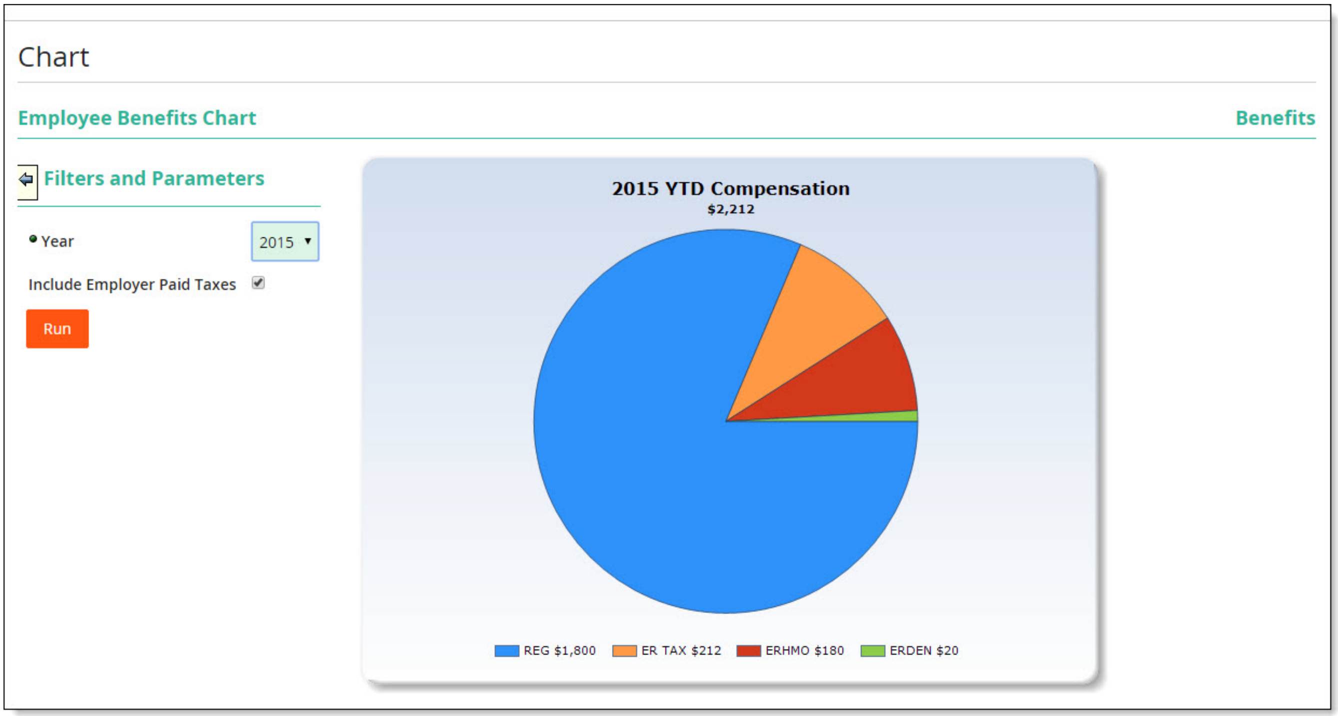

- To return to Web Pay, select Web Pay from the **Applications** menu.



## *YEAR TO DATE COMPENSATION*

View year to date compensation. Click the **X** in the top-right corner of your screen to close this screen and return to the self service portal.

1. Select the **Year** from the drop down.
2. Check the **Include Employer Paid Taxes** box to display employer paid taxes in the chart.
3. Click the **Run** icon to display the information.




### *Important Notes*

- The YTD Compensation Chart will display up to 12 sections of information including employer paid taxes. The largest earnings and/or deductions will display first. Additional earnings and deductions will be combined into a total section that appears as Other.
- The YTD Compensation Chart pulls data from payroll history based on check date. It does not project or annualize values based on insurance plan or recurring deduction/earning setup.

## HOME

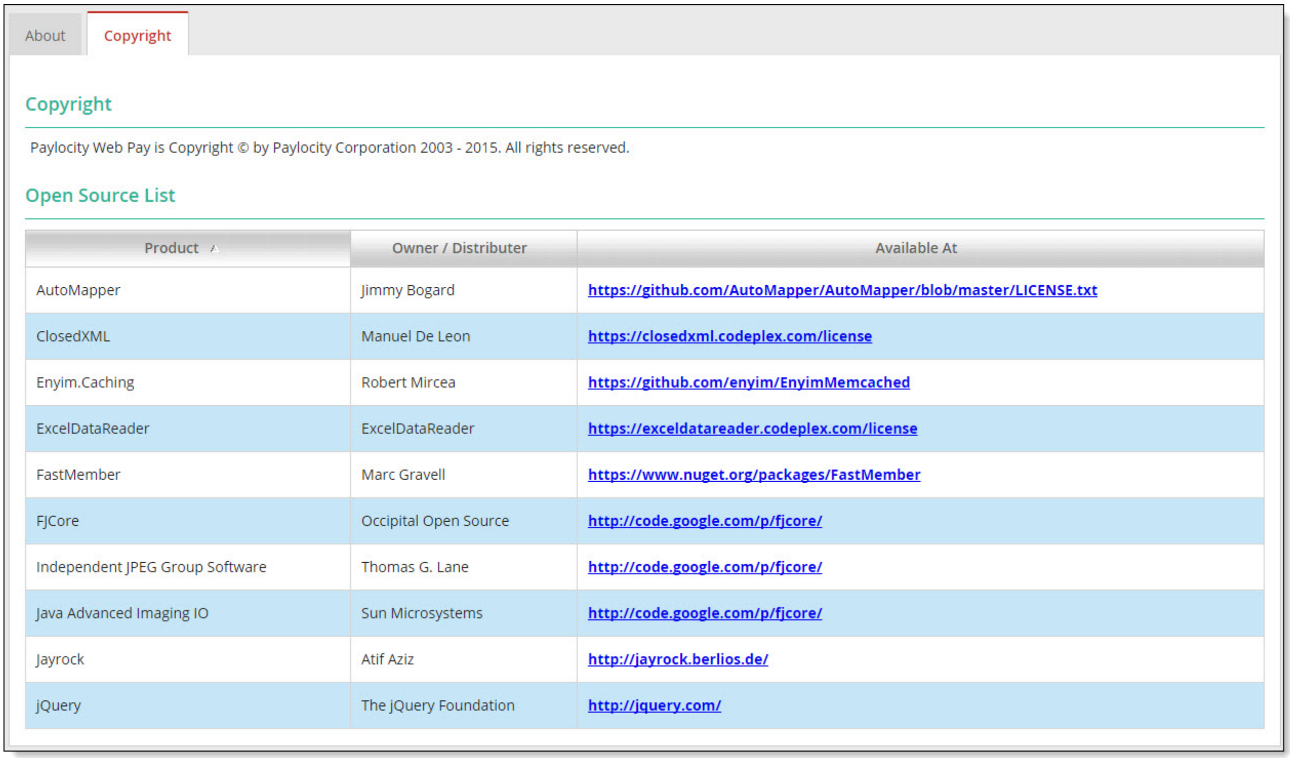
### *ABOUT*

View product information and system requirements.

- Click the **Verify your system setup** button to confirm all system requirements are present and accurate to run the application. A green check will appear next to each option that meets the requirements.
- Adobe Reader is required to view and print pay stubs, reports, and other documents. Click the applicable link in this screen to download Adobe Reader.
- Users may be required to click the applicable link to download and run the installation program to enable Offsite Printing.

## COPYRIGHT

View copyright information.



About | Copyright

### Copyright

Paylocity Web Pay is Copyright © by Paylocity Corporation 2003 - 2015. All rights reserved.

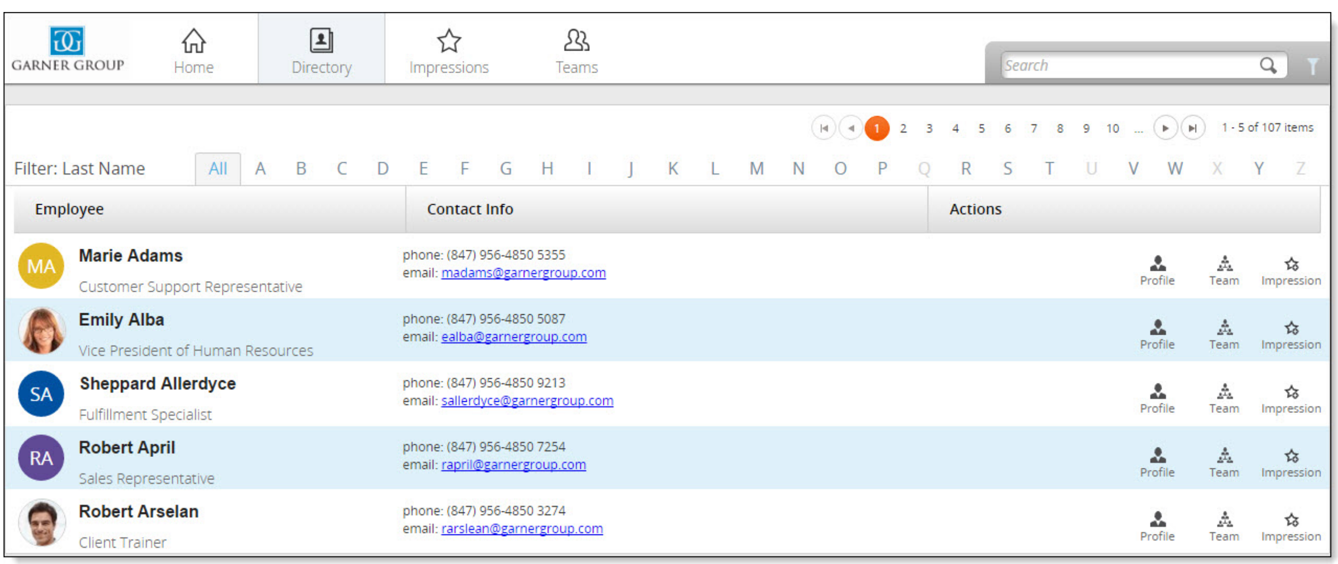
### Open Source List

| Product | Owner / Distributer | Available At |
|---|---|---|
| AutoMapper | Jimmy Bogard | https://github.com/AutoMapper/AutoMapper/blob/master/LICENSE.txt |
| ClosedXML | Manuel De Leon | https://closedxml.codeplex.com/license |
| Enyim.Caching | Robert Mircea | https://github.com/enyim/EnyimMemcached |
| ExcelDataReader | ExcelDataReader | https://exceldatareader.codeplex.com/license |
| FastMember | Marc Gravell | https://www.nuget.org/packages/FastMember |
| FJCore | Occipital Open Source | http://code.google.com/p/fjcore/ |
| Independent JPEG Group Software | Thomas G. Lane | http://code.google.com/p/fjcore/ |
| Java Advanced Imaging IO | Sun Microsystems | http://code.google.com/p/fjcore/ |
| Jayrock | Atif Aziz | http://jayrock.berlios.de/ |
| jQuery | The jQuery Foundation | http://jquery.com/ |

## DIRECTORY

View employee contact information. Use the search filters to view specific employees.

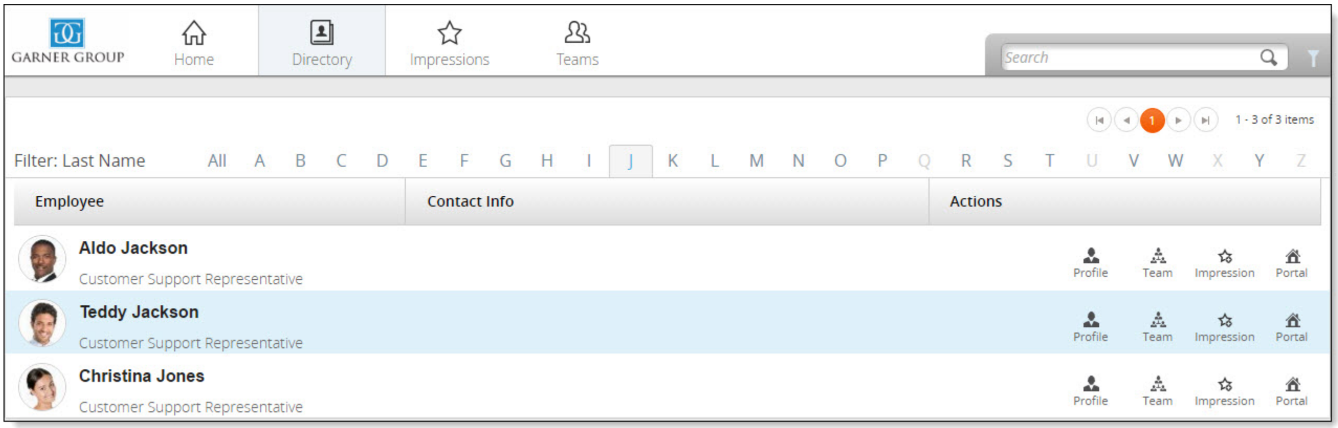
- Click the **Email** link to send an email to the employee.
- Click **Profile** to view the employee's profile.
- Click **Team** to view the employee's team.
- Click **Impression** to submit an impression badge for the employee.
- Click **Portal** to access the self service portal.



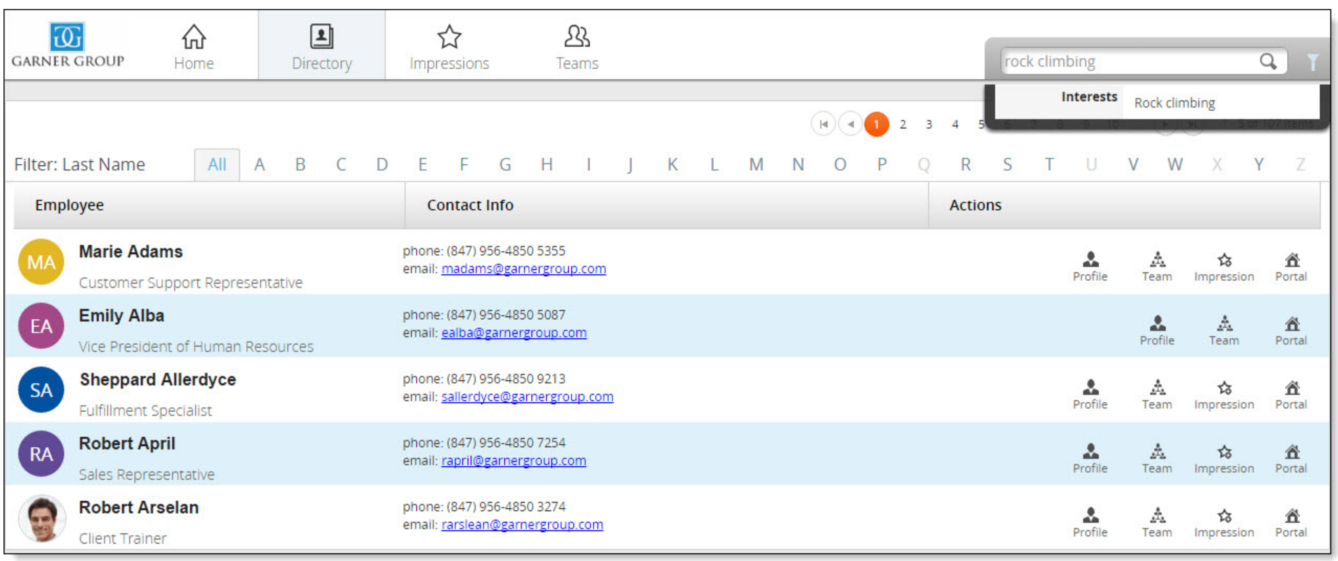
## *SEARCH FILTER OPTIONS*

Search for employees in Web Pay self service and social collaboration.

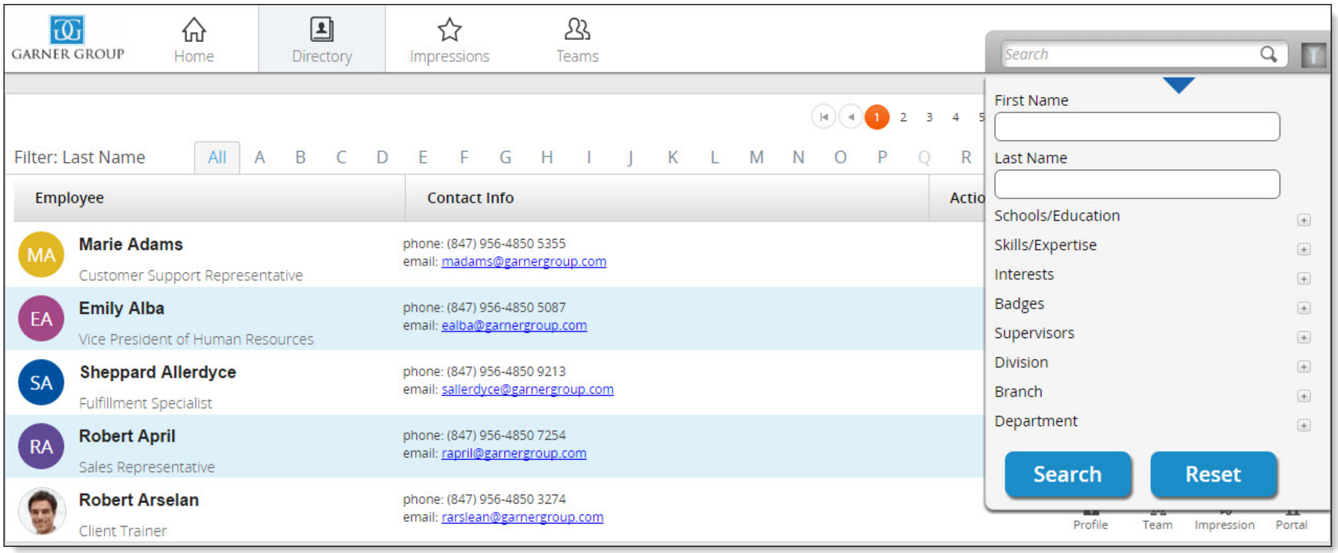
- Select a letter in the **Last Name Filter** to display only employees whose last name begins with the selected letter.
- Click **All** to display all employees.




- Enter the employee's name in the **Search** field to find a specific employee.
- Enter information in the **Search** field to find specific employees who match the search criteria.
- Selected search criteria may appear at the top of the screen. Click the **X** to remove selected criteria.




- Click the filter icon to use multiple search criteria.
- Enter the applicable criteria in each search field and click **Search**. Click **Reset** to clear the specified search criteria.

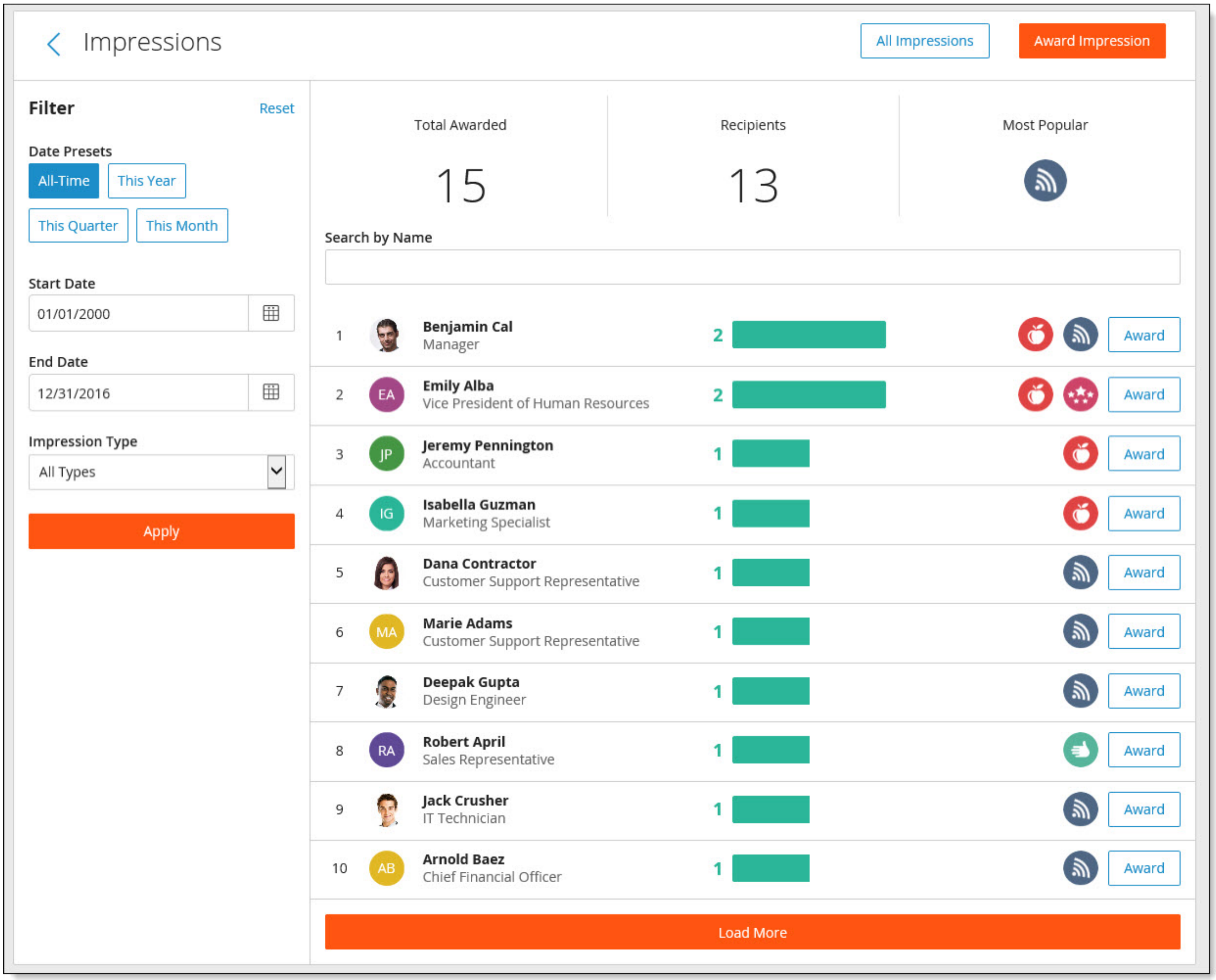



## *IMPRESSIONS*

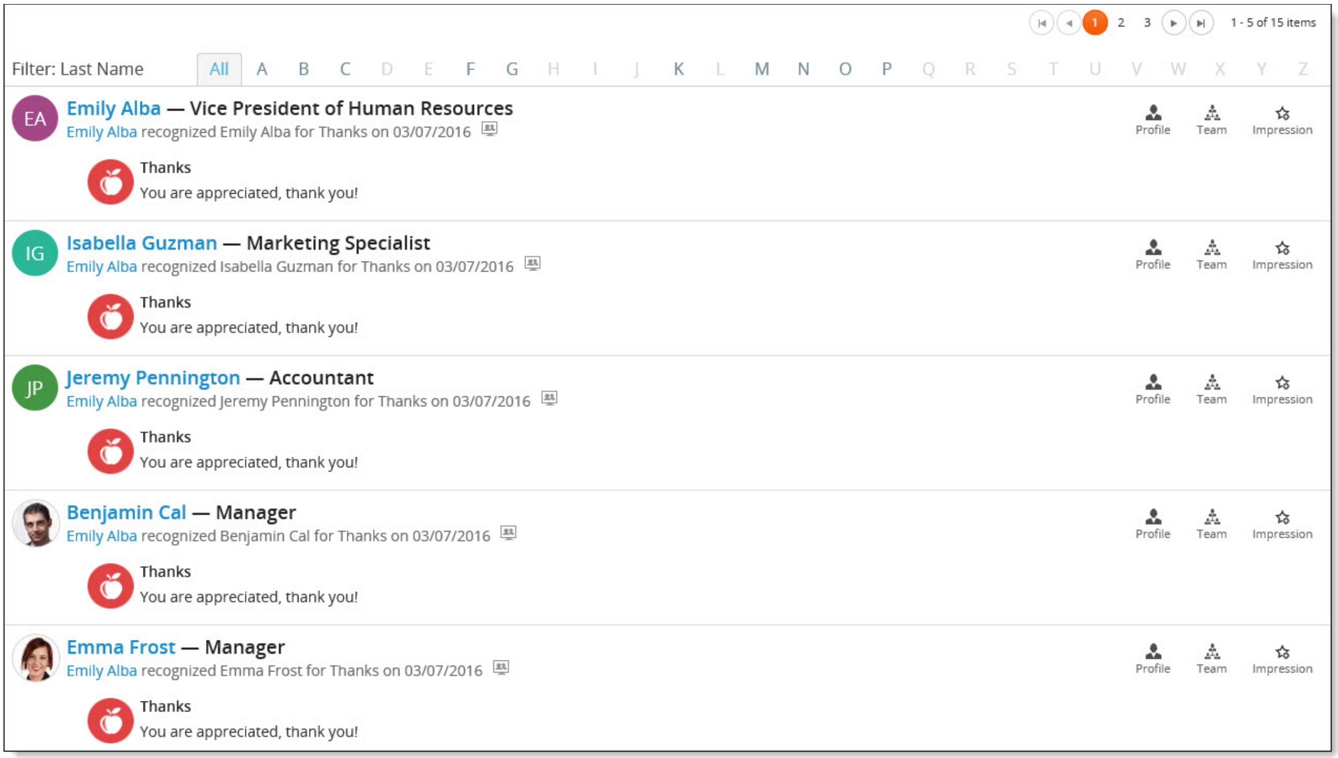
View employee impression badges. Use the search filters to view specific employees.

Depending on the company's configuration, supervisor approval of the impression badge may be required before the impression badge appears in this screen.

- Click **Award Impression** to award an impression badge for a fellow employee.
- Click **All Impressions** to view a list of all impressions awarded.



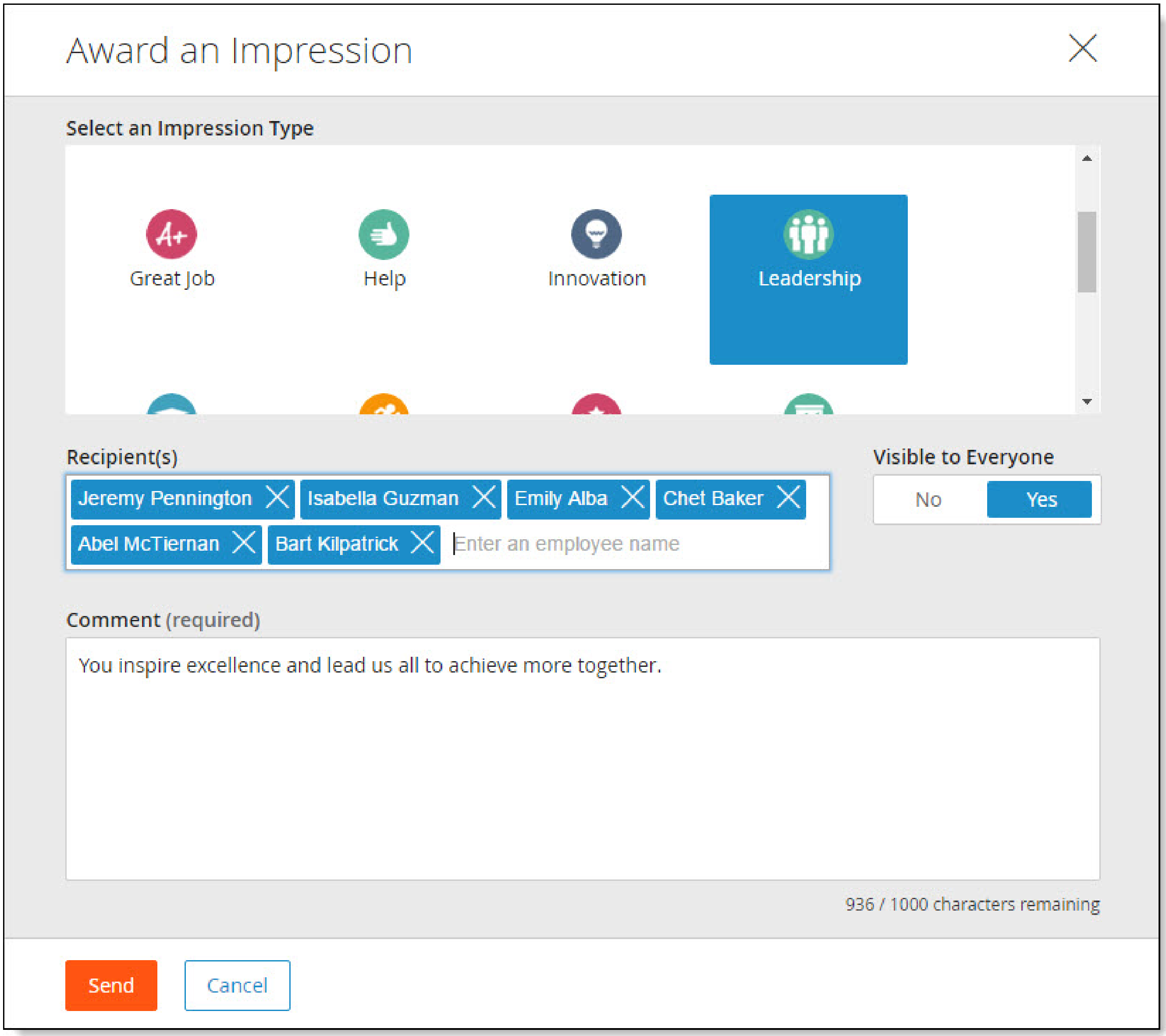

- Click **Profile** to view the employee's profile.
- Click **Team** to view the employee's team.
- Click **Impression** to award an impression badge to the employee.




## *AWARD AN IMPRESSION*

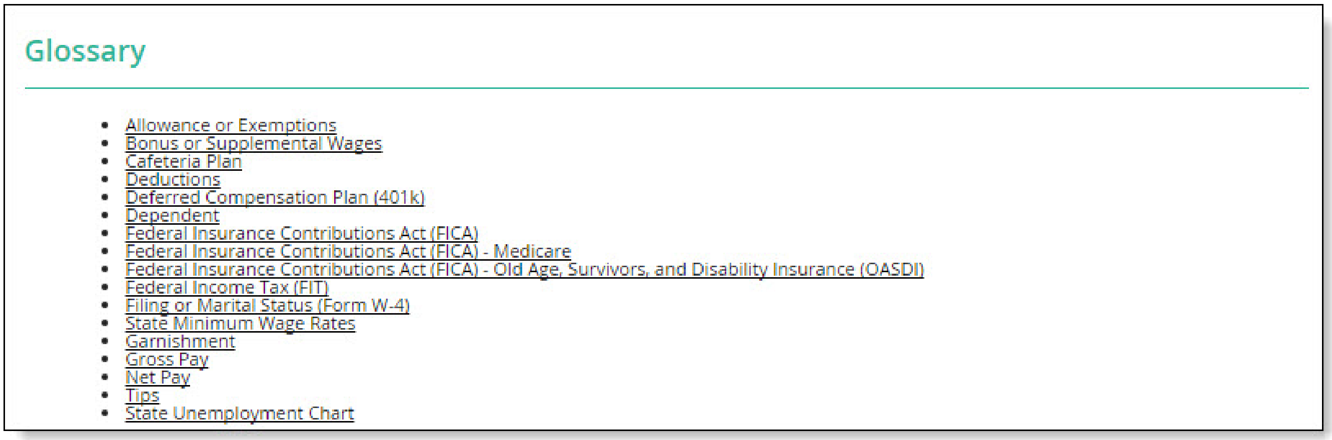
Submit an impression badge to recognize a fellow employee for a job well done. Depending on the company's configuration, supervisor approval of the impression badge may be required.

1. Select the **Impression Type** from the available list. The selected badge displays a default title and comments.
2. Type the name(s) of the recipient(s) in the **Recipient(s)** field.
3. Choose whether the Impression will be **Visible to Everyone**.
4. Customize the comment information in the **Comments** field.
5. Once complete, **Send** the impression.


Award an Impression
Select an Impression Type
Great Job
Help
Innovation
Leadership
Recipient(s)
Jeremy Pennington
Isabella Guzman
Emily Alba
Chet Baker
Abel McTiernan
Bart Kilpatrick
Enter an employee name
Visible to Everyone
No
Yes
Comment (required)
You inspire excellence and lead us all to achieve more together.
936 / 1000 characters remaining
Send
Cancel

## *GLOSSARY*

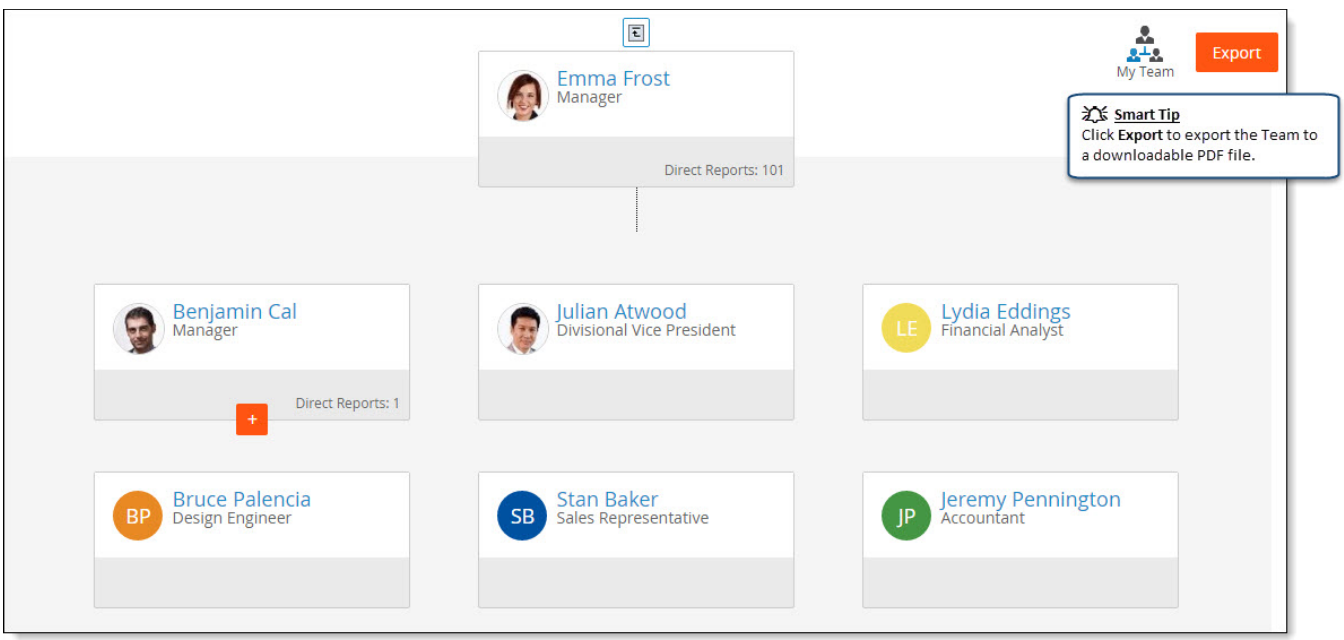
View payroll terms and calculations to assist with questions about paychecks. This screen cannot be edited.




## *TEAMS*

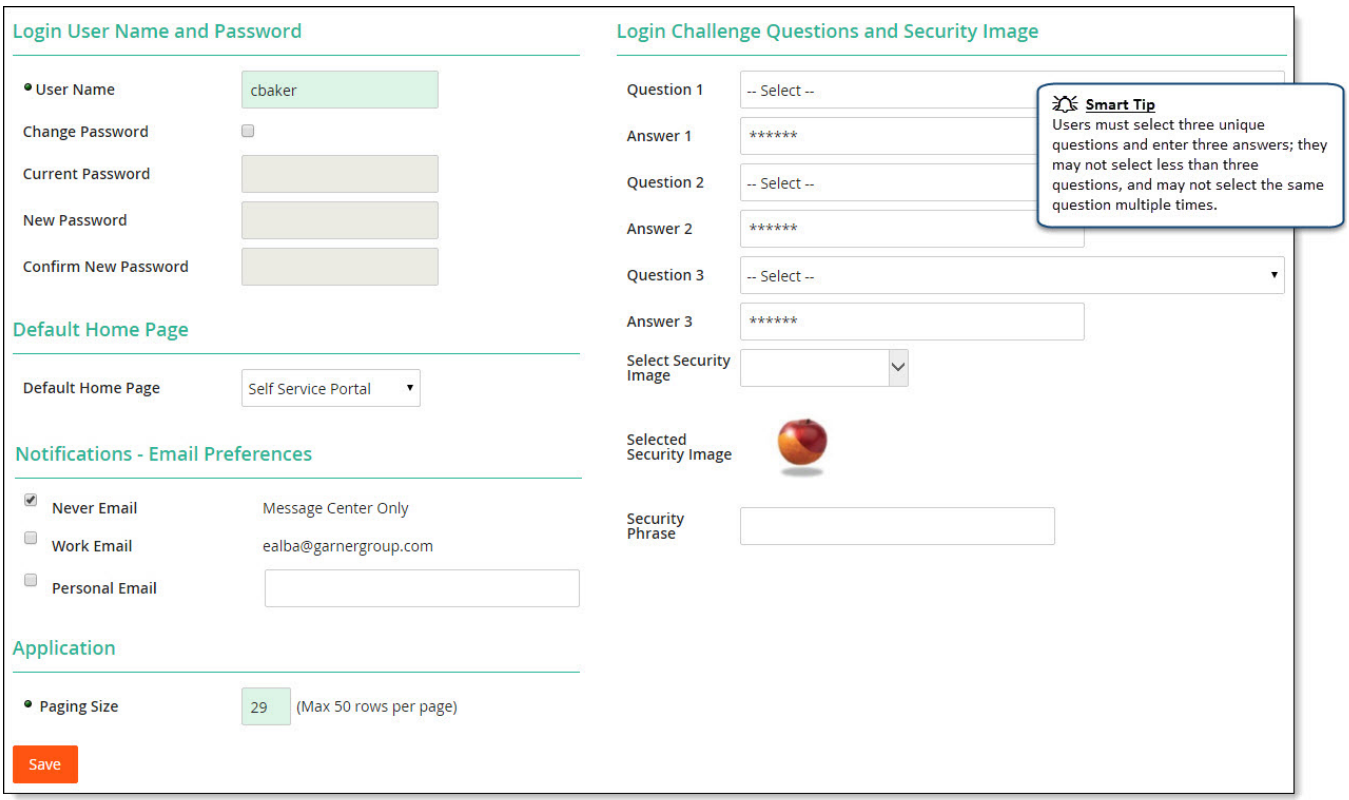
View employee teams. The company team structure appears based on information entered in the Supervisor field. Use the search filters to view specific employees.

- Users may click **My Team** to view their own team.
- Click the move up icon to move up one level.
- Click the plus (**+**) sign to display direct reports.
- Hover the mouse over the name to display additional details.



## *PREFERENCES*

1. Enter the **User Name**.
2. To change the password, check the **Change Password** box.
3. Enter the **Current Password**.
4. Enter the **New Password** and enter the new password a second time in the **Confirm New Password** field.
5. Select the **Default Home Page** at login.
6. Check the box(es) within the "Notifications – Email Preferences" area to choose where you want to have notifications sent; multiple selections can be made.
7. Select the number of rows that appear on a page in the **Paging Size** field.
8. Select a login challenge question from the **Question 1**, **Question 2**, and **Question 3** drop downs. Enter the answer to the respective login challenge question in the **Answer 1**, **Answer 2**, and **Answer 3** fields.
9. Select an image from the **Select Security Image** drop down. This image will appear on the login screen once the **Company Id** and **Username** are entered.
10. Enter a personal **Security Phrase**. This phrase will appear on the login screen once the **Company Id** and **Username** are entered.
11. **Save** the updated information.



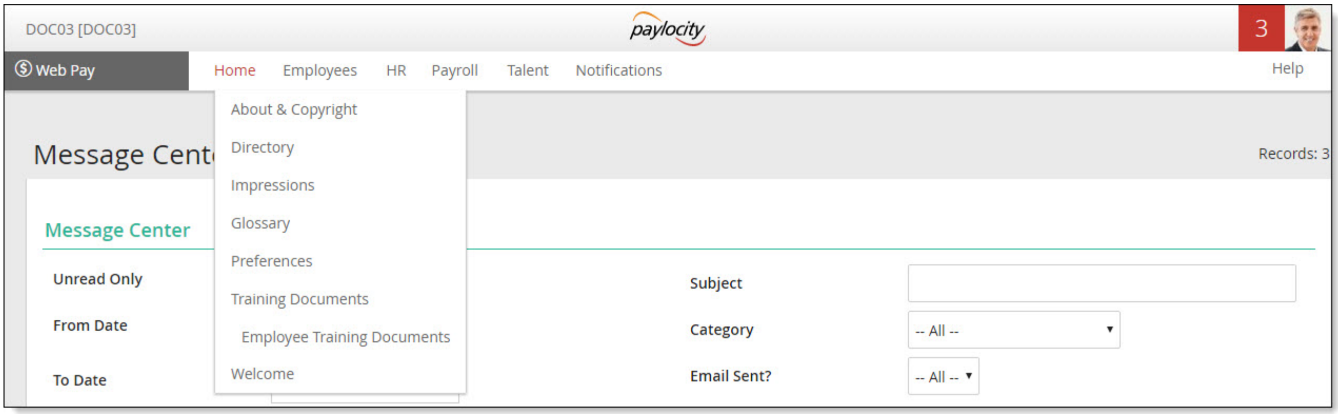

Users may be required to enter their password when saving changes. Enter the **Password** and click **Save** to save the updated personal settings.

### *Important Notes*

- Notifications are always sent to the Message Center.
- Users who establish challenge questions must select three unique questions and enter three answers. They may not select only one or two questions and they may not select a question more than once.

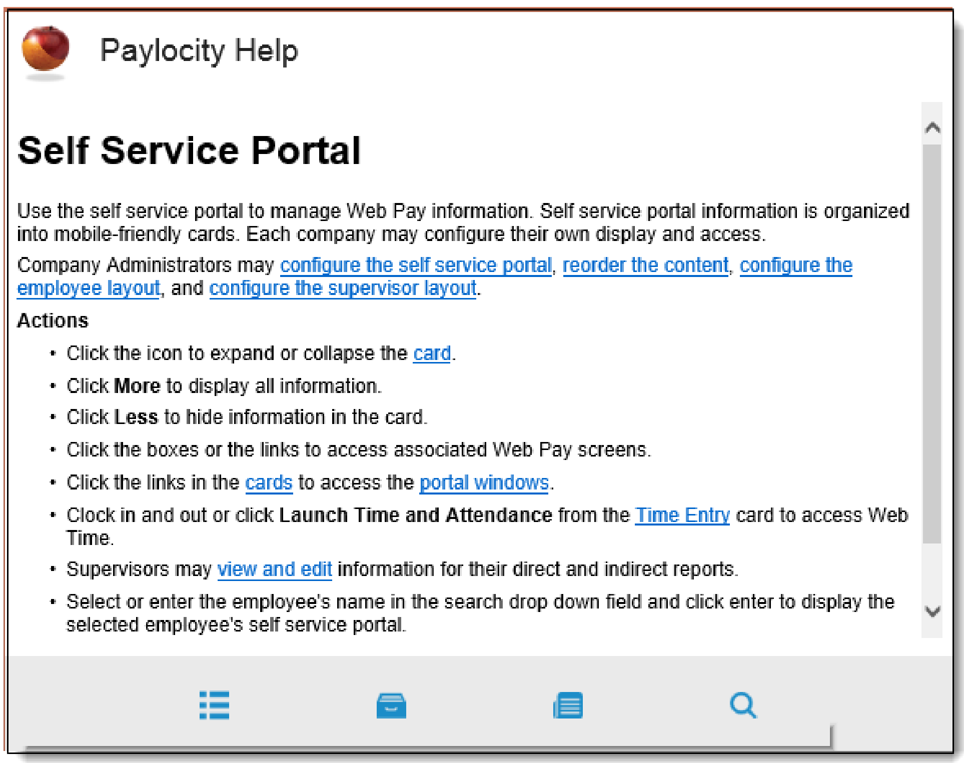
## *TRAINING DOCUMENTS*

Access online training documents and videos.




## *HELP*

Clicking **Help** at the top right of the screen will open a help text pop-up screen. This screen provides assistance to navigate through various screens, fields and pages.



## EMPLOYEES

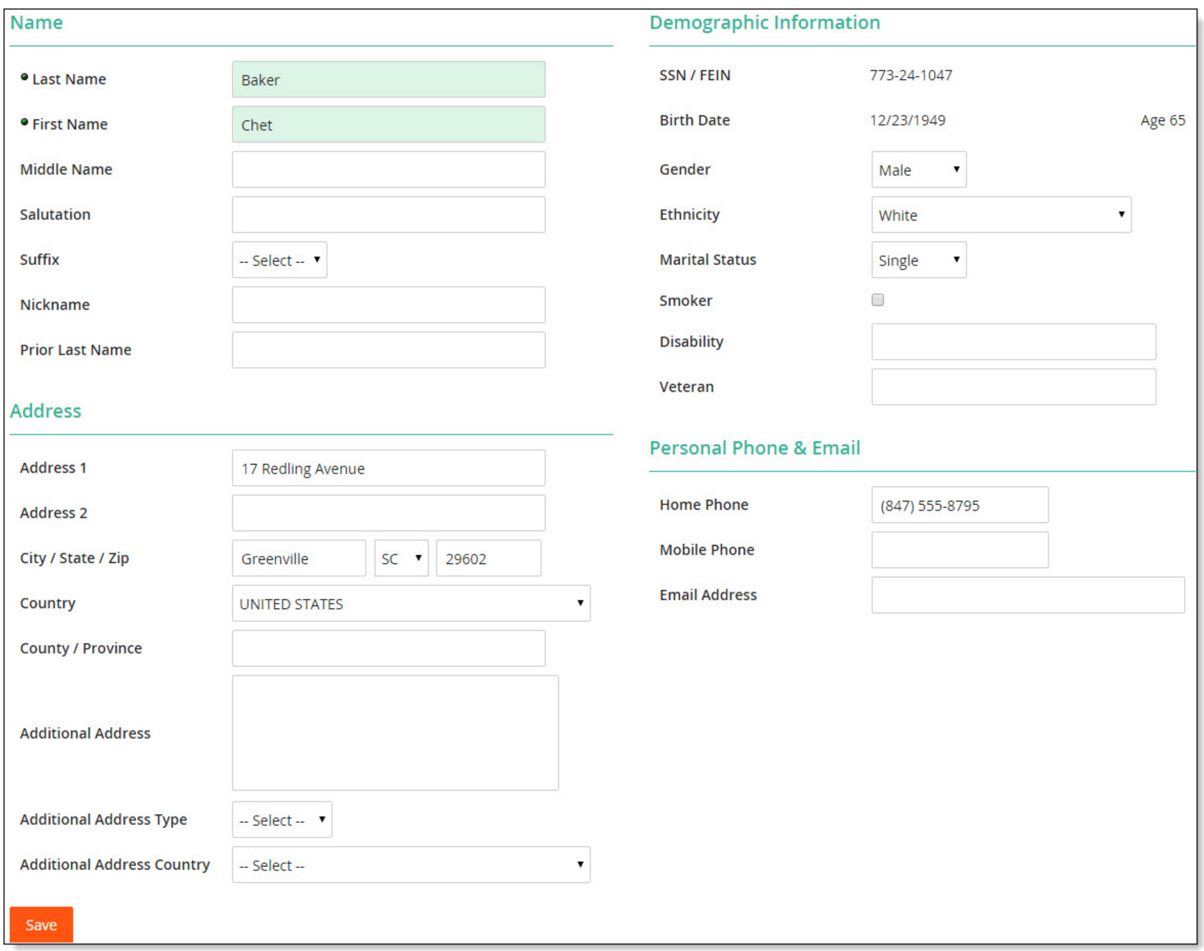
## EMPLOYEE INFO

## PERSONAL

### *DEMOGRAPHICS*

Add or edit general employee information.

1. Enter the **Last Name** (40 character limit), **First Name** (40 character limit), and **Middle Name** (20 character limit).
2. Enter a **Salutation** (10 character limit).
3. Select a **Suffix** from the drop down.
4. Enter a **Nickname** (20 character limit) and/or **Prior Last Name** (40 character limit).
5. Enter the **Address**, **Phone**, and **Email** information.
6. Select the **Gender** from the drop down.
7. Select the **Ethnicity** from the drop down.
8. Select the **Marital Status** from the drop down.
9. Check the **Smoker** box, if applicable.
10. Enter information in the **Disability** field (30 character limit).
11. Enter information in the **Veteran** field (30 character limit).
12. **Save** the updated information.




### *Important Notes*

- Employees are not able to add or edit their own Social Security Number (**SSN**) or **Birth Date** information. Employees must contact the Company Administrator to make these changes.

## *IN THE ADDRESS SECTION*

1. Enter the address in the **Address 1** field (30 to 50 character limit) and applicable address information in the **Address 2** field (30 to 50 character limit).
2. Enter the **City** (30 character limit), select the **State** from the drop down, and enter the **Zip Code**.
3. Select a **Country** from the drop down.
4. Enter the **County**.
5. Enter the applicable **Additional Address** (100 character limit).
6. Select the **Additional Address Type** from the drop down.
7. Select the **Additional Address Country** from the drop down.
8. Enter the **Home Phone** number and **Mobile Phone** number.
9. Enter the **Email** address (40 character limit).

### *Important Notes*

- It may be necessary to enter the plus (**+**) sign before the phone number in order to save the phone number.
- The character limit for address fields may vary depending on the selected screen.

## *DEPENDENTS*

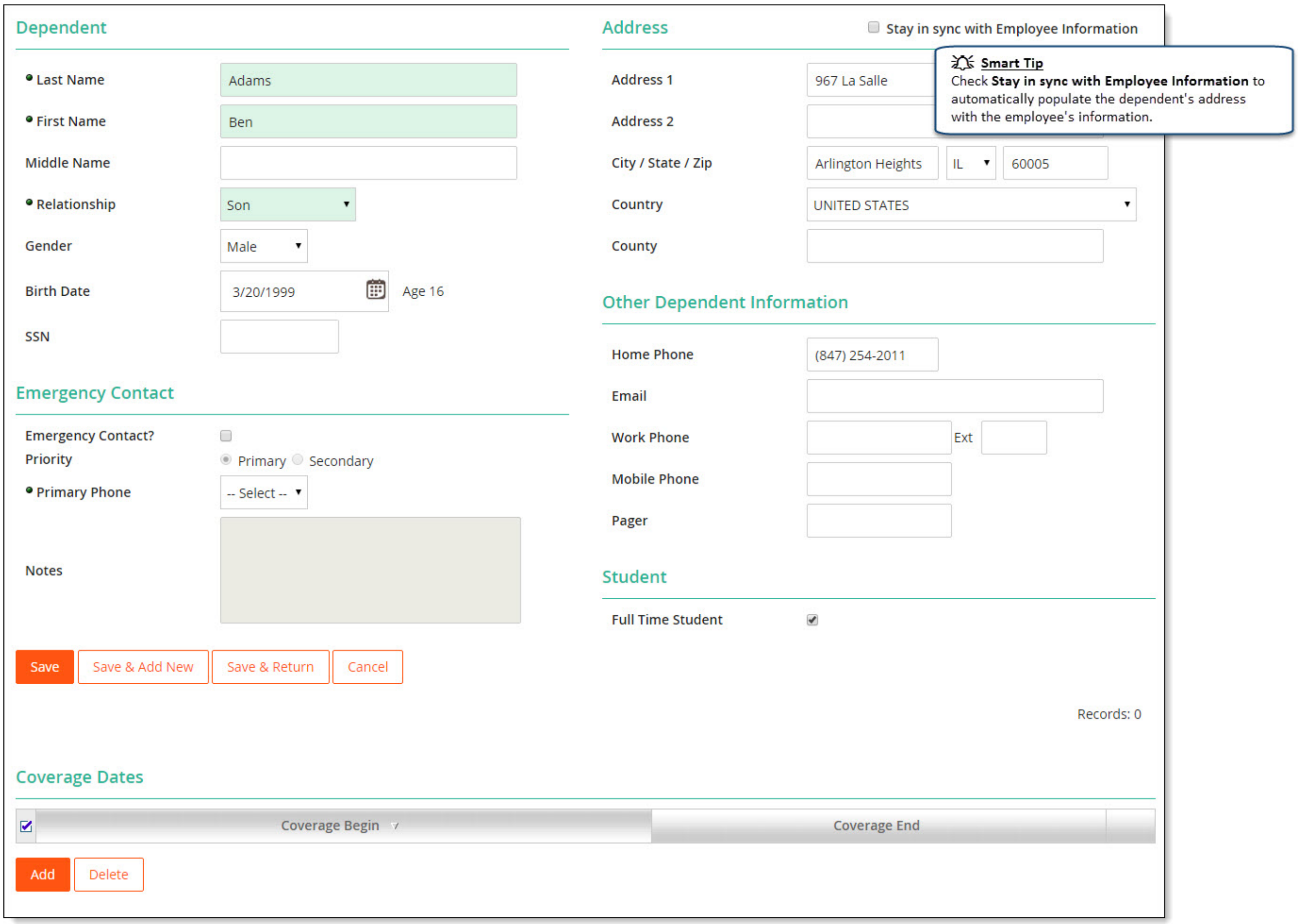
- Click the **Add** button to add a new dependent.
- Click the **Last Name** link to display or modify the dependent details.
- Check the box adjacent to the **Last Name** and click the **Delete** button to delete the dependent.

Dependents

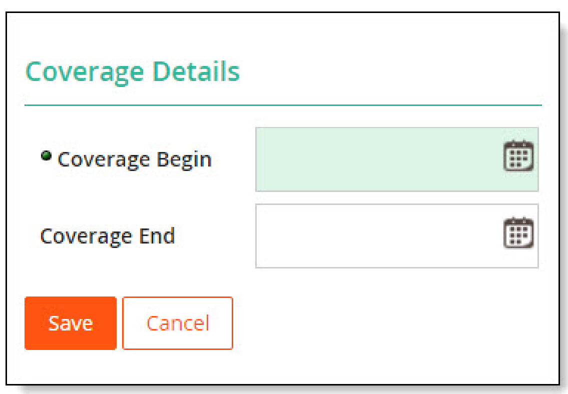
| ☑ | Last Name | First Name | Relationship | Gender | SSN | Birth Date |
|---|---|---|---|---|---|---|
| ☐ | Adams | Ben | Son | Male | 654-87-3216 | 03/20/1999 |
| ☐ | Adams | Ed | Husband | Male | 345769987 | 06/12/1970 |

Add Delete

1. Enter the **Last Name** (40 character limit), **First Name** (40 character limit), and **Middle Name** (20 character limit).
2. Select the **Relationship** from the drop down.
3. Select the **Gender** from the drop down.
4. Select or enter the **Birth Date**.
5. Enter the Social Security number in the **SSN** field.
6. If the dependent is an emergency contact, check the **Emergency Contact** box and select the **Primary Phone** from the drop down.
7. Enter additional information the **Notes** field.
8. Enter the applicable **Address**, **Phone**, and **Email** information.
9. Check the **Full Time Student** box, if applicable.



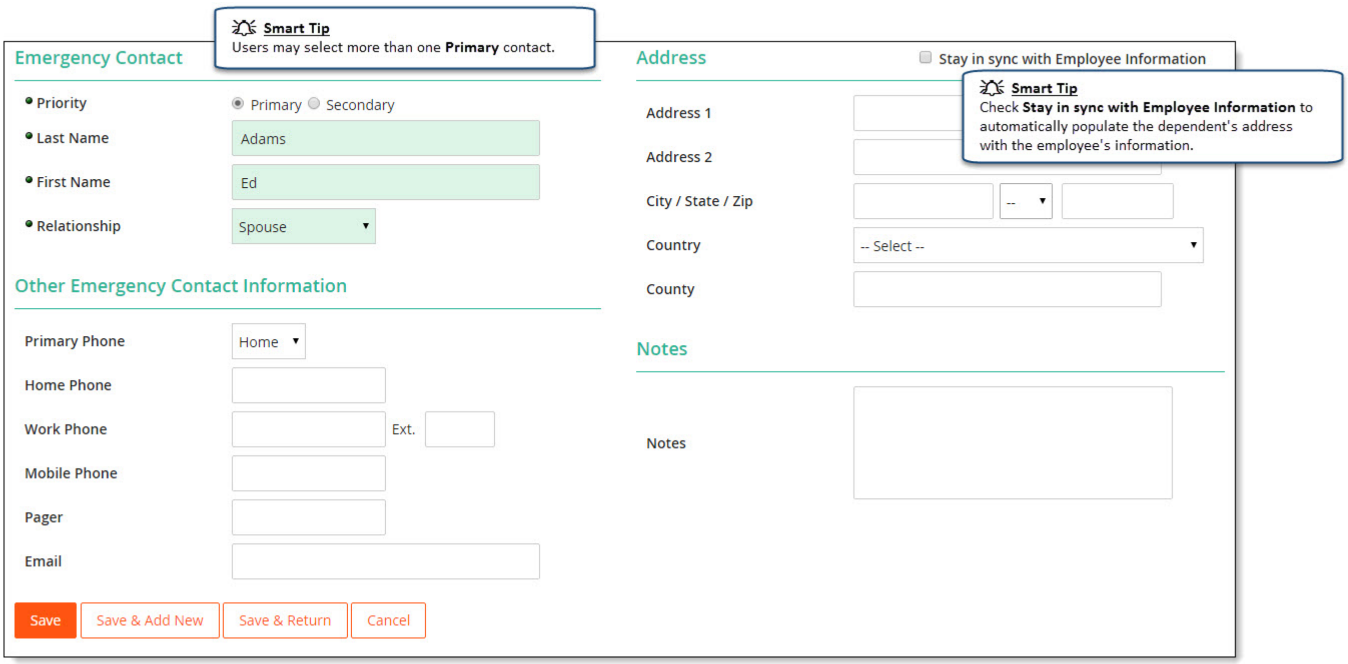

10. Once you **Save** the information, the **Coverage Dates** section will display.
    1. Click **Add** to add coverage information to the dependent.
    2. Enter or select the **Coverage Begin** date.
    3. Enter or select the **Coverage End** date (*if applicable*).
    4. Click **Save**.



## *EMERGENCY CONTACTS*

- Click the **Add** button to add a new emergency contact.
- Click the **Last Name** link to display or modify the emergency contact details.
- Check the box adjacent to the **Last Name** and click the **Delete** button to delete the dependent.

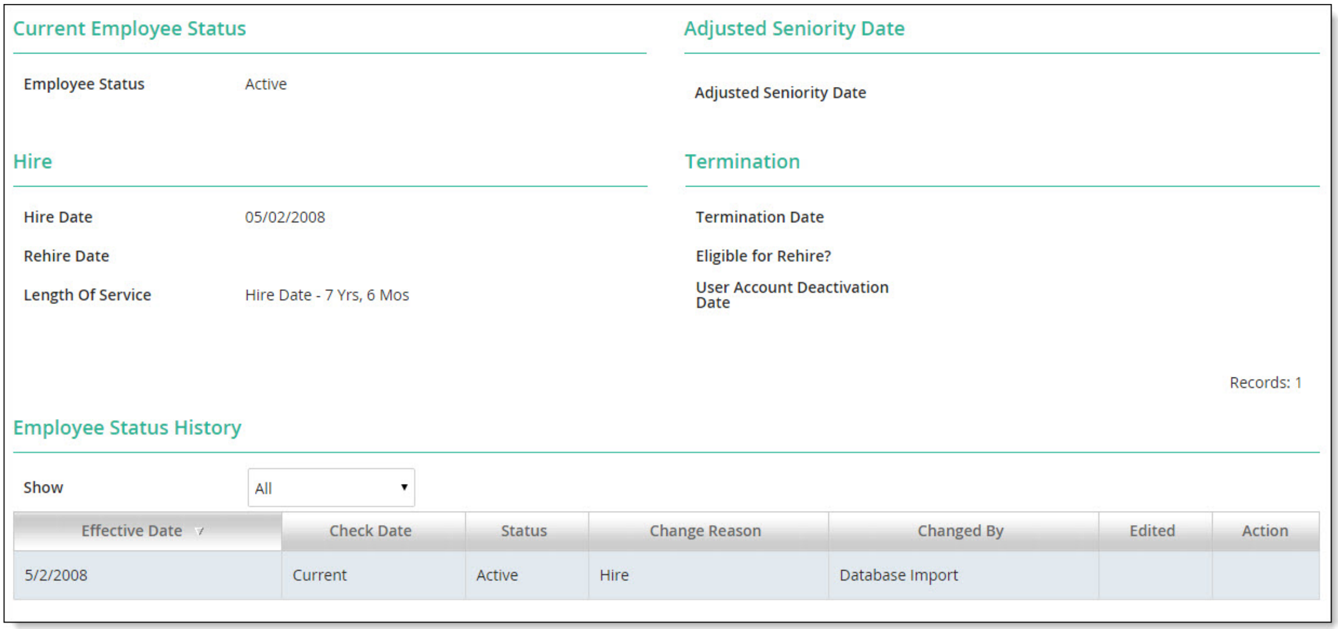

1. Select the **Priority**.
2. Enter the **Last Name** and **First Name**.
3. Select the **Relationship** from the drop down.
4. Select the **Primary Phone** from the drop down.
5. Enter the **Address**, **Phone**, and **Email** information.
6. Enter additional information in the **Notes** field (100 character limit).
7. **Save** the updated information.



## WORK

### *EMPLOYEE STATUS*

View employee status information.




### *DEPT & POSITION*

View supervisor, reviewer, position, home department cost center, pay settings, and union information.

## Current

**Effective Date** 05/20/2015

**Change Reason** Change Reviewer

## Supervisor / Reviewer

**Supervisor** FROST, EMMA [62]

**Reviewer** FROST, EMMA [62]

**Is Supervisor / Reviewer?**

## Cost Center(s)

**Division** 200 - Mid-Atlantic

**Branch** 301 - Finance

**Department** 110 - Sales - Inside

## Position

**Employment Type** Regular Full Time (30+ Hours)

**Position** FINANALYST - Financial Analyst

**Job Title** Financial Analyst

**EEO Class** 1 - Officials and Managers

**Work Comp** 8810 - Clerical

**Home Shift**

## Pay Settings

**Pay Group**

**OT Exempt?**

**Tipped**

**Minimum Wage Exempt?**

## Union

**Union**

**Affiliation Date**

**Union Position**

**Initiation Collected?**

**Dues Collected?**

Records: 5

## Dept / Position History

**Show** All

| Effective Date | Check Date | Change Reason | Changed By | Edited | Action |
|---|---|---|---|---|---|
| 5/20/2015 | Current | Change Reviewer | Emily Alba | | |
| 5/13/2015 | History | Change Reviewer | Emily Alba | ✔ | |
| 12/10/2012 | History | Position Change | oashrafi | ✔ | |
| 1/31/2011 | History | | Emily Alba | | |
| 10/28/2010 | History | Initial | Database Import | | |

## *LOCATION*

View work site information.

### Work Location

| | |
|---|---|
| Work Location | -- Use default Company Address |
| Address 1 | 3850 N Wilke Rd |
| Address 2 | |
| City / State / Zip | ARLINGTON HEIGHTS IL 60004 |
| Country | UNITED STATES |
| County | COOK |

### Work Phone / Email / Mail Stop

| | |
|---|---|
| Work Phone | Ext |
| Mobile Phone | |
| Pager | |
| Email | |
| Mail Stop | |

### *Important Notes*

- Temporary password resets are emailed to the work email address entered in the **Email** field.
- Employees can have notifications sent to this work email address in addition to having them sent to the Message Center.

## *ELIGIBILITY*

View information regarding eligibility for work.

### Work Authorization

| | |
|---|---|
| Work Authorization | |
| USCIS or Admission Number | |
| Visa Type | |
| Expiry Date | |

### I-9 Verification

| | |
|---|---|
| I-9 Verified? | ☐ |
| Date Verified | |
| Notes | |

### SSN Verification

| | |
|---|---|
| SSN | xxx-xx-1047 |
| SSN Verified? | ☐ |
| Date Verified | |
| Notes | |

## *EMPLOYEE I-9 EMPLOYMENT ELIGIBILITY*

Click **View** to review the I-9 work authorization document generated when the employee was hired.

### Work Authorization

| | |
|---|---|
| Work Authorization | A citizen of the United States |
| USCIS Number | |
| Visa Type | |
| Foreign Passport Number | |
| Attested By | Emily Alba 2/29/2016 |
| Expiration Date | |
| I94 Admission Number | |
| Country of Issuance | |

### I9

| Document Name | Received Date | Uploaded Date | Action |
|---|---|---|---|
| Generated I9 Document.pdf | 02/29/2016 | 02/29/2016 | View |

## *AUTHORIZATION TRACKING*

View work authorization status.

- Click the **Date** link to display the details.

Authorization Activity Tracking

| ☑ | Date | Type | Status | Attorney | Attorney Phone | Notes | Updated By |
|---|---|---|---|---|---|---|---|
| ☐ | 11/12/2013 | I-9 Verification | Verified | | | | Alba, Emily [16] |

- Click the **Cancel** button to return to the main screen.

Authorization Activity Tracking Details

| | |
|---|---|
| Work Authorization Type | I-9 Verification |
| Date | 11/12/2013 |
| Status | Verified |
| Attorney Name | |
| Attorney Phone | |
| Notes | |

Cancel

## *STATUTORY*

Vets 100/100A Tracking

| | |
|---|---|
| Enable? | ☑ |
| Hiring Location | Headquarters |

New Hire Medical Availability

| | |
|---|---|
| Medical Coverage Available? | ☑ |
| Medical Coverage Date | 1/1/2015 |

Vets 100

| | |
|---|---|
| Job Category | 2 - Professionals |
| Covered Veteran | ☐ Special Disabled Veterans<br>☐ Vietnam Era Veterans<br>☐ Recently Separated Veterans<br>☑ Other Protected Veterans |

Vets 100A

| | |
|---|---|
| Job Category | |
| Covered Veteran | ☐ Disabled Veterans<br>☐ Active Duty Wartime Or Campaign Badge Veteran<br>☐ Armed Forces Service Medal Veterans<br>☐ Recently Separated Veterans |

## PAYROLL SETUP

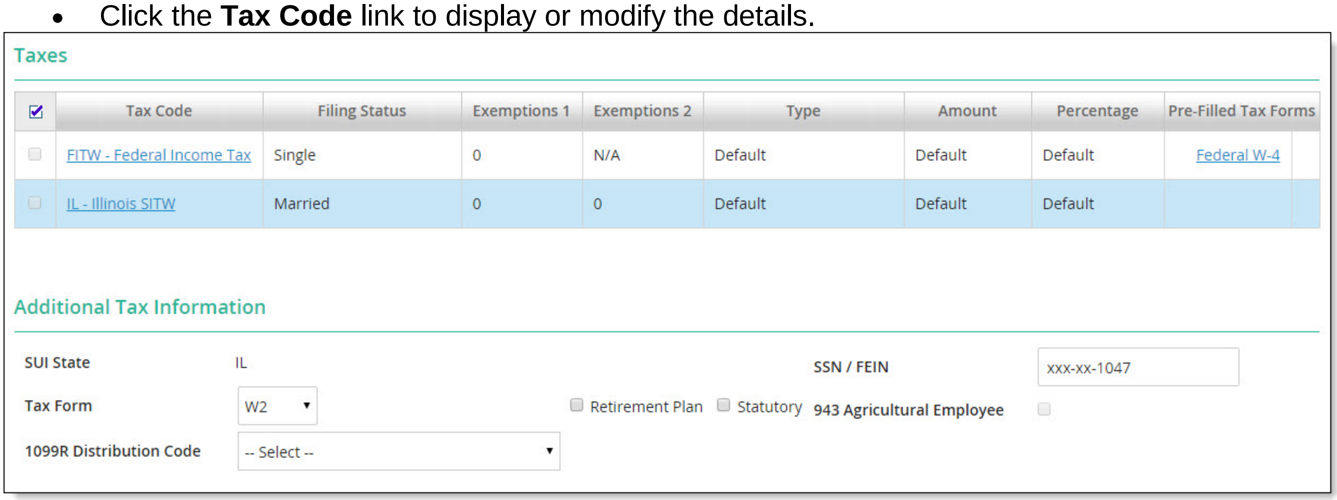
### *RATES*

View pay rates or salary amounts. The display includes rate history and information on additional rates.

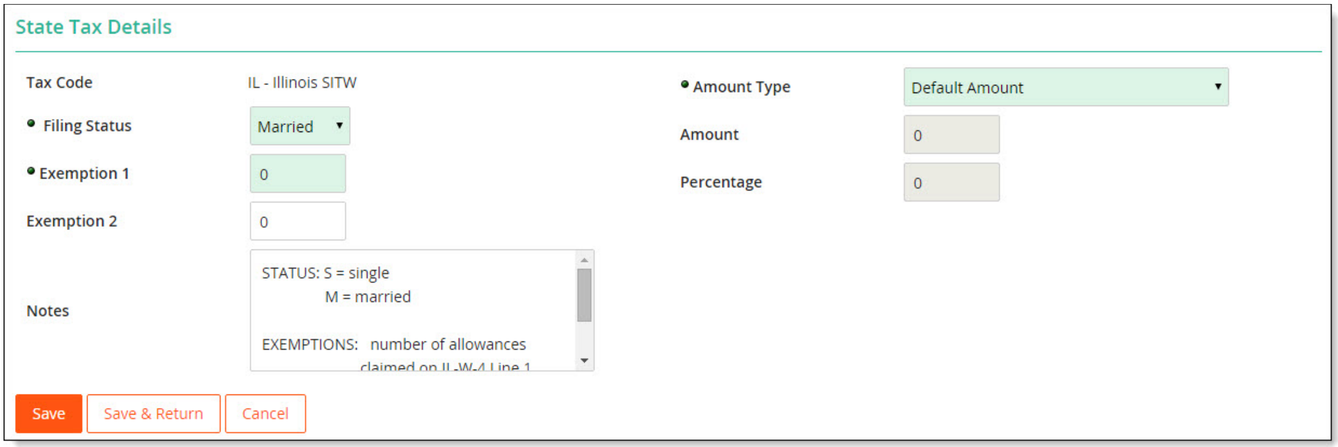

### *TAXES*

View or edit tax information.

- Click the **Tax Code** link to display or modify the details.

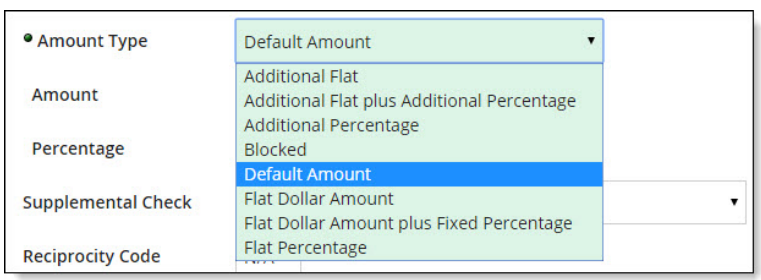



1. Select a **Filing Status** from the drop down.
2. Enter the number of exemptions in the **Exemption 1** field and the applicable number of exemptions in the **Exemption 2** field (*if applicable*).
3. Select the applicable Amount Type if different from the Default Amount.
4. Enter an **Amount**. This field is enabled when a dollar **Amount Type** is selected from the drop down.
5. Enter a **Percentage** as a whole number not as a decimal (e.g., 10% should be entered as 10.00 instead of 0.10). This field is enabled when a percentage Amount Type is selected from the drop down.
6. For State Taxes, enter the **Percentage Allocation** for the state selected.
7. Designate the **SUI** from the drop down.
8. **Save** the updated information.




## *AMOUNT TYPES*

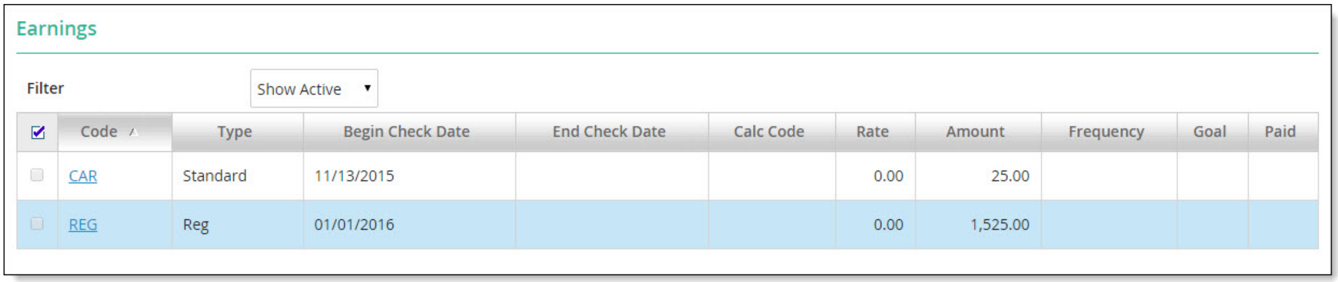
- **Additional Flat**: Add an additional flat dollar amount to what the employee should have withheld.
- **Additional Flat plus Additional Percentage**: Add an additional flat dollar amount and a percentage of taxable wages to what the employee should have withheld.
- **Additional Percentage**: Add a percentage of taxable wages to what the employee should have withheld.
- **Blocked**: No tax amount should be taken but the employee's wages are still reflected as taxable.
- **Flat Dollar Amount**: Withhold only the amount entered within the **Amount** field.
- **Flat Dollar Amount plus Fixed Percentage**: Withhold the amount entered within the **Amount** field and the percentage of taxable wages entered within the **Percentage** field.
- **Flat Percentage**: Withhold only the percentage of taxable wages entered within the **Percentage** field.



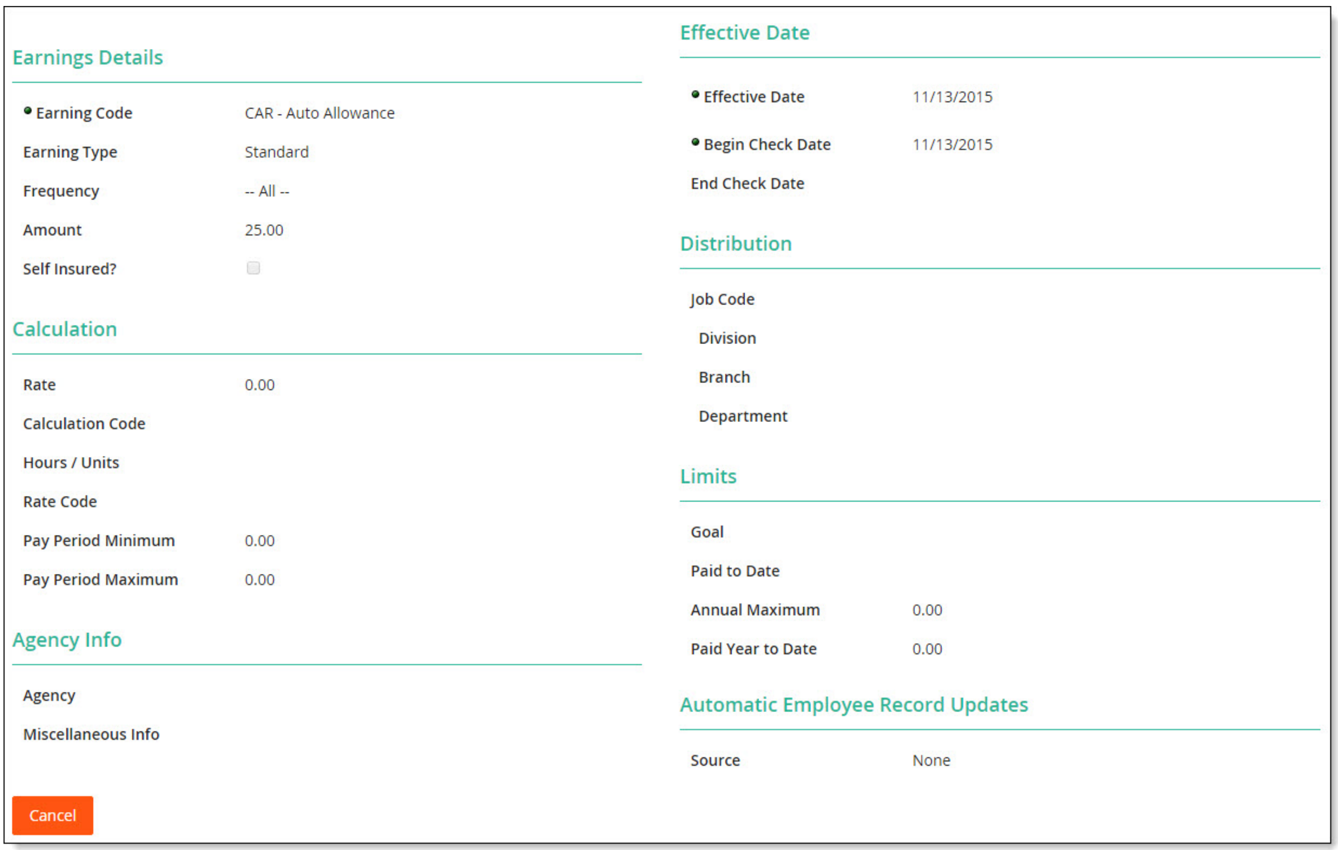
## *EARNINGS*

View regularly scheduled recurring earnings.

- Click the **Code** link to display its details.



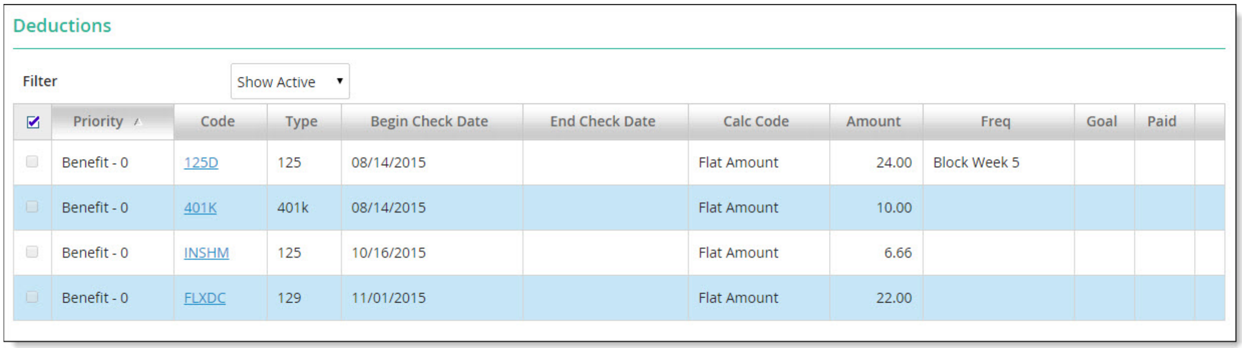

- Click the **Cancel** button to return to the main screen.



## *DEDUCTIONS*

View regularly scheduled recurring deductions.

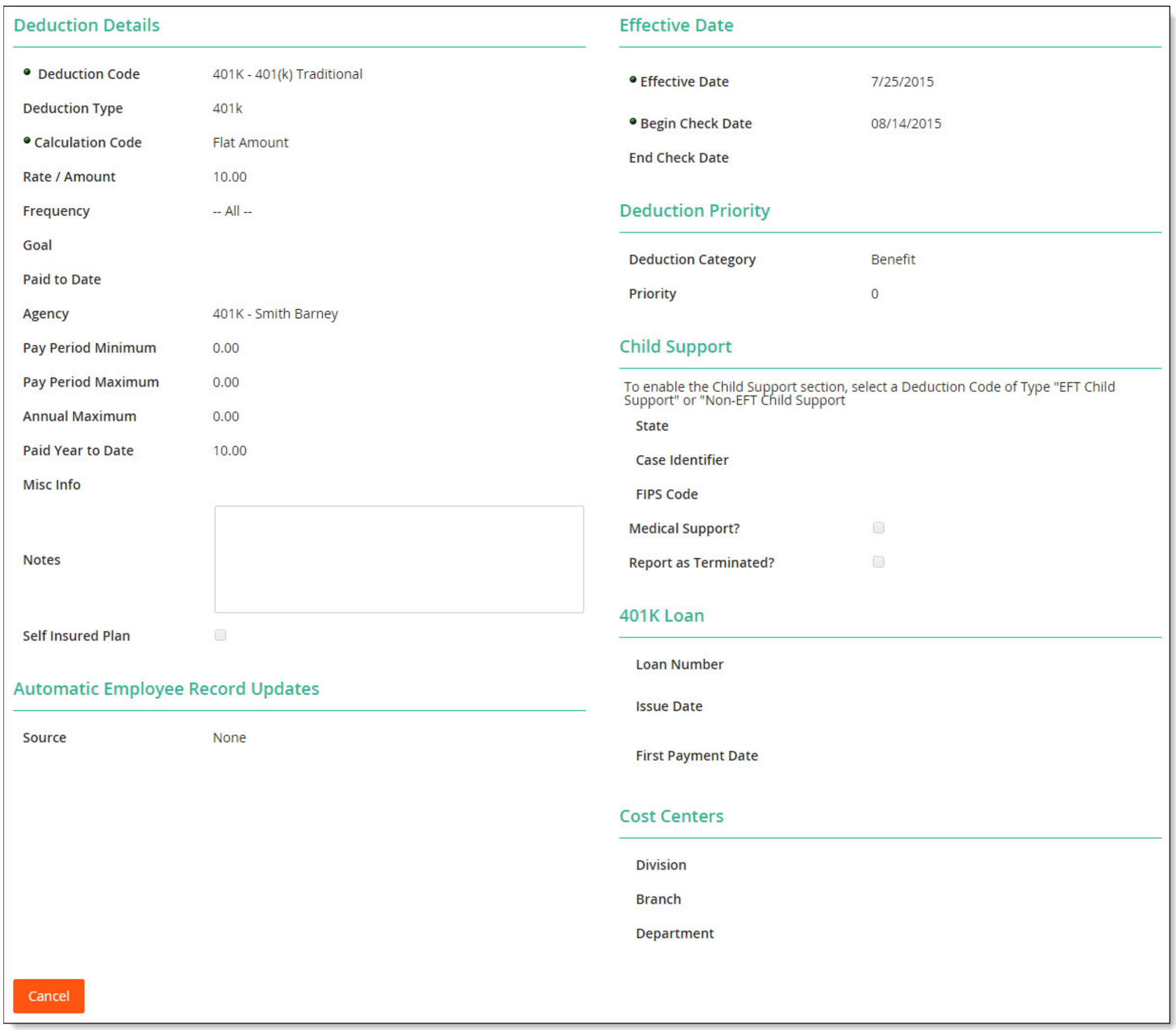
- Click the **Deduction Code** link to display its details.


Deductions

Filter: Show Active

| Priority | Code | Type | Begin Check Date | End Check Date | Calc Code | Amount | Freq | Goal | Paid |
|---|---|---|---|---|---|---|---|---|---|
| Benefit - 0 | 125D | 125 | 08/14/2015 | | Flat Amount | 24.00 | Block Week 5 | | |
| Benefit - 0 | 401K | 401k | 08/14/2015 | | Flat Amount | 10.00 | | | |
| Benefit - 0 | INSHM | 125 | 10/16/2015 | | Flat Amount | 6.66 | | | |
| Benefit - 0 | FLXDC | 129 | 11/01/2015 | | Flat Amount | 22.00 | | | |

- Click the **Cancel** button to return to the main screen.



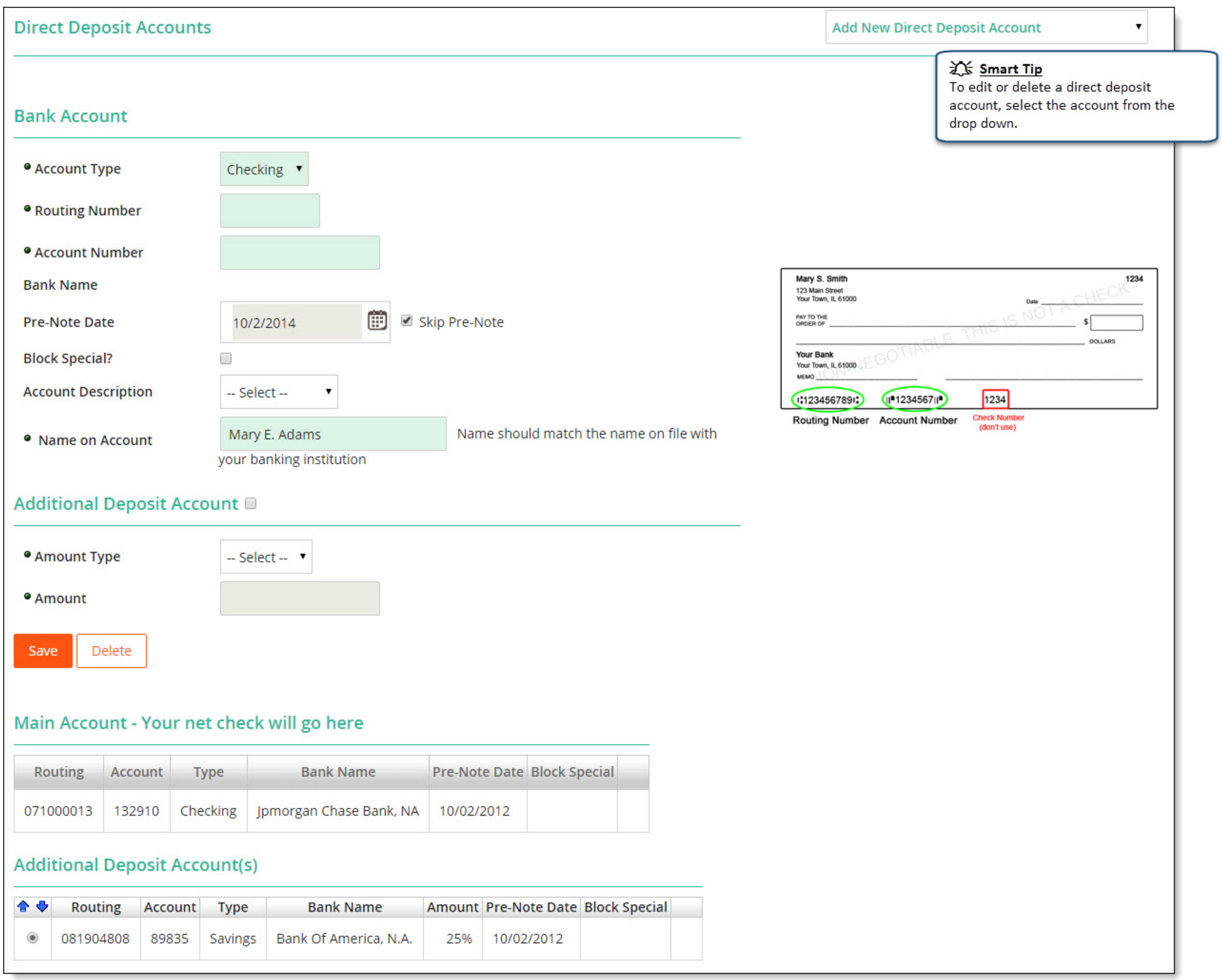

### *Important Notes*

- Users may be able to edit deductions in the self service portal. Changes made by employees will not take effect until a Company Administrator approves them.

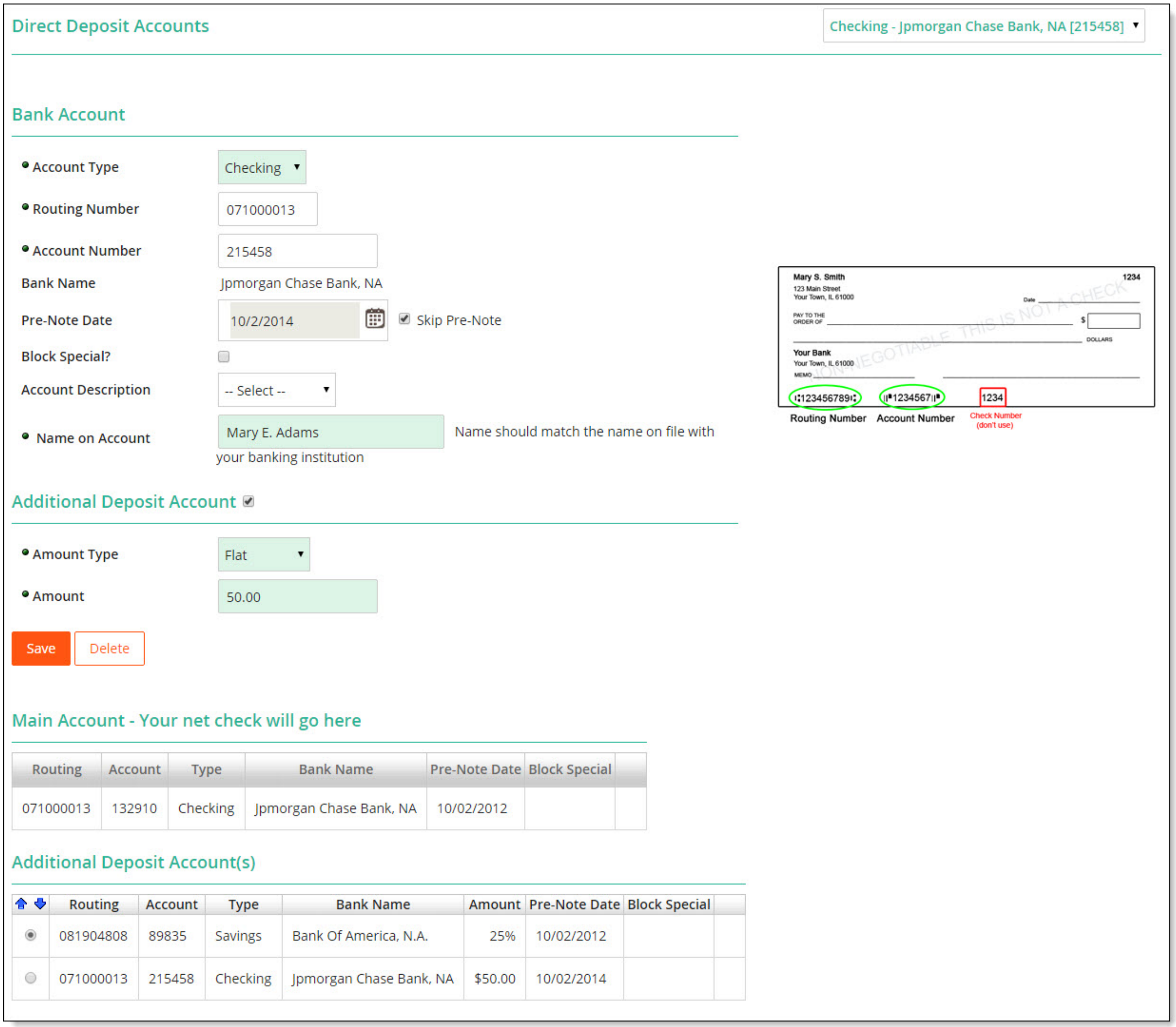
## *DIRECT DEPOSIT*

Add, edit, or delete direct deposit account information. Click the **X** in the top-right corner of your screen to close this screen and return to the self service portal.

1. To add a new direct deposit account, select **Add New Direct Deposit Account** from the drop down.
2. Select the applicable **Account Type** (Checking, Savings, or Pay Card) from the drop down.
3. Enter the nine digit ABA Transit **Routing Number** without dashes or spaces.
4. Enter the **Account Number** without spaces or symbols (17 character limit).
5. Enter the **Name on Account** (30 character limit).
6. If this is the main account, **Save** the updated information to deposit the entire paycheck to this main account. If this is an additional account, check the **Additional Deposit Account** box.
7. Select the **Amount Type** from the drop down to indicate whether the numeric value in the **Amount** field should be a Flat dollar amount, Percent, or Net Minus. Selecting Net Minus will issue a live check for the dollar amount entered into the **Amount** field with the balance being deposited into the corresponding bank account.
8. Enter the **Amount** based on the **Amount Type**.
9. **Save** the updated information. The specified amount will be deposited in each additional account listed and the net check will be deposited into the main account.



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




### *Important Notes*

- The system will not allow an incorrect **Routing Number** to be saved.
- Selecting Net Minus will issue a live check for the dollar amount entered into the **Amount** field with the balance being deposited into the corresponding bank account.

## *LABOR ALLOCATION*

View specific distribution of wages.

### Labor Allocation

- Allocation %

### Select Earning Code / Code Group

- An Earning Code or Code Group is **Required**

**Earning Code** Gross Earnings

### Select Job Code / Cost Center(s)

- A Job Code, Workers Comp Code or at least one Cost Center is **Required**

| Override | Home |
|---|---|
| **Division** | 200 - Mid-Atlantic |
| **Branch** | 301 - Finance |
| **Department** | 110 - Sales - Inside |
| **Job Code** | |
| **Workers Comp Code** | |

Records: 2

**Total Allocation: 100.00%**

Note: Total allocation must be 100%. Any unallocated amount will be assigned to the employee's home Cost Center(s)

| | % | Division | Branch | Department | Job Code | Workers Comp | Earning Code or Code Group |
|---|---|---|---|---|---|---|---|
| | 25.0000 | 200 - Mid-Atlantic | 301 - Finance | 110 - Sales - Inside | | | Gross Earnings |
| | 75.0000 | 200 - Mid-Atlantic | 301 - Finance | 120 - Sales - Outside | | | Gross Earnings |

## PAY

### *CURRENT CHECKS*

View current check information. Users are able to print a pay stub by clicking the **Download Printable Version** button on the bottom of this screen.

To view a paycheck or direct deposit voucher issued prior to the current check, click the **Check Date** drop down and select the applicable check date to display the check or voucher.

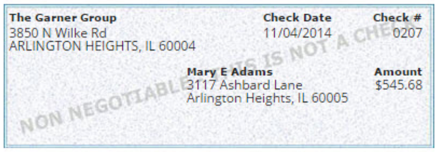
The Employee section, which displays the **Employee Id** and **Department**, can be expanded or collapsed by clicking the double arrows. The **Check** or **Voucher #**, **Delivery Location**, **Check Date**, **Period Begin** and **End Dates**, **Gross Earnings**, **Gross YTD**, **Net Earnings**, and **Net YTD** are displayed in the Check section. Depending on the company's configuration, the bottom sections of the screen will display applicable details about Direct Deposits, Earnings, Deductions, Benefits, Taxes, and Time Off.

## Employee

| | | | |
|---|---|---|---|
| **Employee Id** | 3 | **Division** | 400 - Central |
| **Salary** | $1,000.00 | **Branch** | 201 - Business Development |
| | | **Department** | 600 - Client Support |

## Check

**Show Adjustment Checks** No ▾ **Check Date** 11/04/2014 - C0207 ▾




| | | |
|---|---|---|
| **Check # - Delivery Location** | 207 | Default |
| **Check Date** | 11/04/2014 | |
| **Period Begin Date - End Date** | 10/19/2014 | 10/25/2014 |
| **Gross Earnings - YTD** | $1,025.00 | $1,025.00 |
| **Net Earnings - YTD** | $545.68 | $545.68 |

## Direct Deposits

| Bank | Account | Type | Amount | YTD |
|---|---|---|---|---|

## Earnings

| Description | Hrs | Rate | Current | YTD |
|---|---|---|---|---|
| 401K MATCH | | | $51.25 | $51.25 |
| Auto Allowance | | | $25.00 | $25.00 |
| Employer Paid Dental | | | $20.00 | $20.00 |
| Employer Paid HDHP | | | $250.00 | $250.00 |
| REGULAR | | $25.00 | $1,000.00 | $1,000.00 |
| Totals | | | $1,025.00 | $1,025.00 |

## Taxes

| Description | Current | YTD |
|---|---|---|
| Federal Income Tax | $49.75 | $49.75 |
| Illinois SITW | $32.28 | $32.28 |
| Medicare | $11.14 | $11.14 |
| OASDI | $47.65 | $47.65 |
| Totals | $140.82 | $140.82 |

## Deductions

| Description | Current | YTD |
|---|---|---|
| HSA | $100.00 | $100.00 |
| Dental Insurance | $31.50 | $31.50 |
| HDHP PPO Medical | $125.00 | $125.00 |
| Totals | $256.50 | $256.50 |

## Time Off

| Description | Available | Taken |
|---|---|---|
| Personal | | |
| Sick | 0.00 | |
| Vacation | -0.62 | 208.00 |

## Benefits

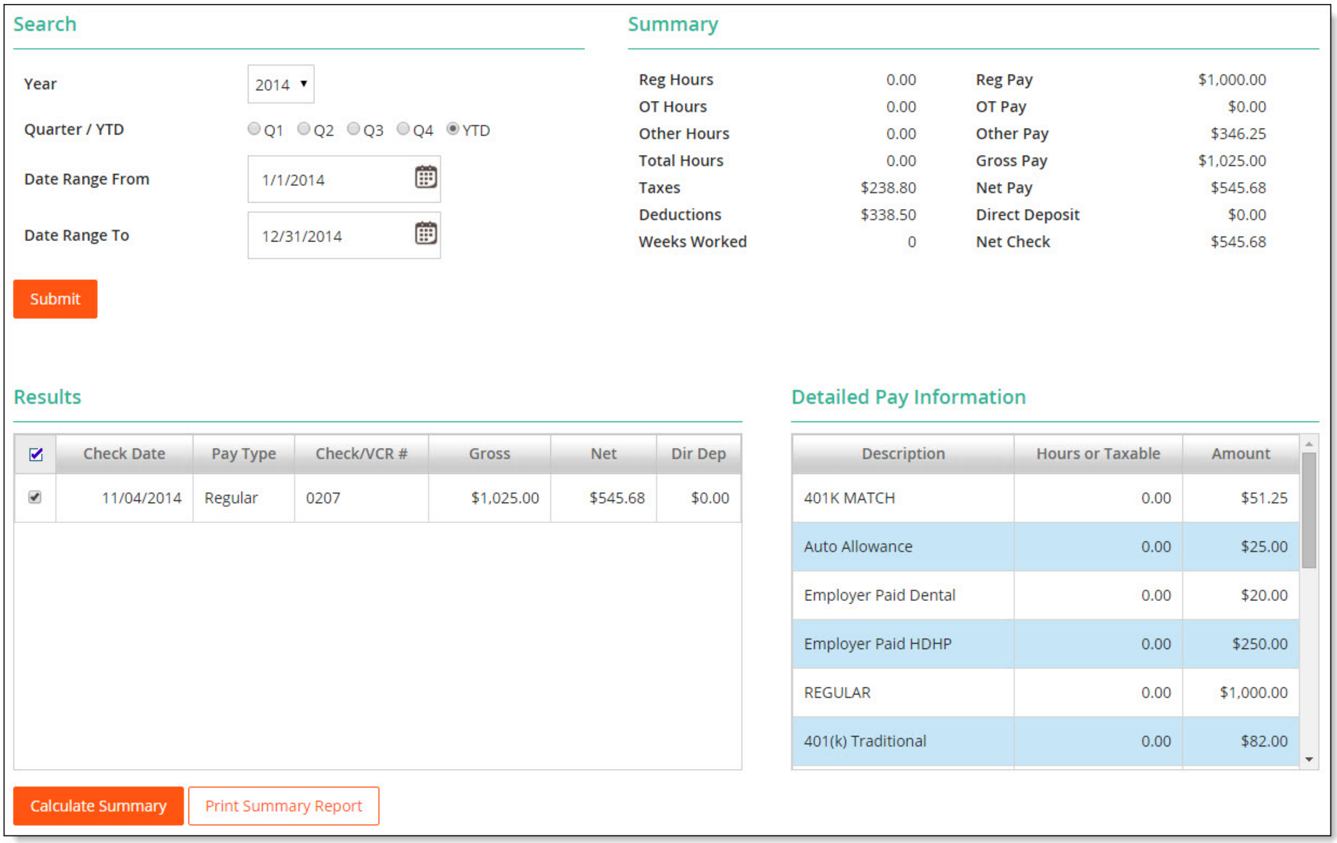
| Description | Current | YTD |
|---|---|---|

Download Printable Version

## *CHECK HISTORY*

Search for checks in a specific date range.

- Select a **Date Range From** and **Date Range To**, populating the checks to display.
- Click the **Submit** button to display the results.
- To summarize only certain checks in the specified date range, check the box adjacent to the applicable checks in the Results section.
- Click the **Calculate Summary** button to display the sum totals of the selected checks in the Summary and Detailed Pay Information sections.
- Click the **Print Summary Report** button to print a copy of the Check History Summary Report.



## *TAX FORMS*

View and print W2s, 1099s, and 1095-Cs that have been processed by Paylocity.

- Click the **Tax Year** link to view or print a copy of the tax form.

Tax Forms

| Tax Year | Fed Wages | Fed Witholding | SS Wages | SS Witholding | Medicare Wages | Medicare Witholding | 1095-C |
|---|---|---|---|---|---|---|---|
| 2012 | $19,576.00 | $1,516.38 | $22,064.00 | $926.71 | $22,064.00 | $319.92 | |
| 2011 | $30,964.00 | $3,437.32 | $33,240.00 | $1,396.08 | $33,240.00 | $481.96 | |

- Close the PDF file to return to the main screen.

**Copy C - FOR EMPLOYEE'S RECORDS ONLY** **2012** OMB No. 1545-0008

| | | |
|---|---|---|
| a Control number<br>PROC1<br>1 | 1 Wages, tips, other comp.<br>40,268.00 | 2 Federal income tax withheld<br>6,740.06 |
| | 3 Social security wages<br>42,698.00 | 4 Social security tax withheld<br>1,793.33 |
| b Employer ID number<br>00-5554442 | 5 Medicare wages and tips<br>42,698.00 | 6 Medicare tax withheld<br>619.12 |

c Employer's name, address, and ZIP code
The Garner Group
3850 N Wilke Rd
ARLINGTON HEIGHTS, IL 60004

d Employee's social security number 987-65-4321

e Employee's name, address, and ZIP code
Emily I Alba
117 Bayview Circle
Hermosa Beach, CA 90254

| | | |
|---|---|---|
| 7 Social security tips<br>0.00 | 8 Allocated tips<br>0.00 | 9 Advance EIC payment<br>0.00 |
| 10 Dependent care benefits<br>0.00 | 11 Nonqualified plans<br>0.00 | |

| | | | |
|---|---|---|---|
| 12a | D | 2,430.00 | 13 Statutory employee / Retirement plan: X / 3rd-party sick pay |
| 12b | DD | 11,032.00 | 14 Other |
| 12c | | | |
| 12d | | | |

| 15 State | Employer's State ID# | 16 State wages, tips, etc. | 17 State income tax |
|---|---|---|---|
| IL | 0000000000000 | 40,268.00 | 2,013.40 |

| 18 Local wages, tips, etc. | 19 Local income tax | 20 Locality name |
|---|---|---|
| N/A | N/A | N/A |

**Form W-2 Wage and Tax Statement** Dept. of the Treasury - IRS

This information is being furnished to the IRS. If you are required to file a tax return, a negligence penalty/other sanction may be imposed on you if this income is taxable and you fail to report it.

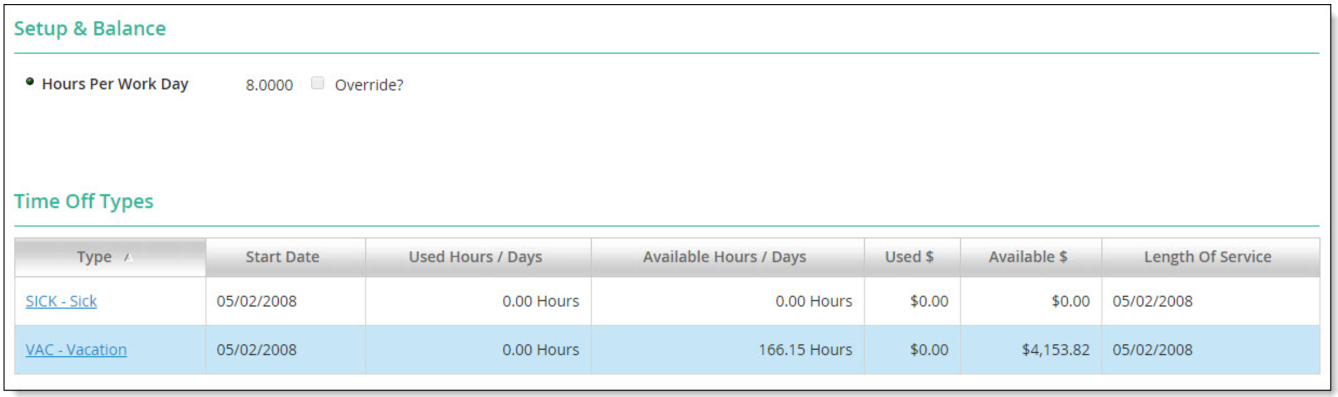
**Printed by Paylocity Payroll**
Page 2 of 2

## TIME OFF

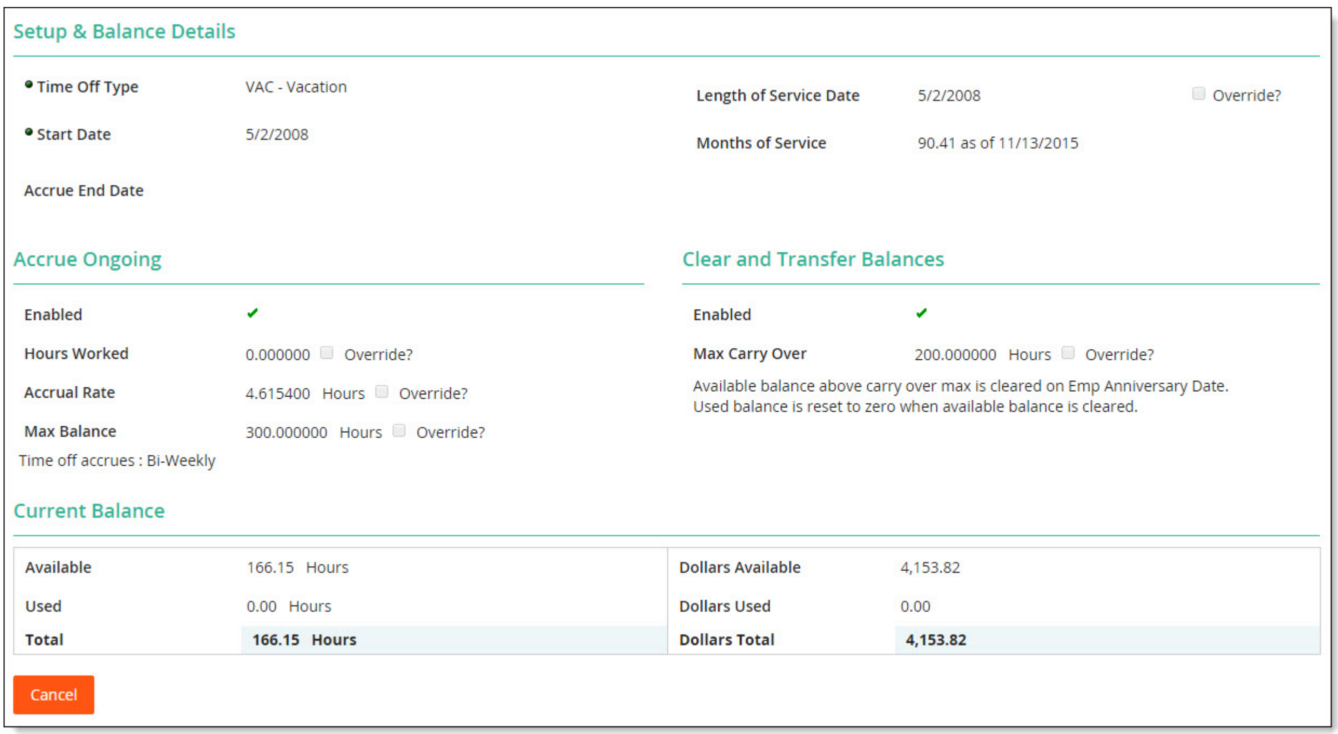
### *BALANCES*

View time off information.

- Click the **Type** link to display the details.

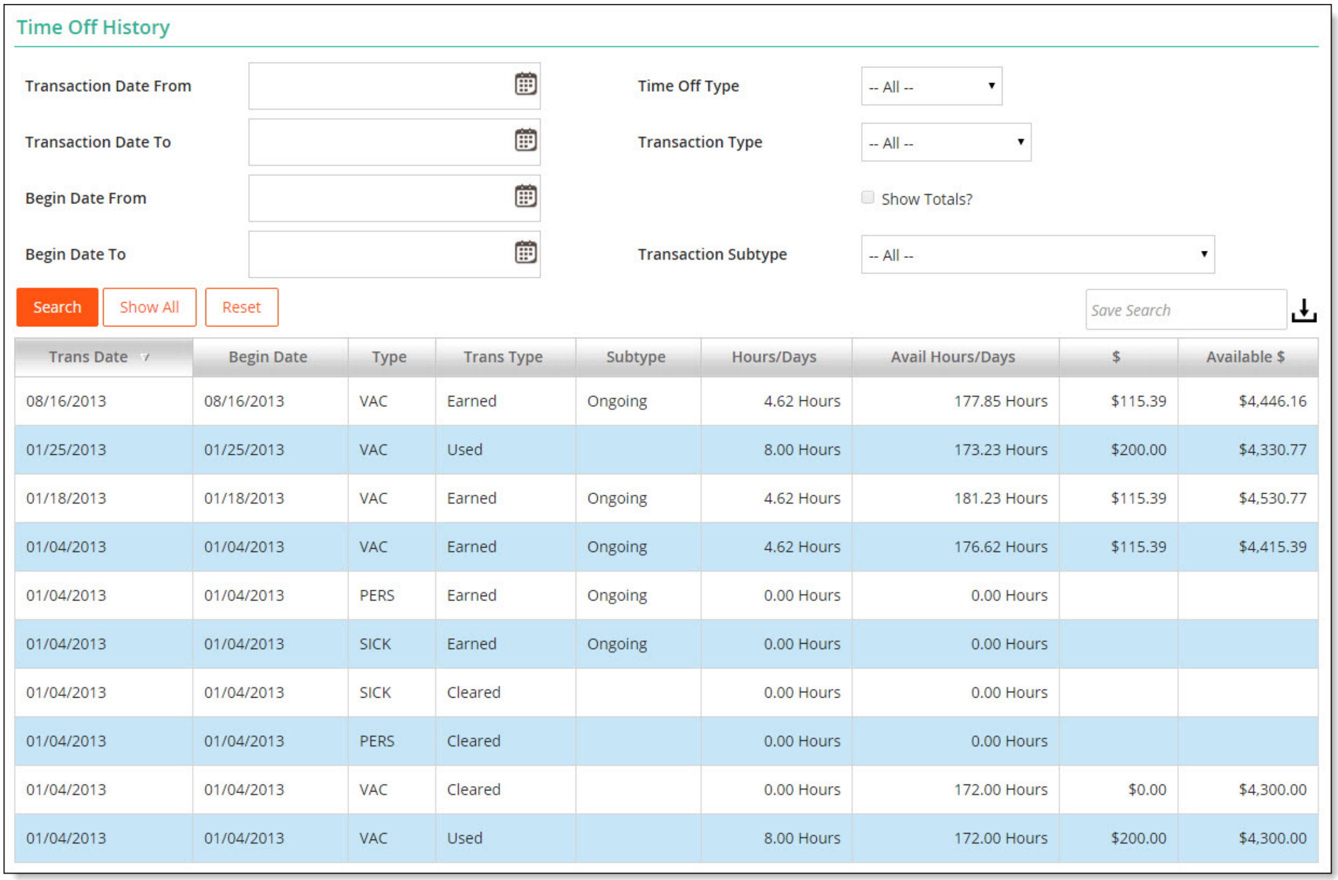



- Click the **Cancel** button to return to the main screen.



## *HISTORY*

View time off benefits earned and used per payroll and any manual adjustments made in Web Pay. Users can search for time off based on selected date ranges and/or types and display totals.


Time Off History

Transaction Date From | Time Off Type: -- All --
Transaction Date To | Transaction Type: -- All --
Begin Date From | Show Totals?
Begin Date To | Transaction Subtype: -- All --

Search | Show All | Reset | Save Search

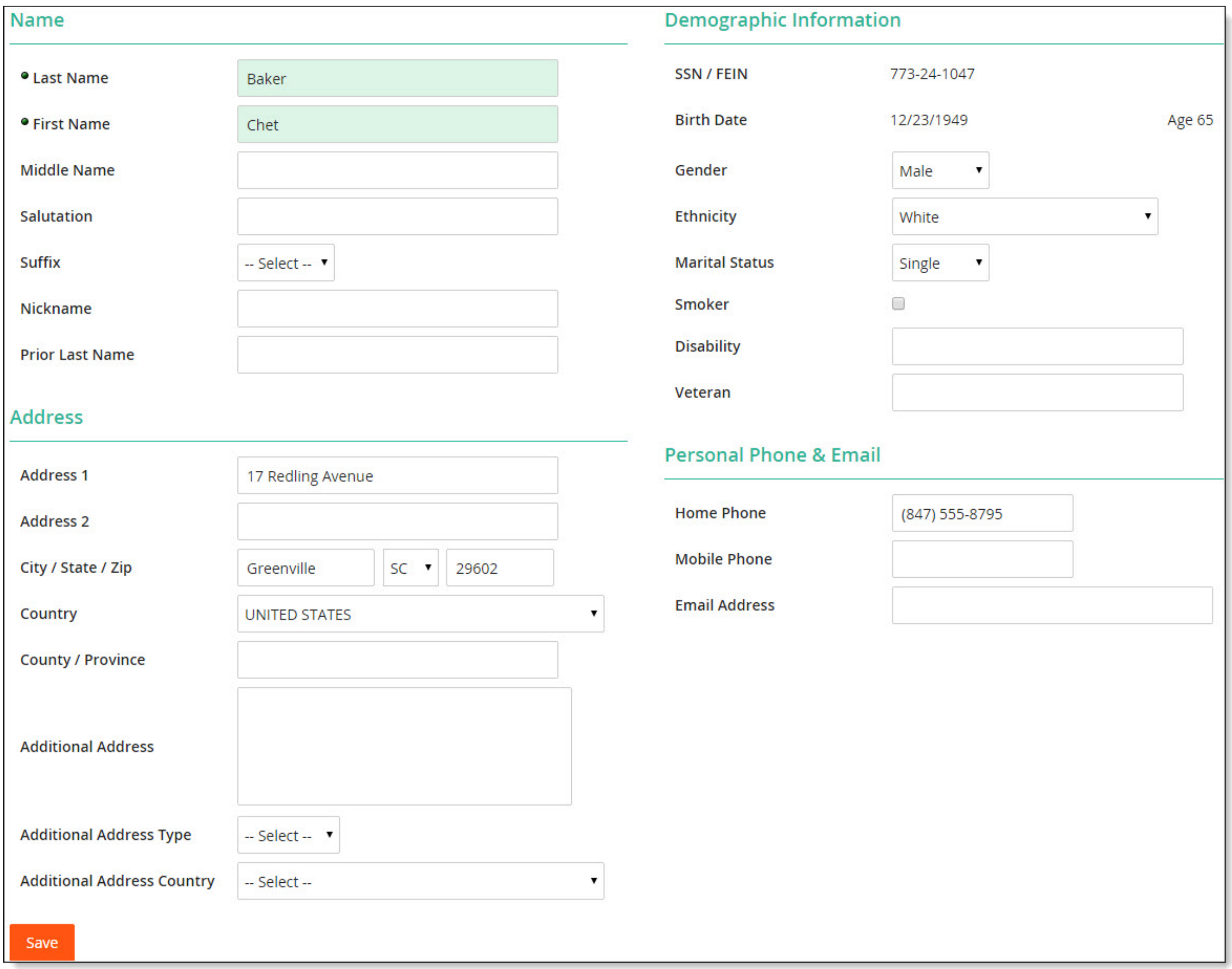
| Trans Date | Begin Date | Type | Trans Type | Subtype | Hours/Days | Avail Hours/Days | $ | Available $ |
|---|---|---|---|---|---|---|---|---|
| 08/16/2013 | 08/16/2013 | VAC | Earned | Ongoing | 4.62 Hours | 177.85 Hours | $115.39 | $4,446.16 |
| 01/25/2013 | 01/25/2013 | VAC | Used | | 8.00 Hours | 173.23 Hours | $200.00 | $4,330.77 |
| 01/18/2013 | 01/18/2013 | VAC | Earned | Ongoing | 4.62 Hours | 181.23 Hours | $115.39 | $4,530.77 |
| 01/04/2013 | 01/04/2013 | VAC | Earned | Ongoing | 4.62 Hours | 176.62 Hours | $115.39 | $4,415.39 |
| 01/04/2013 | 01/04/2013 | PERS | Earned | Ongoing | 0.00 Hours | 0.00 Hours | | |
| 01/04/2013 | 01/04/2013 | SICK | Earned | Ongoing | 0.00 Hours | 0.00 Hours | | |
| 01/04/2013 | 01/04/2013 | SICK | Cleared | | 0.00 Hours | 0.00 Hours | | |
| 01/04/2013 | 01/04/2013 | PERS | Cleared | | 0.00 Hours | 0.00 Hours | | |
| 01/04/2013 | 01/04/2013 | VAC | Cleared | | 0.00 Hours | 172.00 Hours | $0.00 | $4,300.00 |
| 01/04/2013 | 01/04/2013 | VAC | Used | | 8.00 Hours | 172.00 Hours | $200.00 | $4,300.00 |

## PERSONAL

### *DEMOGRAPHICS*

Add or edit general employee information.

1. Enter the **Last Name** (40 character limit), **First Name** (40 character limit), and **Middle Name** (20 character limit).
2. Enter a **Salutation** (10 character limit).
3. Select a **Suffix** from the drop down.
4. Enter a **Nickname** (20 character limit) and/or **Prior Last Name** (40 character limit).
5. Enter the **Address**, **Phone**, and **Email** information.
6. Select the **Gender** from the drop down.
7. Select the **Ethnicity** from the drop down.
8. Select the **Marital Status** from the drop down.
9. Check the **Smoker** box, if applicable.
10. Enter information in the **Disability** field (30 character limit).
11. Enter information in the **Veteran** field (30 character limit).
12. **Save** the updated information.

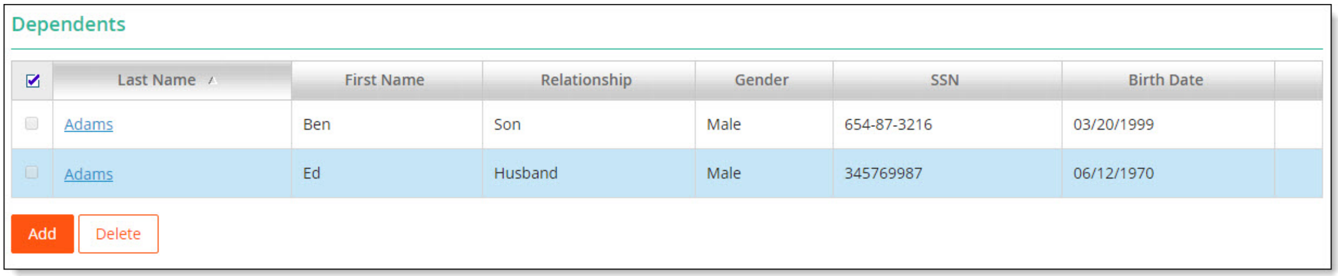



### *Important Notes*

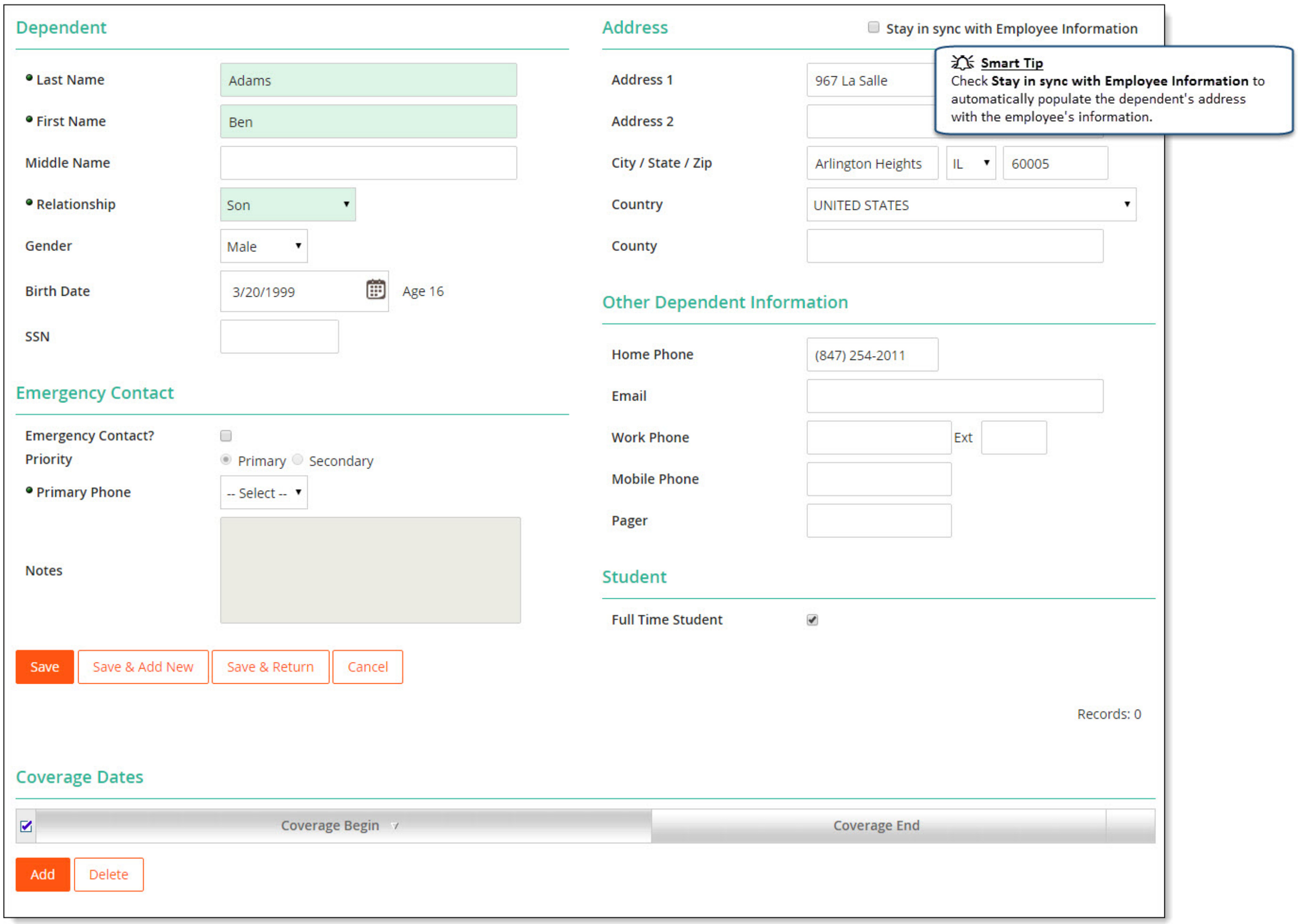
- Employees are not able to add or edit their own Social Security Number (**SSN**) or **Birth Date** information. Employees must contact the Company Administrator to make these changes.

## *DEPENDENTS*

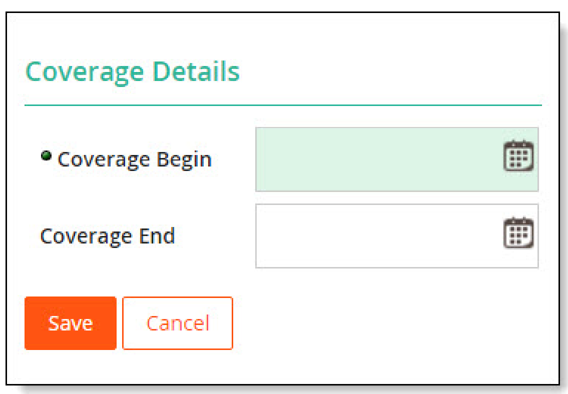
- Click the **Add** button to add a new dependent.
- Click the **Last Name** link to display or modify the dependent details.
- Check the box adjacent to the **Last Name** and click the **Delete** button to delete the dependent.




1. Enter the **Last Name** (40 character limit), **First Name** (40 character limit), and **Middle Name** (20 character limit).
2. Select the **Relationship** from the drop down.
3. Select the **Gender** from the drop down.
4. Select or enter the **Birth Date**.
5. Enter the Social Security number in the **SSN** field.
6. If the dependent is an emergency contact, check the **Emergency Contact** box and select the **Primary Phone** from the drop down.
7. Enter additional information the **Notes** field.
8. Enter the applicable **Address**, **Phone**, and **Email** information.
9. Check the **Full Time Student** box, if applicable.



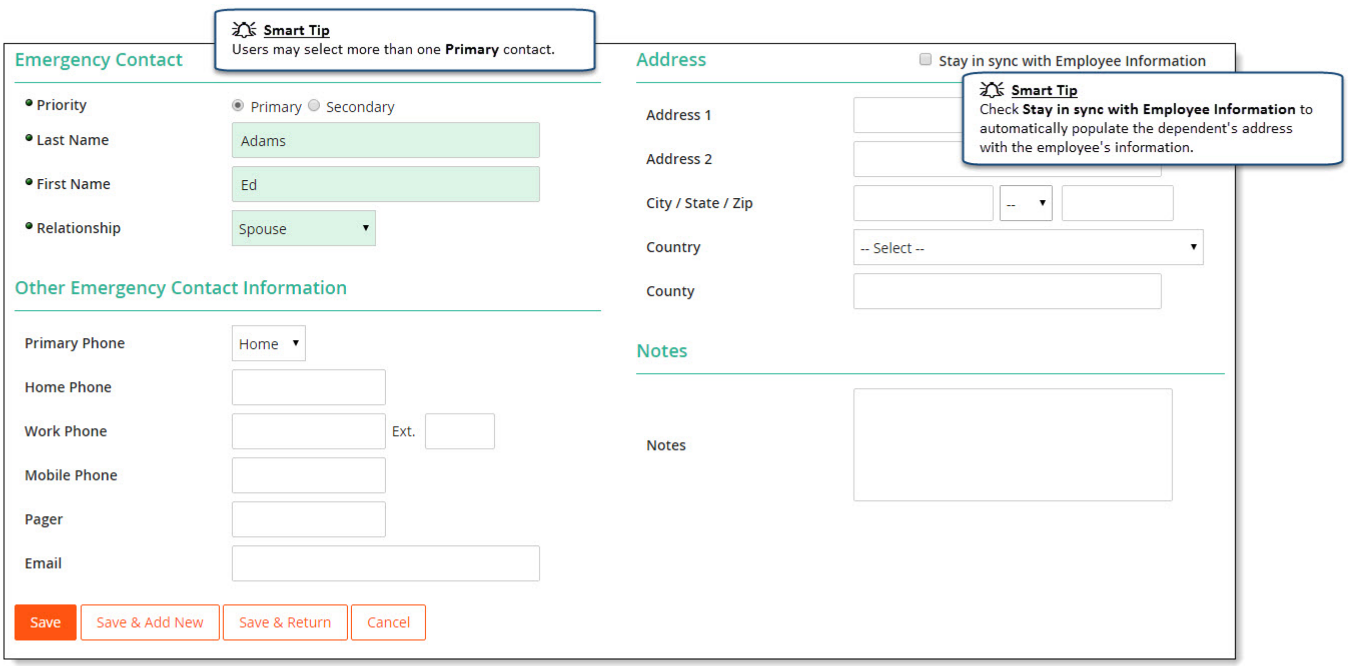

10. Once you **Save** the information, the **Coverage Dates** section will display.
    1. Click **Add** to add coverage information to the dependent.
    2. Enter or select the **Coverage Begin** date.
    3. Enter or select the **Coverage End** date (*if applicable*).
    4. Click **Save**.



## *EMERGENCY CONTACTS*

- Click the **Add** button to add a new emergency contact.
- Click the **Last Name** link to display or modify the emergency contact details.
- Check the box adjacent to the **Last Name** and click the **Delete** button to delete the dependent.

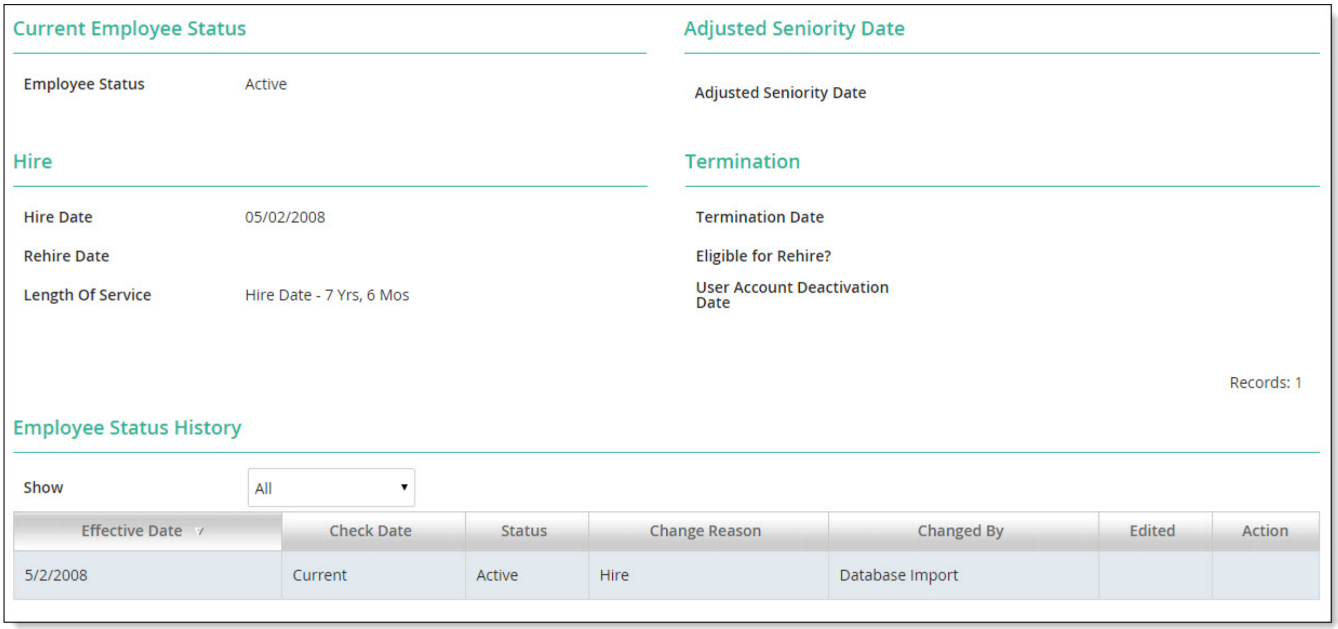

1. Select the **Priority**.
2. Enter the **Last Name** and **First Name**.
3. Select the **Relationship** from the drop down.
4. Select the **Primary Phone** from the drop down.
5. Enter the **Address**, **Phone**, and **Email** information.
6. Enter additional information in the **Notes** field (100 character limit).
7. **Save** the updated information.



## WORK

### *EMPLOYEE STATUS*

View employee status information.




### *DEPT & POSITION*

View supervisor, reviewer, position, home department cost center, pay settings, and union information.

## Current

| | | | |
|---|---|---|---|
| **Effective Date** | 05/20/2015 | **Change Reason** | Change Reviewer |

## Supervisor / Reviewer

| | |
|---|---|
| **Supervisor** | FROST, EMMA [62] |
| **Reviewer** | FROST, EMMA [62] |
| **Is Supervisor / Reviewer?** | |

## Cost Center(s)

| | |
|---|---|
| **Division** | 200 - Mid-Atlantic |
| **Branch** | 301 - Finance |
| **Department** | 110 - Sales - Inside |

## Position

| | |
|---|---|
| **Employment Type** | Regular Full Time (30+ Hours) |
| **Position** | FINANALYST - Financial Analyst |
| **Job Title** | Financial Analyst |
| **EEO Class** | 1 - Officials and Managers |
| **Work Comp** | 8810 - Clerical |
| **Home Shift** | |

## Pay Settings

**Pay Group**

**OT Exempt?**

**Tipped**

**Minimum Wage Exempt?**

## Union

**Union**

**Affiliation Date**

**Union Position**

**Initiation Collected?**

**Dues Collected?**

Records: 5

## Dept / Position History

**Show** All

| Effective Date | Check Date | Change Reason | Changed By | Edited | Action |
|---|---|---|---|---|---|
| 5/20/2015 | Current | Change Reviewer | Emily Alba | | |
| 5/13/2015 | History | Change Reviewer | Emily Alba | ✔ | |
| 12/10/2012 | History | Position Change | oashrafi | ✔ | |
| 1/31/2011 | History | | Emily Alba | | |
| 10/28/2010 | History | Initial | Database Import | | |

## *LOCATION*

View work site information.

### Work Location

| | |
|---|---|
| Work Location | -- Use default Company Address |
| Address 1 | 3850 N Wilke Rd |
| Address 2 | |
| City / State / Zip | ARLINGTON HEIGHTS IL 60004 |
| Country | UNITED STATES |
| County | COOK |

### Work Phone / Email / Mail Stop

| | |
|---|---|
| Work Phone | Ext |
| Mobile Phone | |
| Pager | |
| Email | |
| Mail Stop | |

### *Important Notes*

- Temporary password resets are emailed to the work email address entered in the **Email** field.
- Employees can have notifications sent to this work email address in addition to having them sent to the Message Center.

## *ELIGIBILITY*

View information regarding eligibility for work.

### Work Authorization

| | |
|---|---|
| Work Authorization | |
| USCIS or Admission Number | |
| Visa Type | |
| Expiry Date | |

### I-9 Verification

| | |
|---|---|
| I-9 Verified? | ☐ |
| Date Verified | |
| Notes | |

### SSN Verification

| | |
|---|---|
| SSN | xxx-xx-1047 |
| SSN Verified? | ☐ |
| Date Verified | |
| Notes | |

## *EMPLOYEE I-9 EMPLOYMENT ELIGIBILITY*

Click **View** to review the I-9 work authorization document generated when the employee was hired.

### Work Authorization

| | | | |
|---|---|---|---|
| Work Authorization | A citizen of the United States | Attested By | Emily Alba 2/29/2016 |
| USCIS Number | | Expiration Date | |
| Visa Type | | I94 Admission Number | |
| Foreign Passport Number | | Country of Issuance | |

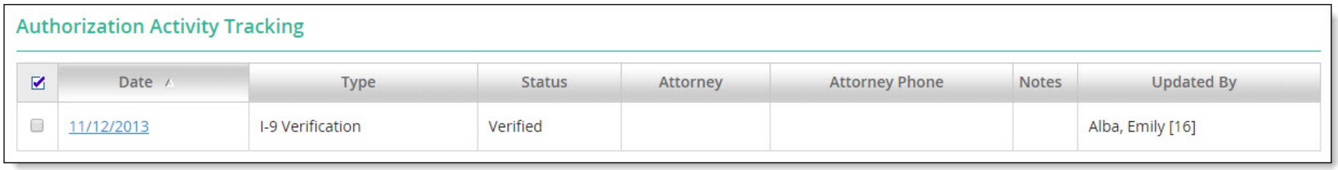
### I9

| Document Name | Received Date | Uploaded Date | Action |
|---|---|---|---|
| Generated I9 Document.pdf | 02/29/2016 | 02/29/2016 | View |

## *AUTHORIZATION TRACKING*

View work authorization status.

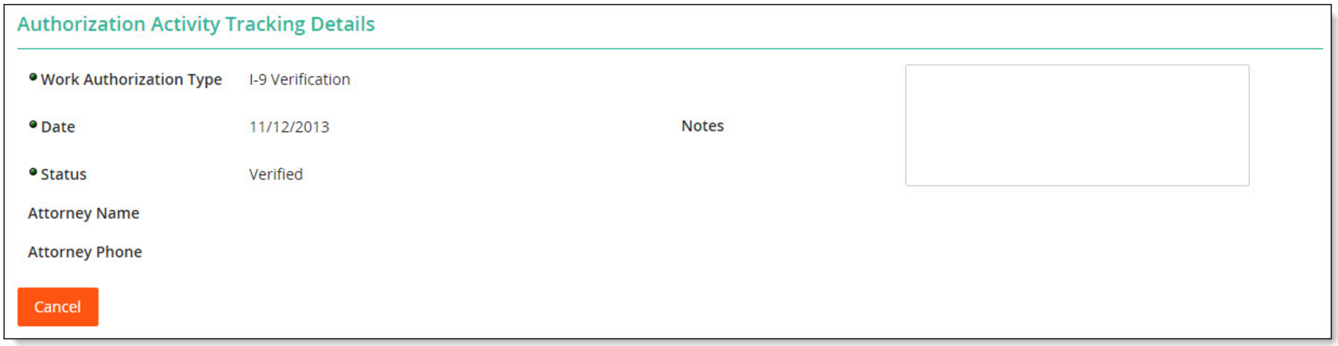
- Click the **Date** link to display the details.



Authorization Activity Tracking

| | Date | Type | Status | Attorney | Attorney Phone | Notes | Updated By |
|---|---|---|---|---|---|---|---|
| ☐ | 11/12/2013 | I-9 Verification | Verified | | | | Alba, Emily [16] |

- Click the **Cancel** button to return to the main screen.



Authorization Activity Tracking Details

| | |
|---|---|
| Work Authorization Type | I-9 Verification |
| Date | 11/12/2013 |
| Status | Verified |
| Attorney Name | |
| Attorney Phone | |
| Notes | |

Cancel

## *STATUTORY*

Vets 100/100A Tracking

Enable? ☑

Hiring Location: Headquarters

New Hire Medical Availability

Medical Coverage Available? ☑

Medical Coverage Date: 1/1/2015

Vets 100

Job Category: 2 - Professionals

Covered Veteran:
☐ Special Disabled Veterans
☐ Vietnam Era Veterans
☐ Recently Separated Veterans
☑ Other Protected Veterans

Vets 100A

Job Category

Covered Veteran:
☐ Disabled Veterans
☐ Active Duty Wartime Or Campaign Badge Veteran
☐ Armed Forces Service Medal Veterans
☐ Recently Separated Veterans

## EMPLOYMENT

### *RATES*

View pay rates or salary amounts. The display includes rate history and information on additional rates.

Rates

Show: All

| Effective | Check Date | Change Reason | Pay Type | Salary | Rate / Per | Freq | Annual Salary | Auto Pay | Amount | % | Action |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 5/2/2008 | Current | | Salary | $1,000.00 | 0.0000 / Hour | W | $52,000.00 | ✔ | | | |

Records: 1

Additional Rates

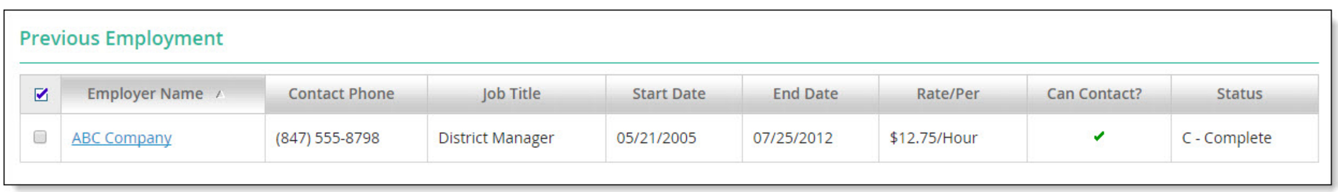
Show: Current and Future

| Effective | Check Date | End Check Date | Change Reason | Rate | Rate / Per | Division | Branch | Department | Job | Shift | Action |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1/1/2016 | Current | | | PT - Paint | 15.0000 / Hour | | | | | | |

### *PREVIOUS EMPLOYERS*

View employment history prior to being employed by the company.

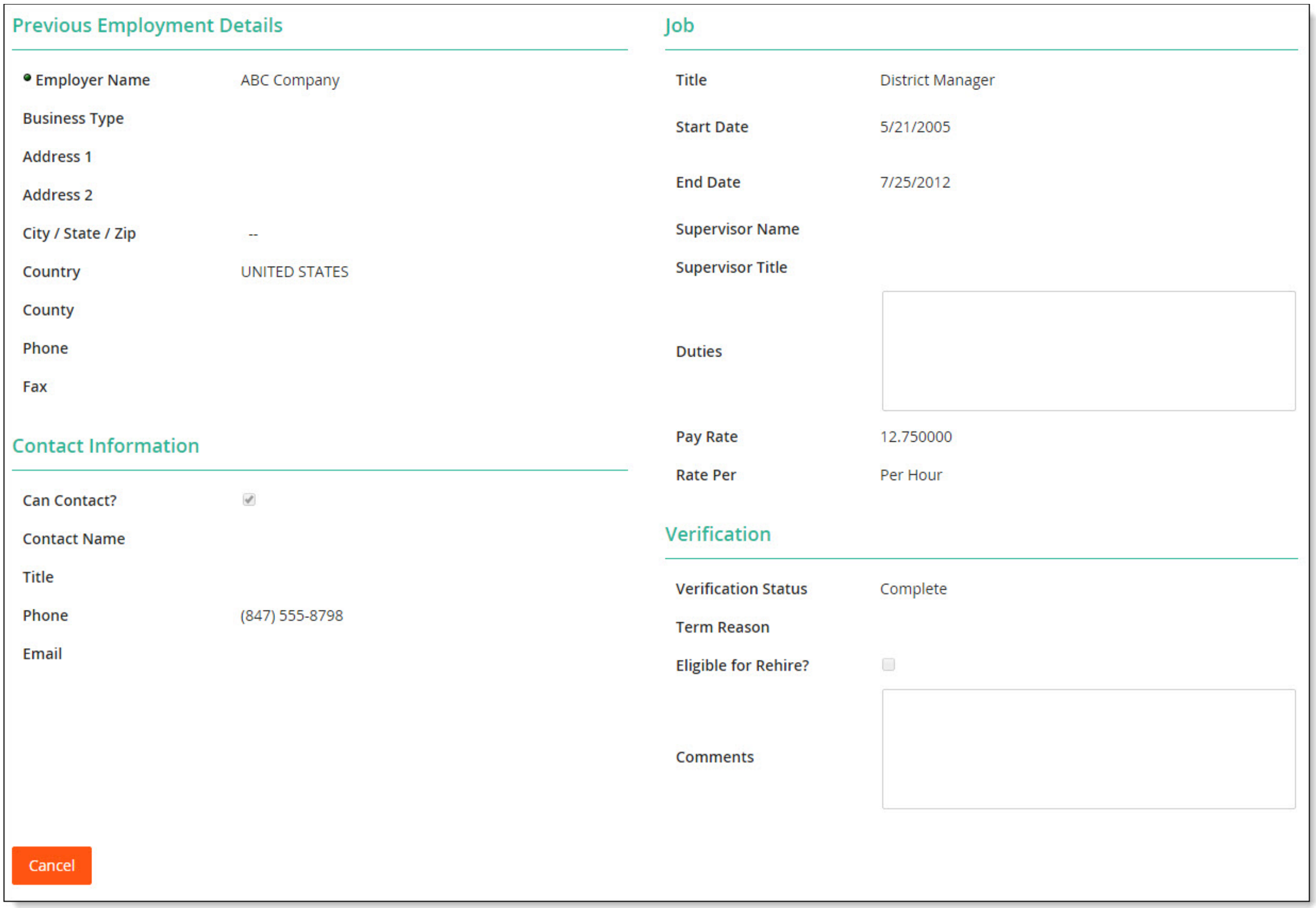
- Click the **Employer Name** link to display the details.



Previous Employment

| ☑ | Employer Name | Contact Phone | Job Title | Start Date | End Date | Rate/Per | Can Contact? | Status |
|---|---|---|---|---|---|---|---|---|
| ☐ | ABC Company | (847) 555-8798 | District Manager | 05/21/2005 | 07/25/2012 | $12.75/Hour | ✔ | C - Complete |

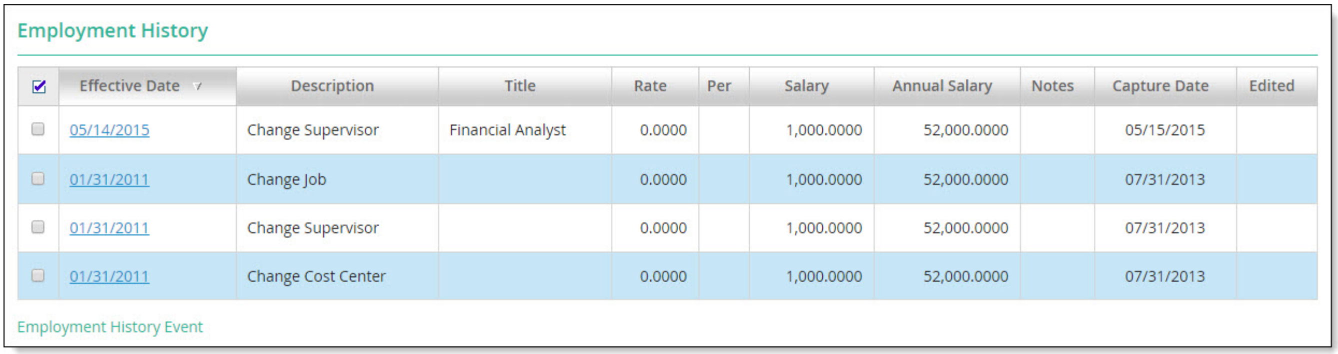
- Click the **Cancel** button to return to the main screen.


Previous Employment Details
Employer Name
ABC Company
Business Type
Address 1
Address 2
City / State / Zip
--
Country
UNITED STATES
County
Phone
Fax
Contact Information
Can Contact?
Contact Name
Title
Phone
(847) 555-8798
Email
Cancel
Job
Title
District Manager
Start Date
5/21/2005
End Date
7/25/2012
Supervisor Name
Supervisor Title
Duties
Pay Rate
12.750000
Rate Per
Per Hour
Verification
Verification Status
Complete
Term Reason
Eligible for Rehire?
Comments

## *EMPLOYMENT HISTORY*

The Employment History screen is a single page view of the employee's compensation and position history while employed by the company. Changes to the employee work information such as a job change, performance appraisal, new rate, or employment status change are automatically added to Employment History overnight.

- Click the **Effective Date** link to display the details.

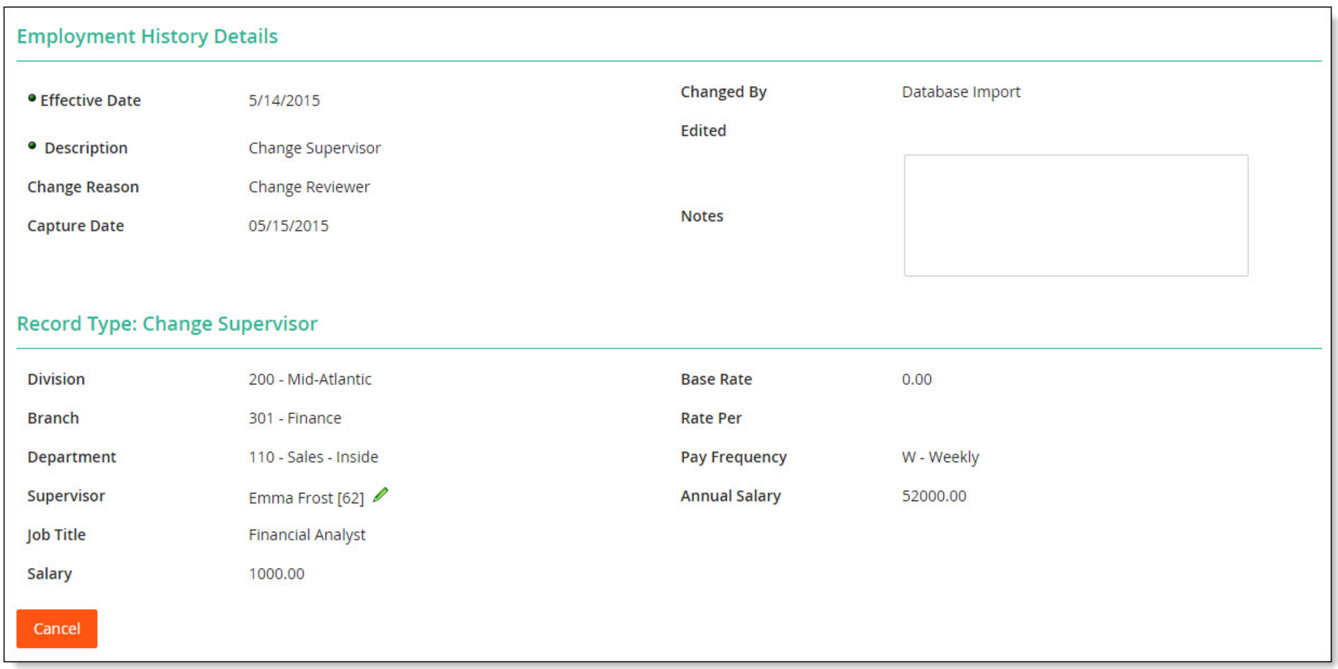


Employment History

| | Effective Date | Description | Title | Rate | Per | Salary | Annual Salary | Notes | Capture Date | Edited |
|---|---|---|---|---|---|---|---|---|---|---|
| | 05/14/2015 | Change Supervisor | Financial Analyst | 0.0000 | | 1,000.0000 | 52,000.0000 | | 05/15/2015 | |
| | 01/31/2011 | Change Job | | 0.0000 | | 1,000.0000 | 52,000.0000 | | 07/31/2013 | |
| | 01/31/2011 | Change Supervisor | | 0.0000 | | 1,000.0000 | 52,000.0000 | | 07/31/2013 | |
| | 01/31/2011 | Change Cost Center | | 0.0000 | | 1,000.0000 | 52,000.0000 | | 07/31/2013 | |

Employment History Event

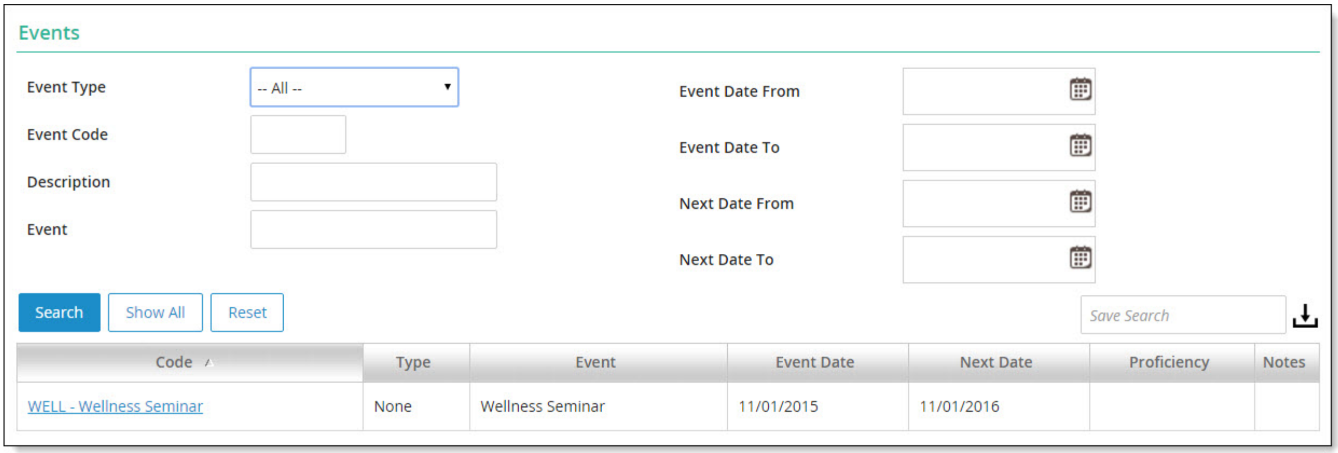
- Click the **Cancel** button to return to the main screen.



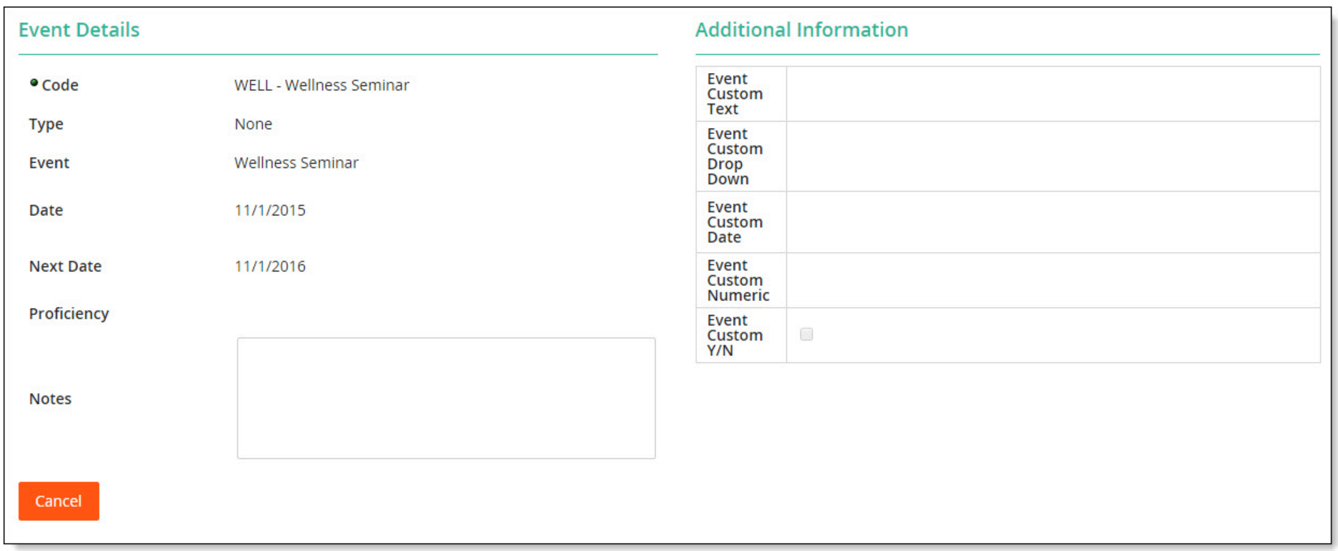
## *EVENTS*

View events, awards, or disciplinary actions.

- Click the **Code** link to display its details.

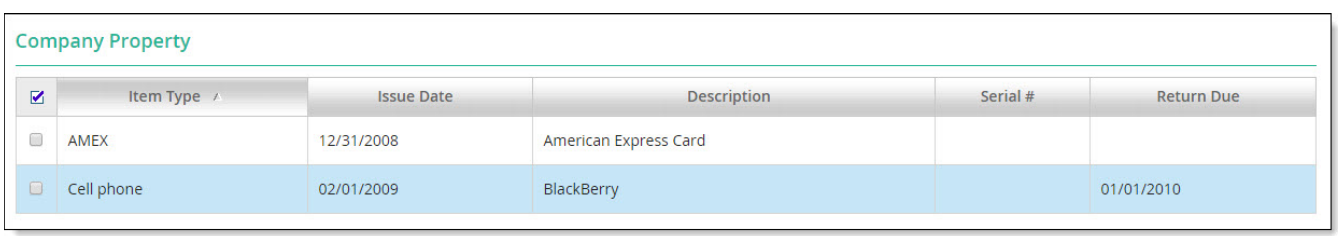



- Click the **Cancel** button to return to the main screen.




## *COMPANY PROPERTY*

View the company property that has been issued.



## PAY HISTORY

### *CURRENT CHECKS*

View current check information. Users are able to print a pay stub by clicking the **Download Printable Version** button on the bottom of this screen.

To view a paycheck or direct deposit voucher issued prior to the current check, click the **Check Date** drop down and select the applicable check date to display the check or voucher.

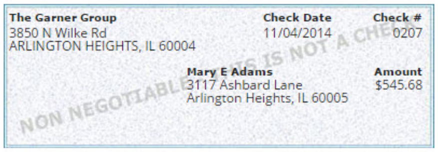
The Employee section, which displays the **Employee Id** and **Department**, can be expanded or collapsed by clicking the double arrows. The **Check** or **Voucher #**, **Delivery Location**, **Check Date**, **Period Begin** and **End Dates**, **Gross Earnings**, **Gross YTD**, **Net Earnings**, and **Net YTD** are displayed in the Check section. Depending on the company's configuration, the bottom sections of the screen will display applicable details about Direct Deposits, Earnings, Deductions, Benefits, Taxes, and Time Off.

## Employee

| | | | |
|---|---|---|---|
| **Employee Id** | 3 | **Division** | 400 - Central |
| **Salary** | $1,000.00 | **Branch** | 201 - Business Development |
| | | **Department** | 600 - Client Support |

## Check

**Show Adjustment Checks** No **Check Date** 11/04/2014 - C0207




| | | |
|---|---|---|
| **Check # - Delivery Location** | 207 | Default |
| **Check Date** | 11/04/2014 | |
| **Period Begin Date - End Date** | 10/19/2014 | 10/25/2014 |
| **Gross Earnings - YTD** | $1,025.00 | $1,025.00 |
| **Net Earnings - YTD** | $545.68 | $545.68 |

## Direct Deposits

| Bank | Account | Type | Amount | YTD |
|---|---|---|---|---|

## Earnings

| Description | Hrs | Rate | Current | YTD |
|---|---|---|---|---|
| 401K MATCH | | | $51.25 | $51.25 |
| Auto Allowance | | | $25.00 | $25.00 |
| Employer Paid Dental | | | $20.00 | $20.00 |
| Employer Paid HDHP | | | $250.00 | $250.00 |
| REGULAR | | $25.00 | $1,000.00 | $1,000.00 |
| Totals | | | $1,025.00 | $1,025.00 |

## Taxes

| Description | Current | YTD |
|---|---|---|
| Federal Income Tax | $49.75 | $49.75 |
| Illinois SITW | $32.28 | $32.28 |
| Medicare | $11.14 | $11.14 |
| OASDI | $47.65 | $47.65 |
| Totals | $140.82 | $140.82 |

## Deductions

| Description | Current | YTD |
|---|---|---|
| HSA | $100.00 | $100.00 |
| Dental Insurance | $31.50 | $31.50 |
| HDHP PPO Medical | $125.00 | $125.00 |
| Totals | $256.50 | $256.50 |

## Time Off

| Description | Available | Taken |
|---|---|---|
| Personal | | |
| Sick | 0.00 | |
| Vacation | -0.62 | 208.00 |

## Benefits

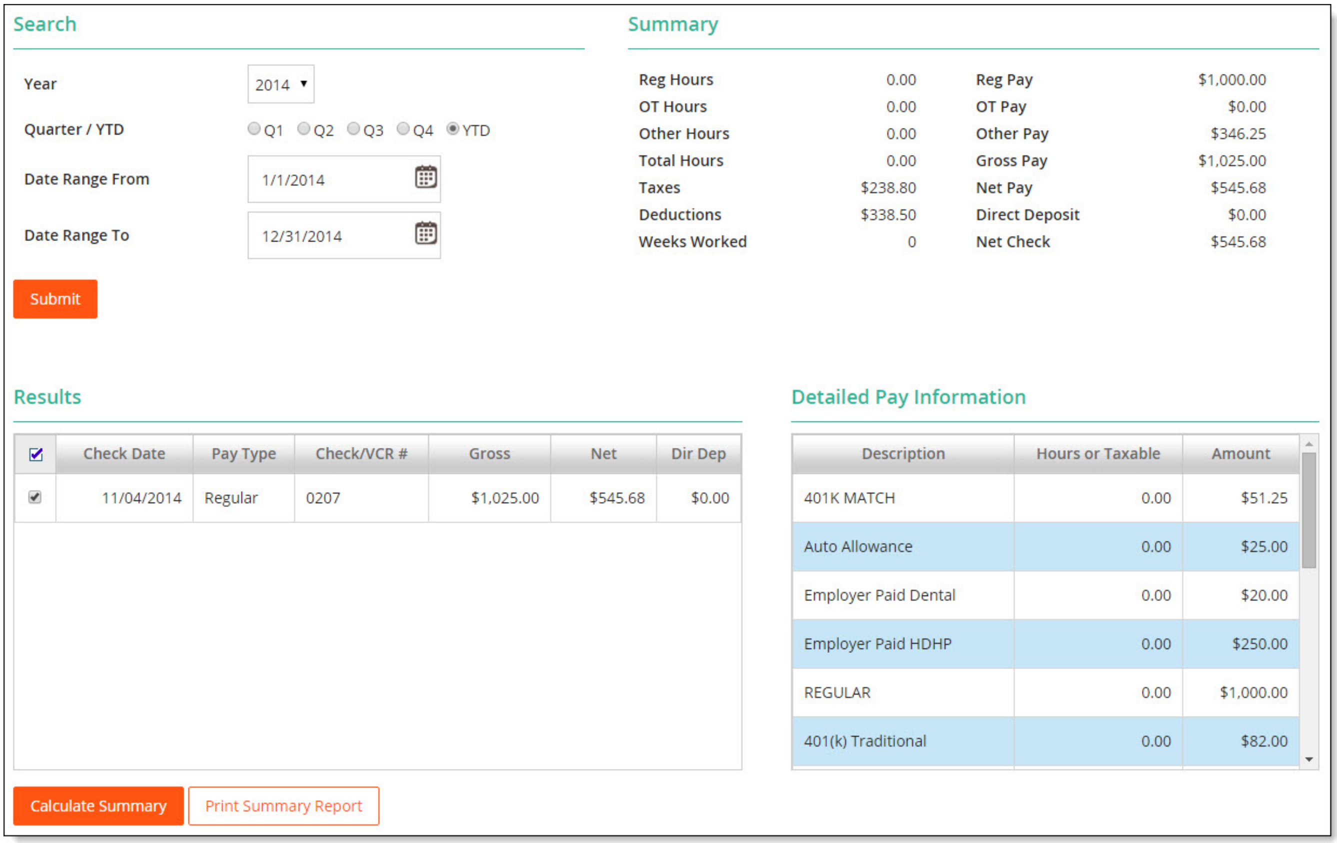
| Description | Current | YTD |
|---|---|---|

Download Printable Version

## *CHECK HISTORY*

Search for checks in a specific date range.

- Select a **Date Range From** and **Date Range To**, populating the checks to display.
- Click the **Submit** button to display the results.
- To summarize only certain checks in the specified date range, check the box adjacent to the applicable checks in the Results section.
- Click the **Calculate Summary** button to display the sum totals of the selected checks in the Summary and Detailed Pay Information sections.
- Click the **Print Summary Report** button to print a copy of the Check History Summary Report.



## *TAX FORMS*

View and print W2s, 1099s, and 1095-Cs that have been processed by Paylocity.

- Click the **Tax Year** link to view or print a copy of the tax form.

Tax Forms

| Tax Year | Fed Wages | Fed Witholding | SS Wages | SS Witholding | Medicare Wages | Medicare Witholding | 1095-C |
|---|---|---|---|---|---|---|---|
| 2012 | $19,576.00 | $1,516.38 | $22,064.00 | $926.71 | $22,064.00 | $319.92 | |
| 2011 | $30,964.00 | $3,437.32 | $33,240.00 | $1,396.08 | $33,240.00 | $481.96 | |

- Close the PDF file to return to the main screen.

**Copy C - FOR EMPLOYEE'S RECORDS ONLY** **2012** OMB No. 1545-0008

| | | |
|---|---|---|
| a Control number<br>PROC1<br>1 | 1 Wages, tips, other comp.<br>40,268.00 | 2 Federal income tax withheld<br>6,740.06 |
| b Employer ID number<br>00-5554442 | 3 Social security wages<br>42,698.00 | 4 Social security tax withheld<br>1,793.33 |
| | 5 Medicare wages and tips<br>42,698.00 | 6 Medicare tax withheld<br>619.12 |

c Employer's name, address, and ZIP code
The Garner Group
3850 N Wilke Rd
ARLINGTON HEIGHTS, IL 60004

d Employee's social security number 987-65-4321

e Employee's name, address, and ZIP code
Emily I Alba
117 Bayview Circle
Hermosa Beach, CA 90254

| | | |
|---|---|---|
| 7 Social security tips<br>0.00 | 8 Allocated tips<br>0.00 | 9 Advance EIC payment<br>0.00 |
| 10 Dependent care benefits<br>0.00 | 11 Nonqualified plans<br>0.00 | |

| | | |
|---|---|---|
| 12a | D | 2,430.00 |
| 12b | DD | 11,032.00 |
| 12c | | |
| 12d | | |

| 13 Statutory employee | Retirement plan | 3rd-party sick pay |
|---|---|---|
| | X | |

14 Other

| 15 State | Employer's State ID# | 16 State wages, tips, etc. | 17 State income tax |
|---|---|---|---|
| IL | 0000000000000 | 40,268.00 | 2,013.40 |

| 18 Local wages, tips, etc. | 19 Local income tax | 20 Locality name |
|---|---|---|
| N/A | N/A | N/A |

**Form W-2 Wage and Tax Statement** Dept. of the Treasury - IRS

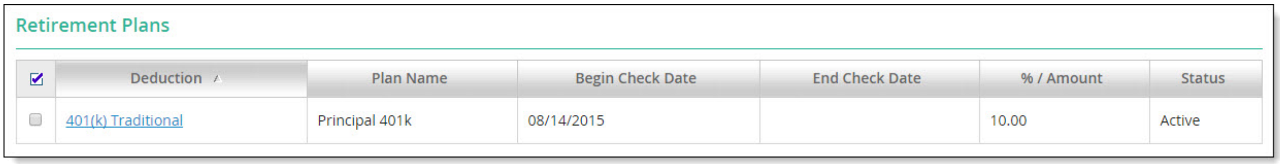
This information is being furnished to the IRS. If you are required to file a tax return, a negligence penality/other sanction may be imposed on you if this income is taxable and you fail to report it.

**Printed by Paylocity Payroll**
Page 2 of 2

## *RETIREMENT PLANS*

View retirement plan information.

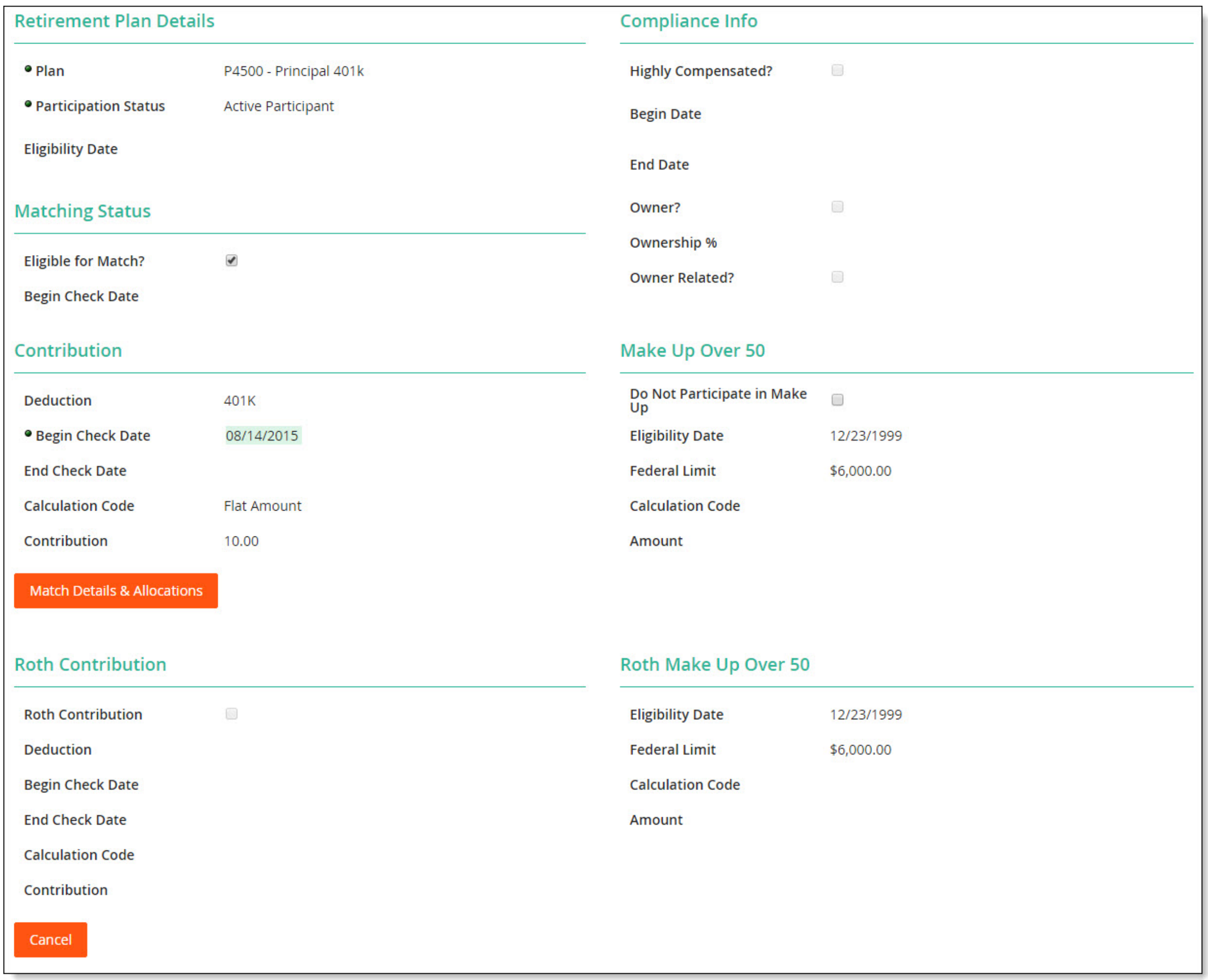
- Click the **Deduction** link to display the details.



Retirement Plans

| ☑ | Deduction | Plan Name | Begin Check Date | End Check Date | % / Amount | Status |
|---|---|---|---|---|---|---|
| ☐ | 401(k) Traditional | Principal 401k | 08/14/2015 | | 10.00 | Active |

- Click the **Match Details & Allocations** button to display the established match rules for the current Plan



Retirement Plan Details

| | |
|---|---|
| Plan | P4500 - Principal 401k |
| Participation Status | Active Participant |
| Eligibility Date | |

Matching Status

| | |
|---|---|
| Eligible for Match? | ☑ |
| Begin Check Date | |

Contribution

| | |
|---|---|
| Deduction | 401K |
| Begin Check Date | 08/14/2015 |
| End Check Date | |
| Calculation Code | Flat Amount |
| Contribution | 10.00 |

Match Details & Allocations

Roth Contribution

| | |
|---|---|
| Roth Contribution | ☐ |
| Deduction | |
| Begin Check Date | |
| End Check Date | |
| Calculation Code | |
| Contribution | |

Cancel

Compliance Info

| | |
|---|---|
| Highly Compensated? | ☐ |
| Begin Date | |
| End Date | |
| Owner? | ☐ |
| Ownership % | |
| Owner Related? | ☐ |

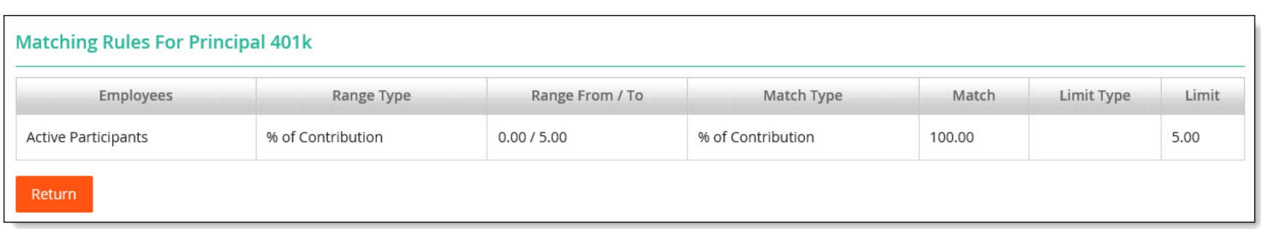
Make Up Over 50

| | |
|---|---|
| Do Not Participate in Make Up | ☐ |
| Eligibility Date | 12/23/1999 |
| Federal Limit | $6,000.00 |
| Calculation Code | |
| Amount | |

Roth Make Up Over 50

| | |
|---|---|
| Eligibility Date | 12/23/1999 |
| Federal Limit | $6,000.00 |
| Calculation Code | |
| Amount | |

- Click the **Return** button to return to the main screen.



Matching Rules For Principal 401k

| Employees | Range Type | Range From / To | Match Type | Match | Limit Type | Limit |
|---|---|---|---|---|---|---|
| Active Participants | % of Contribution | 0.00 / 5.00 | % of Contribution | 100.00 | | 5.00 |

Return

## *INSURANCE PLANS*

View insurance plan information.

- Click the **View** link to access the plan web site.
- Click the **Description** link to display the details.

### Insurance Plans

Filter: Show Active

| ☑ | Web Site Click to View | Description | Plan Type | Start Date | End Date | Employee Code | Employer Code | Rate Type | Waived |
|---|---|---|---|---|---|---|---|---|---|
| ☐ | View | BCBS PPO Standard | MED - Medical | 11/13/2015 | | INSMD | ERMED | | |

- Click the **View** link to access the plan web site.
- Click the **Cancel** button to return to the main screen.

### Employee Insurance Plan Details

| | |
|---|---|
| Active? | ☑ |
| • Plan | BCBS PPO Standard - MD10034556 |
| Change Reason | Marriage |
| Plan Type | Medical |
| Plan Effective Date | 1/1/2011 |
| Plan Expiration Date | |
| Web Site Link | View |
| Beneficiary | |

### Coverage

| | |
|---|---|
| • Eligibility Date | 1/1/2015 |
| • Coverage Start Date | 11/13/2015 |
| • Coverage End Date | |
| Waive Coverage? | ☐ |
| Waive Coverage Date | |

### Premium Contribution Amounts Per Payroll

| | |
|---|---|
| How Are Premiums Paid? | Employee and Employer Contribution |
| Rate Setup Per Rate Type | Flat Amount |
| Rate Type | PPOFM - PPO Family |
| Employee | 170.00 |
| Employer | 340.00 |
| Total | 510.00 |

### Employee Deduction or Earning

| | |
|---|---|
| Deduction or Earning | INSMD |
| Calculation Code | Flat Amount |
| Pay Frequency | Use Employee Frequency |
| • Begin Check Date | 11/13/2015 |
| End Check Date | |

### Employer Deduction or Earning

| | |
|---|---|
| Deduction or Earning | ERMED |
| Calculation Code | Flat Amount |
| Pay Frequency | Use Employee Frequency |
| • Begin Check Date | 11/13/2015 |
| End Check Date | |

### Dependents Covered

| ☑ | Last Name | First Name | Relationship |
|---|---|---|---|
| ☑ | Mary | Baker | Daughter |

### Evidence of Insurability Status

Evidence of Insurability Status may be specified when any Coverage Amount exceeds a Guaranteed Issue Amount

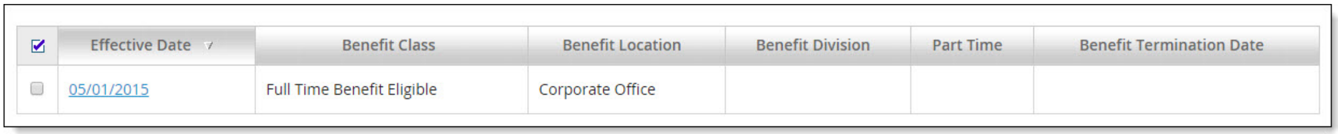
| | | | |
|---|---|---|---|
| Provide Evidence of Insurability | | Status | Approved |
| | | Status Date | |

Cancel

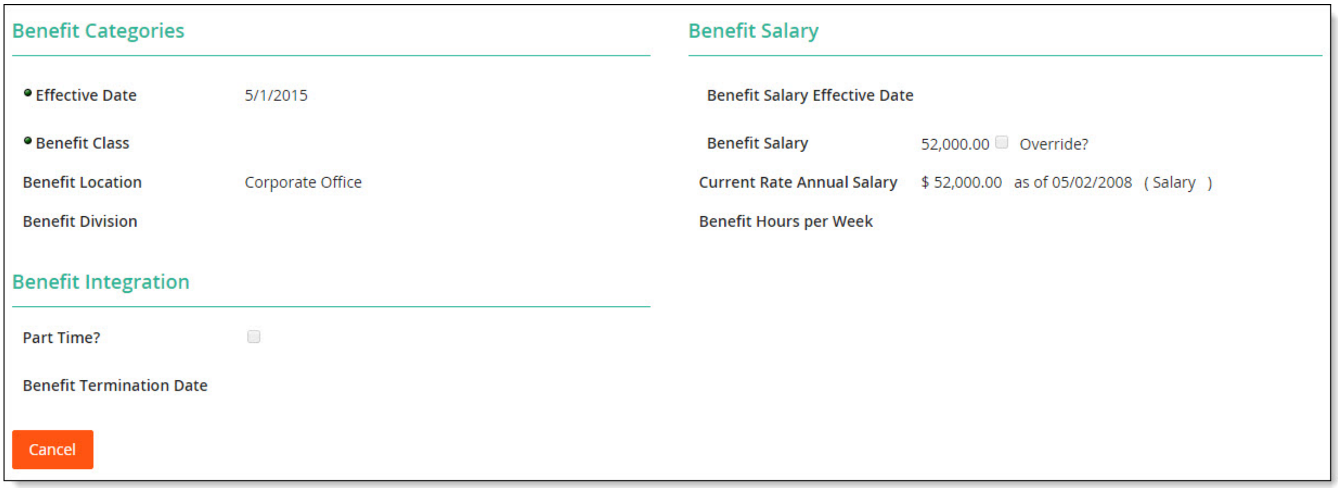
## *CLASSES*

View setup values used for employee benefits integration and insurance plan settings.

- Click the **Effective Date** to view the selected benefit.




- Click the **Cancel** button to return to the main screen.

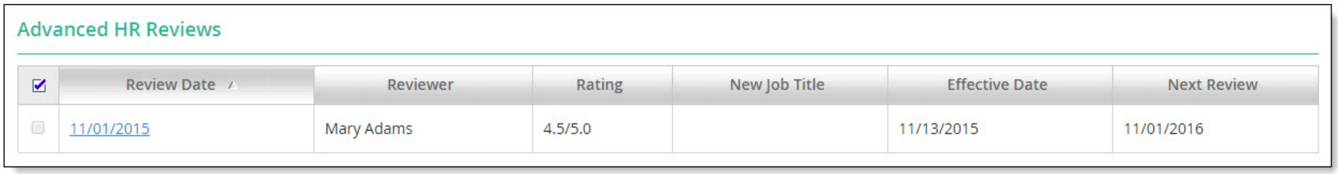


# PERFORMANCE

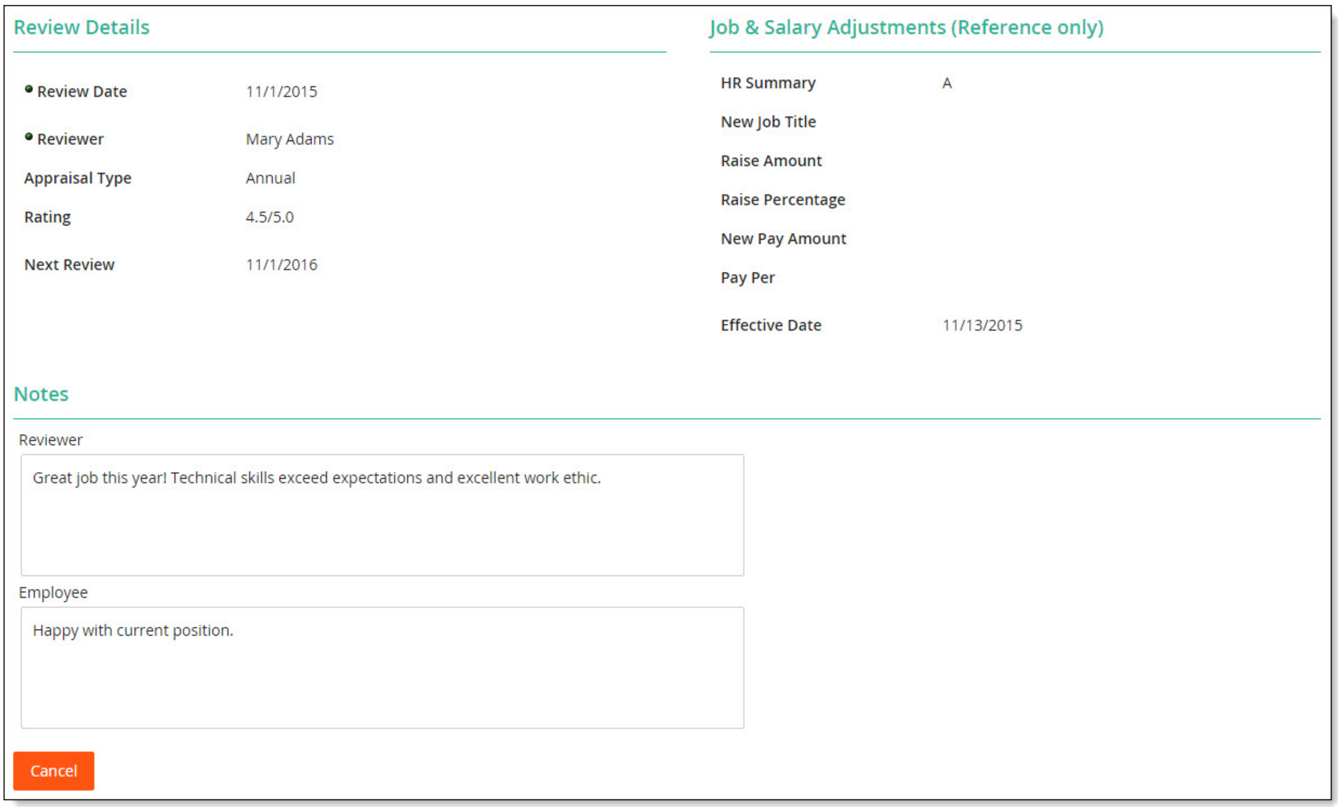
## *ADVANCED HR REVIEWS*

View performance reviews.

- Click the **Review Date** link to display its details.



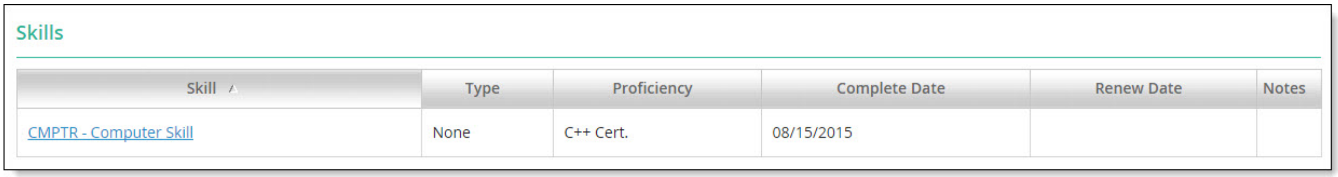

- Click the **Cancel button** to return to the main screen.



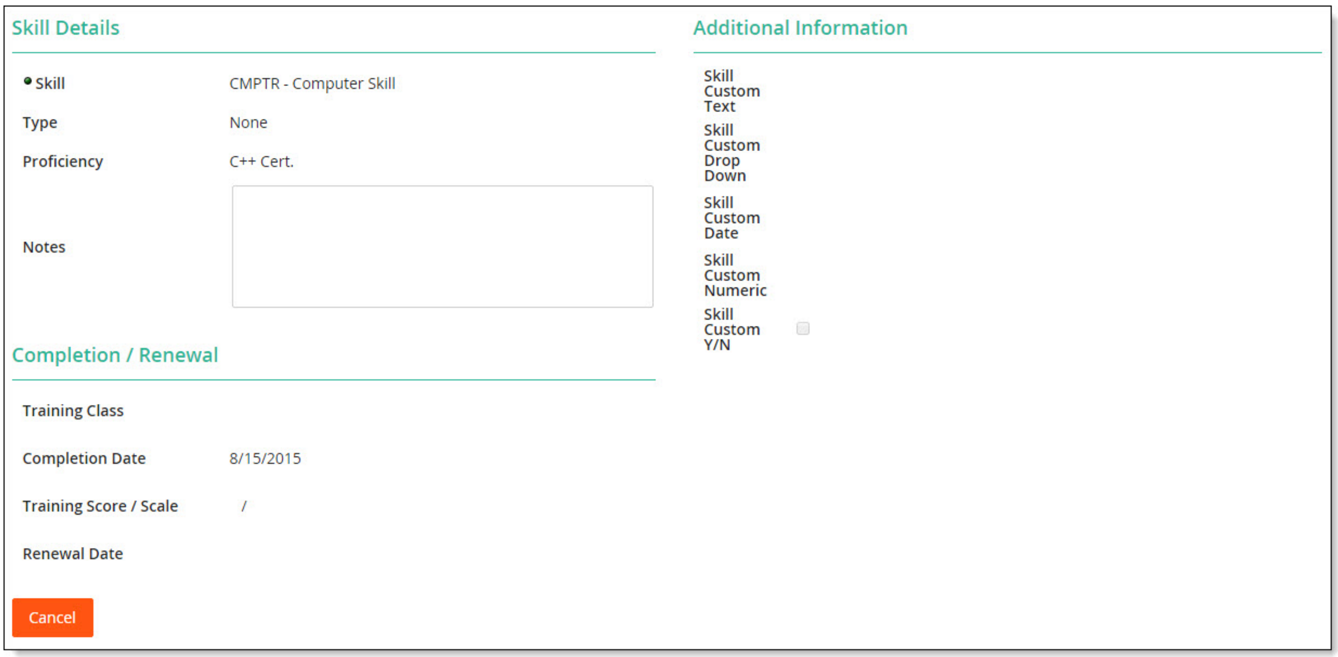
## *SKILLS*

View skill information.

- Click the **Skill** link to display the details.




- Click the **Cancel** button to return to the main screen.



## *EDUCATION*

View education information which may include classes taken while employed by the company and tuition reimbursement information.

- Click the **School** link to display the details.

### Education

| ☑ | School | Start Date | End Date | Degree / Course of Study | Major / License | GPA / Scale | Status |
|---|---|---|---|---|---|---|---|
| ☐ | Northern Illinois University | 09/05/2003 | 05/28/2008 | Bachelor of Business Administration | Business | 3.20/4.0 | C - Complete |

- Click the **Cancel** button to return to the main screen.

### School

| | |
|---|---|
| Type | University |
| • Name | Northern Illinois University |
| Address 1 | |
| Address 2 | |
| City / State / Zip | -- |
| Country | UNITED STATES |
| Phone | |

### Verification / Contact

| | |
|---|---|
| Verification Status | Complete |
| Contact Name | |
| Title | |
| Phone | |
| Email | |

### Notes

| | |
|---|---|
| Notes | |

### Degree / Course of Study

| | |
|---|---|
| Degree / Course of Study | Bachelor of Business Administration |
| Start Date | 9/5/2003 |
| End Date | 5/28/2008 |
| GPA / Scale | 3.20 / 4 |
| Major / License | Business |
| 2nd Major | |
| Minor | |
| Key Classes | |
| Awards | |

### Expiration / Renewal

| | |
|---|---|
| Expiration Date | ☐ Create Event |
| Renewal Date | ☐ Create Event |

### Tuition Reimbursement

| | |
|---|---|
| Eligible | ☐ |
| Paid Date | |
| Amount | 0.00 |

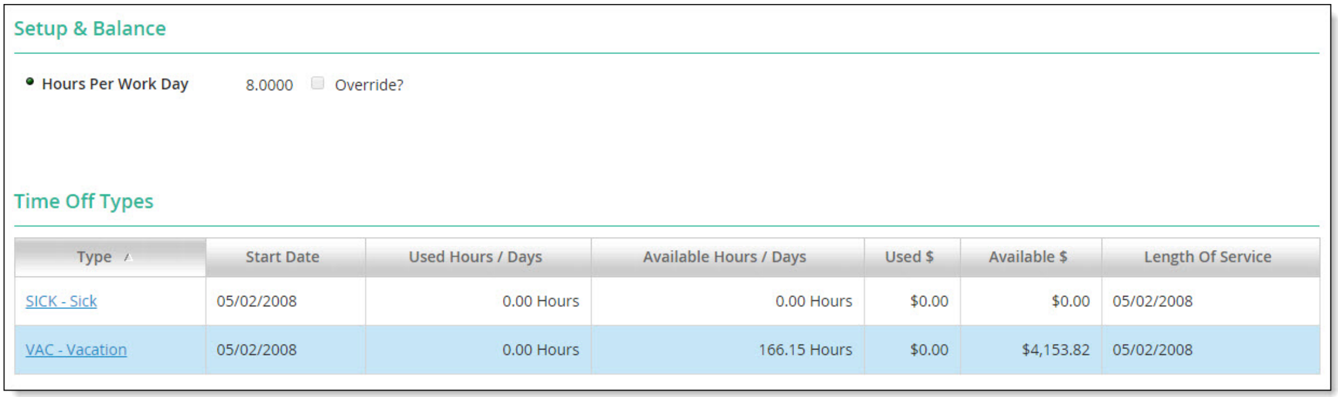
Cancel

## TIME OFF

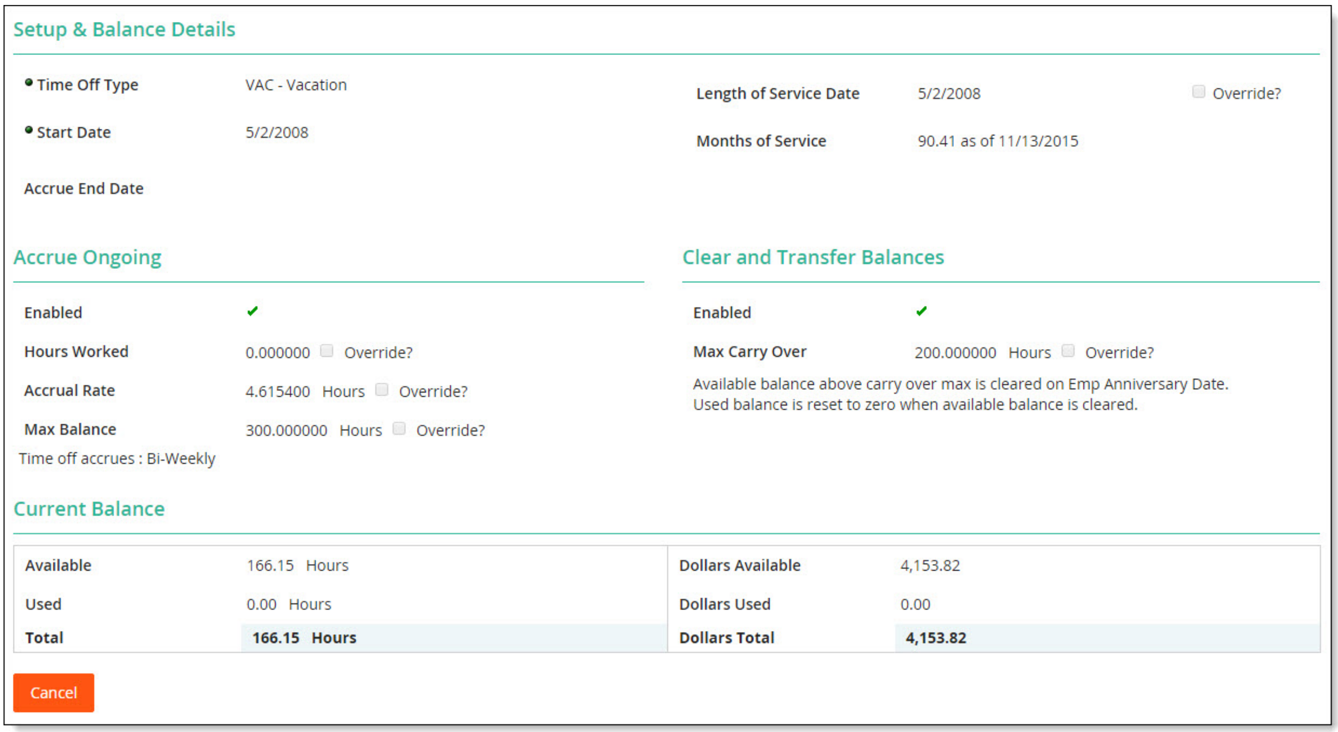
### *BALANCES*

View time off information.

- Click the **Type** link to display the details.

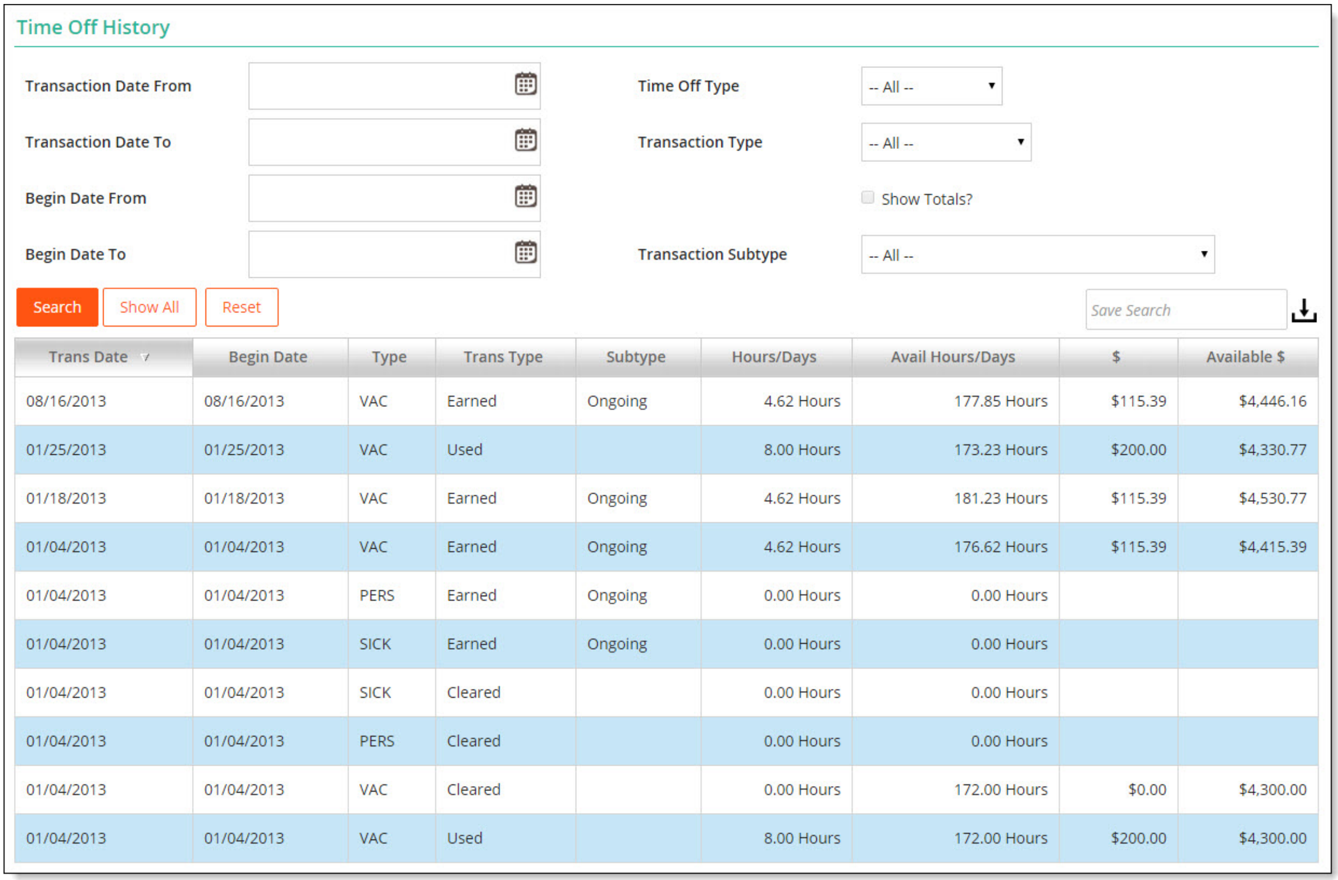



- Click the **Cancel** button to return to the main screen.



## *HISTORY*

View time off benefits earned and used per payroll and any manual adjustments made in Web Pay. Users can search for time off based on selected date ranges and/or types and display totals.



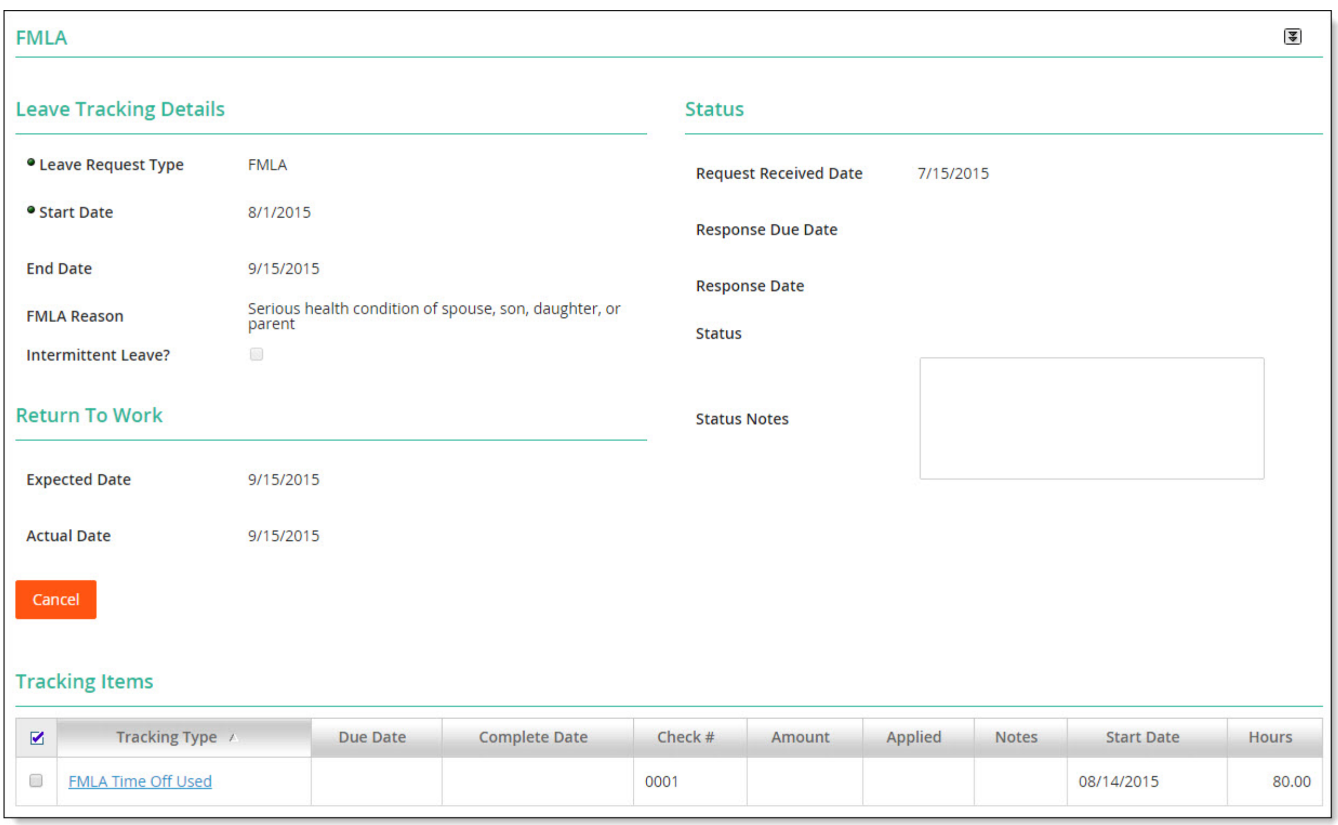

| Trans Date | Begin Date | Type | Trans Type | Subtype | Hours/Days | Avail Hours/Days | $ | Available $ |
|---|---|---|---|---|---|---|---|---|
| 08/16/2013 | 08/16/2013 | VAC | Earned | Ongoing | 4.62 Hours | 177.85 Hours | $115.39 | $4,446.16 |
| 01/25/2013 | 01/25/2013 | VAC | Used | | 8.00 Hours | 173.23 Hours | $200.00 | $4,330.77 |
| 01/18/2013 | 01/18/2013 | VAC | Earned | Ongoing | 4.62 Hours | 181.23 Hours | $115.39 | $4,530.77 |
| 01/04/2013 | 01/04/2013 | VAC | Earned | Ongoing | 4.62 Hours | 176.62 Hours | $115.39 | $4,415.39 |
| 01/04/2013 | 01/04/2013 | PERS | Earned | Ongoing | 0.00 Hours | 0.00 Hours | | |
| 01/04/2013 | 01/04/2013 | SICK | Earned | Ongoing | 0.00 Hours | 0.00 Hours | | |
| 01/04/2013 | 01/04/2013 | SICK | Cleared | | 0.00 Hours | 0.00 Hours | | |
| 01/04/2013 | 01/04/2013 | PERS | Cleared | | 0.00 Hours | 0.00 Hours | | |
| 01/04/2013 | 01/04/2013 | VAC | Cleared | | 0.00 Hours | 172.00 Hours | $0.00 | $4,300.00 |
| 01/04/2013 | 01/04/2013 | VAC | Used | | 8.00 Hours | 172.00 Hours | $200.00 | $4,300.00 |

## *LEAVE TRACKING*

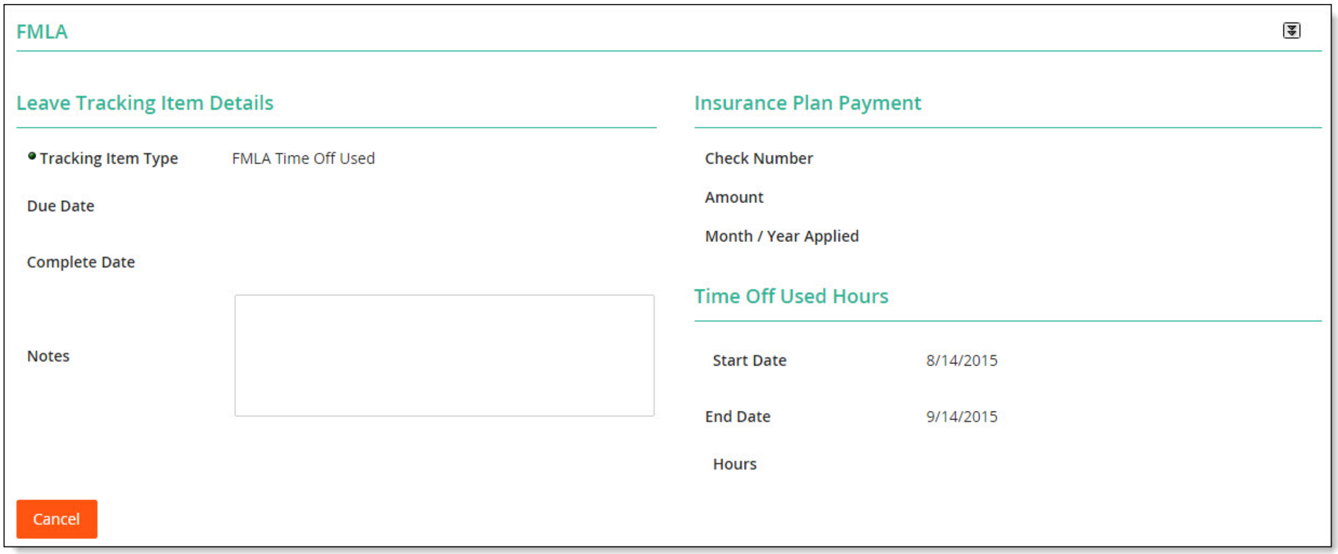
View information about leaves such as Family and Medical Leave Act (FMLA), disability leave, or military leave.

- Click the **Start Date** link to display the details.


- Click the **Tracking Type** link to display the details.



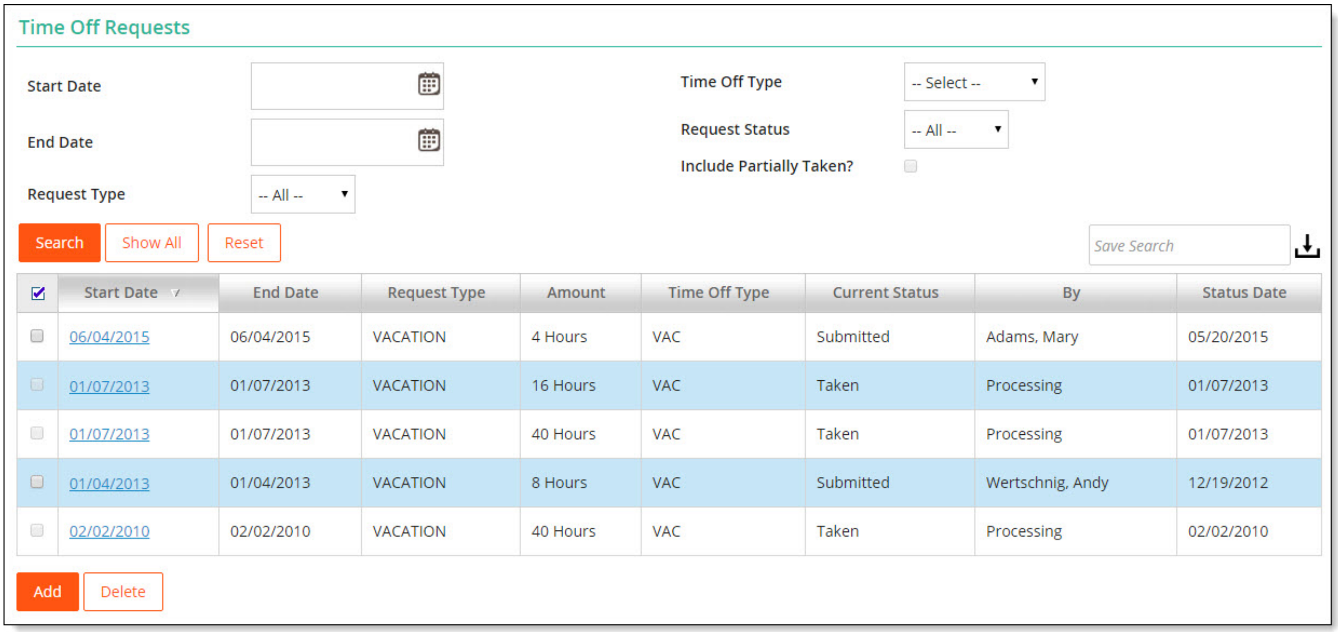
- Click the **Cancel** button to return to the main screen.



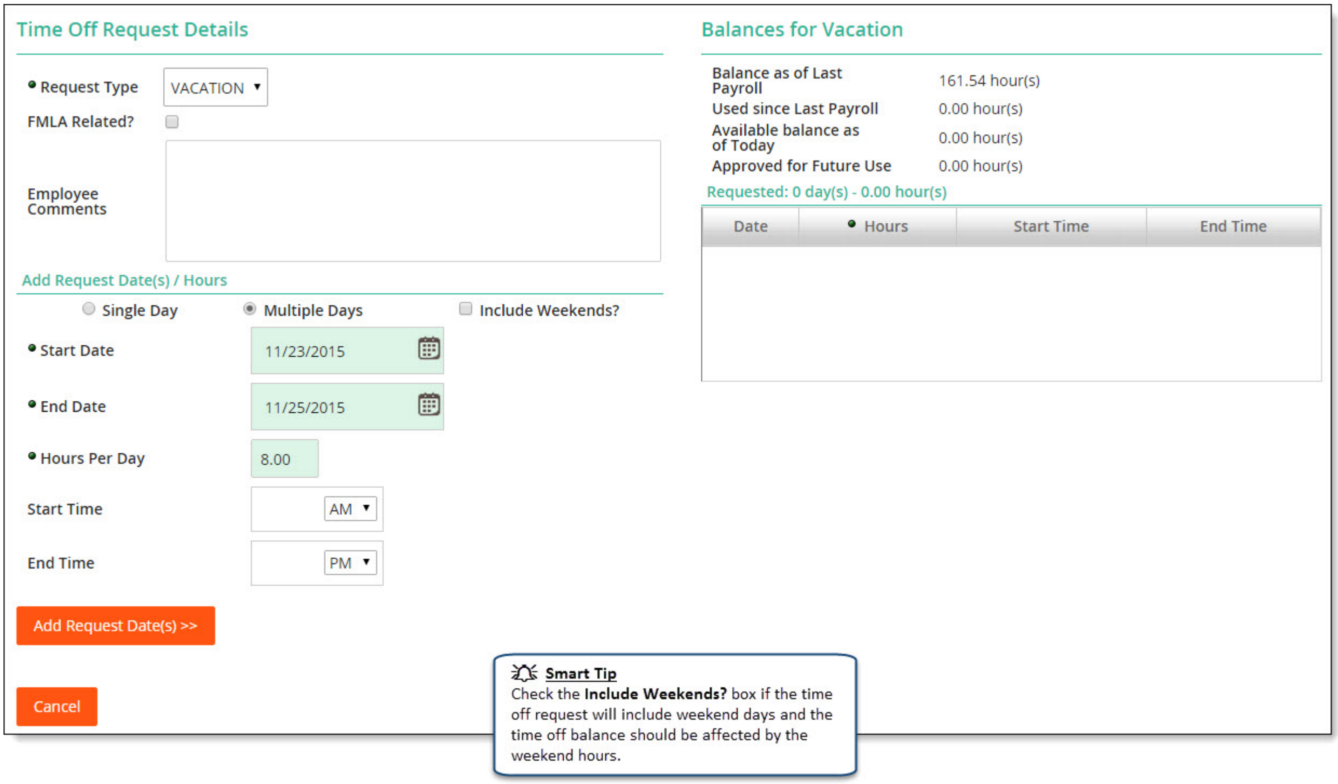
## *TIME OFF REQUESTS*

Submit time off requests. User may also submit time off requests in the self service portal. Once a request is approved or declined, the employee receives a message in the Message Center and the new status appears in this screen.

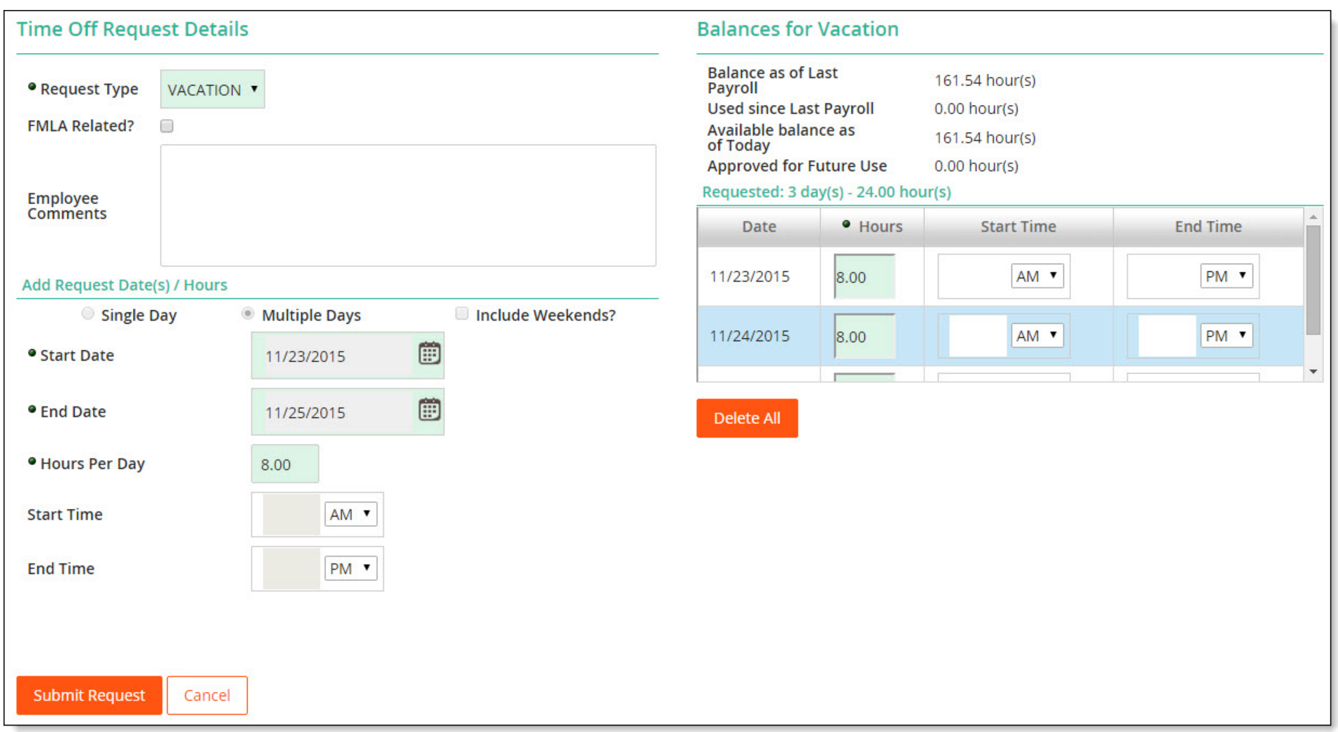
- Click the **Add** button to add a time off request.
- Click the **Start Date** link to display or modify the details.
- Check the box adjacent to the **Start Date** and click the **Delete** button to cancel the request.




1. Select a **Request Type** from the drop down.
2. Check the **FMLA Related** box if the time off request is related to FMLA leave.
3. Enter additional information in the **Employee Comments** field.
4. Select the **Single Day** or **Multiple Days** radio button.
5. Select or enter the **Start Date**.
6. Select or enter the **End Date**.
7. Enter the **Hours Per Day**.
8. Enter the applicable **Start Time** and **End Time**.
9. Click the **Add Request Date(s)>>** button.




10. Verify all information.
11. Click the **Submit Request** button.




### *Important Notes*

- Time off accruals and self service must be implemented in order to use the Time Off Requests feature.

## CURRENT CHECKS

### *CURRENT CHECKS*

View current check information. Users are able to print a pay stub by clicking the **Download Printable Version** button on the bottom of this screen.

To view a paycheck or direct deposit voucher issued prior to the current check, click the **Check Date** drop down and select the applicable check date to display the check or voucher.

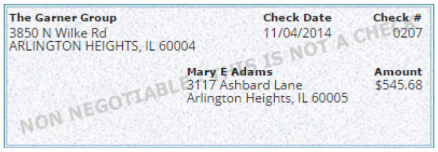
The Employee section, which displays the **Employee Id** and **Department**, can be expanded or collapsed by clicking the double arrows. The **Check** or **Voucher #**, **Delivery Location**, **Check Date**, **Period Begin** and **End Dates**, **Gross Earnings**, **Gross YTD**, **Net Earnings**, and **Net YTD** are displayed in the Check section. Depending on the company's configuration, the bottom sections of the screen will display applicable details about Direct Deposits, Earnings, Deductions, Benefits, Taxes, and Time Off.

## Employee

| | | | |
|---|---|---|---|
| **Employee Id** | 3 | **Division** | 400 - Central |
| **Salary** | $1,000.00 | **Branch** | 201 - Business Development |
| | | **Department** | 600 - Client Support |

## Check

**Show Adjustment Checks** No ▾ **Check Date** 11/04/2014 - C0207 ▾




| | | |
|---|---|---|
| **Check # - Delivery Location** | 207 | Default |
| **Check Date** | 11/04/2014 | |
| **Period Begin Date - End Date** | 10/19/2014 | 10/25/2014 |
| **Gross Earnings - YTD** | $1,025.00 | $1,025.00 |
| **Net Earnings - YTD** | $545.68 | $545.68 |

## Direct Deposits

| Bank | Account | Type | Amount | YTD |
|---|---|---|---|---|

## Earnings

| Description | Hrs | Rate | Current | YTD |
|---|---|---|---|---|
| 401K MATCH | | | $51.25 | $51.25 |
| Auto Allowance | | | $25.00 | $25.00 |
| Employer Paid Dental | | | $20.00 | $20.00 |
| Employer Paid HDHP | | | $250.00 | $250.00 |
| REGULAR | | $25.00 | $1,000.00 | $1,000.00 |
| Totals | | | $1,025.00 | $1,025.00 |

## Taxes

| Description | Current | YTD |
|---|---|---|
| Federal Income Tax | $49.75 | $49.75 |
| Illinois SITW | $32.28 | $32.28 |
| Medicare | $11.14 | $11.14 |
| OASDI | $47.65 | $47.65 |
| Totals | $140.82 | $140.82 |

## Deductions

| Description | Current | YTD |
|---|---|---|
| HSA | $100.00 | $100.00 |
| Dental Insurance | $31.50 | $31.50 |
| HDHP PPO Medical | $125.00 | $125.00 |
| Totals | $256.50 | $256.50 |

## Time Off

| Description | Available | Taken |
|---|---|---|
| Personal | | |
| Sick | 0.00 | |
| Vacation | -0.62 | 208.00 |

## Benefits

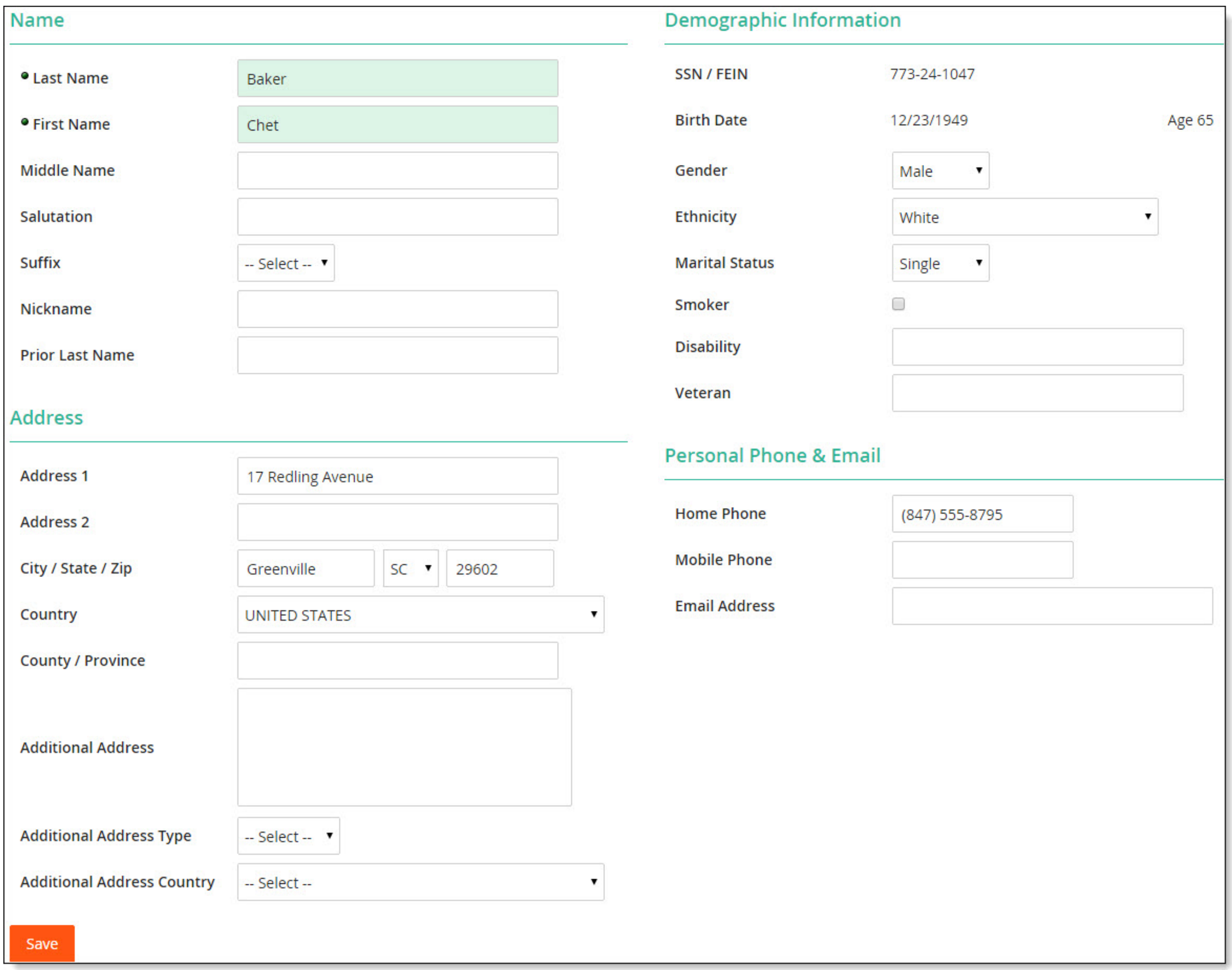
| Description | Current | YTD |
|---|---|---|

Download Printable Version

### *DEMOGRAPHICS*

Add or edit general employee information.

1. Enter the **Last Name** (40 character limit), **First Name** (40 character limit), and **Middle Name** (20 character limit).
2. Enter a **Salutation** (10 character limit).
3. Select a **Suffix** from the drop down.
4. Enter a **Nickname** (20 character limit) and/or **Prior Last Name** (40 character limit).
5. Enter the **Address**, **Phone**, and **Email** information.
6. Select the **Gender** from the drop down.
7. Select the **Ethnicity** from the drop down.
8. Select the **Marital Status** from the drop down.
9. Check the **Smoker** box, if applicable.
10. Enter information in the **Disability** field (30 character limit).
11. Enter information in the **Veteran** field (30 character limit).
12. **Save** the updated information.

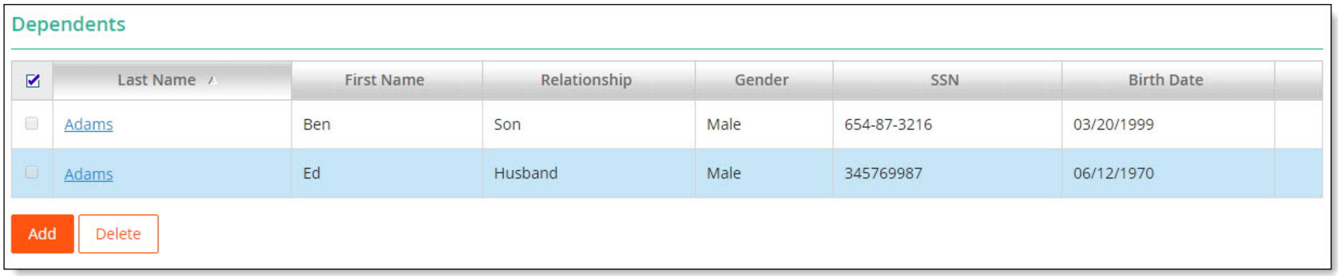



### ***Important Notes***

- Employees are not able to add or edit their own Social Security Number (**SSN**) or **Birth Date** information. Employees must contact the Company Administrator to make these changes.

## *DEPENDENTS*

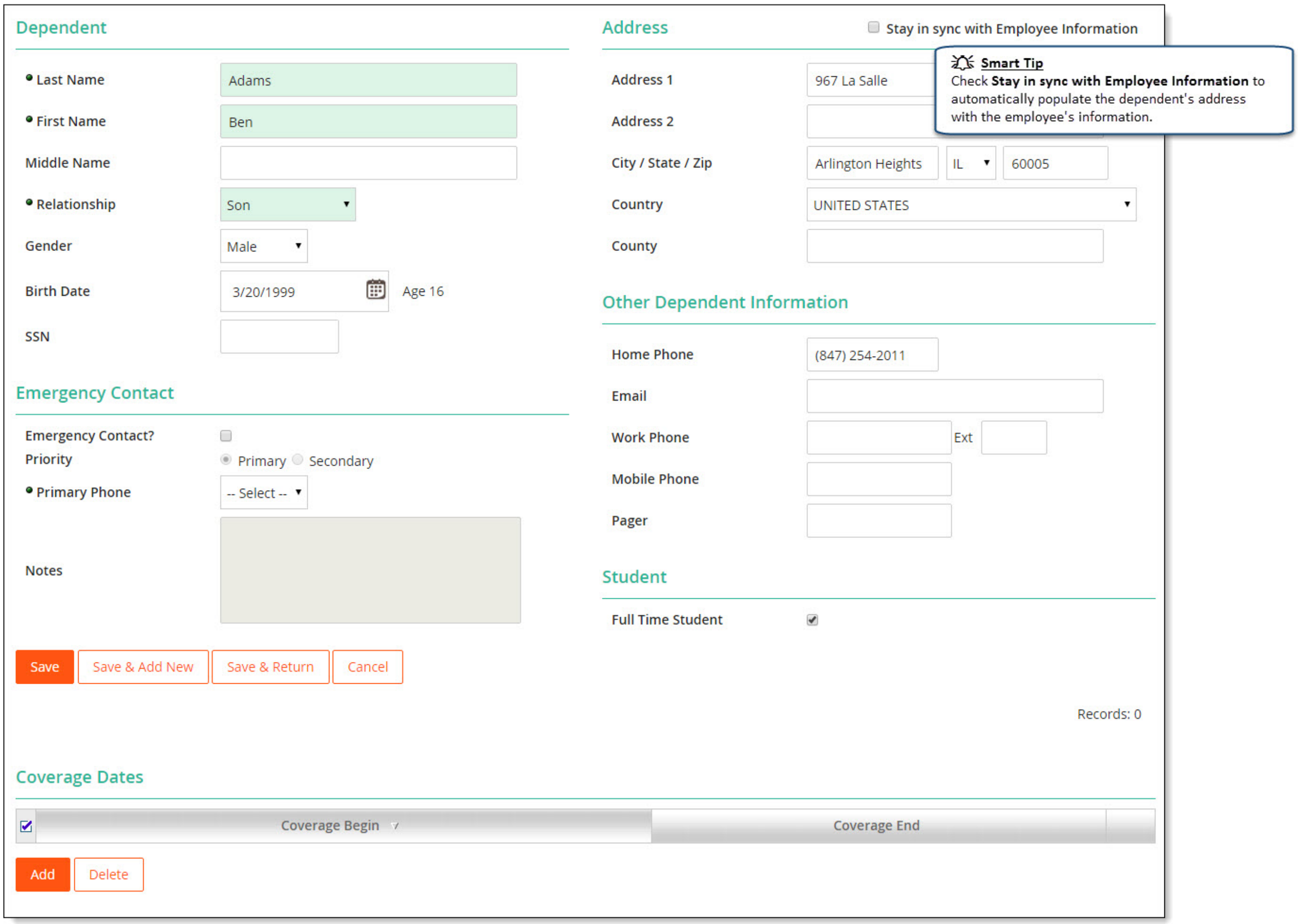
- Click the **Add** button to add a new dependent.
- Click the **Last Name** link to display or modify the dependent details.
- Check the box adjacent to the **Last Name** and click the **Delete** button to delete the dependent.


Dependents

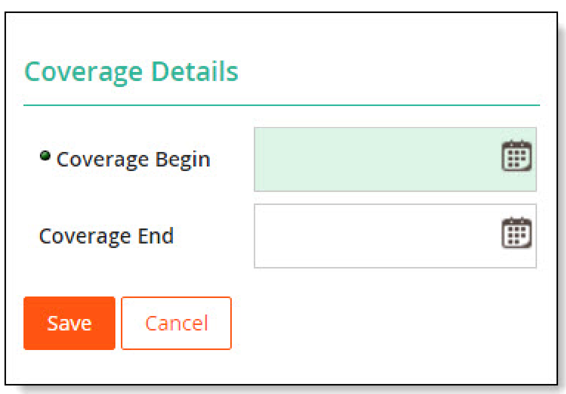
| | Last Name | First Name | Relationship | Gender | SSN | Birth Date |
|---|---|---|---|---|---|---|
| | Adams | Ben | Son | Male | 654-87-3216 | 03/20/1999 |
| | Adams | Ed | Husband | Male | 345769987 | 06/12/1970 |

Add Delete

1. Enter the **Last Name** (40 character limit), **First Name** (40 character limit), and **Middle Name** (20 character limit).
2. Select the **Relationship** from the drop down.
3. Select the **Gender** from the drop down.
4. Select or enter the **Birth Date**.
5. Enter the Social Security number in the **SSN** field.
6. If the dependent is an emergency contact, check the **Emergency Contact** box and select the **Primary Phone** from the drop down.
7. Enter additional information the **Notes** field.
8. Enter the applicable **Address**, **Phone**, and **Email** information.
9. Check the **Full Time Student** box, if applicable.



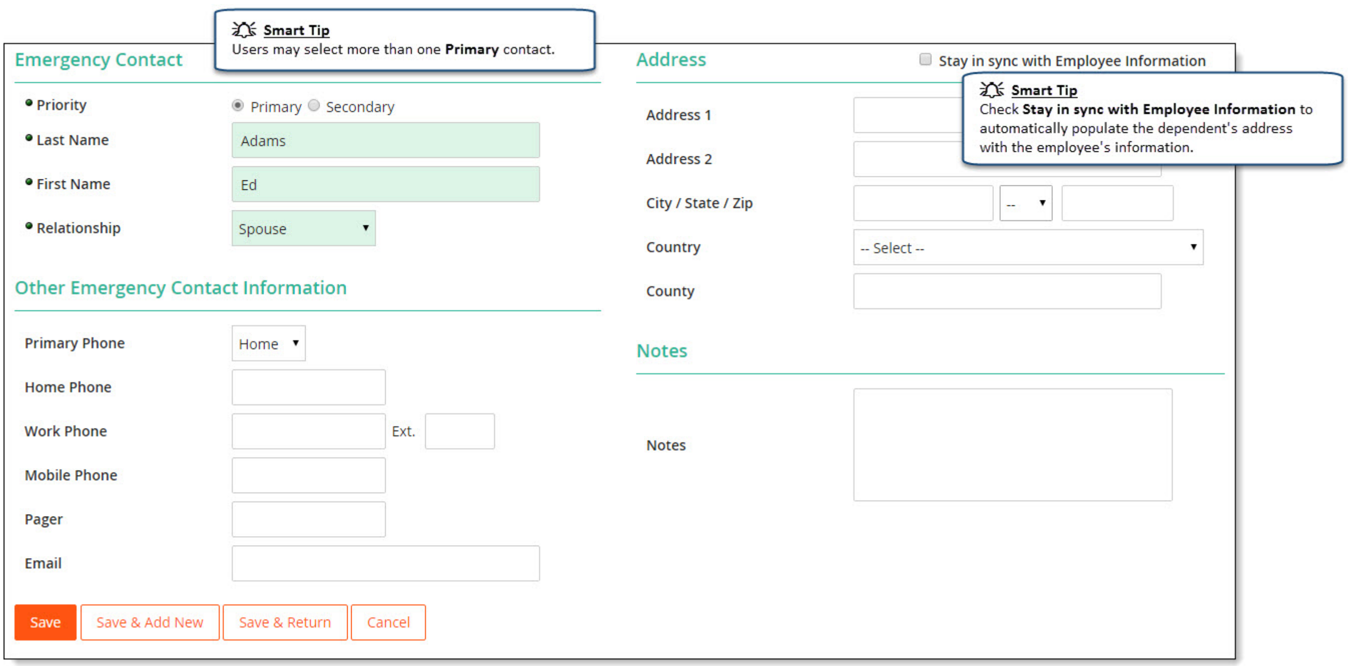

10. Once you **Save** the information, the **Coverage Dates** section will display.
    1. Click **Add** to add coverage information to the dependent.
    2. Enter or select the **Coverage Begin** date.
    3. Enter or select the **Coverage End** date (*if applicable*).
    4. Click **Save**.



## *EMERGENCY CONTACTS*

- Click the **Add** button to add a new emergency contact.
- Click the **Last Name** link to display or modify the emergency contact details.
- Check the box adjacent to the **Last Name** and click the **Delete** button to delete the dependent.

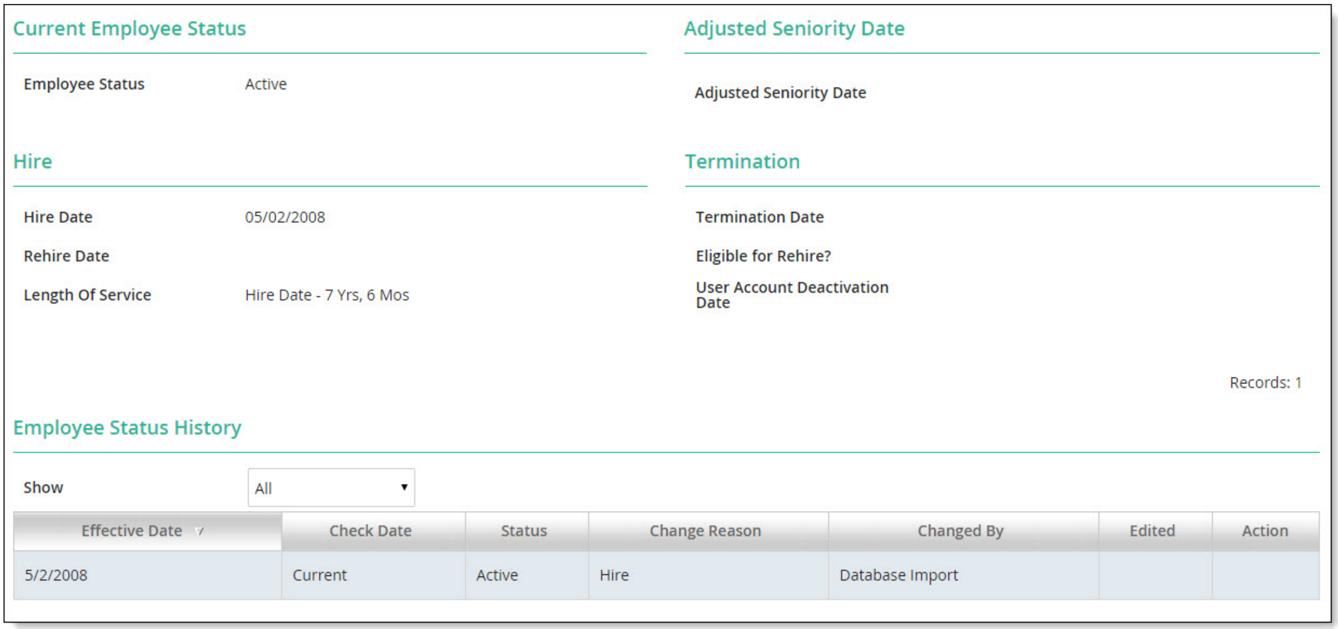

1. Select the **Priority**.
2. Enter the **Last Name** and **First Name**.
3. Select the **Relationship** from the drop down.
4. Select the **Primary Phone** from the drop down.
5. Enter the **Address**, **Phone**, and **Email** information.
6. Enter additional information in the **Notes** field (100 character limit).
7. **Save** the updated information.



## WORK

### *EMPLOYEE STATUS*

View employee status information.



Current Employee Status

Employee Status Active

Adjusted Seniority Date

Adjusted Seniority Date

Hire

Hire Date 05/02/2008

Rehire Date

Length Of Service Hire Date - 7 Yrs, 6 Mos

Termination

Termination Date

Eligible for Rehire?

User Account Deactivation Date

Records: 1

Employee Status History

Show All

| Effective Date | Check Date | Status | Change Reason | Changed By | Edited | Action |
|---|---|---|---|---|---|---|
| 5/2/2008 | Current | Active | Hire | Database Import | | |

### *DEPT & POSITION*

View supervisor, reviewer, position, home department cost center, pay settings, and union information.

## Current

| | | | |
|---|---|---|---|
| **Effective Date** | 05/20/2015 | **Change Reason** | Change Reviewer |

## Supervisor / Reviewer

| | |
|---|---|
| **Supervisor** | FROST, EMMA [62] |
| **Reviewer** | FROST, EMMA [62] |
| **Is Supervisor / Reviewer?** | |

## Cost Center(s)

| | |
|---|---|
| **Division** | 200 - Mid-Atlantic |
| **Branch** | 301 - Finance |
| **Department** | 110 - Sales - Inside |

## Position

| | |
|---|---|
| **Employment Type** | Regular Full Time (30+ Hours) |
| **Position** | FINANALYST - Financial Analyst |
| **Job Title** | Financial Analyst |
| **EEO Class** | 1 - Officials and Managers |
| **Work Comp** | 8810 - Clerical |
| **Home Shift** | |

## Pay Settings

**Pay Group**

**OT Exempt?**

**Tipped**

**Minimum Wage Exempt?**

## Union

**Union**

**Affiliation Date**

**Union Position**

**Initiation Collected?**

**Dues Collected?**

Records: 5

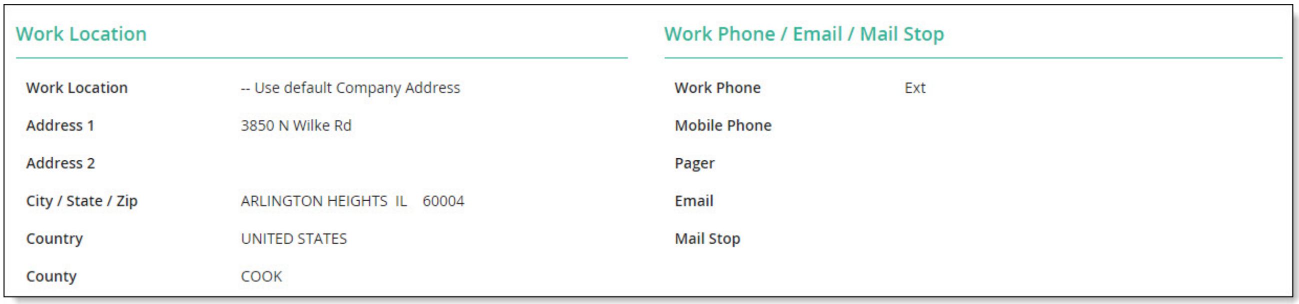
## Dept / Position History

**Show** All

| Effective Date | Check Date | Change Reason | Changed By | Edited | Action |
|---|---|---|---|---|---|
| 5/20/2015 | Current | Change Reviewer | Emily Alba | | |
| 5/13/2015 | History | Change Reviewer | Emily Alba | ✔ | |
| 12/10/2012 | History | Position Change | oashrafi | ✔ | |
| 1/31/2011 | History | | Emily Alba | | |
| 10/28/2010 | History | Initial | Database Import | | |

## *WORK LOCATION*

View work site information.



**Work Location**

| | |
|---|---|
| Work Location | -- Use default Company Address |
| Address 1 | 3850 N Wilke Rd |
| Address 2 | |
| City / State / Zip | ARLINGTON HEIGHTS IL 60004 |
| Country | UNITED STATES |
| County | COOK |

**Work Phone / Email / Mail Stop**

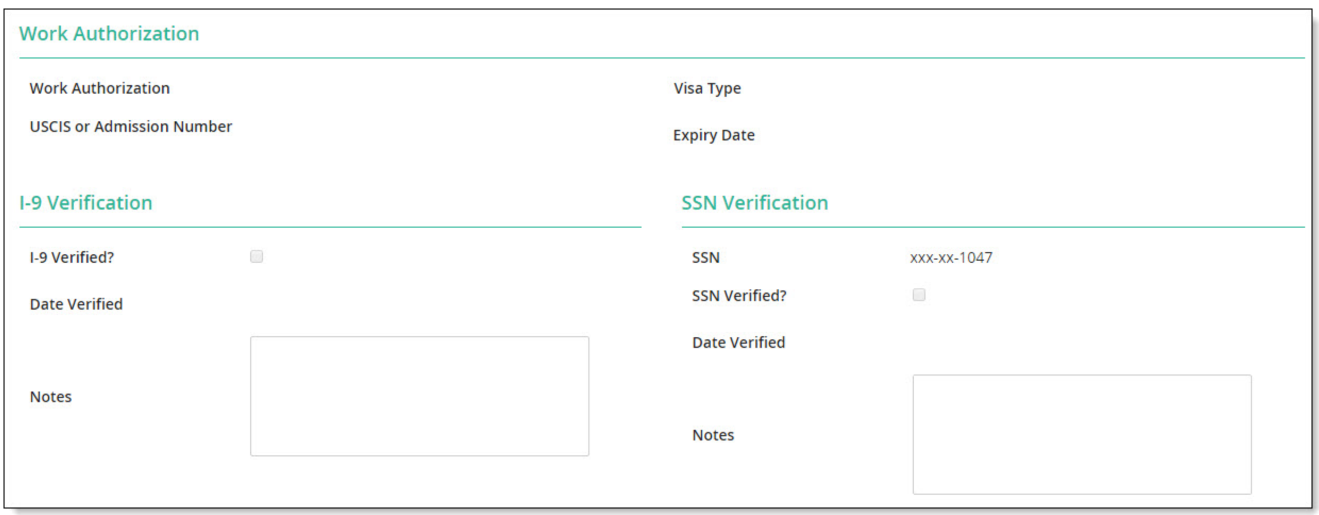
| | |
|---|---|
| Work Phone | Ext |
| Mobile Phone | |
| Pager | |
| Email | |
| Mail Stop | |

### *Important Notes*

- Temporary password resets are emailed to the work email address entered in the **Email** field.
- Employees can have notifications sent to this work email address in addition to having them sent to the Message Center.

## *ELIGIBILITY*

View information regarding eligibility for work.



**Work Authorization**

| | | | |
|---|---|---|---|
| Work Authorization | | Visa Type | |
| USCIS or Admission Number | | Expiry Date | |

**I-9 Verification**

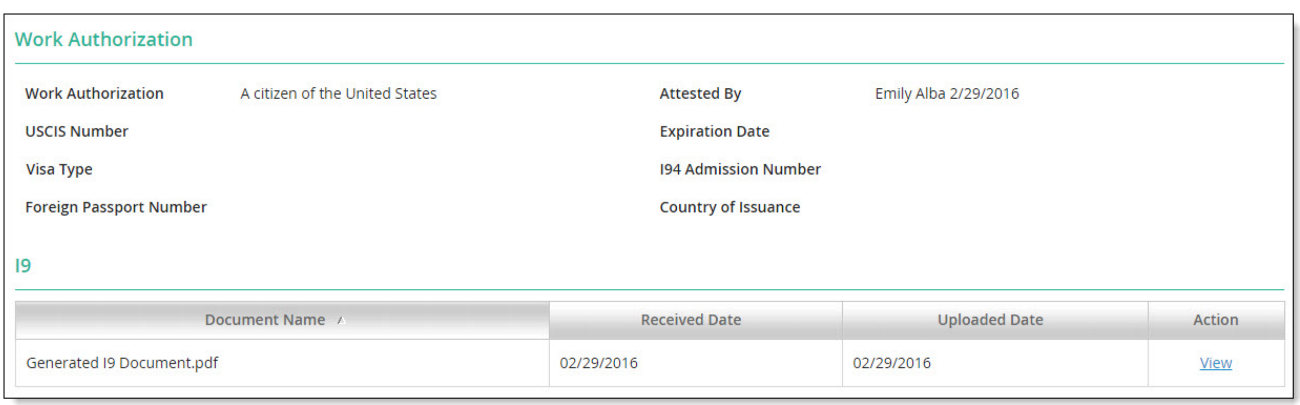
| | |
|---|---|
| I-9 Verified? | ☐ |
| Date Verified | |
| Notes | |

**SSN Verification**

| | |
|---|---|
| SSN | xxx-xx-1047 |
| SSN Verified? | ☐ |
| Date Verified | |
| Notes | |

## *EMPLOYEE I-9 EMPLOYMENT ELIGIBILITY*

Click **View** to review the I-9 work authorization document generated when the employee was hired.



**Work Authorization**

| | | | |
|---|---|---|---|
| Work Authorization | A citizen of the United States | Attested By | Emily Alba 2/29/2016 |
| USCIS Number | | Expiration Date | |
| Visa Type | | I94 Admission Number | |
| Foreign Passport Number | | Country of Issuance | |

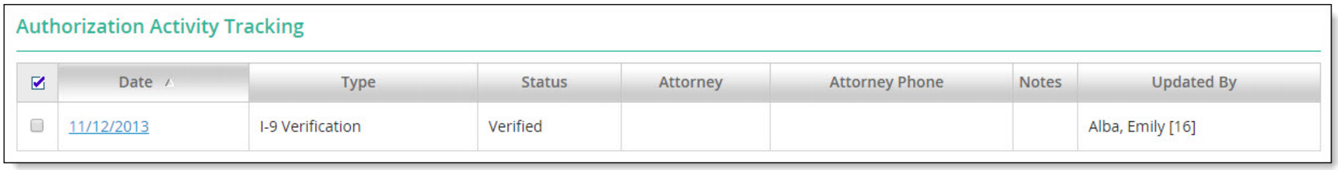
**I9**

| Document Name | Received Date | Uploaded Date | Action |
|---|---|---|---|
| Generated I9 Document.pdf | 02/29/2016 | 02/29/2016 | View |

## *AUTHORIZATION TRACKING*

View work authorization status.

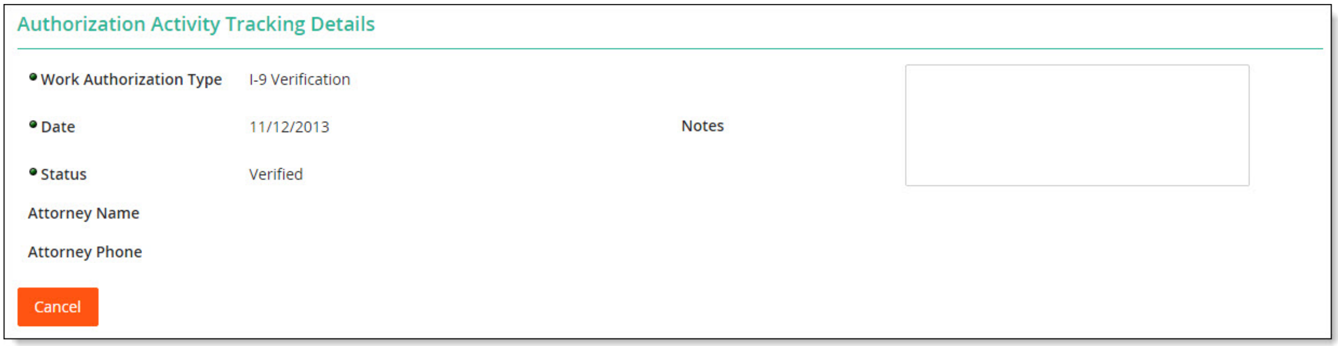
- Click the **Date** link to display the details.



Authorization Activity Tracking

| ☑ | Date | Type | Status | Attorney | Attorney Phone | Notes | Updated By |
|---|---|---|---|---|---|---|---|
| ☐ | 11/12/2013 | I-9 Verification | Verified | | | | Alba, Emily [16] |

- Click the **Cancel** button to return to the main screen.



Authorization Activity Tracking Details

| | |
|---|---|
| Work Authorization Type | I-9 Verification |
| Date | 11/12/2013 |
| Status | Verified |
| Attorney Name | |
| Attorney Phone | |
| Notes | |

Cancel

## *STATUTORY*

Vets 100/100A Tracking

| | |
|---|---|
| Enable? | ☑ |
| Hiring Location | Headquarters |

New Hire Medical Availability

| | |
|---|---|
| Medical Coverage Available? | ☑ |
| Medical Coverage Date | 1/1/2015 |

Vets 100

| | |
|---|---|
| Job Category | 2 - Professionals |
| Covered Veteran | ☐ Special Disabled Veterans<br>☐ Vietnam Era Veterans<br>☐ Recently Separated Veterans<br>☑ Other Protected Veterans |

Vets 100A

| | |
|---|---|
| Job Category | |
| Covered Veteran | ☐ Disabled Veterans<br>☐ Active Duty Wartime Or Campaign Badge Veteran<br>☐ Armed Forces Service Medal Veterans<br>☐ Recently Separated Veterans |

## EMPLOYMENT

### *RATES*

View pay rates or salary amounts. The display includes rate history and information on additional rates

**Rates**

Show: All

| Effective | Check Date | Change Reason | Pay Type | Salary | Rate / Per | Freq | Annual Salary | Auto Pay | Amount | % | Action |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 5/2/2008 | Current | | Salary | $1,000.00 | 0.0000 / Hour | W | $52,000.00 | ✔ | | | |

Records: 1

**Additional Rates**

Show: Current and Future

| Effective | Check Date | End Check Date | Change Reason | Rate | Rate / Per | Division | Branch | Department | Job | Shift | Action |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1/1/2016 | Current | | | PT - Paint | 15.0000 / Hour | | | | | | |

### *PREVIOUS EMPLOYERS*

View employment history prior to being employed by the company.

- Click the **Employer Name** link to display the details.

**Previous Employment**

| ☑ | Employer Name | Contact Phone | Job Title | Start Date | End Date | Rate/Per | Can Contact? | Status |
|---|---|---|---|---|---|---|---|---|
| ☐ | ABC Company | (847) 555-8798 | District Manager | 05/21/2005 | 07/25/2012 | $12.75/Hour | ✔ | C - Complete |

- Click the **Cancel** button to return to the main screen.

## Previous Employment Details

| | |
|---|---|
| Employer Name | ABC Company |
| Business Type | |
| Address 1 | |
| Address 2 | |
| City / State / Zip | -- |
| Country | UNITED STATES |
| County | |
| Phone | |
| Fax | |

## Contact Information

| | |
|---|---|
| Can Contact? | ☑ |
| Contact Name | |
| Title | |
| Phone | (847) 555-8798 |
| Email | |

## Job

| | |
|---|---|
| Title | District Manager |
| Start Date | 5/21/2005 |
| End Date | 7/25/2012 |
| Supervisor Name | |
| Supervisor Title | |
| Duties | |
| Pay Rate | 12.750000 |
| Rate Per | Per Hour |

## Verification

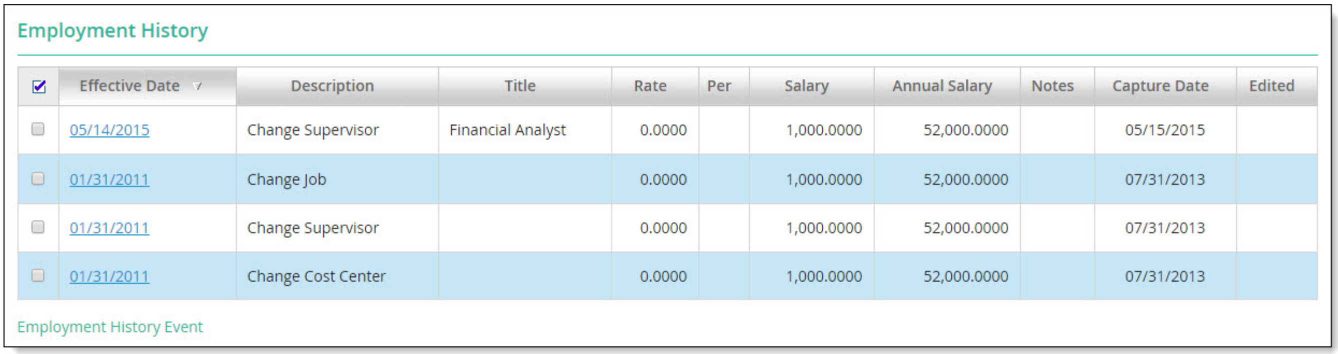
| | |
|---|---|
| Verification Status | Complete |
| Term Reason | |
| Eligible for Rehire? | ☐ |
| Comments | |

Cancel

## *EMPLOYMENT HISTORY*

The Employment History screen is a single page view of the employee's compensation and position history while employed by the company. Changes to the employee work information such as a job change, performance appraisal, new rate, or employment status change are automatically added to Employment History overnight.

- Click the **Effective Date** link to display the details.

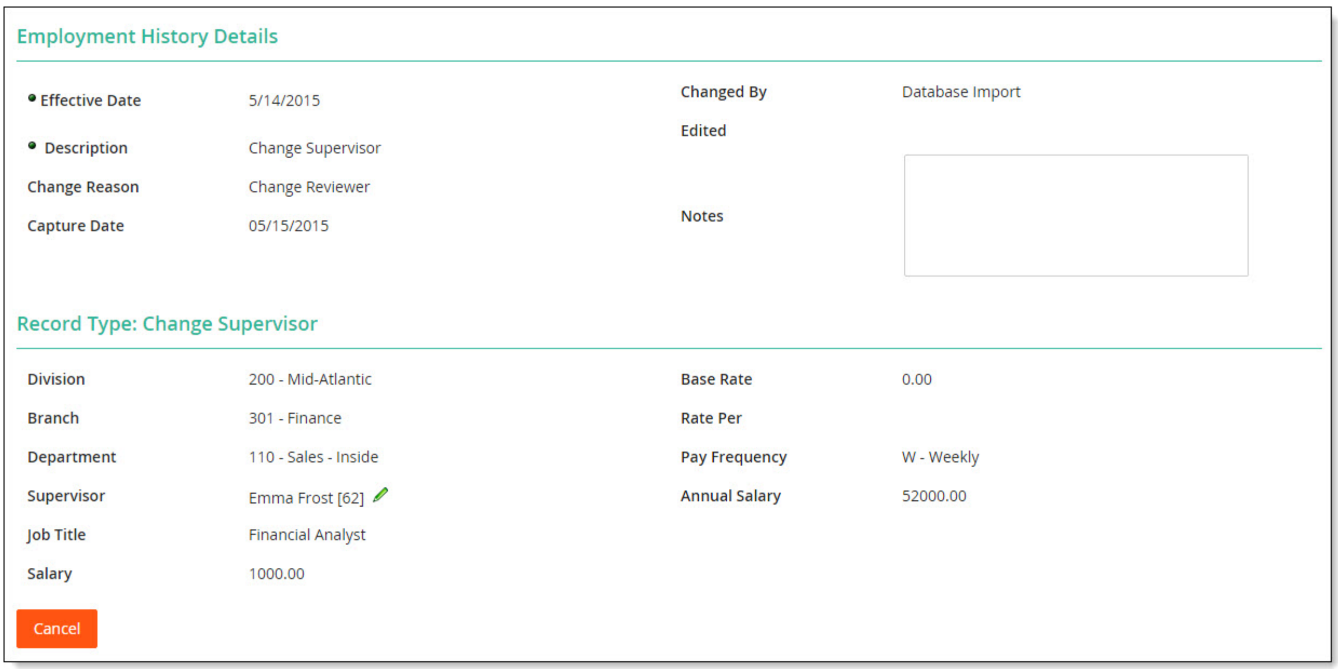


Employment History

| | Effective Date | Description | Title | Rate | Per | Salary | Annual Salary | Notes | Capture Date | Edited |
|---|---|---|---|---|---|---|---|---|---|---|
| | 05/14/2015 | Change Supervisor | Financial Analyst | 0.0000 | | 1,000.0000 | 52,000.0000 | | 05/15/2015 | |
| | 01/31/2011 | Change Job | | 0.0000 | | 1,000.0000 | 52,000.0000 | | 07/31/2013 | |
| | 01/31/2011 | Change Supervisor | | 0.0000 | | 1,000.0000 | 52,000.0000 | | 07/31/2013 | |
| | 01/31/2011 | Change Cost Center | | 0.0000 | | 1,000.0000 | 52,000.0000 | | 07/31/2013 | |

Employment History Event

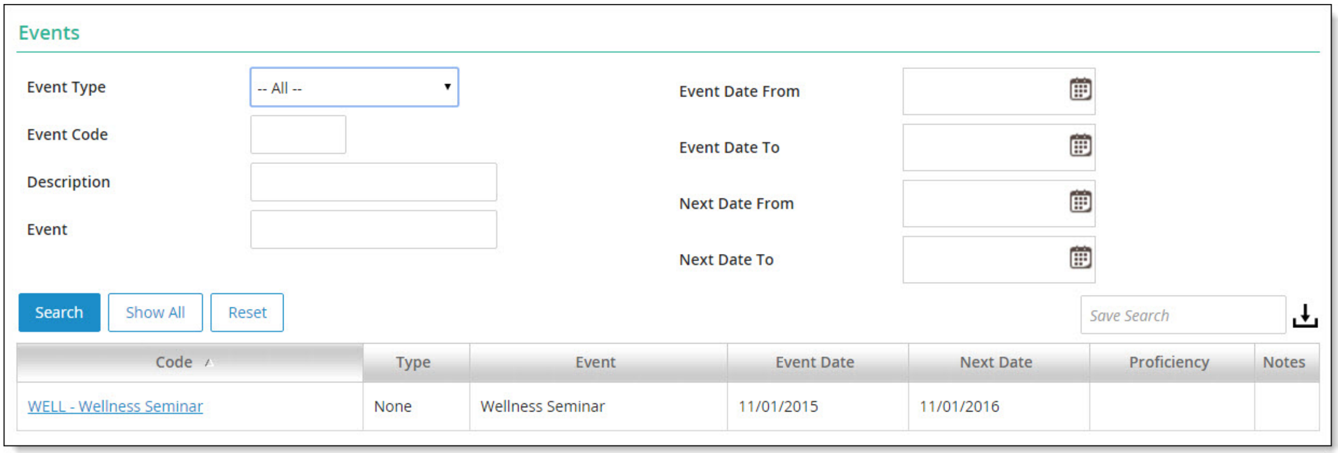
- Click the **Cancel** button to return to the main screen.



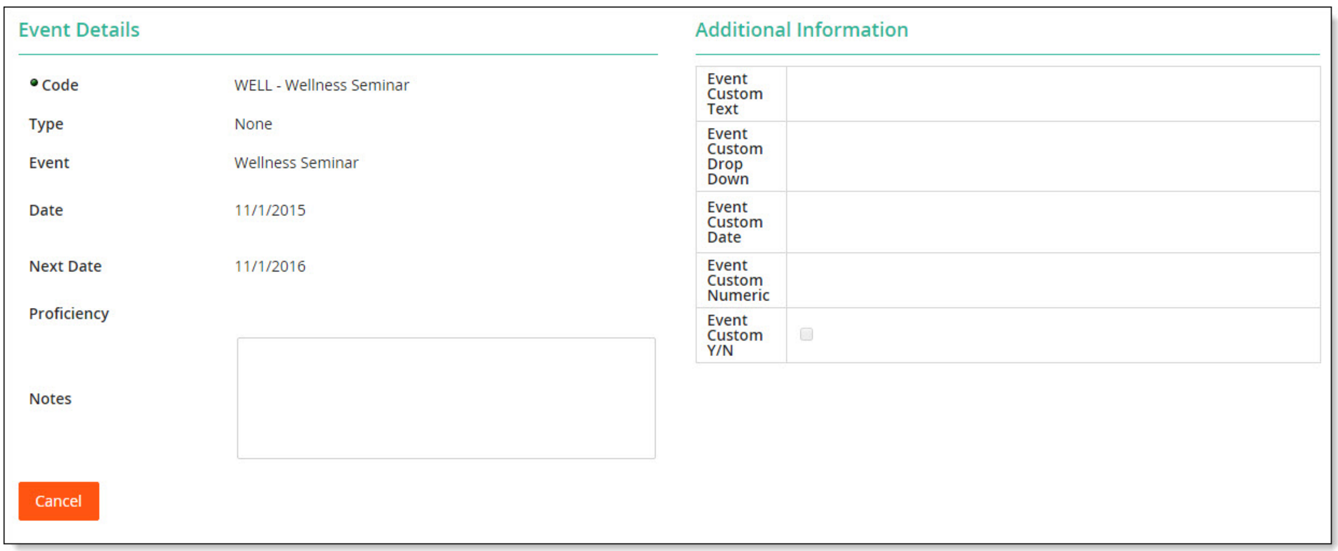
## *EVENTS*

View events, awards, or disciplinary actions.

- Click the **Code** link to display its details.

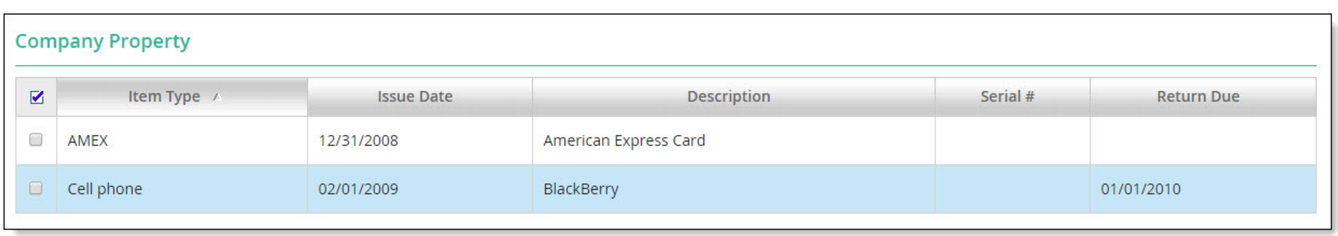



- Click the **Cancel** button to return to the main screen.




## *COMPANY PROPERTY*

View the company property that has been issued.



## PAY HISTORY

### *CURRENT CHECKS*

View current check information. Users are able to print a pay stub by clicking the **Download Printable Version** button on the bottom of this screen.

To view a paycheck or direct deposit voucher issued prior to the current check, click the **Check Date** drop down and select the applicable check date to display the check or voucher.

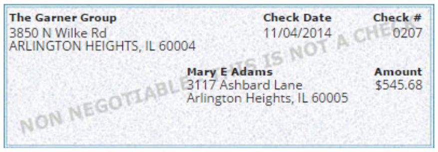
The Employee section, which displays the **Employee Id** and **Department**, can be expanded or collapsed by clicking the double arrows. The **Check** or **Voucher #**, **Delivery Location**, **Check Date**, **Period Begin** and **End Dates**, **Gross Earnings**, **Gross YTD**, **Net Earnings**, and **Net YTD** are displayed in the Check section. Depending on the company's configuration, the bottom sections of the screen will display applicable details about Direct Deposits, Earnings, Deductions, Benefits, Taxes, and Time Off.

## Employee

| | | | |
|---|---|---|---|
| **Employee Id** | 3 | **Division** | 400 - Central |
| **Salary** | $1,000.00 | **Branch** | 201 - Business Development |
| | | **Department** | 600 - Client Support |

## Check

**Show Adjustment Checks** No ▾ **Check Date** 11/04/2014 - C0207 ▾




| | | |
|---|---|---|
| **Check # - Delivery Location** | 207 | Default |
| **Check Date** | 11/04/2014 | |
| **Period Begin Date - End Date** | 10/19/2014 | 10/25/2014 |
| **Gross Earnings - YTD** | $1,025.00 | $1,025.00 |
| **Net Earnings - YTD** | $545.68 | $545.68 |

## Direct Deposits

| Bank | Account | Type | Amount | YTD |
|---|---|---|---|---|

## Earnings

| Description | Hrs | Rate | Current | YTD |
|---|---|---|---|---|
| 401K MATCH | | | $51.25 | $51.25 |
| Auto Allowance | | | $25.00 | $25.00 |
| Employer Paid Dental | | | $20.00 | $20.00 |
| Employer Paid HDHP | | | $250.00 | $250.00 |
| REGULAR | | $25.00 | $1,000.00 | $1,000.00 |
| Totals | | | $1,025.00 | $1,025.00 |

## Taxes

| Description | Current | YTD |
|---|---|---|
| Federal Income Tax | $49.75 | $49.75 |
| Illinois SITW | $32.28 | $32.28 |
| Medicare | $11.14 | $11.14 |
| OASDI | $47.65 | $47.65 |
| Totals | $140.82 | $140.82 |

## Deductions

| Description | Current | YTD |
|---|---|---|
| HSA | $100.00 | $100.00 |
| Dental Insurance | $31.50 | $31.50 |
| HDHP PPO Medical | $125.00 | $125.00 |
| Totals | $256.50 | $256.50 |

## Time Off

| Description | Available | Taken |
|---|---|---|
| Personal | | |
| Sick | 0.00 | |
| Vacation | -0.62 | 208.00 |

## Benefits

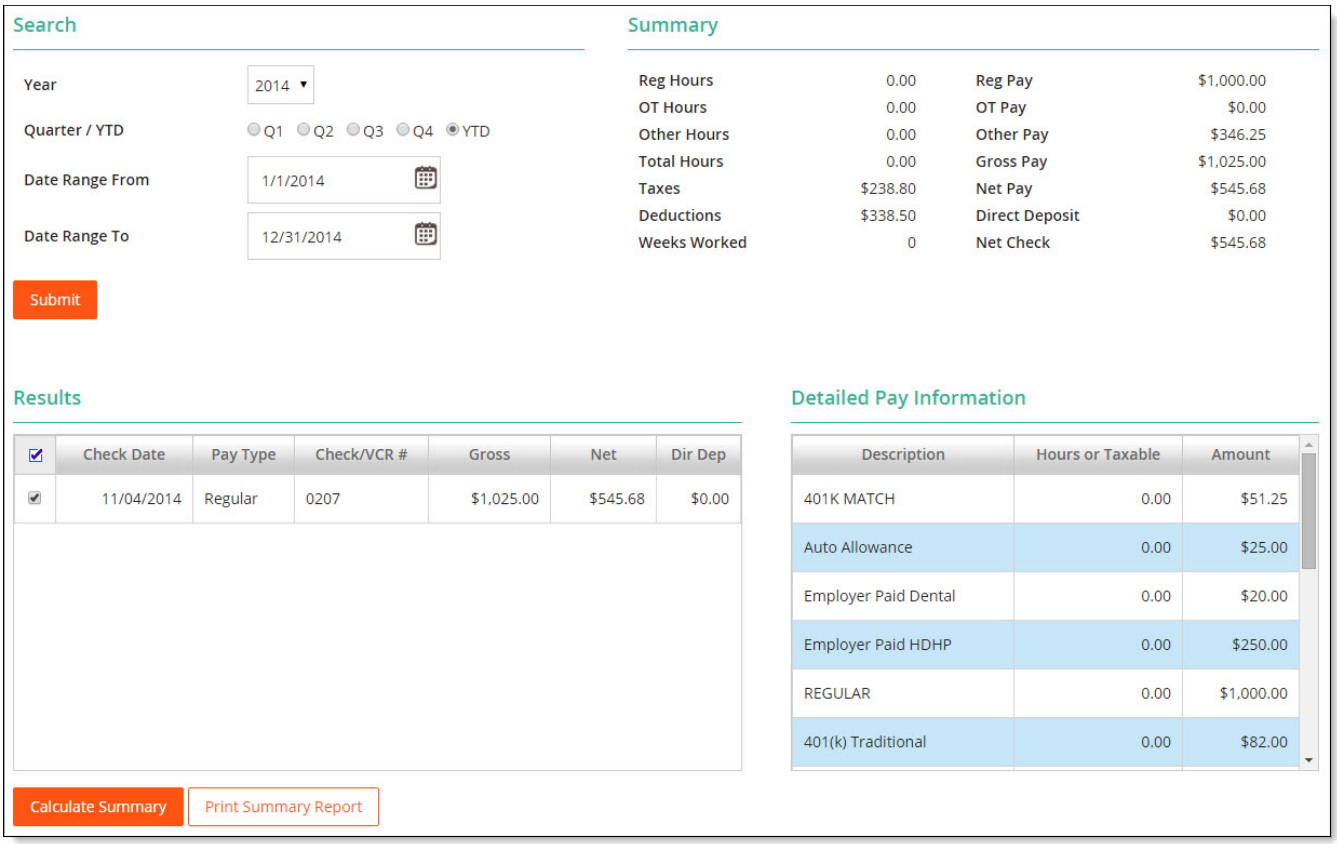
| Description | Current | YTD |
|---|---|---|

Download Printable Version

## *CHECK HISTORY*

Search for checks in a specific date range.

- Select a **Date Range From** and **Date Range To**, populating the checks to display.
- Click the **Submit** button to display the results.
- To summarize only certain checks in the specified date range, check the box adjacent to the applicable checks in the Results section.
- Click the **Calculate Summary** button to display the sum totals of the selected checks in the Summary and Detailed Pay Information sections.
- Click the **Print Summary Report** button to print a copy of the Check History Summary Report.



## *TAX FORMS*

View and print W2s, 1099s, and 1095-Cs that have been processed by Paylocity.

- Click the **Tax Year** link to view or print a copy of the tax form.

**Tax Forms**

| Tax Year | Fed Wages | Fed Witholding | SS Wages | SS Witholding | Medicare Wages | Medicare Witholding | 1095-C |
|---|---|---|---|---|---|---|---|
| 2012 | $19,576.00 | $1,516.38 | $22,064.00 | $926.71 | $22,064.00 | $319.92 | |
| 2011 | $30,964.00 | $3,437.32 | $33,240.00 | $1,396.08 | $33,240.00 | $481.96 | |

- Close the PDF file to return to the main screen.

**Copy C - FOR EMPLOYEE'S RECORDS ONLY** **2012** OMB No. 1545-0008

| | | |
|---|---|---|
| a Control number<br>PROC1<br>1 | 1 Wages, tips, other comp.<br>40,268.00 | 2 Federal income tax withheld<br>6,740.06 |
| b Employer ID number<br>00-5554442 | 3 Social security wages<br>42,698.00 | 4 Social security tax withheld<br>1,793.33 |
| | 5 Medicare wages and tips<br>42,698.00 | 6 Medicare tax withheld<br>619.12 |

c Employer's name, address, and ZIP code
The Garner Group
3850 N Wilke Rd
ARLINGTON HEIGHTS, IL 60004

d Employee's social security number 987-65-4321

e Employee's name, address, and ZIP code
Emily I Alba
117 Bayview Circle
Hermosa Beach, CA 90254

| | | |
|---|---|---|
| 7 Social security tips<br>0.00 | 8 Allocated tips<br>0.00 | 9 Advance EIC payment<br>0.00 |
| 10 Dependent care benefits<br>0.00 | 11 Nonqualified plans<br>0.00 | |

| | | | |
|---|---|---|---|
| 12a | D | 2,430.00 | 13 Statutory employee / Retirement plan: X / 3rd-party sick pay |
| 12b | DD | 11,032.00 | 14 Other |
| 12c | | | |
| 12d | | | |

| | | | |
|---|---|---|---|
| IL | 0000000000000 | 40,268.00 | 2,013.40 |
| 15 State Employer's State ID# | | 16 State wages, tips, etc. | 17 State income tax |
| 18 Local wages, tips, etc.<br>N/A | | 19 Local income tax<br>N/A | 20 Locality name<br>N/A |

**Form W-2 Wage and Tax Statement** Dept. of the Treasury - IRS

This information is being furnished to the IRS. If you are required to file a tax return, a negligence penality/other sanction may be imposed on you if this income is taxable and you fail to report it.

**Printed by Paylocity Payroll**
Page 2 of 2

## BENEFITS

### *RETIREMENT PLANS*

View retirement plan information.

- Click the **Deduction** link to display the details.

#### Retirement Plans

| ☑ | Deduction | Plan Name | Begin Check Date | End Check Date | % / Amount | Status |
|---|---|---|---|---|---|---|
| ☐ | 401(k) Traditional | Principal 401k | 08/14/2015 | | 10.00 | Active |

- Click the **Match Details & Allocations** button to display the established match rules for the current Plan

#### Retirement Plan Details

| | |
|---|---|
| Plan | P4500 - Principal 401k |
| Participation Status | Active Participant |
| Eligibility Date | |

#### Matching Status

| | |
|---|---|
| Eligible for Match? | ☑ |
| Begin Check Date | |

#### Contribution

| | |
|---|---|
| Deduction | 401K |
| Begin Check Date | 08/14/2015 |
| End Check Date | |
| Calculation Code | Flat Amount |
| Contribution | 10.00 |

Match Details & Allocations

#### Compliance Info

| | |
|---|---|
| Highly Compensated? | ☐ |
| Begin Date | |
| End Date | |
| Owner? | ☐ |
| Ownership % | |
| Owner Related? | ☐ |

#### Make Up Over 50

| | |
|---|---|
| Do Not Participate in Make Up | ☐ |
| Eligibility Date | 12/23/1999 |
| Federal Limit | $6,000.00 |
| Calculation Code | |
| Amount | |

#### Roth Contribution

| | |
|---|---|
| Roth Contribution | ☐ |
| Deduction | |
| Begin Check Date | |
| End Check Date | |
| Calculation Code | |
| Contribution | |

#### Roth Make Up Over 50

| | |
|---|---|
| Eligibility Date | 12/23/1999 |
| Federal Limit | $6,000.00 |
| Calculation Code | |
| Amount | |

Cancel

- Click the **Return** button to return to the main screen.

#### Matching Rules For Principal 401k

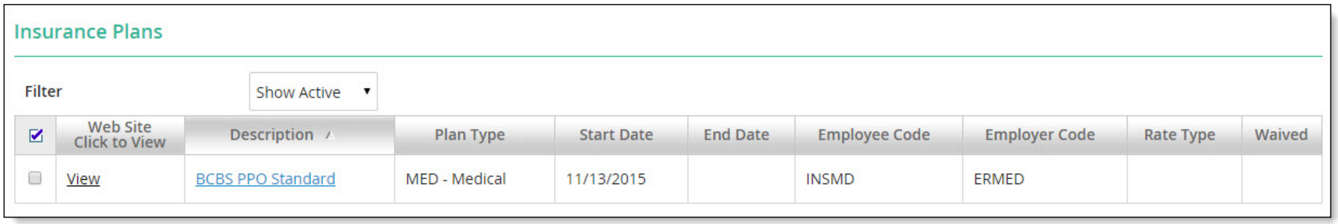
| Employees | Range Type | Range From / To | Match Type | Match | Limit Type | Limit |
|---|---|---|---|---|---|---|
| Active Participants | % of Contribution | 0.00 / 5.00 | % of Contribution | 100.00 | | 5.00 |

Return

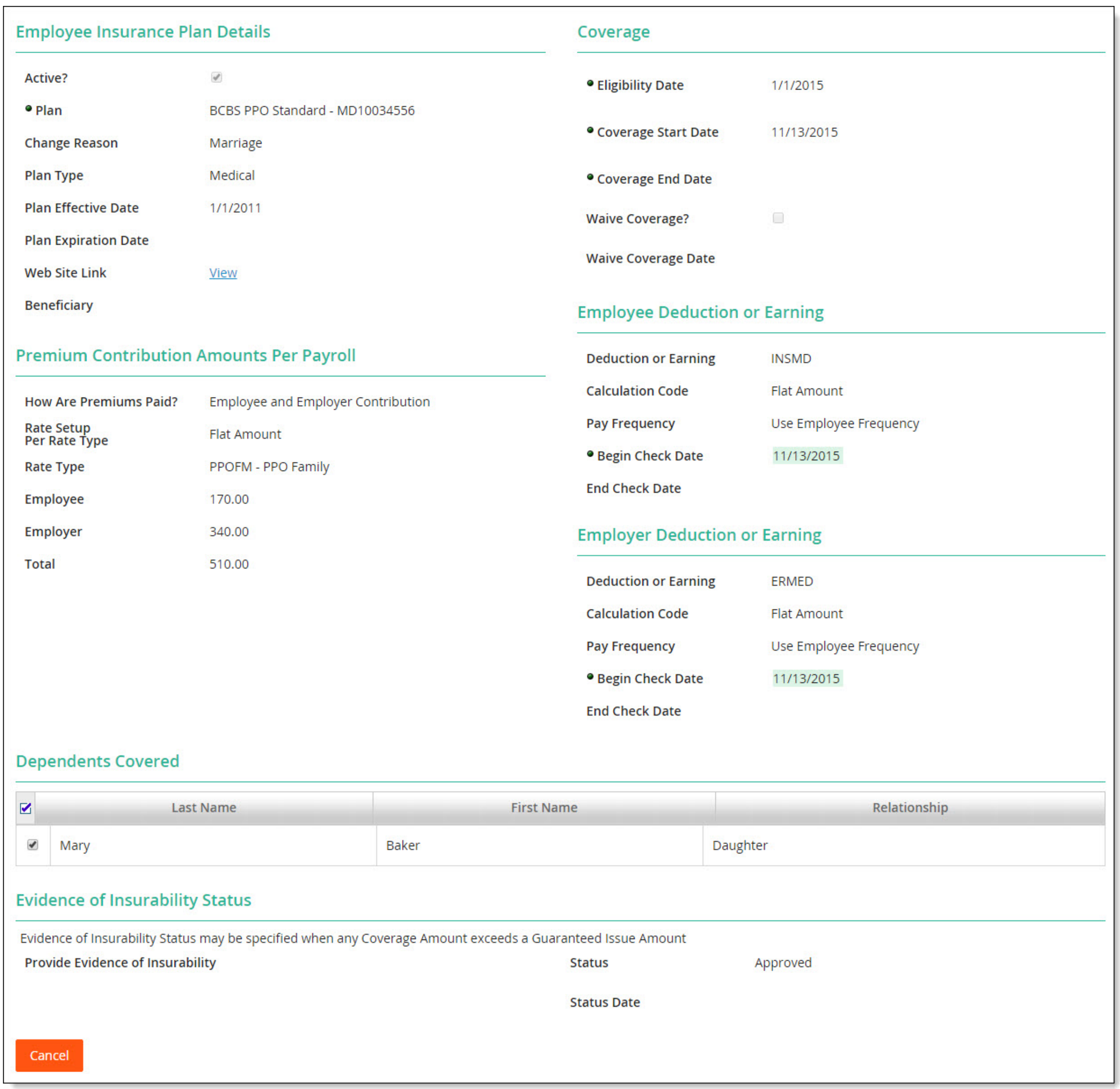
## *INSURANCE PLANS*

View insurance plan information.

- Click the **View** link to access the plan web site.
- Click the **Description** link to display the details.



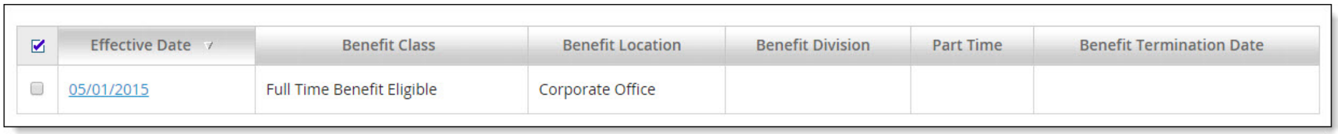

- Click the **View** link to access the plan web site.
- Click the **Cancel** button to return to the main screen.



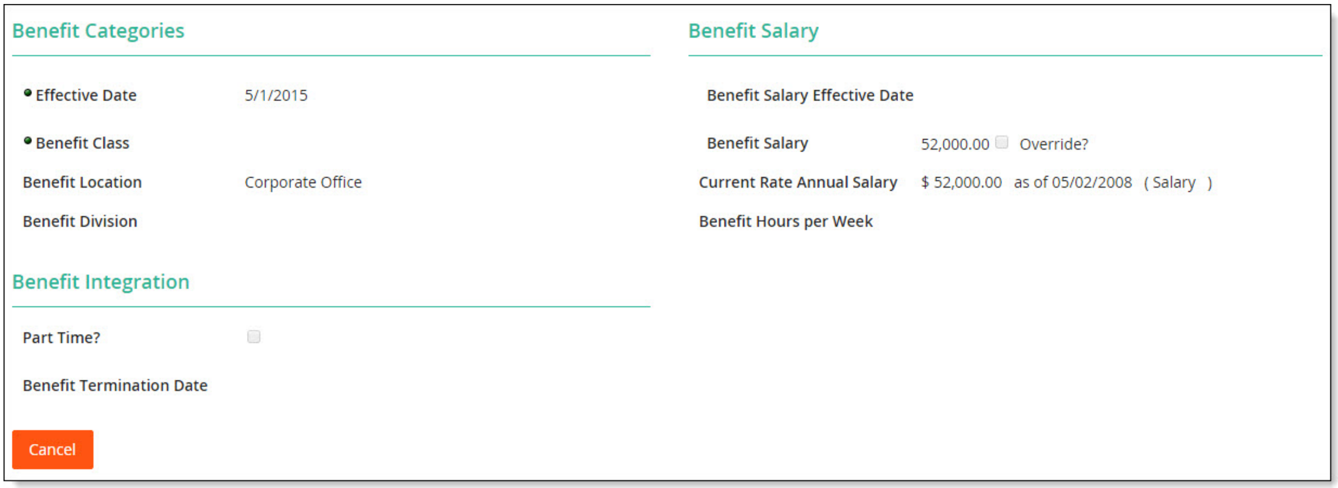
## *CLASSES*

View setup values used for employee benefits integration and insurance plan settings.

- Click the **Effective Date** to view the selected benefit.




- Click the **Cancel** button to return to the main screen.

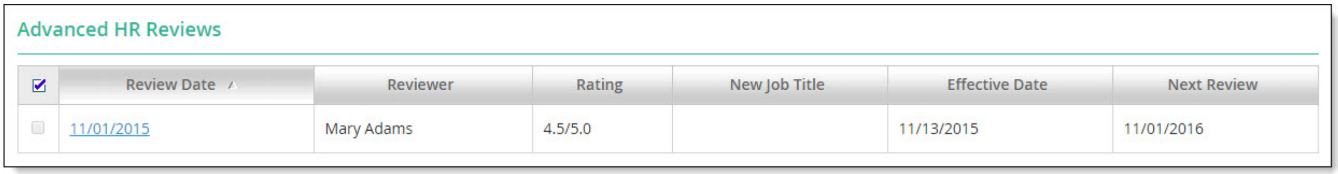


# PERFORMANCE

## *ADVANCED HR REVIEWS*

View performance reviews.

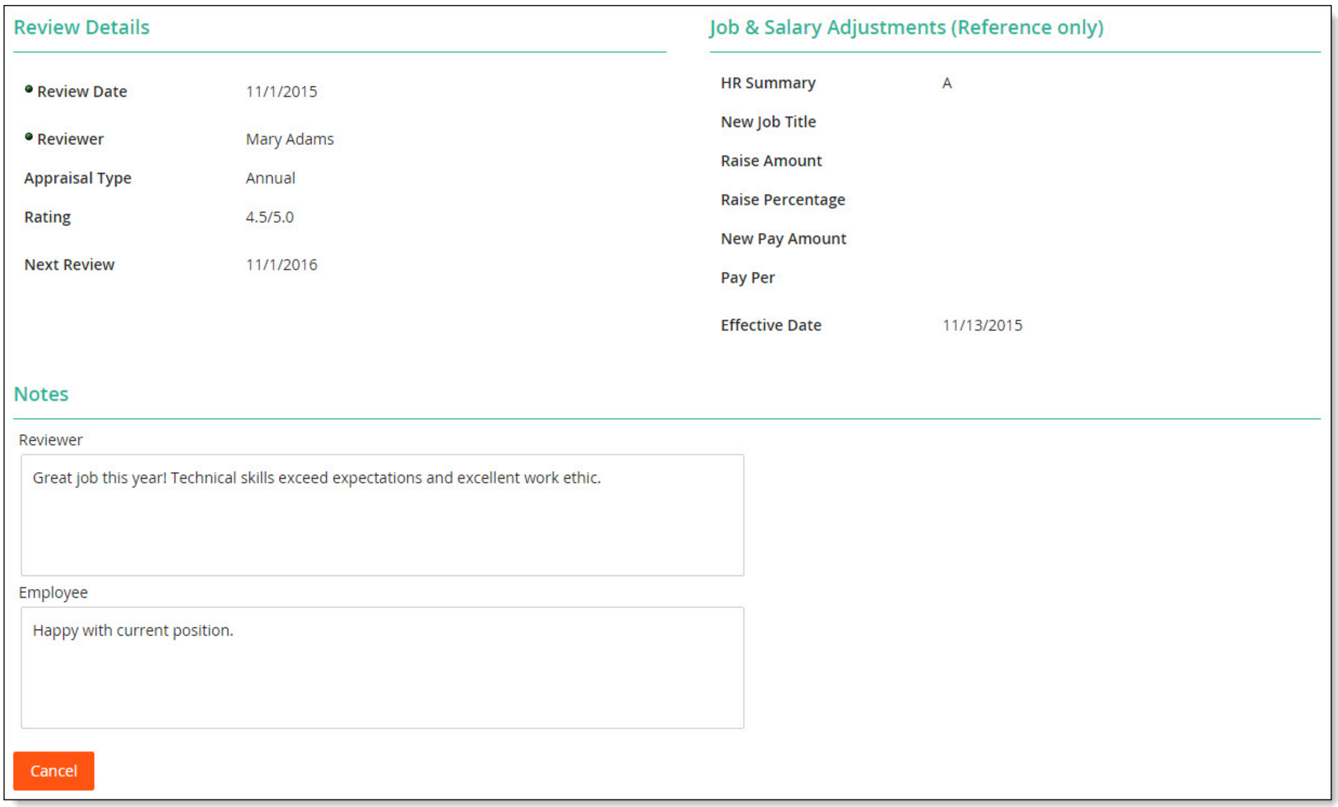
- Click the **Review Date** link to display its details.



Advanced HR Reviews

| | Review Date | Reviewer | Rating | New Job Title | Effective Date | Next Review |
|---|---|---|---|---|---|---|
| | 11/01/2015 | Mary Adams | 4.5/5.0 | | 11/13/2015 | 11/01/2016 |

- Click the **Cancel button** to return to the main screen.



Review Details

| | |
|---|---|
| Review Date | 11/1/2015 |
| Reviewer | Mary Adams |
| Appraisal Type | Annual |
| Rating | 4.5/5.0 |
| Next Review | 11/1/2016 |

Job & Salary Adjustments (Reference only)

| | |
|---|---|
| HR Summary | A |
| New Job Title | |
| Raise Amount | |
| Raise Percentage | |
| New Pay Amount | |
| Pay Per | |
| Effective Date | 11/13/2015 |

Notes

Reviewer

Great job this year! Technical skills exceed expectations and excellent work ethic.

Employee

Happy with current position.

Cancel

## TRAINING

### *SKILLS*

View skill information.

- Click the **Skill** link to display the details.

Skills

| Skill | Type | Proficiency | Complete Date | Renew Date | Notes |
|---|---|---|---|---|---|
| CMPTR - Computer Skill | None | C++ Cert. | 08/15/2015 | | |

- Click the **Cancel** button to return to the main screen.

Skills

| Skill | Type | Proficiency | Complete Date | Renew Date | Notes |
|---|---|---|---|---|---|
| CMPTR - Computer Skill | None | C++ Cert. | 08/15/2015 | | |

### *EDUCATION*

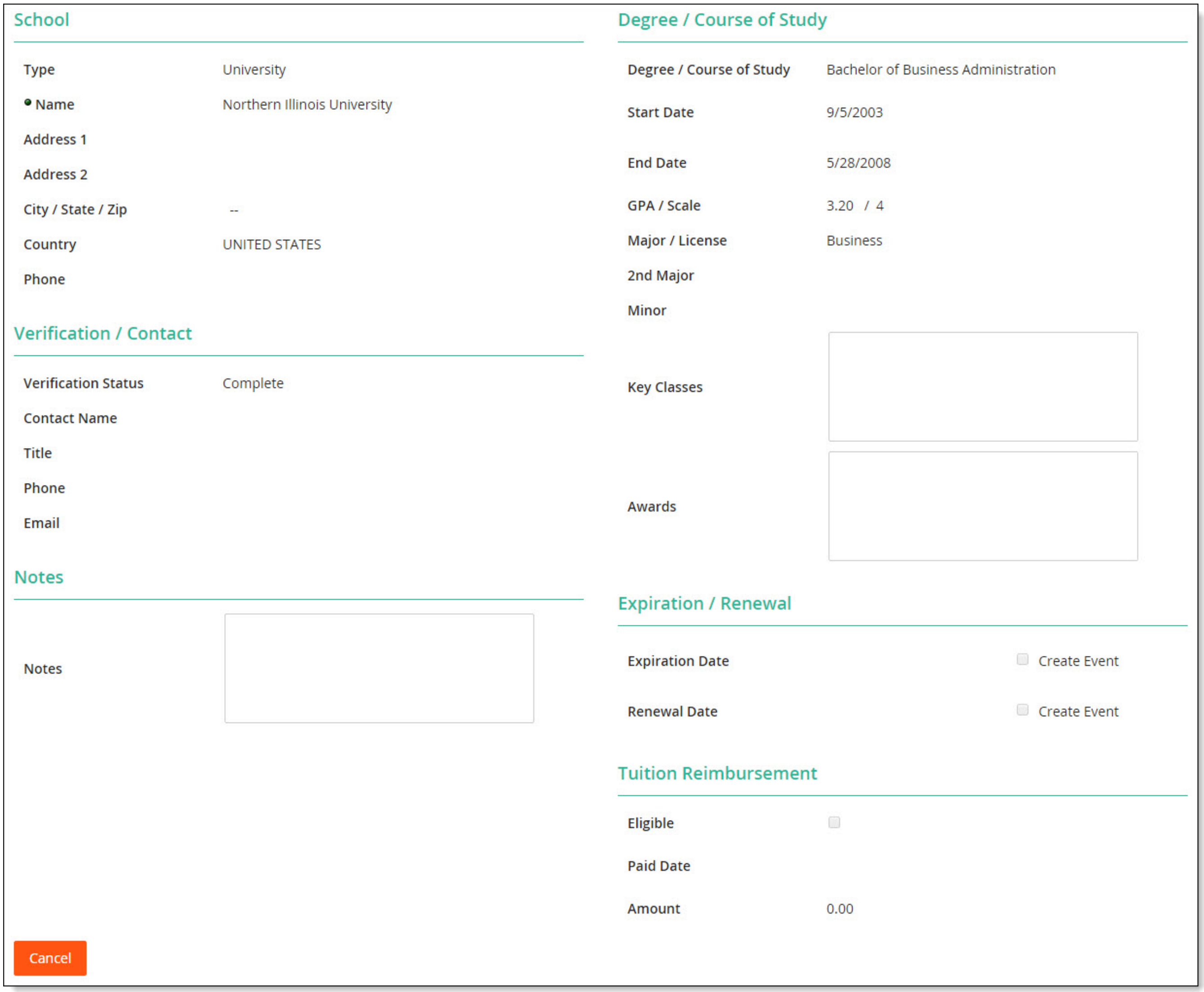
View education information which may include classes taken while employed by the company and tuition reimbursement information.

- Click the **School** link to display the details.

Education

| | School | Start Date | End Date | Degree / Course of Study | Major / License | GPA / Scale | Status |
|---|---|---|---|---|---|---|---|
| | Northern Illinois University | 09/05/2003 | 05/28/2008 | Bachelor of Business Administration | Business | 3.20/4.0 | C - Complete |

- Click the **Cancel** button to return to the main screen.

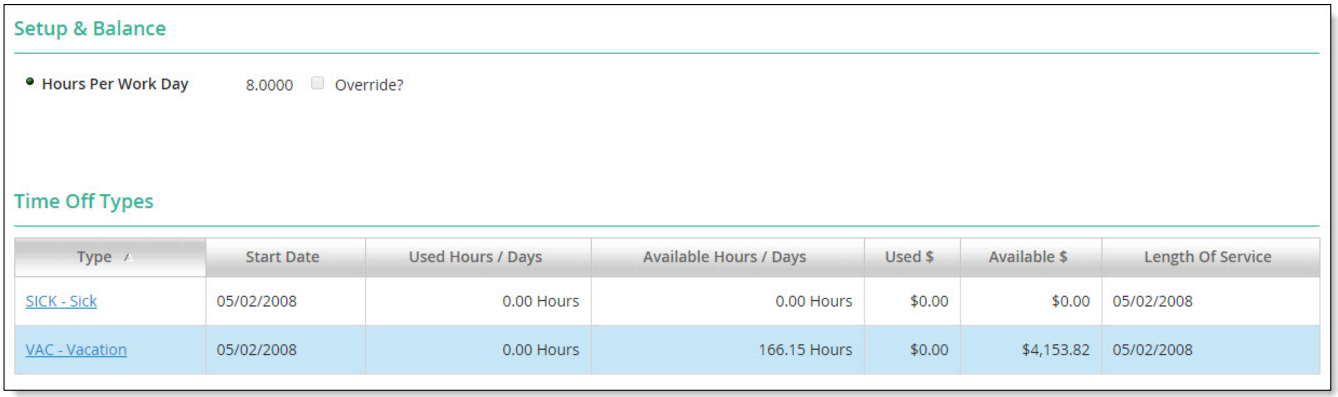

School
Type University
Name Northern Illinois University
Address 1
Address 2
City / State / Zip --
Country UNITED STATES
Phone
Verification / Contact
Verification Status Complete
Contact Name
Title
Phone
Email
Notes
Notes
Degree / Course of Study
Degree / Course of Study Bachelor of Business Administration
Start Date 9/5/2003
End Date 5/28/2008
GPA / Scale 3.20 / 4
Major / License Business
2nd Major
Minor
Key Classes
Awards
Expiration / Renewal
Expiration Date
Create Event
Renewal Date
Create Event
Tuition Reimbursement
Eligible
Paid Date
Amount 0.00
Cancel

## TIME OFF

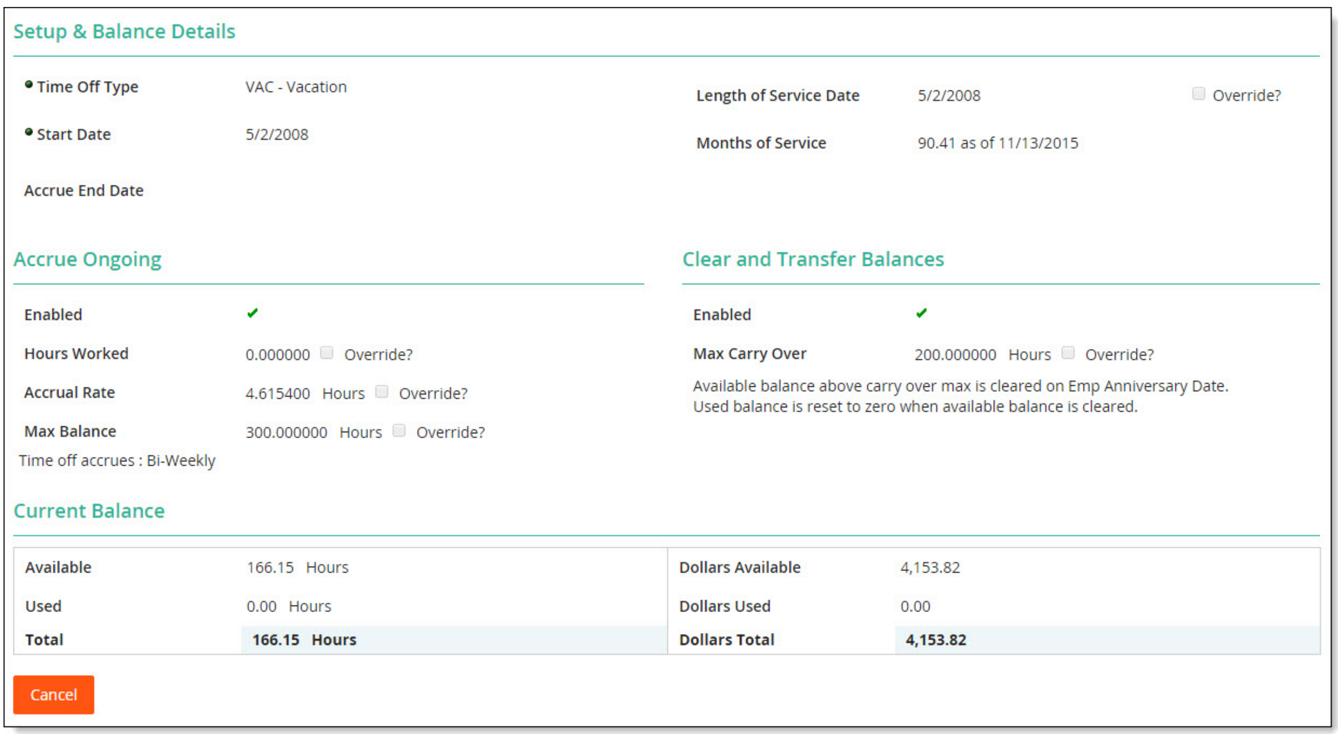
### *BALANCE*

View time off information.

- Click the **Type** link to display the details.




- Click the **Cancel** button to return to the main screen.



## *HISTORY*

View time off benefits earned and used per payroll and any manual adjustments made in Web Pay. Users can search for time off based on selected date ranges and/or types and display totals.

### Time Off History

Transaction Date From | Time Off Type: -- All --

Transaction Date To | Transaction Type: -- All --

Begin Date From | Show Totals?

Begin Date To | Transaction Subtype: -- All --

Search | Show All | Reset | Save Search

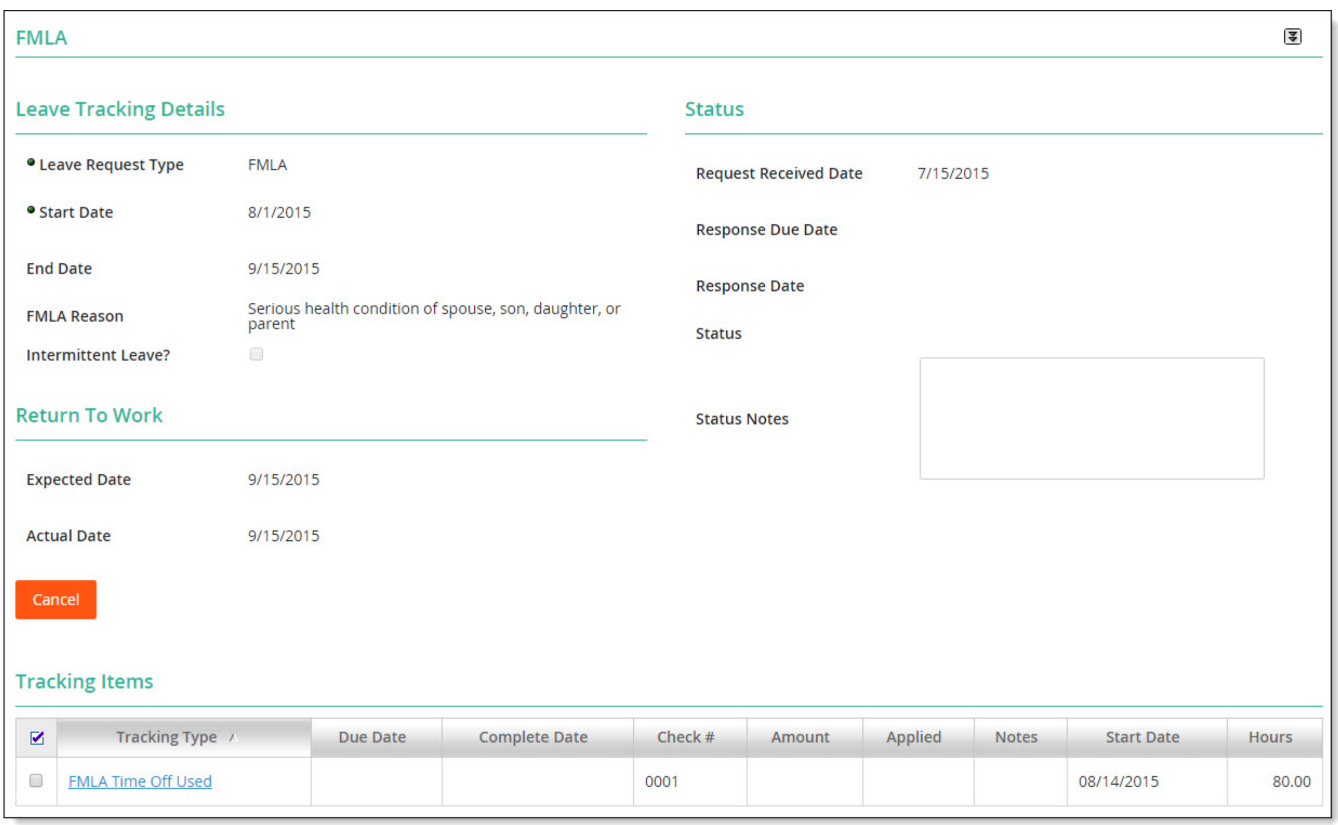
| Trans Date | Begin Date | Type | Trans Type | Subtype | Hours/Days | Avail Hours/Days | $ | Available $ |
|---|---|---|---|---|---|---|---|---|
| 08/16/2013 | 08/16/2013 | VAC | Earned | Ongoing | 4.62 Hours | 177.85 Hours | $115.39 | $4,446.16 |
| 01/25/2013 | 01/25/2013 | VAC | Used | | 8.00 Hours | 173.23 Hours | $200.00 | $4,330.77 |
| 01/18/2013 | 01/18/2013 | VAC | Earned | Ongoing | 4.62 Hours | 181.23 Hours | $115.39 | $4,530.77 |
| 01/04/2013 | 01/04/2013 | VAC | Earned | Ongoing | 4.62 Hours | 176.62 Hours | $115.39 | $4,415.39 |
| 01/04/2013 | 01/04/2013 | PERS | Earned | Ongoing | 0.00 Hours | 0.00 Hours | | |
| 01/04/2013 | 01/04/2013 | SICK | Earned | Ongoing | 0.00 Hours | 0.00 Hours | | |
| 01/04/2013 | 01/04/2013 | SICK | Cleared | | 0.00 Hours | 0.00 Hours | | |
| 01/04/2013 | 01/04/2013 | PERS | Cleared | | 0.00 Hours | 0.00 Hours | | |
| 01/04/2013 | 01/04/2013 | VAC | Cleared | | 0.00 Hours | 172.00 Hours | $0.00 | $4,300.00 |
| 01/04/2013 | 01/04/2013 | VAC | Used | | 8.00 Hours | 172.00 Hours | $200.00 | $4,300.00 |

## *LEAVE TRACKING*

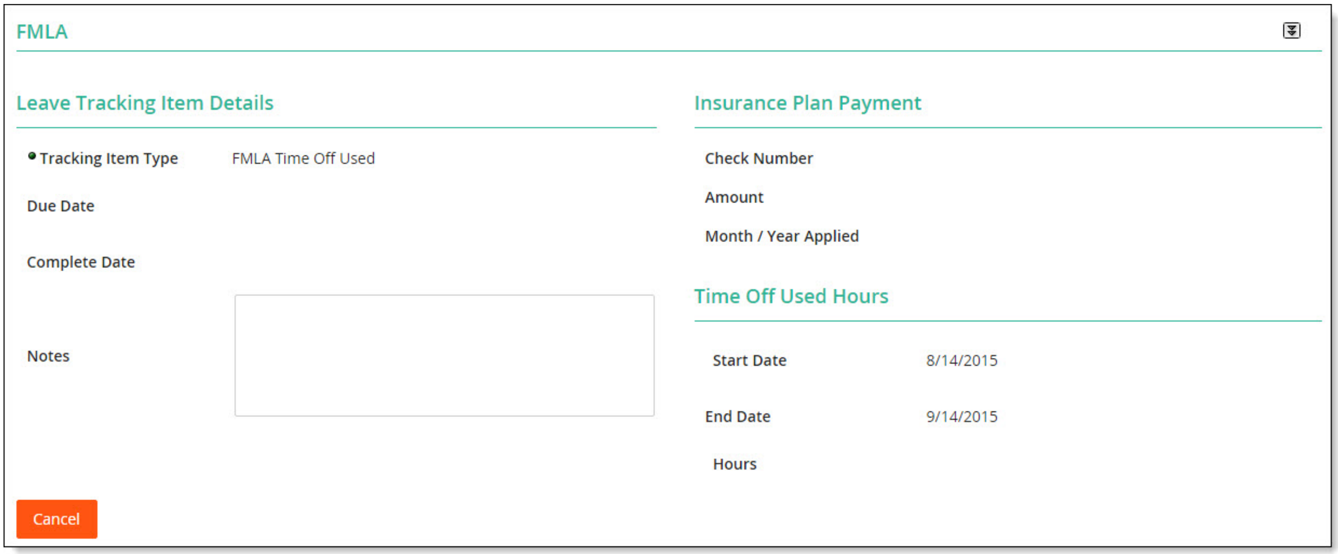
View information about leaves such as Family and Medical Leave Act (FMLA), disability leave, or military leave.

- Click the **Start Date** link to display the details.


- Click the **Tracking Type** link to display the details.



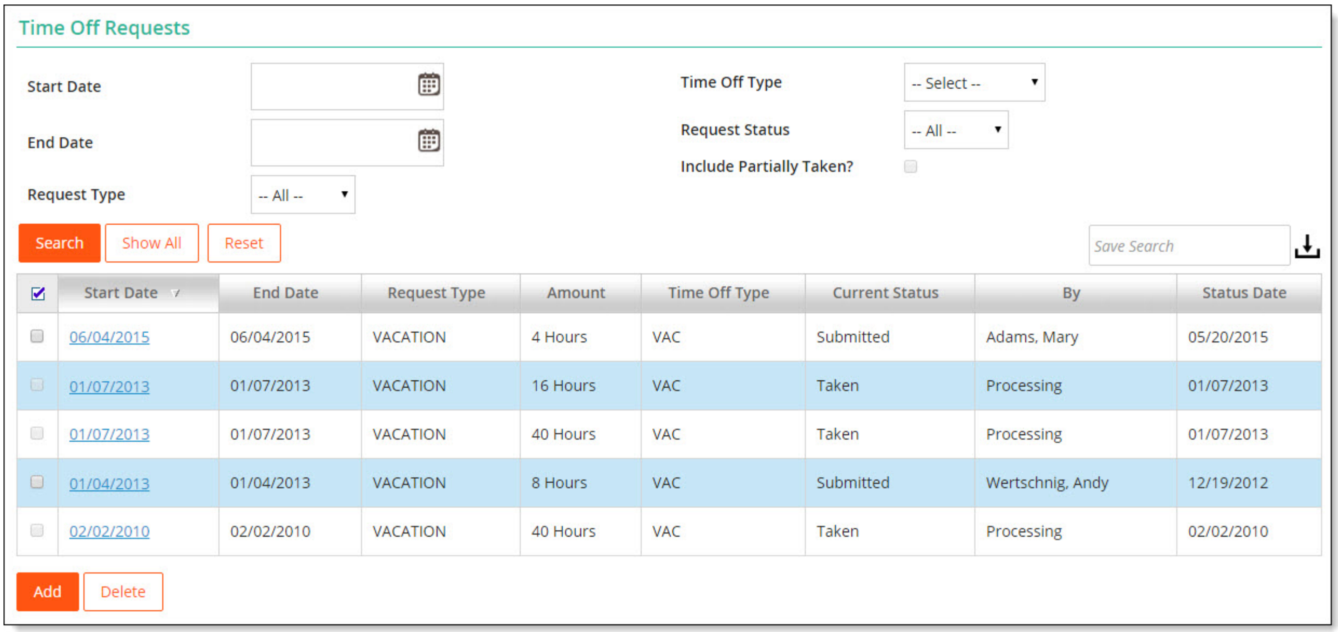
- Click the **Cancel** button to return to the main screen.



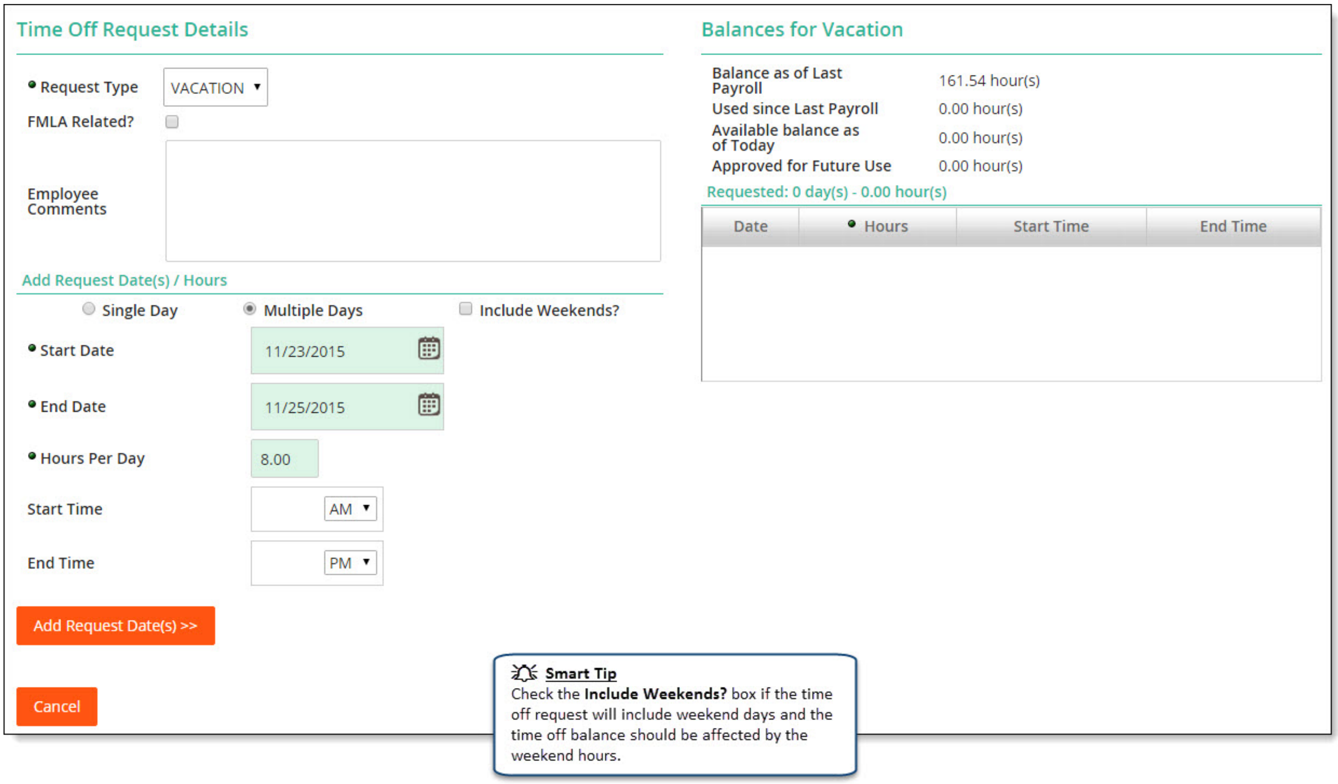
## *TIME OFF REQUESTS*

Submit time off requests. User may also submit time off requests in the self service portal. Once a request is approved or declined, the employee receives a message in the Message Center and the new status appears in this screen.

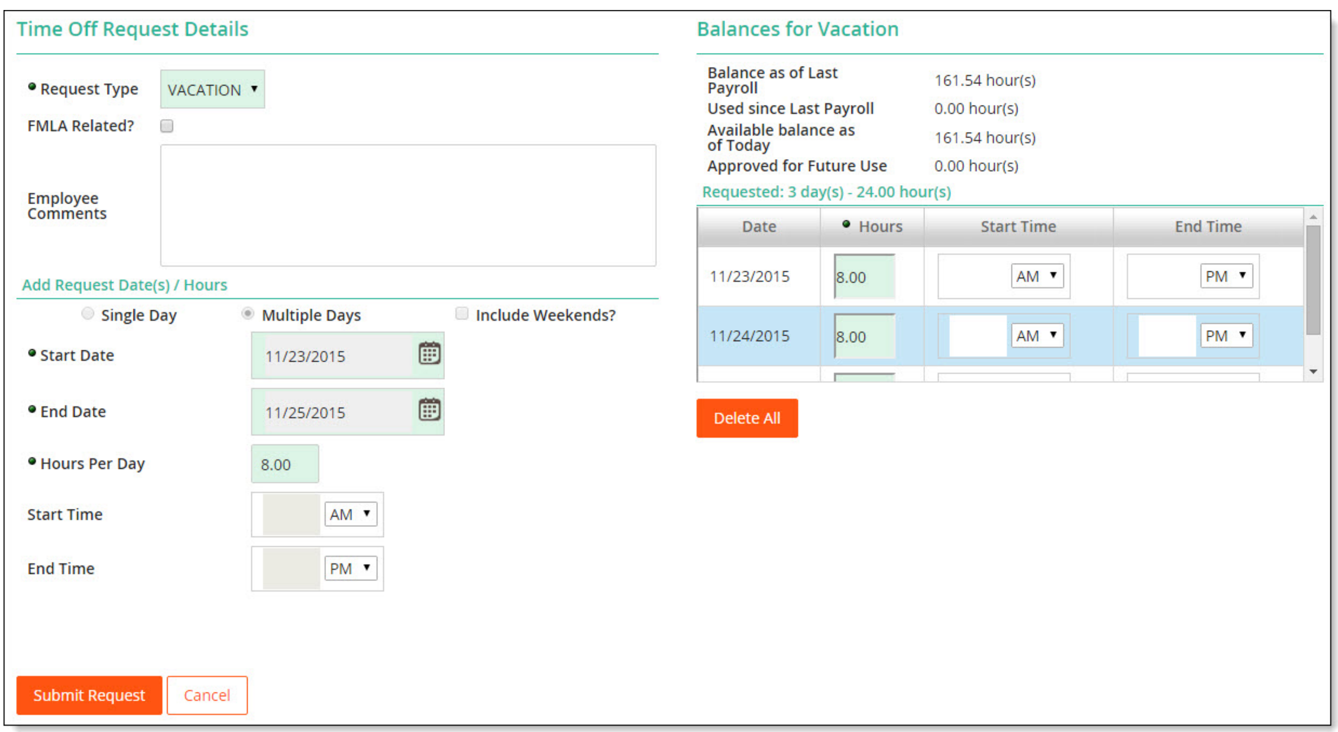
- Click the **Add** button to add a time off request.
- Click the **Start Date** link to display or modify the details.
- Check the box adjacent to the **Start Date** and click the **Delete** button to cancel the request.




1. Select a **Request Type** from the drop down.
2. Check the **FMLA Related** box if the time off request is related to FMLA leave.
3. Enter additional information in the **Employee Comments** field.
4. Select the **Single Day** or **Multiple Days** radio button.
5. Select or enter the **Start Date**.
6. Select or enter the **End Date**.
7. Enter the **Hours Per Day**.
8. Enter the applicable **Start Time** and **End Time**.
9. Click the **Add Request Date(s)>>** button.




10. Verify all information.
11. Click the **Submit Request** button.




### *Important Notes*

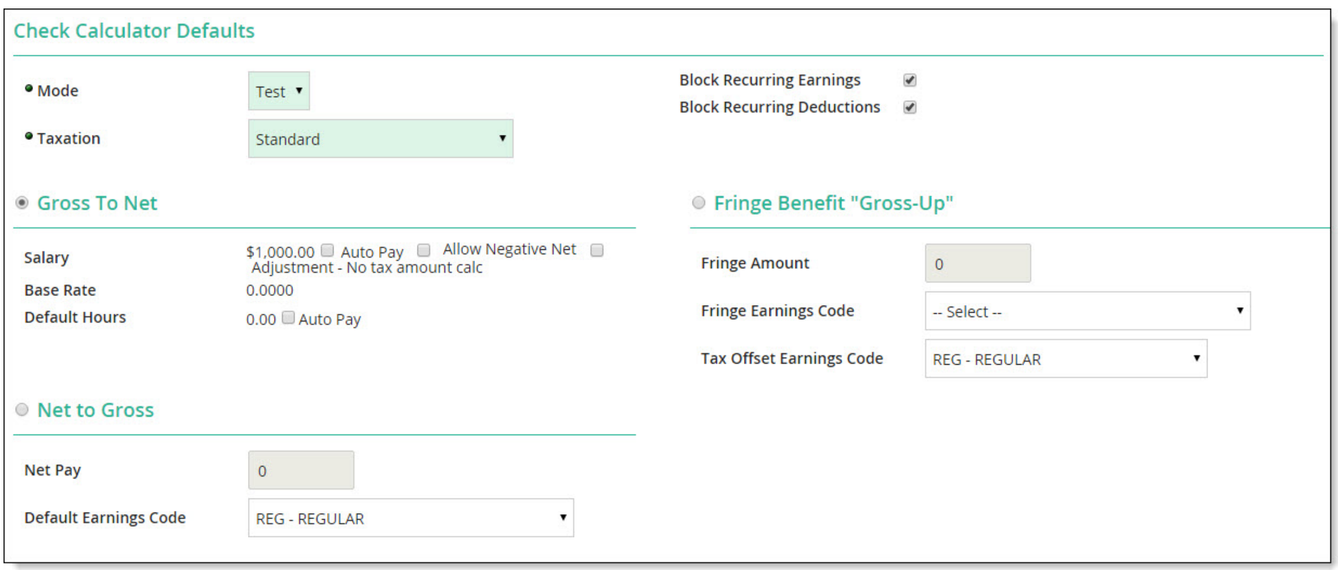
- Time off accruals and self service must be implemented in order to use the Time Off Requests feature.

# PAYROLL

## *CHECK CALCULATOR SETUP*

Test possible payroll changes such as increasing the 401k contribution. View what the outcome of the check will be based on the changes made. Users are not able to save this test check.

1. Select Test **Mode** to test possible payroll changes
2. Select Standard, Use Supplemental Tax Rate, or Block All Income Tax Withholding from the **Taxation** drop down.
3. Clear the **Block Recurring Earnings** box to allow all recurring earnings. Use the Check Calculator Earnings screen to allow or block individual earnings.
4. Clear the **Block Recurring Deductions** box to allow all recurring deductions. Use the Check Calculator Deductions screen to allow or block individual deductions.
5. Select **Gross to Net** to calculate a check based on the employee’s gross pay. Check the applicable box if the employee is to receive the base **Salar**y amount or **Default Hours** amount. If the employee is to receive hours other than default hours, paid with a different rate of pay, or a dollar amount other than the regular salary, click Earnings.
6. Check the **Allow Negative Net** box to prevent the Check Calculator from dropping deductions and taxes until net pay reaches zero or greater. Check the **Adjustment - No Tax amount calc** box to prevent the Check Calculator from calculating tax amounts when adjusting taxable wages.
7. Select **Net to Gross** to calculate a check based on a specific net pay amount. Enter the applicable **Net Pay** amount and select the **Default Earnings Code** for the gross pay.
8. Select **Fringe Benefit "Gross-Up"** to calculate a taxable fringe benefit when no other wages are being paid to the employee and the company will be paying the employee's portion of FICA. Enter the taxable **Fringe Amount**, select the **Fringe Earnings Code**, and select the **Tax Offset Earnings Code**.




### *Important Notes*

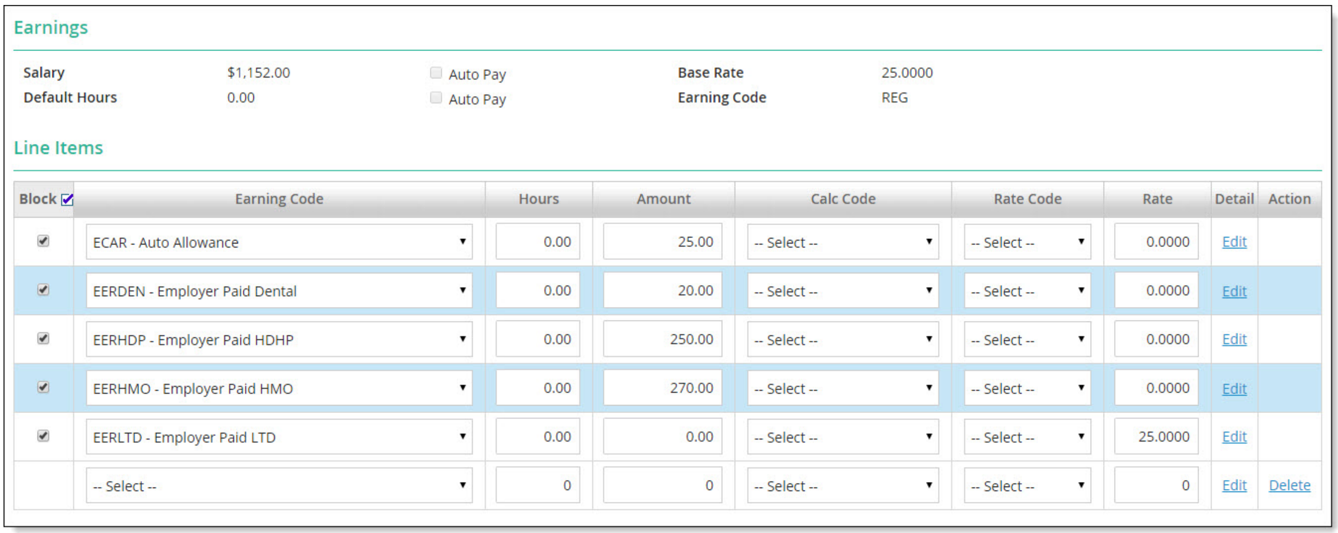
- The default Standard **Taxation** option calculates the check based on the employee’s Federal and State Filing Status and Exemptions.
- Use Supplemental Tax Rate uses the IRS bonus taxation guidelines.
- Block All Income Tax Withholding blocks all established Federal and State taxes. Wages will be reported as taxable but no withholding will take place. This will not adjust the Social Security or Medicare taxes in any way.

## *EARNINGS*

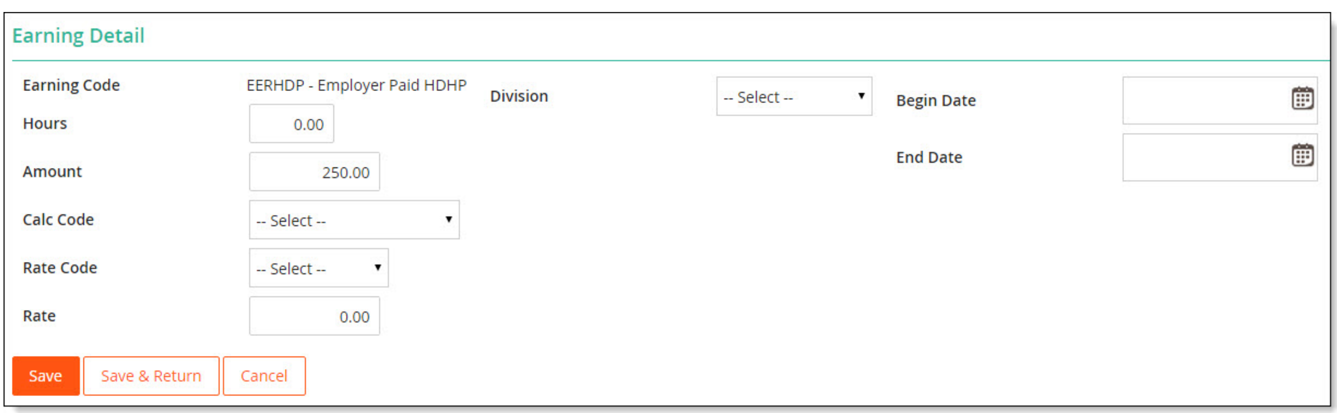
Configure the earning codes. When the Block Recurring Earnings box is checked in the Check Calculator Setup screen, all recurring earnings will have a check in the Block column.

The Line Items section will display recurring earnings established in the Earnings screen. Fields and Line Items in this screen may be enabled based on the setup.

- Check or clear the **Block** box adjacent to the Earning Code to individually block or unblock a recurring earning.
- To enter additional earnings for this check, select the applicable earning from the **Earning Code** drop down.
- Enter the applicable **Hours** or **Amount**.
- Select the applicable **Calc Code** from the drop down.
- Select the applicable **Rate Code** from the drop down.
- Enter the applicable **Rate**.
- Click the **Delete** link in the Action column to delete the Deduction.




- Click the **Edit** link in the Detail column to access the Earning Detail screen to enter additional information for an earning not available through the main Earnings screen. Users may be able to tie the earnings to a **Shift**, **Job**, and/or **Workers Comp Code** as well as enter a **Begin Date** and **End Date**. Users may also able to allocate wages between Cost Centers.

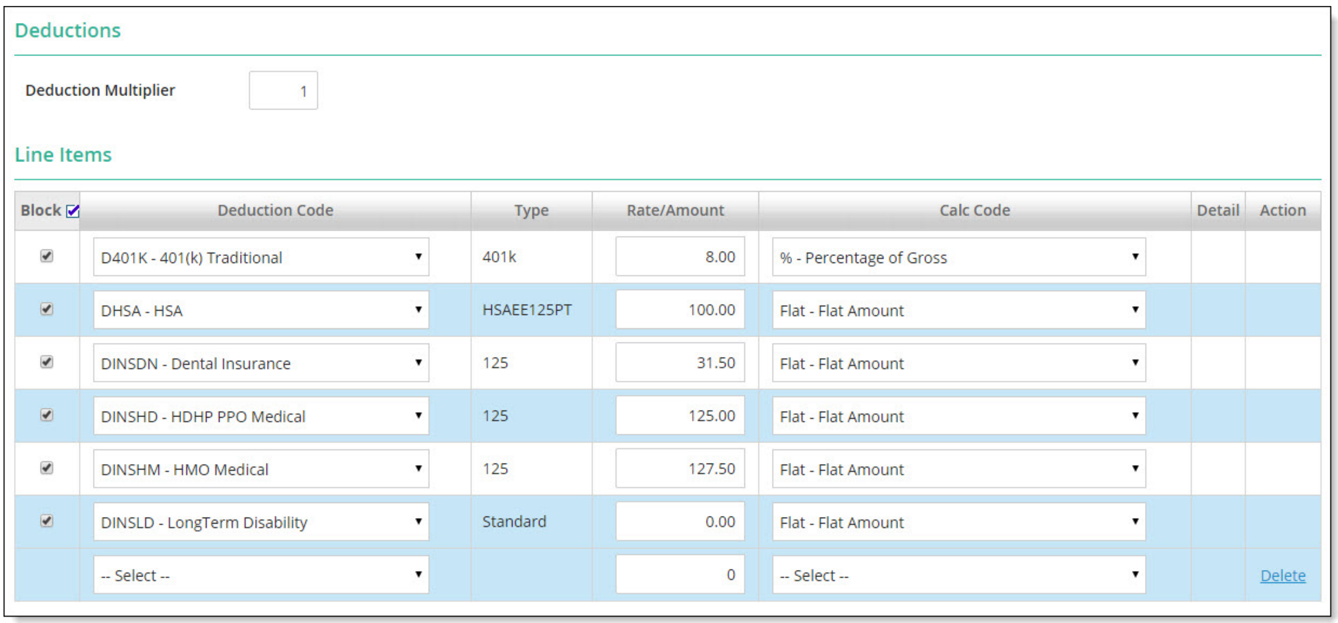


## *DEDUCTIONS*

Configure the deduction codes. When the Block Recurring Deductions box is checked in the Check Calculator Setup screen, all recurring deductions will have a check in the Block column.

The Line Items section will display recurring deductions established in the Deductions screen. Fields and Line Items in this screen may be enabled based on the setup.

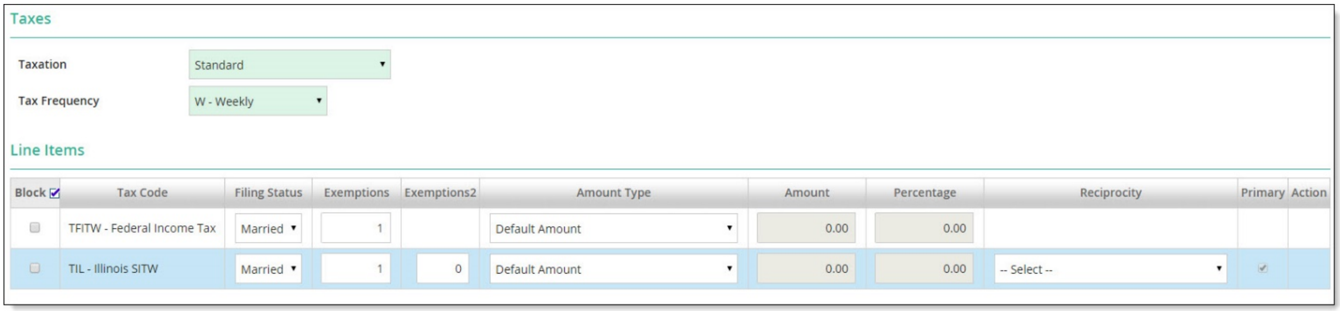
- Enter the **Deduction Multiplier**. The amounts listed in the Line Items section will be multiplied by the factor listed in this field.
- Check or clear the **Block** box adjacent to the **Deduction Code** to individually block or unblock a recurring deduction.
- To enter additional deductions for this check, select the applicable deduction from the **Deduction Code** drop down.
- Enter the applicable **Rate/Amount**.
- Select the applicable **Calc Code** from the drop down.
- Click the **Delete** link in the Action column to delete the Deduction.




## *TAXES*

Adjust the tax withholding taken on the check. Fields and Line Items in this screen may be enabled based on the setup.

- Select the **Taxation** and **Tax Frequency** from the respective drop downs to adjust the amounts withheld from this check.
- Check or clear the **Block** box adjacent to the **Tax Code** to individually block or unblock the tax code.
- To enter additional tax codes, select the applicable **Tax Code** from the drop down.
- If applicable, change the employee's **Filing Status** and **Exemptions** for this check only.
- Use the Amount Type drop down and the **Amount** and/or **Percentage** fields to designate a different amount and/or percentage to withhold for this check.
- Use the **Reciprocity** drop down and the **Primary** check box to designate how the state withholding should occur for this check.
- Click the **Delete** link in the Action column to delete the Tax Code.



Taxes

Taxation: Standard

Tax Frequency: W - Weekly

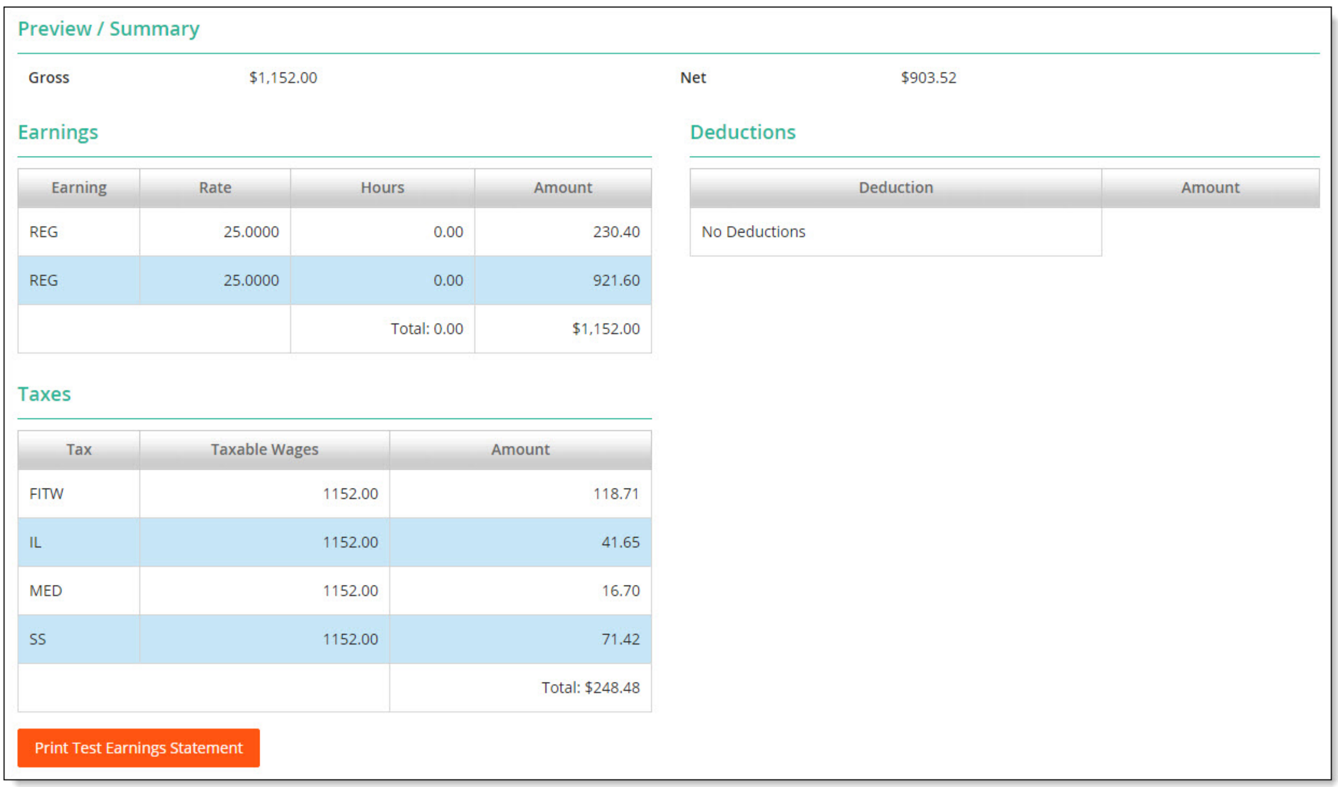
Line Items

| Block | Tax Code | Filing Status | Exemptions | Exemptions2 | Amount Type | Amount | Percentage | Reciprocity | Primary | Action |
|---|---|---|---|---|---|---|---|---|---|---|
| | TFITW - Federal Income Tax | Married | 1 | | Default Amount | 0.00 | 0.00 | | | |
| | TIL - Illinois SITW | Married | 1 | 0 | Default Amount | 0.00 | 0.00 | -- Select -- | | |

## *PREVIEW/SUMMARY*

View the Gross, Net, Earnings, Deductions, and Taxes of the check.

- Click the **Print Test Earnings Statement** button at the bottom of the screen to generate a printable report that displays the possible changes to the paycheck.



Preview / Summary

Gross $1,152.00 Net $903.52

Earnings

| Earning | Rate | Hours | Amount |
|---|---|---|---|
| REG | 25.0000 | 0.00 | 230.40 |
| REG | 25.0000 | 0.00 | 921.60 |
| | | Total: 0.00 | $1,152.00 |

Deductions

| Deduction | Amount |
|---|---|
| No Deductions | |

Taxes

| Tax | Taxable Wages | Amount |
|---|---|---|
| FITW | 1152.00 | 118.71 |
| IL | 1152.00 | 41.65 |
| MED | 1152.00 | 16.70 |
| SS | 1152.00 | 71.42 |
| | | Total: $248.48 |

Print Test Earnings Statement

- Close this screen to return to the main screen.

**The Garner Group**
3850 N Wilke Rd
ARLINGTON HEIGHTS, IL 60004

## Earnings Statement

| | |
|---|---|
| Check Date | **April 24, 2013** |
| Period Ending | **April 20, 2013** |
| Net Pay | **592.25** |
| Check Number | |

**Marie E Adams**
3117 Ashbard Lane
Arlington Heights, IL 60005

| | | | |
|---|---|---|---|
| Employee Number | **3** | Division | **400** |
| | | Branch | **401** |
| | | Department | **600** |

| **Earnings** | **Rate** | **Hours** | **Amount** |
|---|---|---|---|
| REG | 25.00 | | 1,000.00 |
| **Total Gross Pay** | | | **1,000.00** |

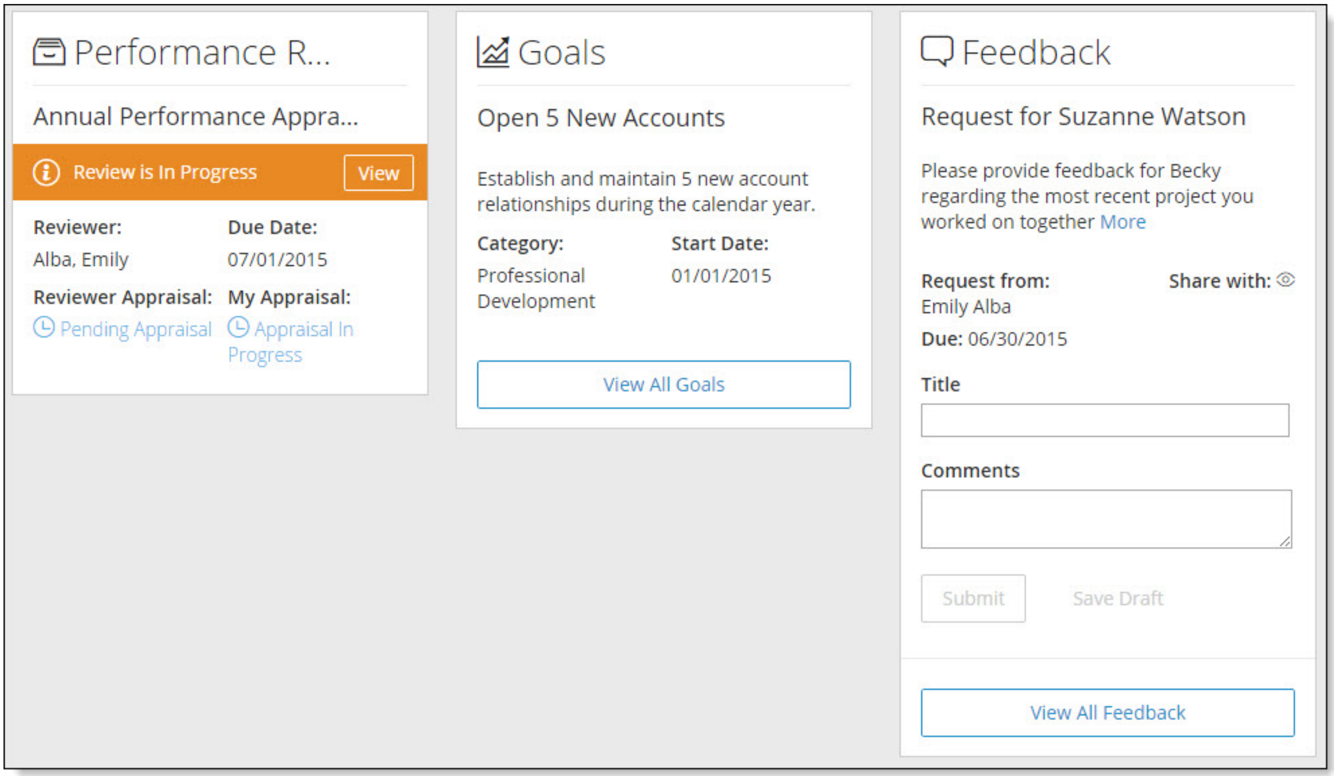
| **Deductions** | **Amount** |
|---|---|
| HSA | 100.00 |
| INSDN | 31.50 |
| INSHD | 125.00 |
| **Total Voluntary Deductions** | **256.50** |

| **Taxes** | **Filing Status** | **Amount** |
|---|---|---|
| FITW | M-1 | 59.17 |
| IL | M-1 | 35.20 |
| MED | | 10.78 |
| SS | | 46.10 |
| **Total Tax Withholding** | | **151.25** |

## *MY PERFORMANCE REVIEW*

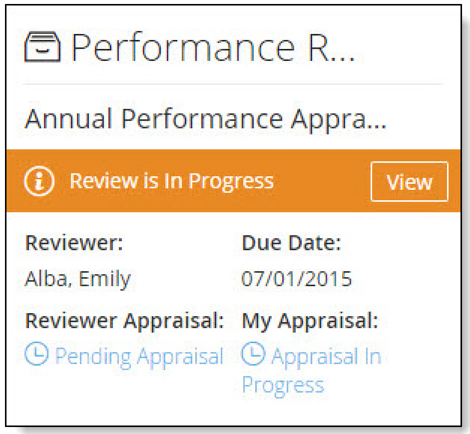
Access performance reviews, goals, and feedback.

- Click **View** to complete the review or modify the details.
- Click **View All Goals** to add or edit goals.
- Click **View All Feedback** to view or provide feedback.



## *HOW TO COMPLETE A PERFORMANCE REVIEW AS AN EMPLOYEE*

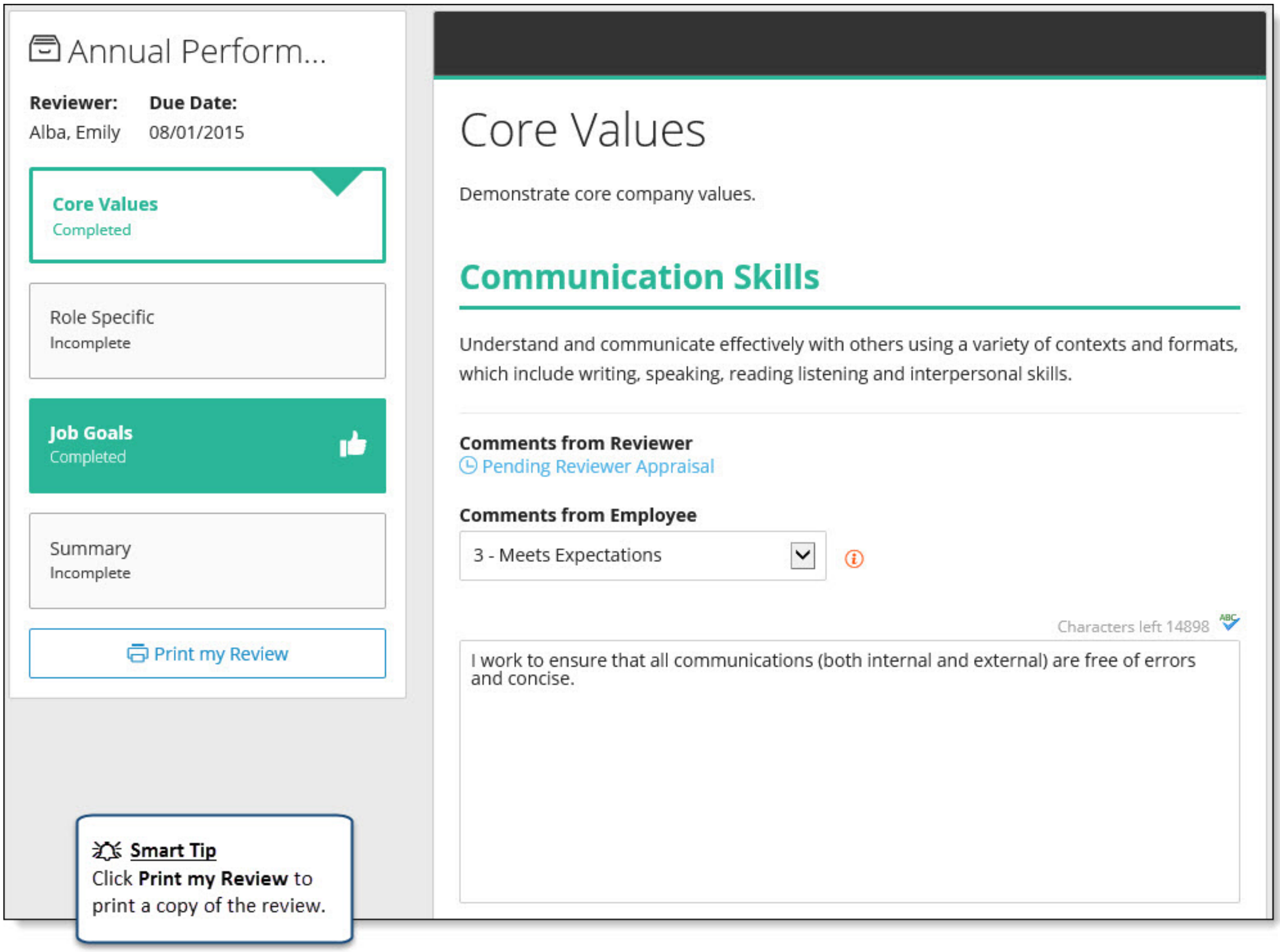
1. To begin, select **View** from My Performance Review.




2. Then navigate to the different portions of the review.

## *REVIEW ITEMS*

1. To navigate to a specific screen, click the desired tab.
2. Select a rating from the drop down.
3. Enter justification for the rating in the **Comments from Employee** field.
4. **Save** the updated information.
5. Complete each review items screen. *Note that when the Performance Review is complete, the Rating Total will be an average of all Review Items.*

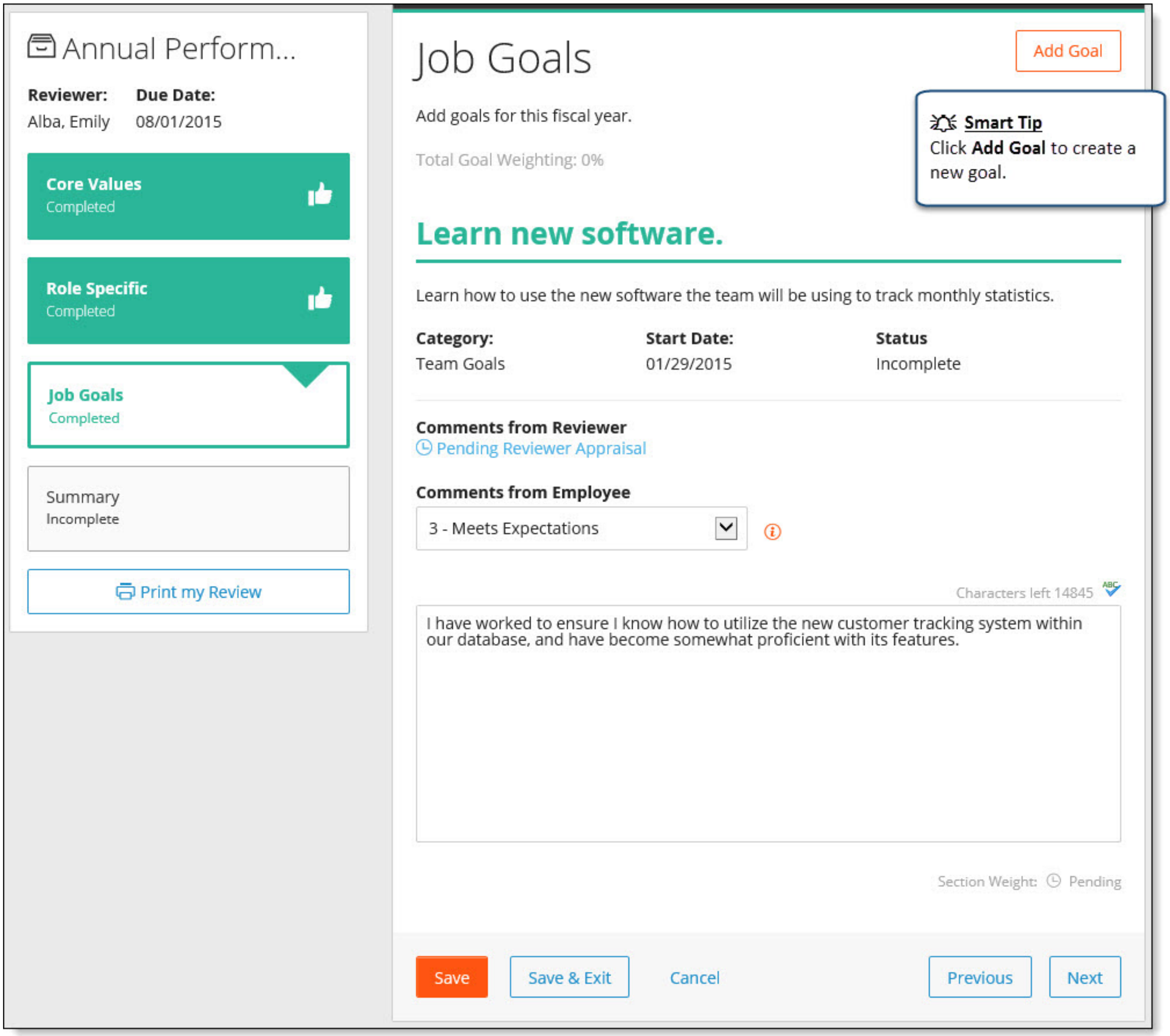


## *GOALS*

If selected by the Administrator during the Review Form Setup, the **Job Goals** tab imports existing, open goals and allows the employee to add to the goals list during the review process. Employees can select from:

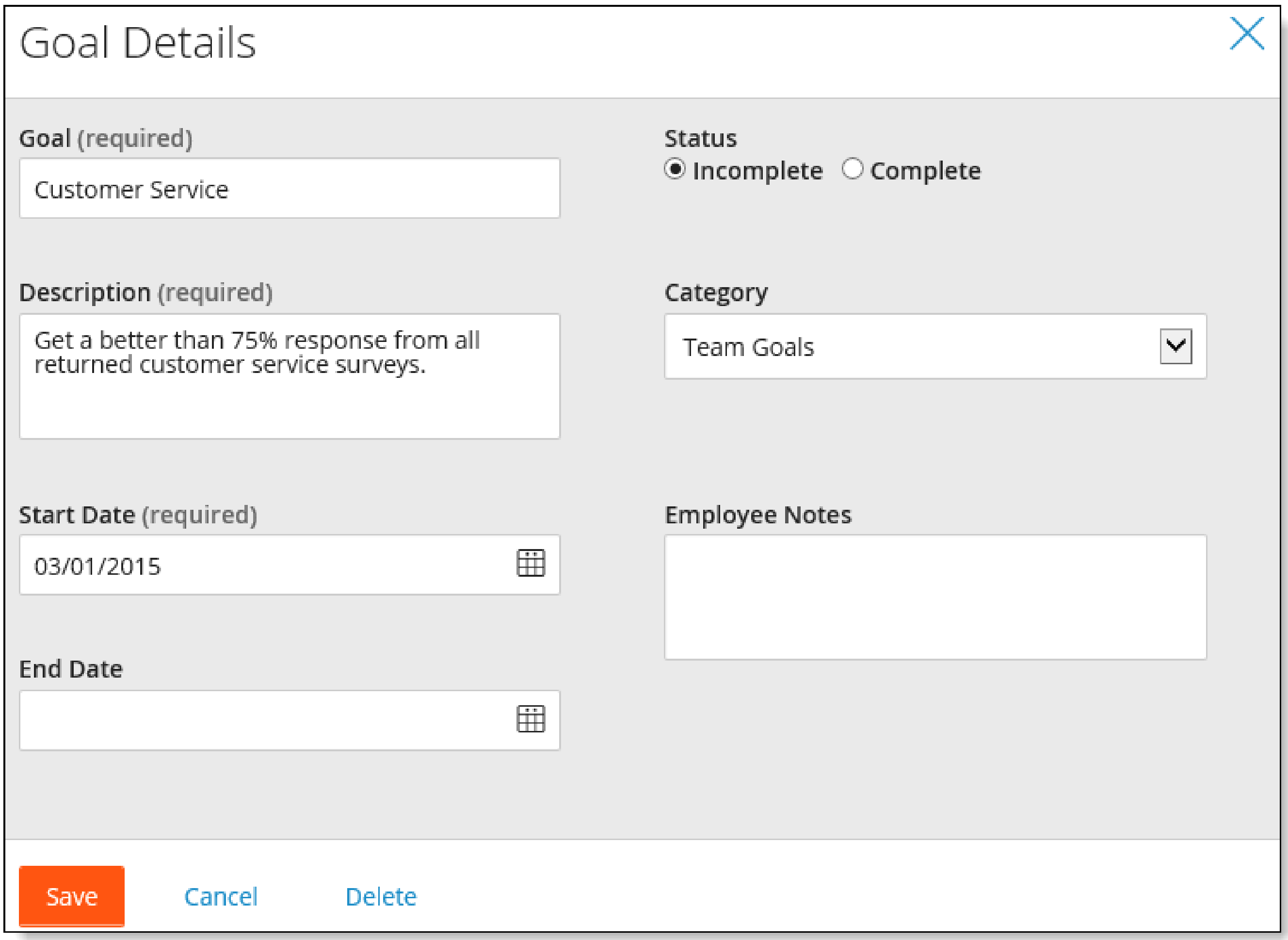
- Input Comments for Existing Goals

  1. Select a rating from the drop down for each goal.
  2. Enter justification for the rating given in the Comments from Employee field.



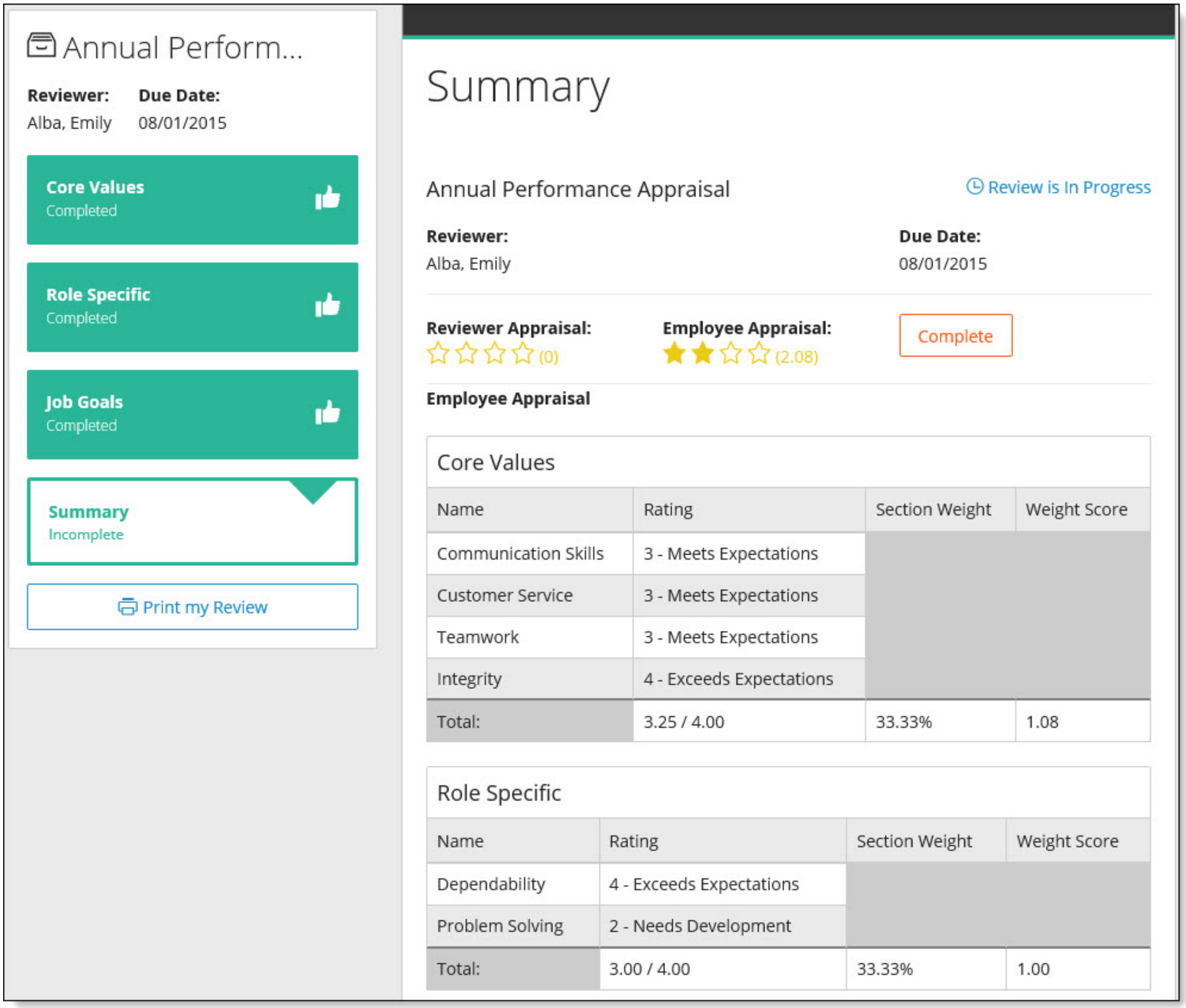
- Add a New Goal or Edit an Existing Goal

  1. Enter the **Goal** name (100 character limit).
  2. Enter the **Description** (8000 character limit).
  3. Select or enter the **Start Date**.
  4. Select or enter the applicable **End Date**.
  5. Select the **Status**.
  6. Select the goal **Category** from the drop-down.
  7. Enter additional information in the **Employee Notes** field.
  8. **Save** the updated information.



## *REVIEW SUMMARY*

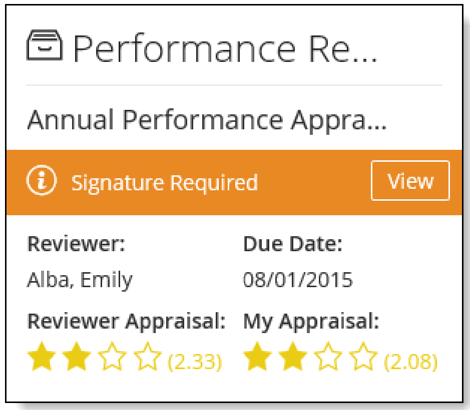
1. Verify the ratings. *Note that when the Performance Review is complete, the Rating Total will be an average of all Review Items.*
2. Click **Complete** to complete the self appraisal and submit the review.



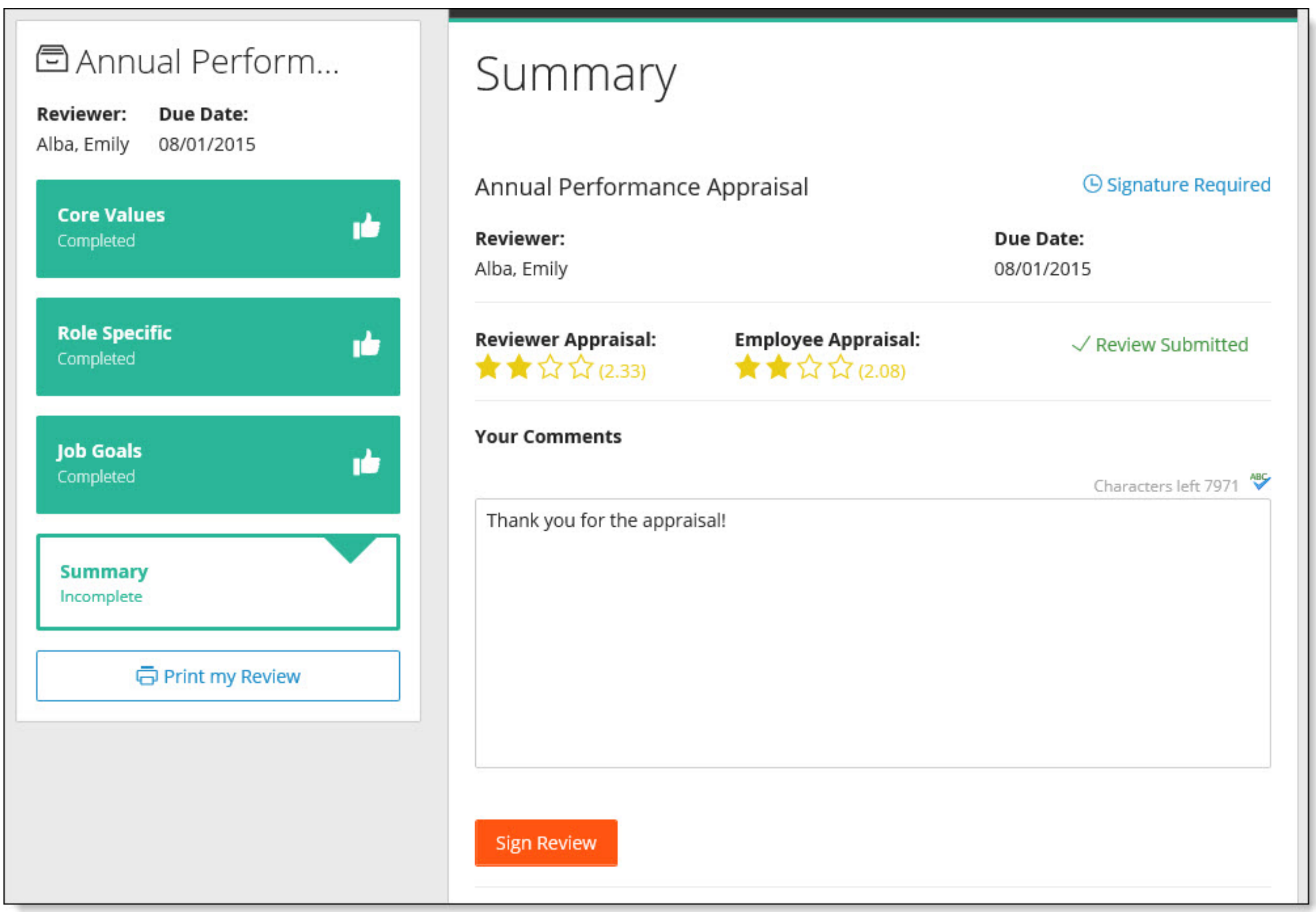

3. **Review Submitted** will appear once the review is submitted.
4. After the reviewer section is complete, the review may be returned to the employee to sign.

## *SIGN THE REVIEW*

1. Select **View** from My Performance Review to sign the review.




2. Click **Employee** or **Reviewer** to view corresponding appraisal details. *Note that when the Performance Review is complete, the Rating Total will be an average of all Review Items.*
3. Enter applicable information in the **Your Comments** field.
4. Click **Sign Review** to sign the performance review.

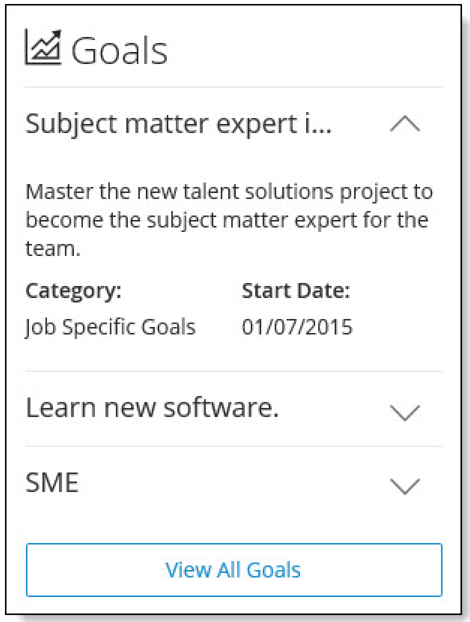



5. A confirmation message will display once complete.

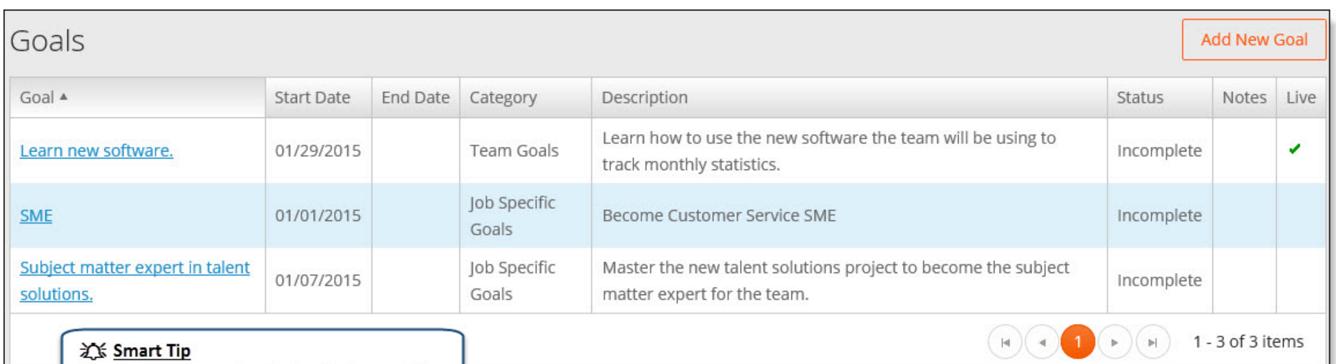
## *GOALS*

Add or edit goals.

- Select **View All Goals** from My Performance Review to display the details.




- Click **Add New Goal** to add a goal.
- Click the **Goal** link to display or modify the details.



Goals — Add New Goal

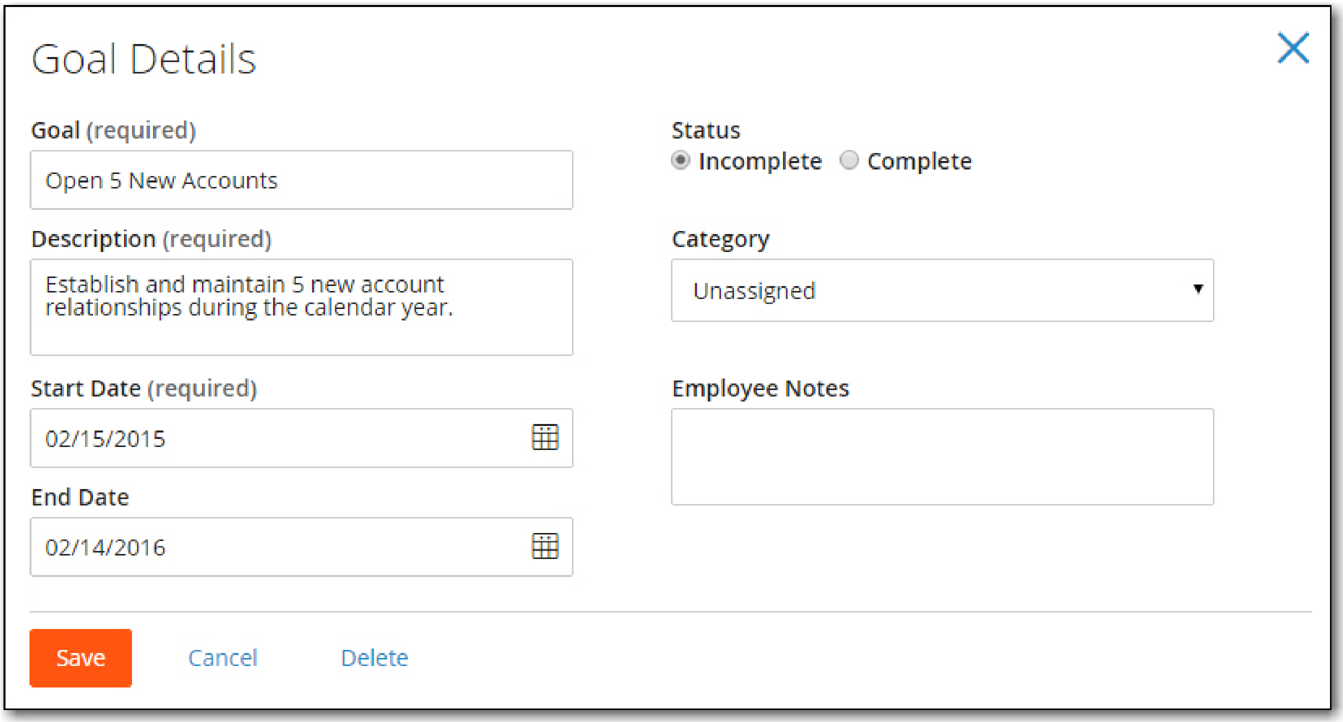
| Goal ▲ | Start Date | End Date | Category | Description | Status | Notes | Live |
|---|---|---|---|---|---|---|---|
| Learn new software. | 01/29/2015 | | Team Goals | Learn how to use the new software the team will be using to track monthly statistics. | Incomplete | | ✔ |
| SME | 01/01/2015 | | Job Specific Goals | Become Customer Service SME | Incomplete | | |
| Subject matter expert in talent solutions. | 01/07/2015 | | Job Specific Goals | Master the new talent solutions project to become the subject matter expert for the team. | Incomplete | | |

1 - 3 of 3 items

**Smart Tip**

If a goal was created with the **Reviewer Edit Only** box checked in the **Assign Goal to Employee Screen**, the employee will not be able to edit the goal.

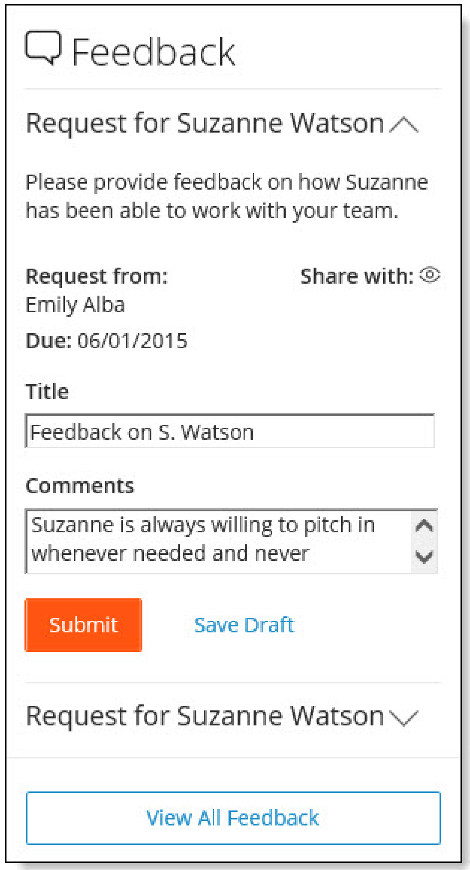
1. Enter the **Goal** (100 character limit).
2. Enter the **Description** (8000 character limit).
3. Select or enter the **Start Date**.
4. Select or enter the applicable **End Date**.
5. Select the **Status**.
6. Select the goal Category.
7. Enter additional information in the **Notes** field.
8. **Save** the updated information.
9. Click **Delete** to delete the goal.



## *FEEDBACK*

Provide feedback for an employee.

- Provide feedback using My Performance Review.



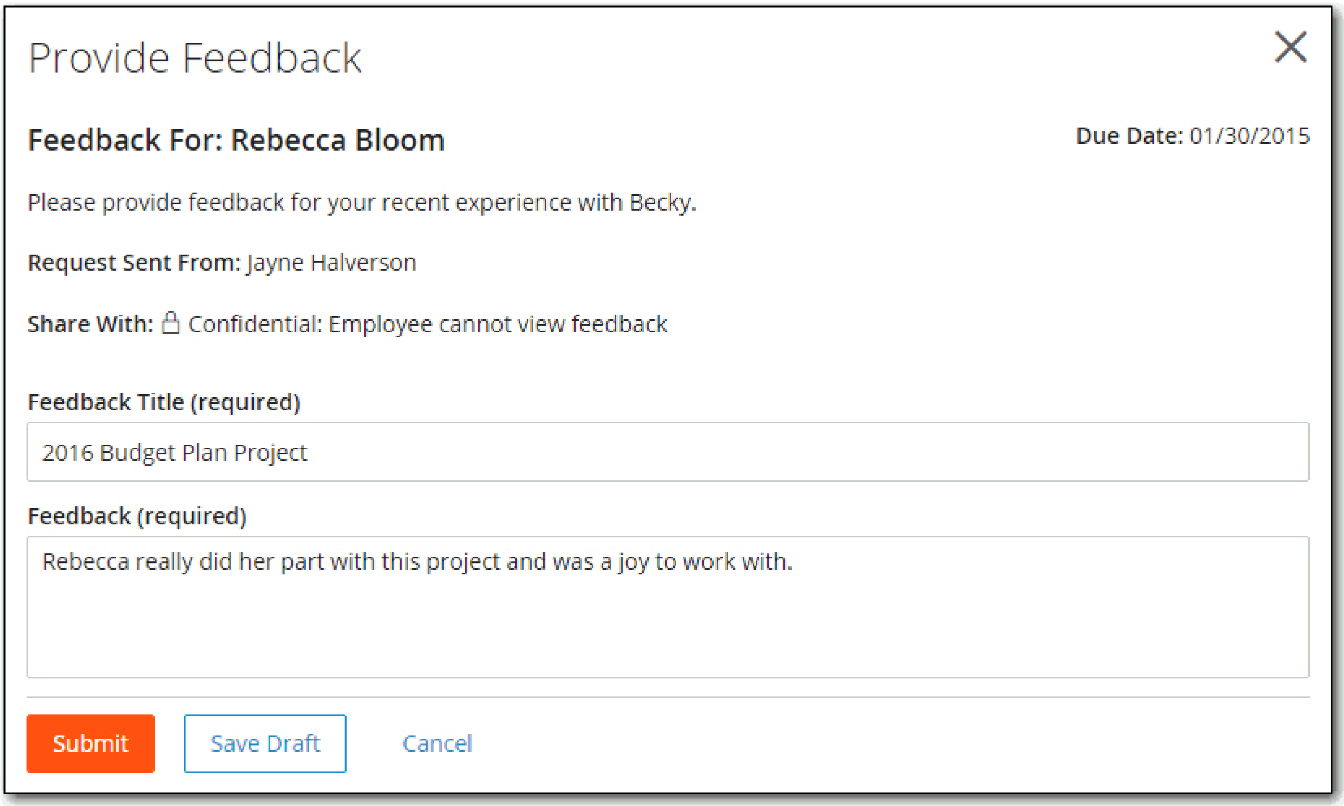

- Click **View All Feedback** to display all feedback.
    - o Click the **View** link to view the submitted feedback.
    - o Click the **Provide Feedback** link to provide feedback for the employee.

Feedback

| Feedback | Feedback For | Request Sent From | Request Date | Due Date | Status | Share With | Feedback Date |
|---|---|---|---|---|---|---|---|
| View | Sheppard Allerdyce [89] | Jayne Halverson [99] | 01/27/2015 | 01/30/2015 | Complete | | 01/27/2015 |
| Provide Feedback | Rebecca Bloom [18] | Jayne Halverson [99] | 01/27/2015 | 01/30/2015 | Pending | | |

1 - 2 of 2 items

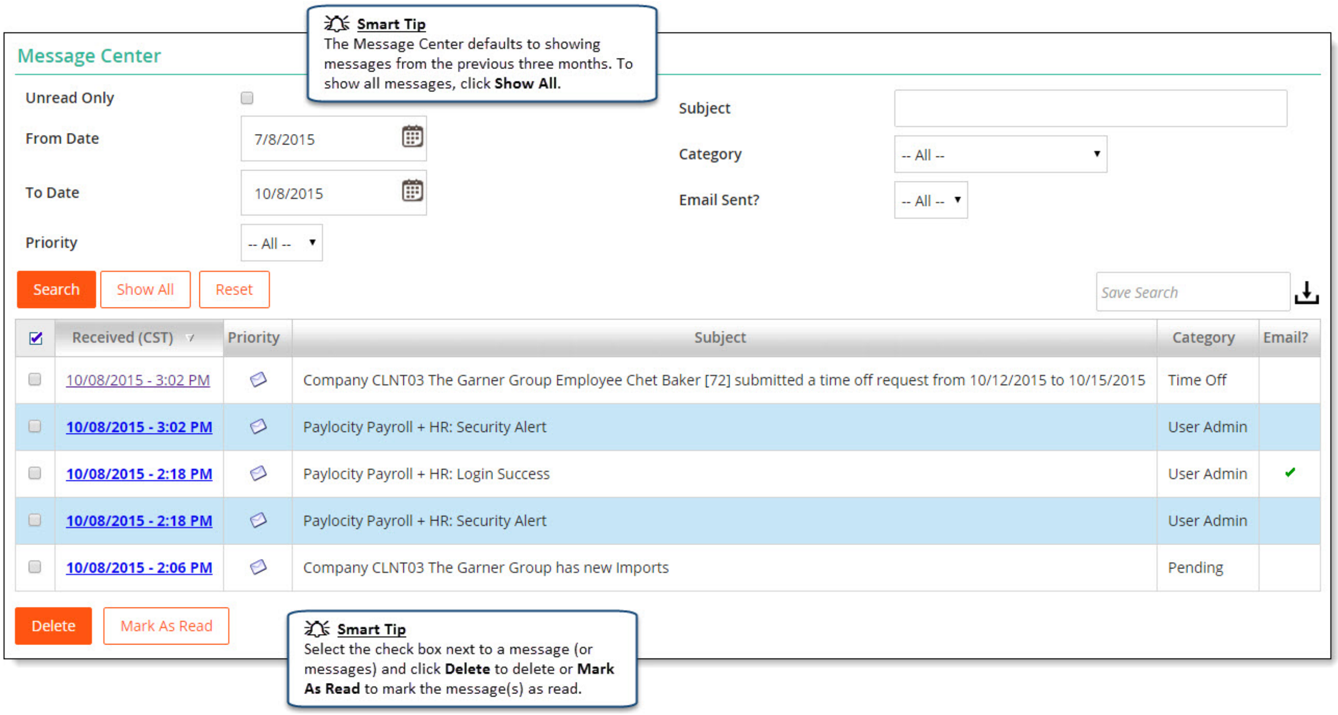
1. Enter the **Feedback Title** (250 character limit).
2. Enter the **Feedback**.
3. Click **Save Draft** to save feedback without submitting.
4. Click **Submit** to submit the feedback. Once feedback has been submitted, it cannot be changed.



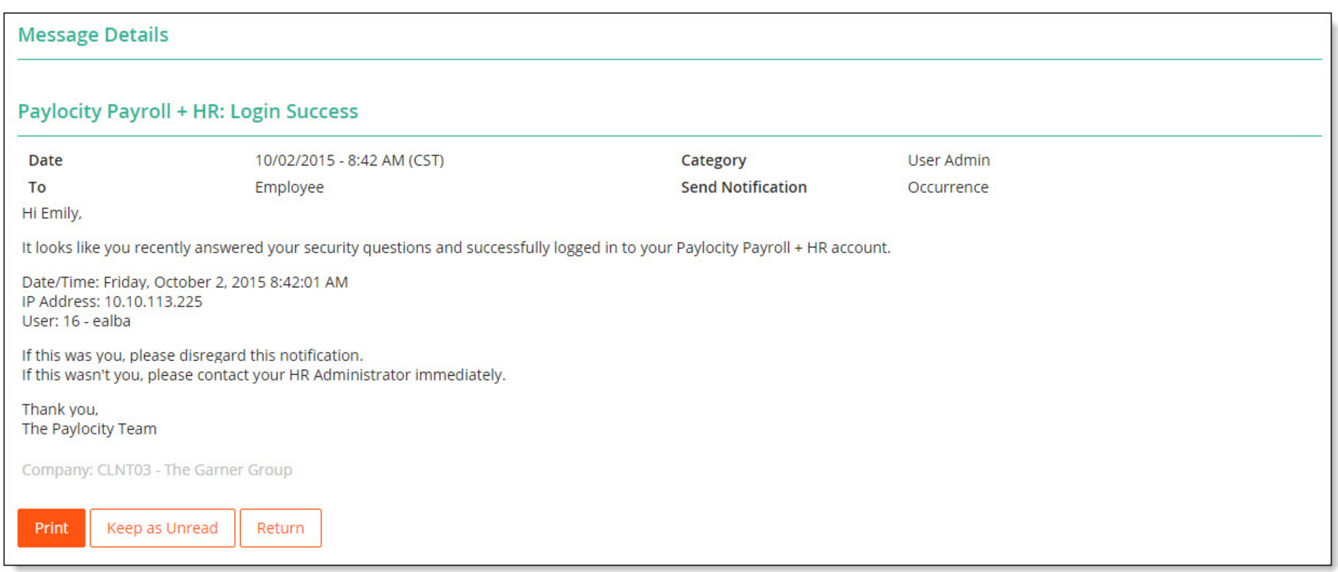
## *MESSAGE CENTER*

View or delete messages.

- Click the **Received** link to view the message details.
- Check the box adjacent to the message and click **Delete** to delete the message.



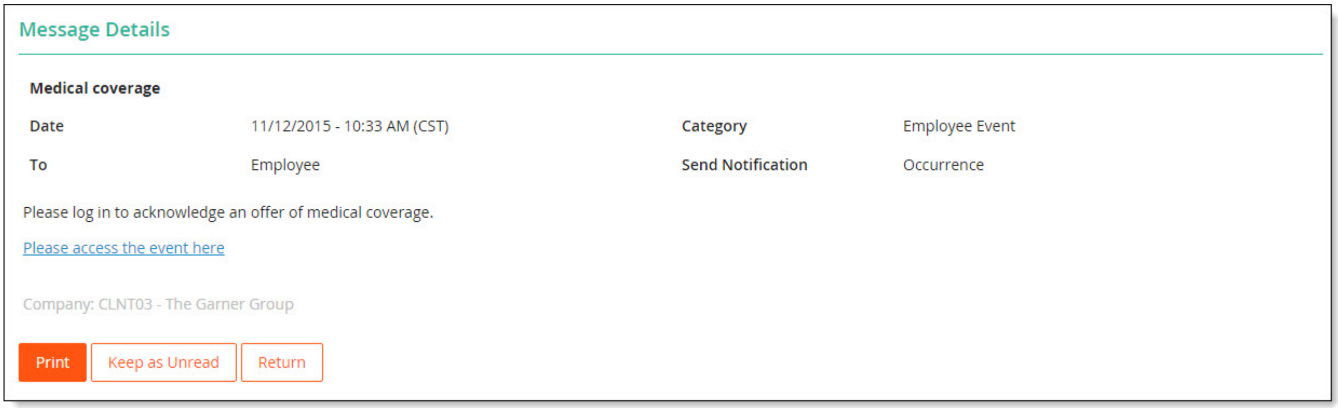

- Click the link to view additional details.
- Click **Print** to print the message.
- Click **Keep As Unread** to keep the message marked as an unread message.
- Click **Return** to return to the previous screen.



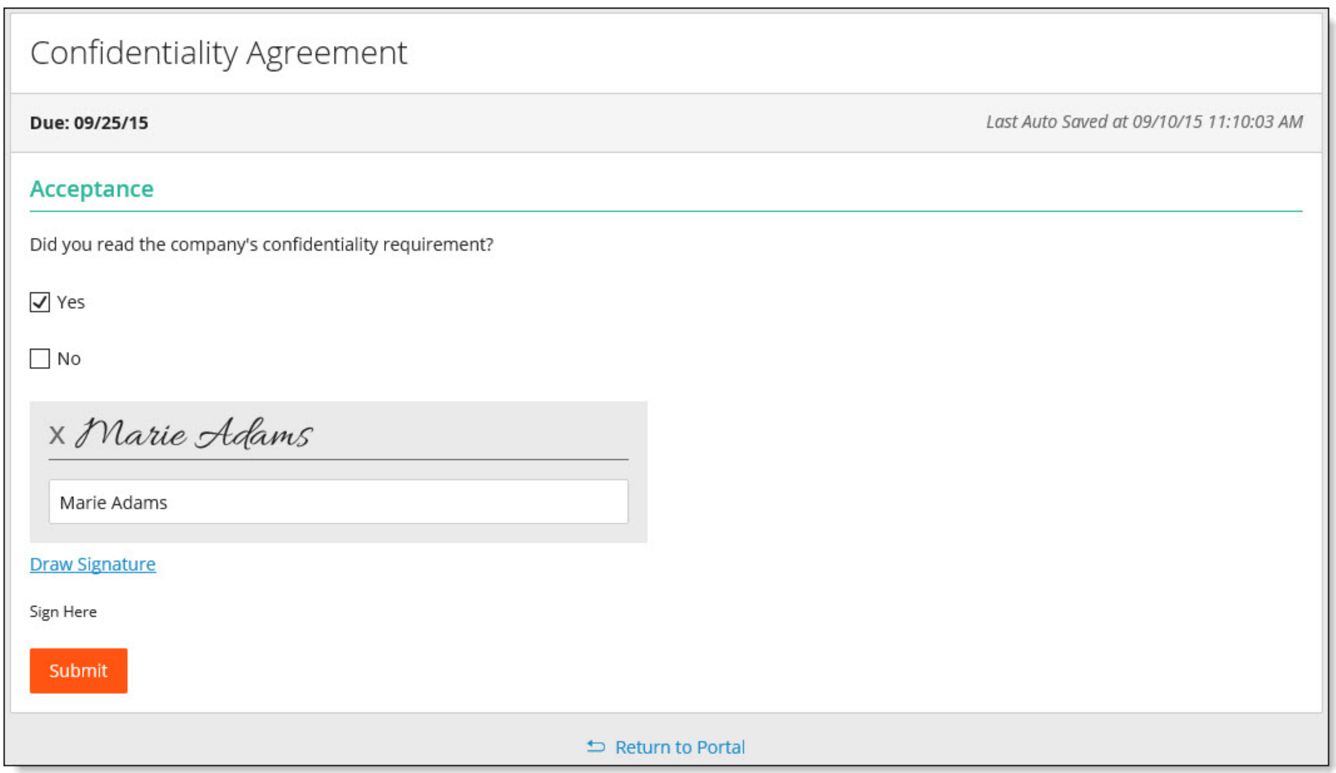
## *EVENT NOTIFICATION*

When an Administrator launches an Event, the selected employee will receive a notification about the Event for completion.

- Click the **Please access the event here** link to display the Event.




1. Fill out the required information within the Event.
2. Click **Submit**.



## B

**Bi-Weekly:** Pay frequency whereby employees are paid alternating weeks on the same day of the week. There are 26 pay periods per year. Ten months of the year there are two pay periods per month, with the remaining two months containing three pay periods.

## C

**Check Date:** Each check generated has a date printed on it. It is that date which validates the check for cashing and thereby makes our client liable for the taxes.

## D

**Deduction:** An amount that is or may be subtracted from an employee's paycheck. They can be taken pre-tax or after tax depending on the type of deduction. The employee must agree to have deductions withheld from their paycheck.

## E

**Employee:** Person who performs services for another person or entity in return for compensation. The relationship must be legal as defined under common law.

**Employer:** Someone who hires and pays wages, thereby providing a livelihood to individuals who perform work. The employment relationship authorizes the employer to decide what to pay workers and what benefits to provide.

**Exemptions:** Personal exemptions reduce the employee's taxable income on the employee's Form 1040 (US Individual Income Tax Return). Withholding allowances free approximately the same amount of wages from income tax withholding and therefore approximate the employee's tax liability at the end of the year. Exemptions and allowances may be used synonymously. Exemptions are determined by the Federal W-4 Form that you must file with your employer annually.

## F

**Federal Income Tax (FIT):** A withholding tax levied against employees. The amount of withholding varies with the amount of earnings, frequency of pay, number of claimed exemptions, and marital status.

**Filing Status:** Filing statuses are single, married filing jointly, married filing separately, head of household, or exempt. Employees must indicate their status. The employer must withhold according to the correct employee table.

**Form W-2:** Employers must file a Form W-2 to report the total amount of wages paid and taxes withheld for each employee in a calendar year.

**Form W-4:** The W-4 tells the employer how many withholding allowances the employee is claiming along with the employee's marital status; it also tells the employer if the employee claims exemption from withholding.

## G

**Gross Income:** The compensation for services, including fees, commissions, fringe benefits, and similar items.

## M

**Minimum Wage:** The lowest allowable hourly wage permitted by the government or a union contract for an employee performing a particular job.

## O

**Overtime:** Time worked in excess of an agreed upon time for normal working hours by an employee in Illinois. Hourly or non-exempt employees must be compensated at the rate of one and one-half their normal hourly rate for overtime work beyond 40 hours in one workweek.

## P

**Pay Frequency:** Refers to the regularity of pay for use by the system in determining the amount of payroll taxes to be withheld. Weekly, bi-weekly, semi-monthly, monthly, quarterly, semi-annually, and annually are possible pay frequencies.

**Pay Period:** The time duration within which the amount a worker has earned is determined so that the worker can be paid properly. (Period Begin through-Period End.)

**Payroll Taxes:** Taxes that are the responsibility of the employer.

## S

**Salary:** A fixed compensation paid to an employee for services.

**Semi-Monthly:** Pay frequency having two pay periods a month and 24 pay periods per year.

**State Income Tax Withholding (SITW):** Income tax for the state withheld from employees.

## T

**Tips:** An employee who receives cash tips of $20 or more in a month must report them to his employer by the 10th day of the following month. Employers are subject to FICA taxes on the reported tip income.

## W

**Workweek:** A fixed and regularly recurring period of 168 hours - 7 consecutive 24 hour periods, as defined by the FLSA.