



REDEFINING THE WORLD OF PAYROLL + HR

Revised 4/29/2016

WEB PAY EMPLOYEE GUIDE

Client Resource

WWW.PAYLOCITY.COM

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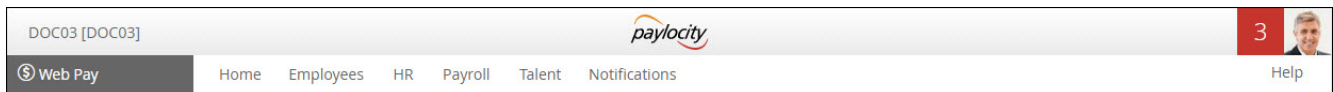
WEB PAY

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

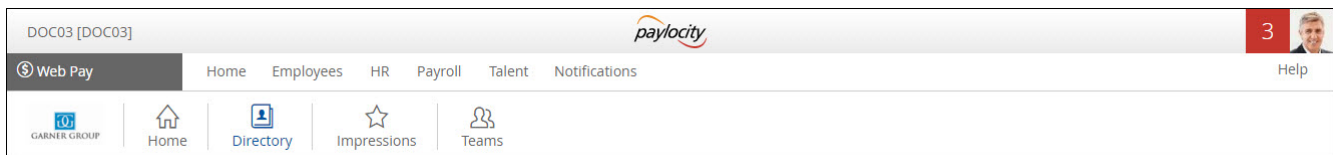
Users may not have access to all of the options described in this guide. Each company determines which options are available and each user's security group determines the display of information.

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

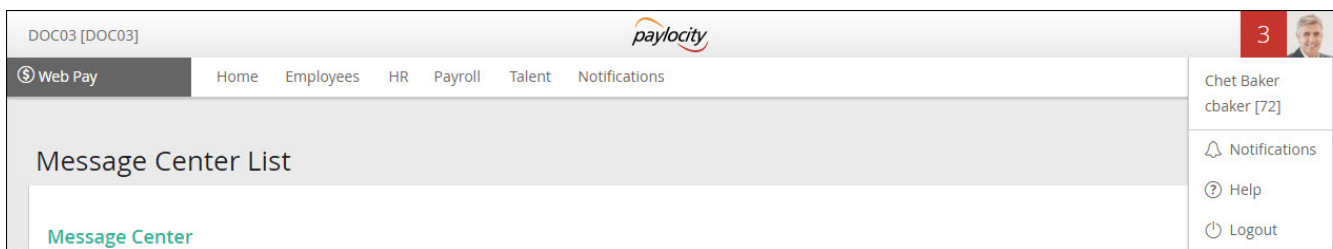
- Click the Paylocity logo in the middle of the header to return to the default home page.
- Access messages in the header section of the screen. The bell indicates there are no messages. When there are messages, the red box displays the number of messages.
- Click **Help** to view help text for each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



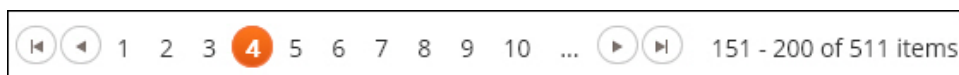
- Select **Log Out** from the Account Profile to log out of the application.



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.

Smart Tip
The Message Center defaults to showing messages from the previous three months. To show all messages, click **Show All**.

Message Center

Unread Only

From Date: 7/8/2015

To Date: 10/8/2015

Priority: -- All --

Subject:

Category: -- All --

Email Sent?: -- All --

[Search](#) [Show All](#) [Reset](#)

<input checked="" type="checkbox"/>	Received (CST)	Priority	Subject	Category	Email?
<input type="checkbox"/>	10/08/2015 - 3:02 PM		Company CLNT03 The Garner Group Employee Chet Baker [72] submitted a time off request from 10/12/2015 to 10/15/2015	Time Off	
<input type="checkbox"/>	10/08/2015 - 3:02 PM		Paylocity Payroll + HR: Security Alert	User Admin	
<input type="checkbox"/>	10/08/2015 - 2:18 PM		Paylocity Payroll + HR: Login Success	User Admin	<input checked="" type="checkbox"/>
<input type="checkbox"/>	10/08/2015 - 2:18 PM		Paylocity Payroll + HR: Security Alert	User Admin	
<input type="checkbox"/>	10/08/2015 - 2:06 PM		Company CLNT03 The Garner Group has new Imports	Pending	

[Delete](#) [Mark As Read](#)

Smart Tip
Select the check box next to a message (or messages) and click **Delete** to delete or **Mark As Read** to mark the message(s) as read.

- 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.

Message Details

Paylocity Payroll + HR: Login Success

Date	10/02/2015 - 8:42 AM (CST)	Category	User Admin
To	Employee	Send Notification	Occurrence

Hi Emily,

It looks like you recently answered your security questions and successfully logged in to your Paylocity Payroll + HR account.

Date/Time: Friday, October 2, 2015 8:42:01 AM
IP Address: 10.10.113.225
User: 16 - ealba

If this was you, please disregard this notification.
If this wasn't you, please contact your HR Administrator immediately.

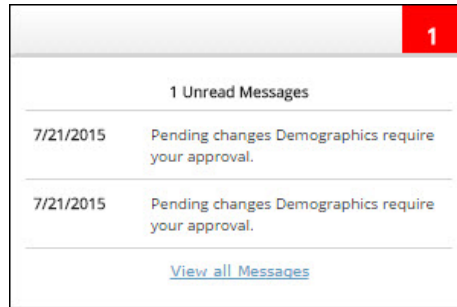
Thank you,
The Paylocity Team

Company: CLNT03 - The Garner Group

[Print](#) [Keep as Unread](#) [Return](#)

MESSAGES

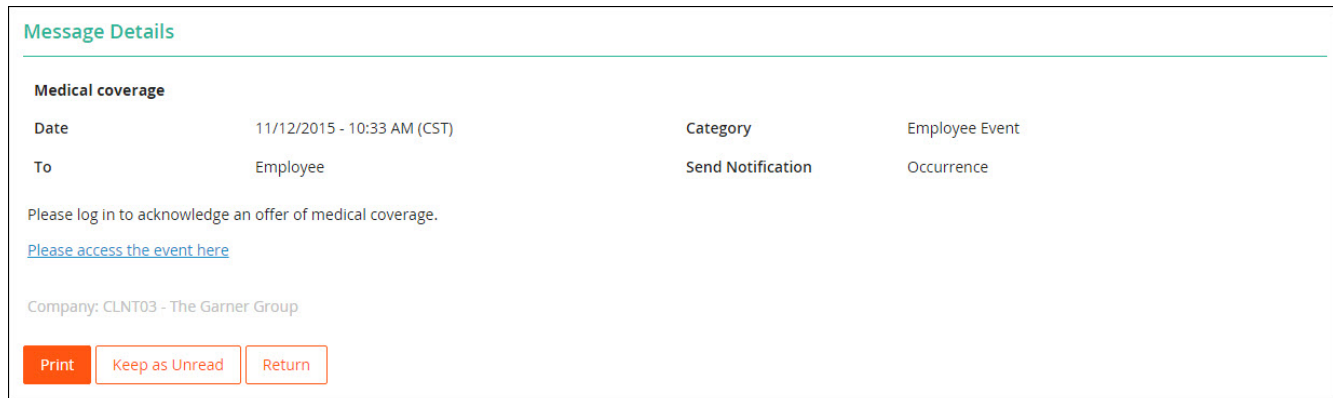
- View messages.
- Click **View all Messages** to access the Message Center.



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**.

Confidentiality Agreement

Due: 09/25/15 Last Auto Saved at 09/10/15 11:10:03 AM

Acceptance

Did you read the company's confidentiality requirement?

Yes
 No

x Marie Adams

Marie Adams


[Draw Signature](#)

Sign Here

[Return to Portal](#)

SIDEBAR MENU

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



Company Id

Username

Password

Remember My Credentials


[Forgot Password](#) [Register User](#)


Info ⋮


- ? **Help**
Find that help you need
- 🛡️ **Security**
Learn more at our security center
- 🌐 **Browser Support**
Recommended software configuration

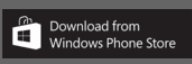
Download our Mobile App

GET IT ON











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 

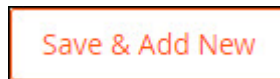
Saving Information

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



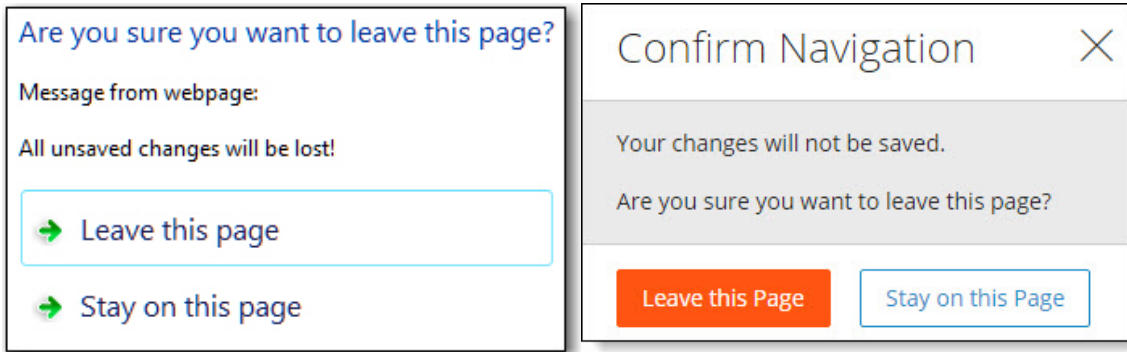
Discard the changes and return to the previous screen.



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.

Time Off History

Transaction Date From:

Transaction Date To:

Begin Date From:

Begin Date To:

Time Off Type:

Transaction Type:


Show Totals?

Transaction Subtype:

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 

Time Off Type

Transaction Date To 

Transaction Type

Begin Date From 

Show Totals?

Begin Date To 

Transaction Subtype

[Search](#)

[Show All](#)

[Reset](#)



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.

Message Center

Unread Only

From Date: 8/3/2015

To Date: 11/3/2015

Priority: -- All --

Subject:

Category: -- All --

Email Sent?: -- All --

<input checked="" type="checkbox"/>	Received (CST) ▾	Priority	Subject	Category	Email?
<input type="checkbox"/>	11/03/2015 - 10:12 AM		Verify Reading and Accepting Confidentiality Statement	Employee Event	
<input type="checkbox"/>	09/10/2015 - 11:10 AM		Verify Reading and Accepting Confidentiality Statement	Employee Event	
<input type="checkbox"/>	08/17/2015 - 10:32 AM		Feedback Requested for Watson, Suzanne [49] - Due: 09/01/2015	Performance Management	

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

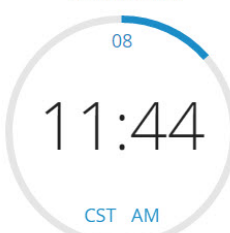
Date	Check #	Net Amount	Dir Dep
10/30/2015	102189	hidden	✓
11/04/2014	102177	hidden	✓

[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.

Apply for Open Position Add New Application ▾

Apply for an open position

• Open Position Application Status

Supervisor Emma Frost [62] Application Date

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.

Change Federal or State Tax Exemptions

Tax	Filing Status	Exemption 1	Exemption 2	Amount Type	Amount (\$)	Percent (%)
FITW - Federal Income Tax	Single ▾	<input type="text" value="0"/>	<input type="text" value="0"/>	Default Amount ▾	<input type="text" value="0"/>	<input type="text" value="0"/>
IL - Illinois SITW	Married ▾	<input type="text" value="0"/>	<input type="text" value="0"/>	Default Amount ▾	<input type="text" value="0"/>	<input type="text" value="0"/>

[View Full Taxes List](#)

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.

The screenshot shows the 'Company News' interface. At the top, there is a search bar with 'All News Items' selected. Below the search bar are filters for 'Publish Date', 'End Date', 'Topic' (set to '-- All --'), and 'Headline'. There are buttons for 'Search', 'Show All', and 'Reset'. A 'Save Search' button is also present. Below the filters is a table with 3 records. The table has columns for 'Publish Date', 'End Date', 'Topic', 'Headline', 'Summary', and 'Posted By'. The first row shows a news item about a 5K Fun Run on 11/13/2014. The second row shows a news item about Electronics Recycling on 11/13/2014. The third row shows a news item about Benefits Enrollment Ends Soon on 11/12/2014. The 'Posted By' column lists 'Alba, Emily' for all items. A 'Records: 3' indicator is visible in the top right and bottom right of the table area.

Publish Date	End Date	Topic	Headline	Summary	Posted By
11/13/2014		News	5k Fun Run	Please join the corporate team for the 5K Fun Run next month. Entry fees will be paid by the company. Every participant will receive a company team shirt and water bottle for the run.	Alba, Emily
11/13/2014		News	Electronics Recycling	The Green Team will be sponsoring a recycling drive to recycle old computers, mobile phones, and other electronic devices.	Alba, Emily
11/12/2014		News	Benefits Enrollment Ends Soon	Benefits enrollment must be completed by Monday.	Alba, Emily

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.

Smart Tip
To edit or delete a direct deposit account, select the account from the drop down.

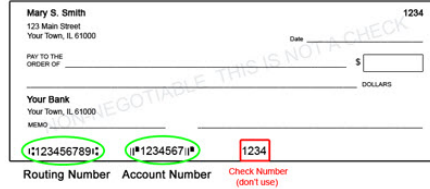
Direct Deposit Accounts

Add New Direct Deposit Account ▾

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

Bank Account

- Account Type:
- Routing Number:
- Account Number:
- Bank Name:
- Name on Account:
Name should match the name on file with your banking institution



Additional Deposit Account

- Amount Type:
- 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
<input checked="" type="radio"/>	071000013	12312	Checking	Jpmorgan Chase Bank, NA	\$25.00
<input type="radio"/>	071000013	2653	Savings	Jpmorgan Chase Bank, NA	5%

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

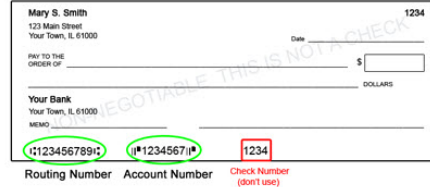
Direct Deposit Account order successfully changed!

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:
- Routing Number:
- Account Number:
- Bank Name:
- Name on Account:

Name should match the name on file with your banking institution



Additional Deposit Account

- Amount Type:
- 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
<input checked="" type="radio"/>	071000013	2653	Savings	Jpmorgan Chase Bank, NA	5%
<input type="radio"/>	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.



Click to Change

Marie Adams


[Save Profile Changes](#)

[Preview](#)


[View](#)

Employee Profile

Personal Information User Preferences



Resume

 No Resume Uploaded

Upload Resume

About Me Characters remaining 1957

I have worked for the company for 10 years.

Schools / Education

Add

Baylor University

Class Of

✖
📄


Skills / Expertise


Add


Microsoft Excel X


Spanish X


Interests



Activities/Fitness


Hobbies


Travel


Music


Movies/TV


Sports Teams


<input type="checkbox"/> Backpacking	<input type="checkbox"/> Horseback Riding	<input type="checkbox"/> Skateboarding
<input type="checkbox"/> Badminton	<input type="checkbox"/> Ice Skating	<input type="checkbox"/> Skiing
<input type="checkbox"/> Baseball	<input type="checkbox"/> Kayak	<input type="checkbox"/> Skydiving
<input type="checkbox"/> Basketball	<input type="checkbox"/> Kickboxing	<input type="checkbox"/> Snowboarding
<input type="checkbox"/> Billiards	<input type="checkbox"/> Kiteboarding	<input type="checkbox"/> Soccer
<input type="checkbox"/> Boating	<input type="checkbox"/> Lacrosse	<input type="checkbox"/> Softball
<input type="checkbox"/> Bowling	<input type="checkbox"/> Martial Arts	<input type="checkbox"/> Surfing
<input type="checkbox"/> Boxing	<input type="checkbox"/> Motor Sports/NASCAR	<input type="checkbox"/> Swimming
<input type="checkbox"/> Bungee Jumping	<input type="checkbox"/> Motorcycle Racing	<input type="checkbox"/> Table Tennis
<input type="checkbox"/> Camping	<input type="checkbox"/> Nature Walk	<input type="checkbox"/> Tai Chi
<input type="checkbox"/> Canoeing	<input type="checkbox"/> Paintball	<input type="checkbox"/> Tennis
<input type="checkbox"/> Cricket	<input type="checkbox"/> Polo	<input type="checkbox"/> Traveling
<input type="checkbox"/> Cycling	<input type="checkbox"/> Racquetball	<input type="checkbox"/> Triathlon
<input type="checkbox"/> Dance	<input type="checkbox"/> River Rafting	<input type="checkbox"/> Volleyball
<input type="checkbox"/> Fencing	<input type="checkbox"/> Rock climbing	<input type="checkbox"/> Wakeboarding
<input type="checkbox"/> Fishing	<input type="checkbox"/> Rodeo	<input type="checkbox"/> Walking
<input type="checkbox"/> Football	<input type="checkbox"/> Rollerblading	<input type="checkbox"/> Waterskiing
<input type="checkbox"/> Golf	<input type="checkbox"/> Rowing	<input type="checkbox"/> Weightlifting
<input type="checkbox"/> Gymnastics	<input type="checkbox"/> Rugby	<input type="checkbox"/> Windsurfing
<input type="checkbox"/> Hiking	<input type="checkbox"/> Running	<input type="checkbox"/> Winter Sports
<input type="checkbox"/> Hockey	<input type="checkbox"/> Sailing	<input type="checkbox"/> Wrestling
<input type="checkbox"/> Horse Riding	<input type="checkbox"/> Scuba Diving	<input type="checkbox"/> Yoga/Pilates


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 Amount** 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.

✕

Company Custom Page

Picnic

The company picnic will be at Brookfield Zoo this Saturday. Please bring your family and join us!

External links and attachments

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**.

The screenshot shows the 'Employee Profile' page for 'Mary'. The 'Details' tab is active, showing fields for First Name (Mary), Last Name (Adams), Middle Name (E), Title (Mr, Mrs, Ms, etc), Suffix (-- select --), Preferred First Name, and Prior Last Name (Twilliger). The 'Personal' section includes Social Security Number / EIN (455-78-4125), Marital Status (Married), Birth Date (08/06/1973, Age 42), Disability, Ethnicity (White), and Sex (Female selected). A 'Save' button is highlighted in orange, and a 'Cancel Changes' button is also present. Three 'Smart Tip' callouts are overlaid on the form: one pointing to the 'Return to Portal' link, one pointing to the 'Married' dropdown, and one pointing to the 'Save' button.

Smart Tip
Click [Return to Portal](#) to return to the Self Service Portal.

Smart Tip
If changes are made that need approval from an administrator, they will appear with a yellow border and the following message will display:
Pending approval: Change(s) highlighted below

Smart Tip
Due to security right restrictions, some employees may not have access to change certain fields. Those will be noted with gray shading and a cursor.

- Contact

The screenshot shows an 'Employee Profile' page for 'Mary'. The 'Contact' tab is active, displaying phone and email information. There are two 'Smart Tip' callouts: one on the left explaining the 'Return to Portal' button, and one on the right about security restrictions. The 'Address' section shows home and work addresses. The 'Emergency Contacts' section shows a list of contacts, including 'Ed' (Spouse) and 'Judy' (Mother-in-Law), with an option to '+ Add 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.

New Emergency Contact ✕

Priority (required)
 Primary Secondary

First Name (required)

Last Name (required)

Relationship (required)

Notes

Primary Phone

Home Phone

Mobile Phone

Work Phone Extension

Email

- 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

Smart Tip
Click **Return to Portal** to return to the Self Service Portal.

Connect

Type	URL	
Twitter	twitter.com/intent/user?user_id=17566709	✓ Connected
Facebook		Connect
LinkedIn		Connect
Google+		Connect

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.

Submit Time Off Request

Select Time Off Request Type

Request Type -- Select --

Optionally Enter Employee Comments

Employee Comments

Save and Add New Save and Close

Discard changes and go to the Time Off Request History

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

Single Day Multiple Days Include Weekends?

Start Date

End Date

Hours Per Day 8.00

Start Time AM

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

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.

Smart Tip
Click **Use Default Image** to return to the default image.

Upload New Profile Image

Use Default Image

Save Profile Changes

Employee Profile Personal Information

Click to Change

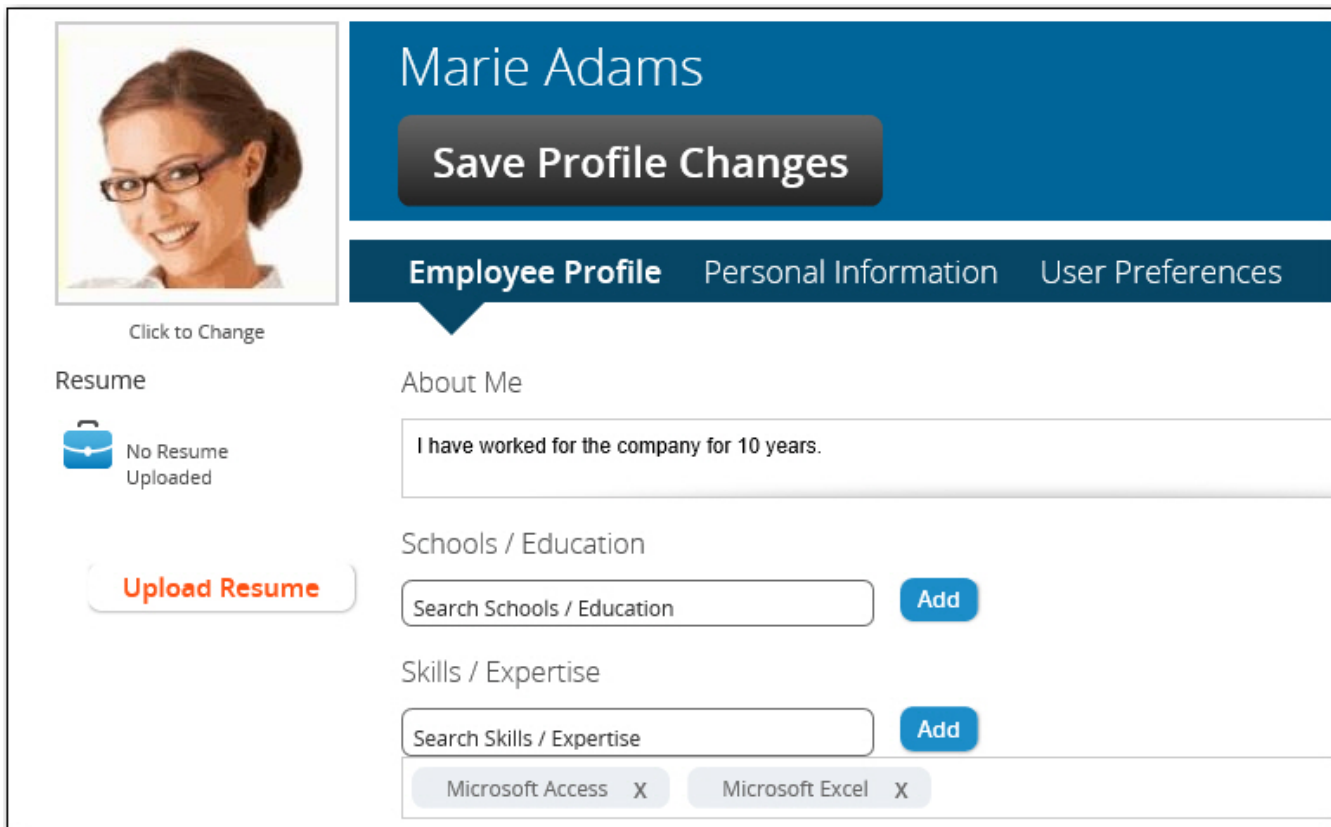
Resume

No Resume Uploaded

About Me

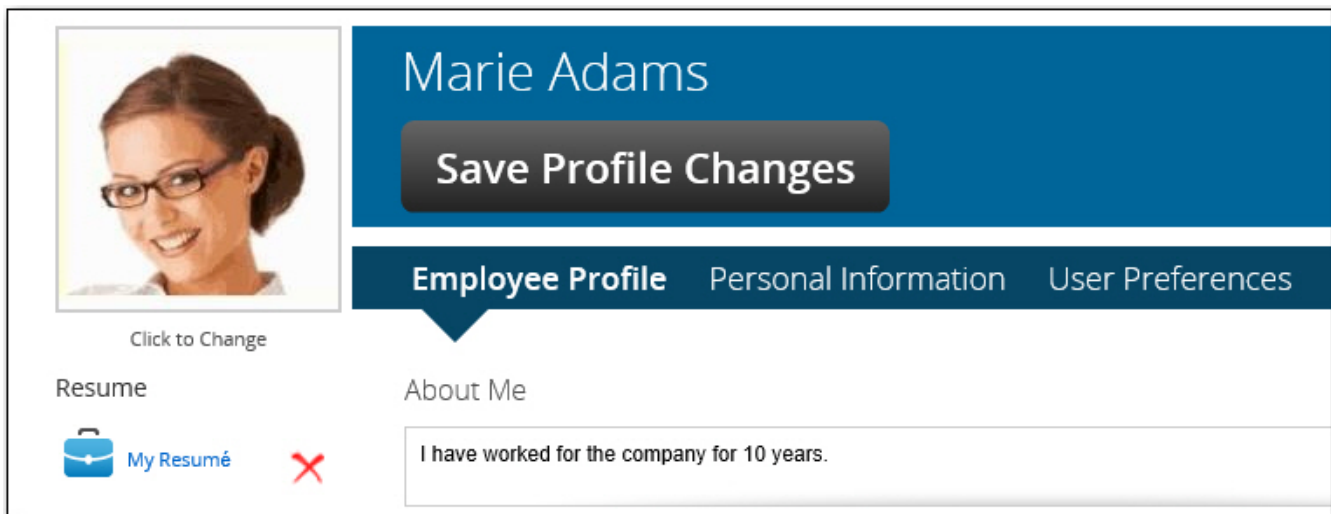
UPLOAD RESUME

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



The screenshot shows the user profile for Marie Adams. At the top left is a profile picture of Marie Adams with glasses, with the text "Click to Change" below it. To the right of the picture is a blue header with "Marie Adams" and a "Save Profile Changes" button. Below the header are three tabs: "Employee Profile" (selected), "Personal Information", and "User Preferences". On the left side, under the "Resume" section, there is a briefcase icon and the text "No Resume Uploaded". Below this is a red "Upload Resume" button. On the right side, under the "About Me" section, there is a text box containing "I have worked for the company for 10 years." Below this are sections for "Schools / Education" and "Skills / Expertise", each with a search input field and an "Add" button. At the bottom, there are two tags: "Microsoft Access X" and "Microsoft Excel X".

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

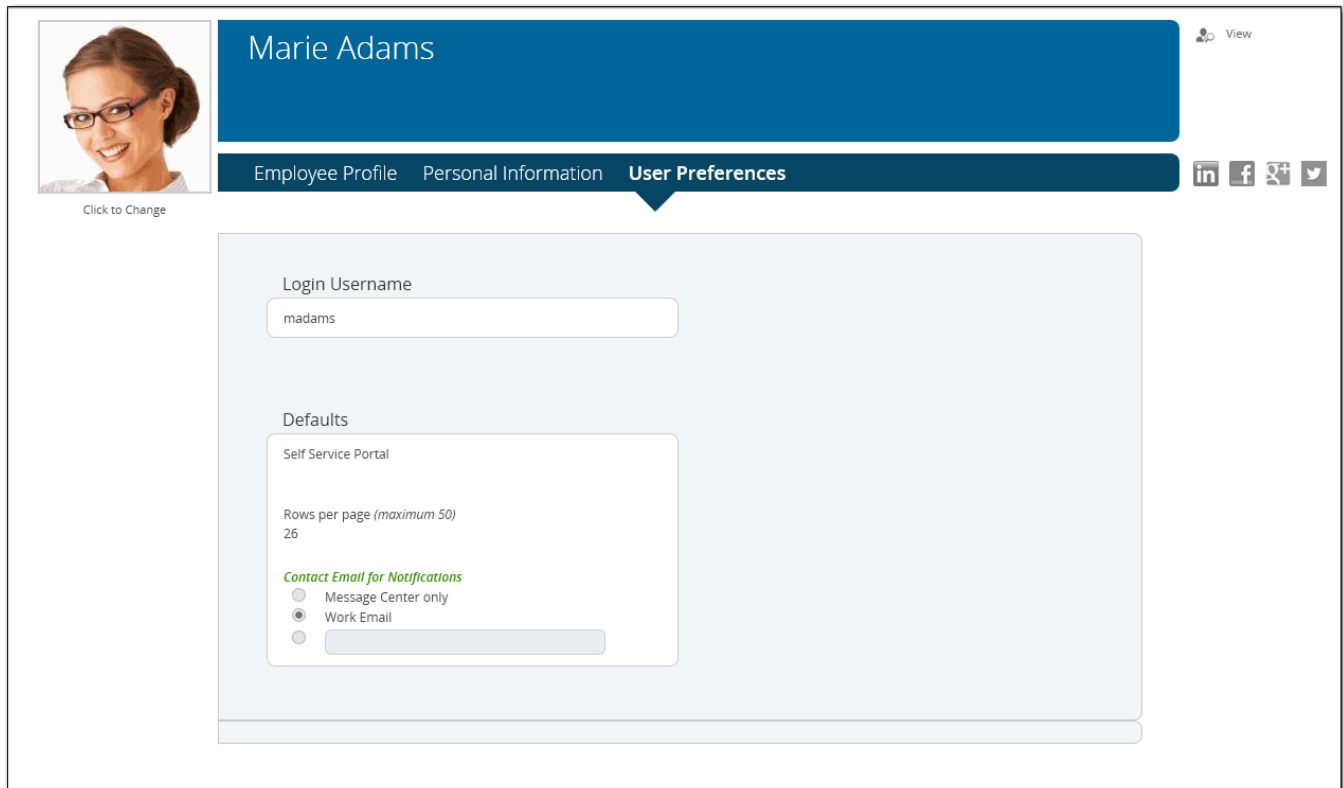


The screenshot shows the user profile for Marie Adams, similar to the previous one. The profile picture and header are the same. In the "Resume" section on the left, the briefcase icon is now labeled "My Resumé" and there is a red "X" icon next to it. The "About Me" text box on the right still contains "I have worked for the company for 10 years." The "Schools / Education" and "Skills / Expertise" sections are also present, but the "Add" buttons are not visible in this view.

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.



The screenshot displays the 'User Preferences' page for Marie Adams. At the top left is a profile picture of Marie Adams with glasses, and below it is a 'Click to Change' link. To the right of the photo is a blue header bar with the name 'Marie Adams' and a 'View' link. Below the header is a navigation bar with three tabs: 'Employee Profile', 'Personal Information', and 'User Preferences' (which is currently selected). To the right of the navigation bar are social media icons for LinkedIn, Facebook, Google+, and Twitter. The main content area is a light blue box containing the following settings:

- Login Username:** A text input field containing 'madams'.
- Defaults:**
 - Self Service Portal:** A section with a dropdown menu.
 - Rows per page (maximum 50):** A text input field containing '26'.
 - Contact Email for Notifications:** A section with three radio button options: 'Message Center only', 'Work Email' (which is selected), and an empty input field.

VIEW CHECKS

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

Smart Tip
Click the filter icon to access a menu allowing you to filter the checks as shown:

Filter Checks Cancel

Presets

Q1 Q2 Q3 Q4 YTD

Last Year

Start Date
01/01/2015

End Date
12/31/2015

Include Adjustment Checks

Apply

Pay

Checks Tax Forms

Last Year 2015

Select All

- December 11, 2015** \$1,080.54
V104242 - Regular
- December 4, 2015** \$1,080.50
V104228 - Regular
- November 27, 2015** \$1,080.53
V104214 - Regular
- November 20, 2015** \$1,080.54
V104200 - Regular
- November 13, 2015** \$1,080.54
V104186 - Regular
- November 6, 2015** \$1,080.54
V104172 - Regular
- October 30, 2015** \$1,080.54
V104158 - Regular
- October 23, 2015** \$1,080.53
V104144 - Regular
- October 16, 2015** \$1,080.54
V104130 - Regular
- October 9, 2015** \$1,080.54
V104116 - Regular
- October 2, 2015** \$1,080.58
V104102 - Regular
- September 25, 2015** \$1,080.50
V104088 - Regular
- September 18, 2015** \$1,080.53
V104074 - Regular
- September 11, 2015** \$1,080.54
V104060 - Regular
- September 4, 2015** \$2,584.99

Smart Tip

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

Download Paystub

Your Check

\$1,080.54

Taxes

\$515.46

Deductions

\$204.00

Your Check
\$1,080.54

Gross Pay
\$2,090.00

Earnings Breakdown for 11/29/2015 - 12/5/2015

Description	Hours	YTD	Rate	Amount	YTD
401K MATCH	0.00	0.00	\$0.00	\$90.00	\$4,634.50
BONUS		0.00			\$5,000.00
Employer Paid Dental	0.00	0.00	\$0.00	\$20.00	\$1,020.00
Employer Paid HMO	0.00	0.00	\$0.00	\$180.00	\$9,180.00
REGULAR	0.00	0.00		\$1,800.00	\$92,690.00
Totals	0.00	0.00		\$2,090.00	\$112,524.50

Direct Deposits

Bank	Account	Type	Amount	YTD
Jpmorgan Chase Bank, NA	...2312	Checking	\$25.00	\$1,275.00
Jpmorgan Chase Bank, NA	2653	Savings	\$54.03	\$2,920.25
Jpmorgan Chase Bank, NA	3678	Checking	\$1,001.51	\$54,209.43
Totals			\$1,080.54	\$58,404.68

Time Off

Personal	Sick
-	-
	40.00 hours
<p>Vacation</p> <p style="font-size: 18px; color: #2e8b57; font-weight: bold;">8.00 hours</p> <p style="font-size: 12px; color: #2e8b57;">221.69 hours</p>	

27

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.

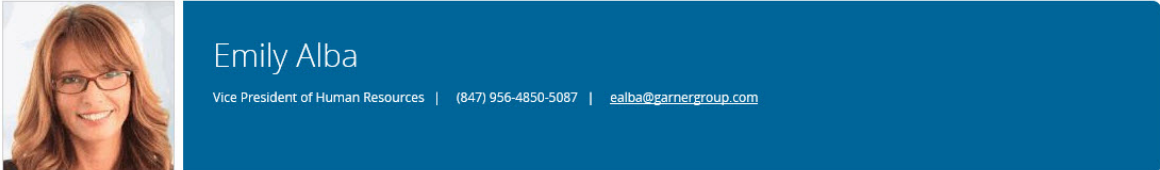
a. Employee social security number 578-98-7458		c. Employer's name, address, and zip code DOC02 3850 N Wilke Rd Arlington Heights, IL 60004	
b. Employer identification number (EIN) 00-5554442		f. Employee's address and zip code 117 Bayview Circle Hermosa Beach, CA 90254	
d. Control number DOC02 16		e. 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 <input type="checkbox"/>		Retirement Plan <input checked="" type="checkbox"/>	Third-Party Sick Pay <input type="checkbox"/>
14. -			
15. ST Employer's state ID number IL 00000000000000		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.


Directory > Employee Profile



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

[Add Impression](#)

[in](#) [f](#) [+](#) [t](#)

 [My Resumé](#)

Home Phone
(847) 956-4850

Mobile Phone
(847) 956-4850




Supervisor
FROST, EMMA

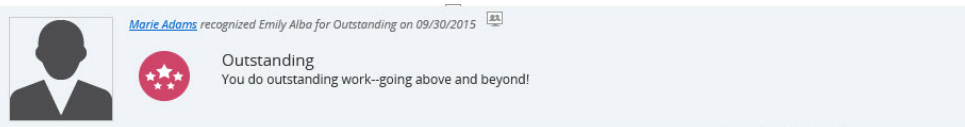
Division
600 - Southwest

Branch
101 - Executive

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

Interests

 **Billiards**  **Comedy Mov-ies**  **Painting**



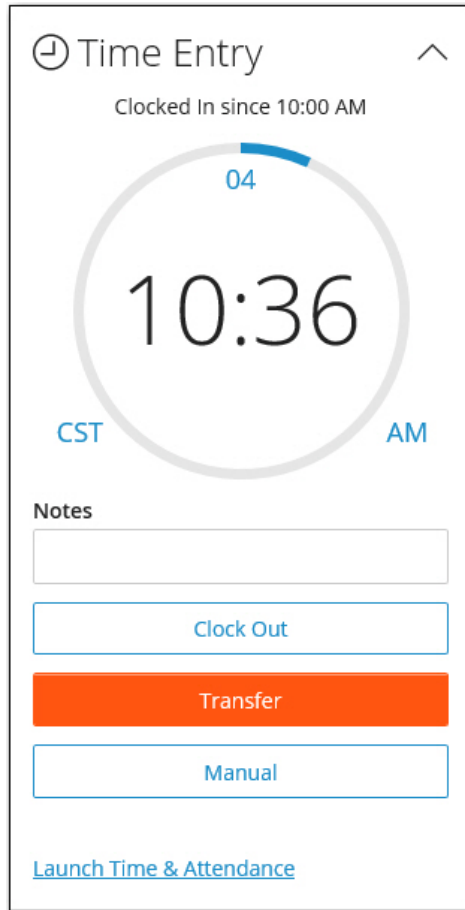
[Marie Adams](#) recognized Emily Alba for Outstanding on 09/30/2015

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

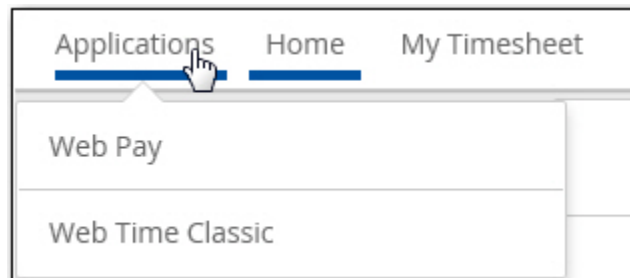
1 - 2 of 2 items

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.



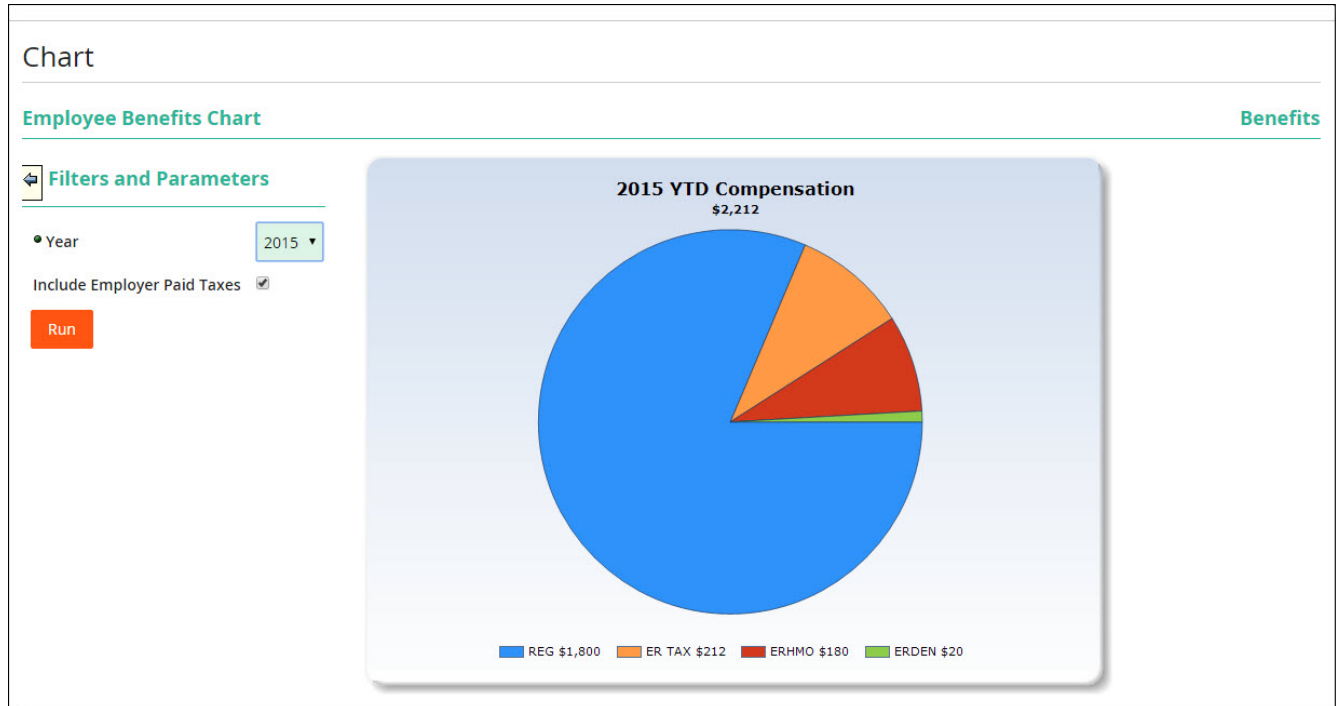
- To return to Web Pay, select Web Pay from the **Applications** menu.



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.

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.

About	
Application	Paylocity Payroll + HR
Version	15.4.8.826
Web Server	demo.paylocity.com / DEMOEVENWEB1
Environment	Escher
Company ID	CLNT03

Product Type	
Product Type	Web Pay Entry
Licensed Users	1000000

System Requirements	
Recommended Browsers	Internet Explorer 8.0+ Firefox 3.0+ Chrome 8.0+ Safari 5.0+ Opera 10.0+
JavaScript	Required and Enabled - Version 1.1+
Cookies	Required and Enabled
SSL	Required
Adobe Reader	Required to view printable version of Employee Checks and some Reports: Click here to download the latest version.

[Verify your system setup](#)

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.

Home
Directory
Impressions
Teams

1 - 5 of 107 items

Filter: Last Name

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

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

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.

The screenshot shows the top navigation bar with 'GARNER GROUP', 'Home', 'Directory', 'Impressions', and 'Teams'. A search bar is on the right. Below the navigation, there are pagination controls and a filter bar for 'Last Name' with letters A through Z. The letter 'J' is selected. Below the filter bar, there are three columns: 'Employee', 'Contact Info', and 'Actions'. Three employees are listed:

Employee	Contact Info	Actions
Aldo Jackson Customer Support Representative		Profile Team Impression Portal
Teddy Jackson Customer Support Representative		Profile Team Impression Portal
Christina Jones Customer Support Representative		Profile Team Impression Portal

- 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.

The screenshot shows the top navigation bar with 'GARNER GROUP', 'Home', 'Directory', 'Impressions', and 'Teams'. A search bar contains 'rock climbing'. Below the navigation, there are pagination controls and a filter bar for 'Last Name' with 'All' selected. A dropdown menu is open showing 'Interests' with 'Rock climbing' selected. Below the filter bar, there are three columns: 'Employee', 'Contact Info', and 'Actions'. Five employees are listed:

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

- 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.

The screenshot shows the Garner Group directory interface. At the top, there are navigation icons for Home, Directory, Impressions, and Teams. Below this is a filter bar for 'Last Name' with an 'All' button and a list of letters from A to R. A list of employees is displayed with columns for Employee, Contact Info, and Action. A search filter overlay is open on the right, showing fields for First Name and Last Name, and a list of filter categories: Schools/Education, Skills/Expertise, Interests, Badges, Supervisors, Division, Branch, and Department. Search and Reset buttons are at the bottom of the overlay.

Employee	Contact Info	Action
Marie Adams Customer Support Representative	phone: (847) 956-4850 5355 email: madams@garnergroupp.com	
Emily Alba Vice President of Human Resources	phone: (847) 956-4850 5087 email: ealba@garnergroupp.com	
Sheppard Allerdyce Fulfillment Specialist	phone: (847) 956-4850 9213 email: sallerdyce@garnergroupp.com	
Robert April Sales Representative	phone: (847) 956-4850 7254 email: rapril@garnergroupp.com	
Robert Arselan Client Trainer	phone: (847) 956-4850 3274 email: rsarslean@garnergroupp.com	

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.

Impressions All Impressions Award Impression

Filter Reset

Date Presets
All-Time This Year
This Quarter This Month

Start Date

End Date

Impression Type































Apply

	Total Awarded	Recipients	Most Popular
	15	13	
<input type="text" value="Search by Name"/>			
1 Benjamin Cal Manager	2	Award	
2 Emily Alba Vice President of Human Resources	2	Award	
3 Jeremy Pennington Accountant	1	Award	
4 Isabella Guzman Marketing Specialist	1	Award	
5 Dana Contractor Customer Support Representative	1	Award	
6 Marie Adams Customer Support Representative	1	Award	
7 Deepak Gupta Design Engineer	1	Award	
8 Robert April Sales Representative	1	Award	
9 Jack Crusher IT Technician	1	Award	
10 Arnold Baez Chief Financial Officer	1	Award	

Load More

- 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.

Filter: Last Name All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 1 - 5 of 15 items

 Emily Alba — Vice President of Human Resources Emily Alba recognized Emily Alba for Thanks on 03/07/2016 	 Profile  Team  Impression
 Thanks You are appreciated, thank you!	
 Isabella Guzman — Marketing Specialist Emily Alba recognized Isabella Guzman for Thanks on 03/07/2016 	 Profile  Team  Impression
 Thanks You are appreciated, thank you!	
 Jeremy Pennington — Accountant Emily Alba recognized Jeremy Pennington for Thanks on 03/07/2016 	 Profile  Team  Impression
 Thanks You are appreciated, thank you!	
 Benjamin Cal — Manager Emily Alba recognized Benjamin Cal for Thanks on 03/07/2016 	 Profile  Team  Impression
 Thanks You are appreciated, thank you!	
 Emma Frost — Manager Emily Alba recognized Emma Frost for Thanks on 03/07/2016 	 Profile  Team  Impression
 Thanks You are appreciated, thank you!	

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

Grid of impression types:

- Great Job (A+ icon)
- Help (thumbs up icon)
- Innovation (lightbulb icon)
- Leadership (group of people icon, highlighted in blue)

Recipient(s)

Jeremy Pennington X Isabella Guzman X Emily Alba X Chet Baker X
Abel McTiernan X Bart Kilpatrick X 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.

Glossary

- [Allowance or Exemptions](#)
- [Bonus or Supplemental Wages](#)
- [Cafeteria Plan](#)
- [Deductions](#)
- [Deferred Compensation Plan \(401k\)](#)
- [Dependent](#)
- [Federal Insurance Contributions Act \(FICA\)](#)
- [Federal Insurance Contributions Act \(FICA\) - Medicare](#)
- [Federal Insurance Contributions Act \(FICA\) - Old Age, Survivors, and Disability Insurance \(OASDI\)](#)
- [Federal Income Tax \(FIT\)](#)
- [Filing or Marital Status \(Form W-4\)](#)
- [State Minimum Wage Rates](#)
- [Garnishment](#)
- [Gross Pay](#)
- [Net Pay](#)
- [Tips](#)
- [State Unemployment Chart](#)

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.

The screenshot displays a team hierarchy. At the top level is Emma Frost, Manager, with 101 Direct Reports. Below her are three direct reports: Benjamin Cal (Manager, 1 Direct Report), Julian Atwood (Divisional Vice President), and Lydia Eddings (Financial Analyst). Under Benjamin Cal are Bruce Palencia (Design Engineer) and Stan Baker (Sales Representative). Under Lydia Eddings is Jeremy Pennington (Accountant). The interface includes a 'My Team' button, an 'Export' button, and a 'Smart Tip' box.

Smart Tip
Click **Export** to export the Team to a downloadable PDF file.

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.

Login User Name and Password

• User Name

Change Password

Current Password

New Password

Confirm New Password

Default Home Page

Default Home Page

Notifications - Email Preferences

Never Email

Work Email

Personal Email

Application

• Paging Size (Max 50 rows per page)

Login Challenge Questions and Security Image

Question 1

Answer 1


Question 2

Answer 2

Question 3

Answer 3

Select Security Image

Selected Security Image 

Security Phrase

Smart Tip

Users must select three unique questions and enter three answers; they may not select less than three questions, and may not select the same question multiple times.

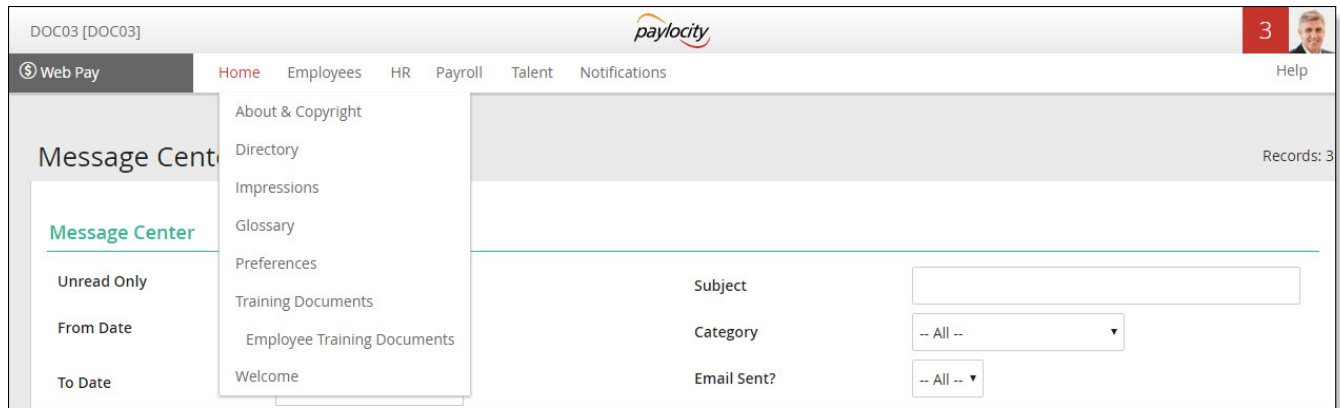
Users may be required to enter their password when saving changes. Enter the **Password** and click **Save** to save the updated personal settings.

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.

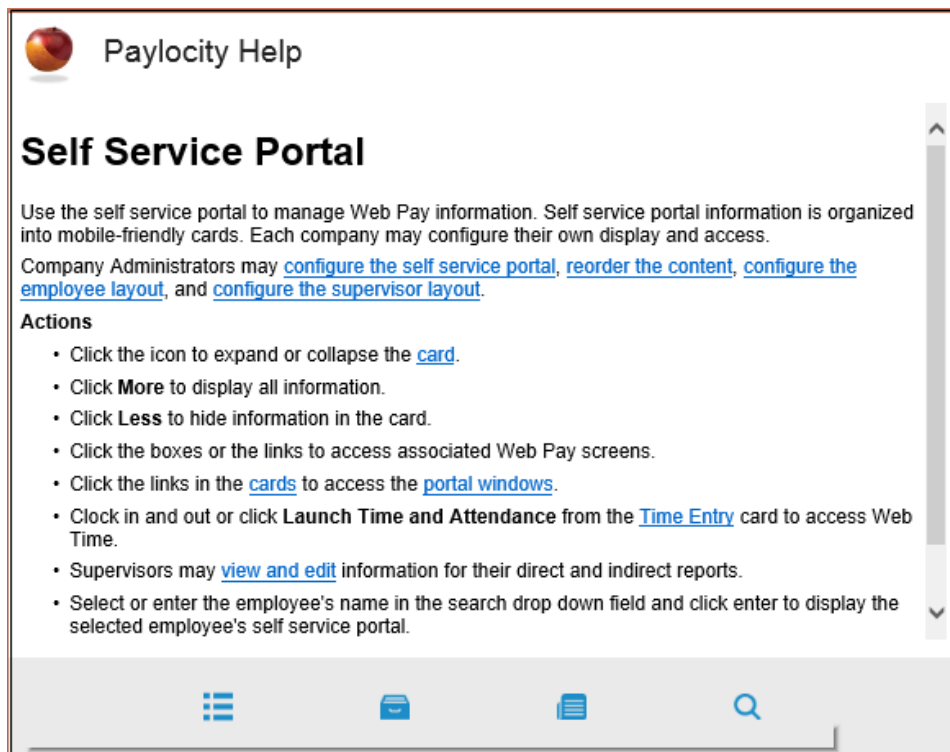
TRAINING DOCUMENTS

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.

Name	Demographic Information
<ul style="list-style-type: none">Last Name: BakerFirst Name: ChetMiddle Name: <input type="text"/>Salutation: <input type="text"/>Suffix: -- Select --Nickname: <input type="text"/>Prior Last Name: <input type="text"/>	SSN / FEIN: 773-24-1047 Birth Date: 12/23/1949 Age 65 Gender: Male Ethnicity: White Marital Status: Single Smoker: <input type="checkbox"/> Disability: <input type="text"/> Veteran: <input type="text"/>
Address	Personal Phone & Email
Address 1: 17 Redling Avenue Address 2: <input type="text"/> City / State / Zip: Greenville SC 29602 Country: UNITED STATES County / Province: <input type="text"/> Additional Address: <input type="text"/> Additional Address Type: -- Select -- Additional Address Country: -- Select --	Home Phone: (847) 555-8795 Mobile Phone: <input type="text"/> Email Address: <input type="text"/>
<input type="button" value="Save"/>	

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							
<input checked="" type="checkbox"/>	Last Name /	First Name	Relationship	Gender	SSN	Birth Date	
<input type="checkbox"/>	Adams	Ben	Son	Male	654-87-3216	03/20/1999	
<input type="checkbox"/>	Adams	Ed	Husband	Male	345769987	06/12/1970	

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.

Dependent

- Last Name:
- First Name:
- Middle Name:
- Relationship:
- Gender:
- Birth Date: Age 16
- SSN:

Emergency Contact

Emergency Contact?

Priority: Primary Secondary

Primary Phone:

Notes:

Address

Stay in sync with Employee Information

Address 1:

Address 2:

City / State / Zip:

Country:

County:

Other Dependent Information

Home Phone:

Email:

Work Phone: Ext.

Mobile Phone:

Pager:

Student

Full Time Student:

Records: 0

Coverage Dates

<input checked="" type="checkbox"/>	Coverage Begin	Coverage End
<input type="button" value="Add"/>	<input type="button" value="Delete"/>	

Smart Tip
 Check **Stay in sync with Employee Information** to automatically populate the dependent's address with the employee's information.

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**.

Coverage Details

- Coverage Begin:
- Coverage End:

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.

Emergency Contacts							
<input checked="" type="checkbox"/>	Last Name ^	First Name	Relationship	Priority	Primary Phone	Email	Notes
<input type="checkbox"/>	Buns	Kelly	Mother	Primary	(626) 333-5555		

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.

Emergency Contact

- Priority
 - Primary
 - Secondary
- Last Name
- First Name
- Relationship

Other Emergency Contact Information

Primary Phone

Home Phone

Work Phone Ext.

Mobile Phone

Pager

Email

Address

Stay in sync with Employee Information

Address 1

Address 2

City / State / Zip --

Country

County

Notes

Notes

Smart Tip
Users may select more than one **Primary** contact.

Smart Tip
Check **Stay in sync with Employee Information** to automatically populate the dependent's address with the employee's information.

WORK

EMPLOYEE STATUS

View employee status information.

Current Employee Status		Adjusted Seniority Date					
Employee Status	Active	Adjusted Seniority Date					
Hire		Termination					
Hire Date	05/02/2008	Termination Date					
Rehire Date		Eligible for Rehire?					
Length Of Service	Hire Date - 7 Yrs, 6 Mos	User Account Deactivation Date					
Records: 1							
Employee Status History							
Show	<input type="text" value="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		Cost Center(s)	
Supervisor	FROST, EMMA [62]	Division	200 - Mid-Atlantic
Reviewer	FROST, EMMA [62]	Branch	301 - Finance
Is Supervisor / Reviewer?		Department	110 - Sales - Inside
Position		Pay Settings	
Employment Type	Regular Full Time (30+ Hours)	Pay Group	
Position	FINANALYST - Financial Analyst	OT Exempt?	
Job Title	Financial Analyst	Tipped	
EEO Class	1 - Officials and Managers	Minimum Wage Exempt?	
Work Comp	8810 - Clerical	Union	
Home Shift		Union	
		Affiliation Date	
		Union Position	
		Initiation Collected?	
		Dues Collected?	

Records: 5

Dept / Position History

Show

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 Phone / Email / Mail Stop	
Work Location	-- Use default Company Address	Work Phone	Ext
Address 1	3850 N Wilke Rd	Mobile Phone	
Address 2		Pager	
City / State / Zip	ARLINGTON HEIGHTS IL 60004	Email	
Country	UNITED STATES	Mail Stop	
County	COOK		

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		SSN Verification	
Work Authorization		SSN	xxx-xx-1047
USCIS or Admission Number		SSN Verified?	<input type="checkbox"/>
		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		I-9	
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	
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							
<input checked="" type="checkbox"/>	Date	Type	Status	Attorney	Attorney Phone	Notes	Updated By
<input type="checkbox"/>	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	Notes	<input type="text"/>
• Status	Verified		
Attorney Name			
Attorney Phone			
<input type="button" value="Cancel"/>			

STATUTORY

Vets 100/100A Tracking		New Hire Medical Availability	
Enable?	<input checked="" type="checkbox"/>	Medical Coverage Available?	<input checked="" type="checkbox"/>
Hiring Location	Headquarters	Medical Coverage Date	1/1/2015
Vets 100		Vets 100A	
Job Category	2 - Professionals	Job Category	
Covered Veteran	<input type="checkbox"/> Special Disabled Veterans <input type="checkbox"/> Vietnam Era Veterans <input type="checkbox"/> Recently Separated Veterans <input checked="" type="checkbox"/> Other Protected Veterans	Covered Veteran	<input type="checkbox"/> Disabled Veterans <input type="checkbox"/> Active Duty Wartime Or Campaign Badge Veteran <input type="checkbox"/> Armed Forces Service Medal Veterans <input type="checkbox"/> Recently Separated Veterans

PAYROLL SETUP

RATES

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

Rates

Show

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	<input checked="" type="checkbox"/>			

Records: 1

Additional Rates

Show

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						

TAXES

View or edit tax information.

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

Taxes

<input checked="" type="checkbox"/>	Tax Code	Filing Status	Exemptions 1	Exemptions 2	Type	Amount	Percentage	Pre-Filled Tax Forms
<input type="checkbox"/>	FITW - Federal Income Tax	Single	0	N/A	Default	Default	Default	Federal W-4
<input type="checkbox"/>	IL - Illinois SITW	Married	0	0	Default	Default	Default	

Additional Tax Information

SUI State SSN / FEIN

Tax Form Retirement Plan Statutory 943 Agricultural Employee

1099R Distribution Code

- Select a **Filing Status** from the drop down.
- Enter the number of exemptions in the **Exemption 1** field and the applicable number of exemptions in the **Exemption 2** field (*if applicable*).
- Select the applicable Amount Type if different from the Default Amount.
- Enter an **Amount**. This field is enabled when a dollar **Amount Type** is selected from the drop down.
- 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.
- For State Taxes, enter the **Percentage Allocation** for the state selected.
- Designate the **SUI** from the drop down.
- Save** the updated information.

State Tax Details

Tax Code: IL - Illinois SITW

Amount Type: Default Amount

Filing Status: Married

Amount: 0

Exemption 1: 0

Percentage: 0

Exemption 2: 0

Notes: STATUS: S = single
M = married
EXEMPTIONS: number of allowances claimed on IL-W-4 Line 1

Buttons: Save, Save & Return, Cancel

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.

Amount Type: Default Amount

Amount: Additional Flat
Additional Flat plus Additional Percentage
Additional Percentage

Percentage: Blocked
Default Amount

Supplemental Check: Flat Dollar Amount
Flat Dollar Amount plus Fixed Percentage
Flat Percentage

Reciprocity Code: [Dropdown]

EARNINGS

View regularly scheduled recurring earnings.

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

Earnings										
Filter Show Active ▾										
<input checked="" type="checkbox"/>	Code ↕	Type	Begin Check Date	End Check Date	Calc Code	Rate	Amount	Frequency	Goal	Paid
<input type="checkbox"/>	CAR	Standard	11/13/2015			0.00	25.00			
<input type="checkbox"/>	REG	Reg	01/01/2016			0.00	1,525.00			

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

Earnings Details		Effective Date	
• Earning Code	CAR - Auto Allowance	• Effective Date	11/13/2015
Earning Type	Standard	• Begin Check Date	11/13/2015
Frequency	-- All --	End Check Date	
Amount	25.00		
Self Insured?	<input type="checkbox"/>		
Calculation		Distribution	
Rate	0.00	Job Code	
Calculation Code		Division	
Hours / Units		Branch	
Rate Code		Department	
Pay Period Minimum	0.00	Limits	
Pay Period Maximum	0.00	Goal	
		Paid to Date	
		Annual Maximum	0.00
		Paid Year to Date	0.00
Agency Info		Automatic Employee Record Updates	
Agency		Source	None
Miscellaneous Info			
Cancel			

DEDUCTIONS

View regularly scheduled recurring deductions.

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

Deductions

Filter Show Active ▾

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

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

Deduction Details

- Deduction Code: 401K - 401(k) Traditional
- Deduction Type: 401k
- Calculation Code: Flat Amount
- Rate / Amount: 10.00
- Frequency: -- All --
- Goal:
- Paid to Date:
- Agency: 401K - Smith Barney
- Pay Period Minimum: 0.00
- Pay Period Maximum: 0.00
- Annual Maximum: 0.00
- Paid Year to Date: 10.00
- Misc Info:
- Notes:
- Self Insured Plan:

Automatic Employee Record Updates

Source: None

Effective Date

- Effective Date: 7/25/2015
- Begin Check Date: 08/14/2015
- End Check Date:

Deduction Priority

Deduction Category: Benefit

Priority: 0

Child Support

To enable the Child Support section, select a Deduction Code of Type "EFT Child Support" or "Non-EFT Child Support"

State:

Case Identifier:

FIPS Code:

Medical Support?

Report as Terminated?

401K Loan

Loan Number:

Issue Date:

First Payment Date:

Cost Centers

Division:

Branch:

Department:

[Cancel](#)

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.

Direct Deposit Accounts
Add New Direct Deposit Account

Smart Tip
To edit or delete a direct deposit account, select the account from the drop down.

Bank Account

- Account Type: Checking
- Routing Number:
- Account Number:
- Bank Name:
- Pre-Note Date: 10/2/2014 Skip Pre-Note
- Block Special?:
- Account Description: -- Select --
- Name on Account: Mary E. Adams Name should match the name on file with your banking institution

Additional Deposit Account

- Amount Type: -- Select --
- Amount:

Save
Delete

Main Account - Your net check will go here

Routing	Account	Type	Bank Name	Pre-Note Date	Block Special
07100013	132910	Checking	Jpmorgan Chase Bank, NA	10/02/2012	

Additional Deposit Account(s)

	Routing	Account	Type	Bank Name	Amount	Pre-Note Date	Block Special
<input checked="" type="radio"/>	081904808	89835	Savings	Bank Of America, N.A.	25%	10/02/2012	

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
Checking - Jpmorgan Chase Bank, NA [215458] ▾

Bank Account

- Account Type Checking ▾
- Routing Number
- Account Number
- Bank Name
- Pre-Note Date Skip Pre-Note
- Block Special?
- Account Description -- Select -- ▾
- Name on Account Name should match the name on file with your banking institution

Additional Deposit Account

- Amount Type Flat ▾
- Amount

Save
Delete

Main Account - Your net check will go here

Routing	Account	Type	Bank Name	Pre-Note Date	Block Special
071000013	132910	Checking	Jpmorgan Chase Bank, NA	10/02/2012	

Additional Deposit Account(s)

⬆ ⬇	Routing	Account	Type	Bank Name	Amount	Pre-Note Date	Block Special
<input checked="" type="radio"/>	081904808	89835	Savings	Bank Of America, N.A.	25%	10/02/2012	
<input type="radio"/>	071000013	215458	Checking	Jpmorgan Chase Bank, NA	\$50.00	10/02/2014	

The image shows a check from Mary S. Smith, 1234 Main Street, Your Town, IL 61000. The routing number 11234567891 and account number 123456789 are circled in green. The check number 1234 is circled in red. A watermark reads 'NEGOTIABLE THIS IS NOT A CHECK'.

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		Select Job Code / Cost Center(s)																																															
<ul style="list-style-type: none"> Allocation % 		<ul style="list-style-type: none"> A Job Code, Workers Comp Code or at least one Cost Center is Required 																																															
Select Earning Code / Code Group		<table border="1"> <tr> <td>Override</td> <td colspan="6">Home</td> </tr> <tr> <td>Division</td> <td colspan="6">200 - Mid-Atlantic</td> </tr> <tr> <td>Branch</td> <td colspan="6">301 - Finance</td> </tr> <tr> <td>Department</td> <td colspan="6">110 - Sales - Inside</td> </tr> <tr> <td>Job Code</td> <td colspan="6"></td> </tr> <tr> <td>Workers Comp Code</td> <td colspan="6"></td> </tr> </table>						Override	Home						Division	200 - Mid-Atlantic						Branch	301 - Finance						Department	110 - Sales - Inside						Job Code							Workers Comp Code						
Override	Home																																																
Division	200 - Mid-Atlantic																																																
Branch	301 - Finance																																																
Department	110 - Sales - Inside																																																
Job Code																																																	
Workers Comp Code																																																	
<ul style="list-style-type: none"> An Earning Code or Code Group is Required 																																																	
Earning Code	Gross Earnings																																																
							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)																																																	
<input checked="" type="checkbox"/>	%	Division	Branch	Department	Job Code	Workers Comp	Earning Code or Code Group																																										
<input type="checkbox"/>	25.0000	200 - Mid-Atlantic	301 - Finance	110 - Sales - Inside			Gross Earnings																																										
<input type="checkbox"/>	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.

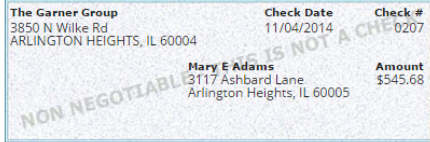
The Employee section, which displays the **Employee Id** and **Department**, can be expanded or collapsed by clicking the double arrows. The **Check or Voucher #**, **Delivery Location**, **Check Date**, **Period Begin and End Dates**, **Gross Earnings**, **Gross YTD**, **Net Earnings**, and **Net YTD** 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 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.

Search		Summary																									
Year	2014 ▾	Reg Hours	0.00	Reg Pay	\$1,000.00																						
Quarter / YTD	<input type="radio"/> Q1 <input type="radio"/> Q2 <input type="radio"/> Q3 <input type="radio"/> Q4 <input checked="" type="radio"/> YTD	OT Hours	0.00	OT Pay	\$0.00																						
Date Range From	1/1/2014	Other Hours	0.00	Other Pay	\$346.25																						
Date Range To	12/31/2014	Total Hours	0.00	Gross Pay	\$1,025.00																						
<input type="button" value="Submit"/>		Taxes	\$238.80	Net Pay	\$545.68																						
		Deductions	\$338.50	Direct Deposit	\$0.00																						
		Weeks Worked	0	Net Check	\$545.68																						
Results			Detailed Pay Information																								
<input checked="" type="checkbox"/>	Check Date	Pay Type	Check/VCR #	Gross	Net	Dir Dep																					
<input checked="" type="checkbox"/>	11/04/2014	Regular	0207	\$1,025.00	\$545.68	\$0.00																					
<table border="1"> <thead> <tr> <th>Description</th> <th>Hours or Taxable</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>401K MATCH</td> <td>0.00</td> <td>\$51.25</td> </tr> <tr> <td>Auto Allowance</td> <td>0.00</td> <td>\$25.00</td> </tr> <tr> <td>Employer Paid Dental</td> <td>0.00</td> <td>\$20.00</td> </tr> <tr> <td>Employer Paid HDHP</td> <td>0.00</td> <td>\$250.00</td> </tr> <tr> <td>REGULAR</td> <td>0.00</td> <td>\$1,000.00</td> </tr> <tr> <td>401(k) Traditional</td> <td>0.00</td> <td>\$82.00</td> </tr> </tbody> </table>							Description	Hours or Taxable	Amount	401K MATCH	0.00	\$51.25	Auto Allowance	0.00	\$25.00	Employer Paid Dental	0.00	\$20.00	Employer Paid HDHP	0.00	\$250.00	REGULAR	0.00	\$1,000.00	401(k) Traditional	0.00	\$82.00
Description	Hours or Taxable	Amount																									
401K MATCH	0.00	\$51.25																									
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Employer Paid HDHP	0.00	\$250.00																									
REGULAR	0.00	\$1,000.00																									
401(k) Traditional	0.00	\$82.00																									
<input type="button" value="Calculate Summary"/>		<input type="button" value="Print 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 Year	Fed Wages	Fed Withholding	SS Wages	SS Withholding	Medicare Wages	Medicare Withholding	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 PROCl 1		1 Wages, tips, other comp. 40,268.00		2 Federal income tax withheld 6,740.06	
b Employer ID number 00-5554442		3 Social security wages 42,698.00		4 Social security tax withheld 1,793.33	
		5 Medicare wages and tips 42,698.00		6 Medicare tax withheld 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 0.00		8 Allocated tips 0.00		9 Advance EIC payment 0.00	
10 Dependent care benefits 0.00		11 Nonqualified plans 0.00			
12a D		2,430.00		13 Statutory employee Retirement plan 3rd-party sick pay X	
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. N/A		19 Local income tax N/A		20 Locality name 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.

Setup & Balance

• Hours Per Work Day 8.0000 Override?

Time Off Types

Type /	Start Date	Used Hours / Days	Available Hours / Days	Used \$	Available \$	Length Of Service
SICK - Sick	05/02/2008	0.00 Hours	0.00 Hours	\$0.00	\$0.00	05/02/2008
VAC - Vacation	05/02/2008	0.00 Hours	166.15 Hours	\$0.00	\$4,153.82	05/02/2008

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

Setup & Balance Details

• Time Off Type VAC - Vacation Length of Service Date 5/2/2008 Override?

• Start Date 5/2/2008 Months of Service 90.41 as of 11/13/2015

Accrue End Date

Accrue Ongoing

Enabled

Hours Worked 0.000000 Override?

Accrual Rate 4.615400 Hours Override?

Max Balance 300.000000 Hours Override?

Time off accrues : Bi-Weekly

Clear and Transfer Balances

Enabled

Max Carry Over 200.000000 Hours Override?

Available balance above carry over max is cleared on Emp Anniversary Date.
Used balance is reset to zero when available balance is cleared.

Current Balance

Available	166.15 Hours	Dollars Available	4,153.82
Used	0.00 Hours	Dollars Used	0.00
Total	166.15 Hours	Dollars Total	4,153.82

[Cancel](#)

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

Transaction Date To

Begin Date From

Begin Date To

Time Off Type

Transaction Type

Show Totals?

Transaction Subtype

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

HUMAN RESOURCES

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.

Name		Demographic Information	
Last Name	<input type="text" value="Baker"/>	SSN / FEIN	773-24-1047
First Name	<input type="text" value="Chet"/>	Birth Date	12/23/1949 Age 65
Middle Name	<input type="text"/>	Gender	Male ▾
Salutation	<input type="text"/>	Ethnicity	White ▾
Suffix	-- Select -- ▾	Marital Status	Single ▾
Nickname	<input type="text"/>	Smoker	<input type="checkbox"/>
Prior Last Name	<input type="text"/>	Disability	<input type="text"/>
		Veteran	<input type="text"/>
Address		Personal Phone & Email	
Address 1	<input type="text" value="17 Redling Avenue"/>	Home Phone	<input type="text" value="(847) 555-8795"/>
Address 2	<input type="text"/>	Mobile Phone	<input type="text"/>
City / State / Zip	<input type="text" value="Greenville"/> <input type="text" value="SC"/> <input type="text" value="29602"/>	Email Address	<input type="text"/>
Country	UNITED STATES ▾		
County / Province	<input type="text"/>		
Additional Address	<input type="text"/>		
Additional Address Type	-- Select -- ▾		
Additional Address Country	-- Select -- ▾		
<input type="button" value="Save"/>			

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							
<input checked="" type="checkbox"/>	Last Name <small>▲</small>	First Name	Relationship	Gender	SSN	Birth Date	
<input type="checkbox"/>	Adams	Ben	Son	Male	654-87-3216	03/20/1999	
<input type="checkbox"/>	Adams	Ed	Husband	Male	345769987	06/12/1970	

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.

Dependent

- Last Name:
- First Name:
- Middle Name:
- Relationship:
- Gender:
- Birth Date: Age 16
- SSN:

Emergency Contact

Emergency Contact?

Priority: Primary Secondary

Primary Phone:

Notes:

Address

Stay in sync with Employee Information

Address 1:

Address 2:

City / State / Zip:

Country:

County:

Other Dependent Information

Home Phone:

Email:

Work Phone: Ext.

Mobile Phone:

Pager:

Student

Full Time Student:

Records: 0

Coverage Dates

<input checked="" type="checkbox"/>	Coverage Begin	Coverage End
<input type="button" value="Add"/>	<input type="button" value="Delete"/>	

Smart Tip
 Check **Stay in sync with Employee Information** to automatically populate the dependent's address with the employee's information.

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**.

Coverage Details

- Coverage Begin:
- Coverage End:

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.

Emergency Contacts							
<input checked="" type="checkbox"/>	Last Name ^	First Name	Relationship	Priority	Primary Phone	Email	Notes
<input type="checkbox"/>	Buns	Kelly	Mother	Primary	(626) 333-5555		

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.

Emergency Contact

- Priority
 - Primary
 - Secondary
- Last Name
- First Name
- Relationship

Other Emergency Contact Information

Primary Phone

Home Phone

Work Phone Ext.

Mobile Phone

Pager

Email

Address

Stay in sync with Employee Information

Address 1

Address 2

City / State / Zip -- --

Country

County

Notes

Notes

Smart Tip
Users may select more than one **Primary** contact.

Smart Tip
Check **Stay in sync with Employee Information** to automatically populate the dependent's address with the employee's information.

WORK

EMPLOYEE STATUS

View employee status information.

Current Employee Status		Adjusted Seniority Date				
Employee Status	Active	Adjusted Seniority Date				
Hire		Termination				
Hire Date	05/02/2008	Termination Date				
Rehire Date		Eligible for Rehire?				
Length Of Service	Hire Date - 7 Yrs, 6 Mos	User Account Deactivation Date				
Records: 1						
Employee Status History						
Show	<input type="text" value="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		Cost Center(s)	
Supervisor	FROST, EMMA [62]	Division	200 - Mid-Atlantic
Reviewer	FROST, EMMA [62]	Branch	301 - Finance
Is Supervisor / Reviewer?		Department	110 - Sales - Inside
Position		Pay Settings	
Employment Type	Regular Full Time (30+ Hours)	Pay Group	
Position	FINANALYST - Financial Analyst	OT Exempt?	
Job Title	Financial Analyst	Tipped	
EEO Class	1 - Officials and Managers	Minimum Wage Exempt?	
Work Comp	8810 - Clerical	Union	
Home Shift		Union	
		Affiliation Date	
		Union Position	
		Initiation Collected?	
		Dues Collected?	

Records: 5

Dept / Position History

Show

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 Phone / Email / Mail Stop	
Work Location	-- Use default Company Address	Work Phone	Ext
Address 1	3850 N Wilke Rd	Mobile Phone	
Address 2		Pager	
City / State / Zip	ARLINGTON HEIGHTS IL 60004	Email	
Country	UNITED STATES	Mail Stop	
County	COOK		

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		SSN Verification	
Work Authorization		SSN	xxx-xx-1047
USCIS or Admission Number		SSN Verified?	<input type="checkbox"/>
		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		I-9	
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	
I-9			
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							
<input checked="" type="checkbox"/>	Date	Type	Status	Attorney	Attorney Phone	Notes	Updated By
<input type="checkbox"/>	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	Notes	
• Status	Verified		
Attorney Name			
Attorney Phone			
<input type="button" value="Cancel"/>			

STATUTORY

Vets 100/100A Tracking		New Hire Medical Availability	
Enable?	<input checked="" type="checkbox"/>	Medical Coverage Available?	<input checked="" type="checkbox"/>
Hiring Location	Headquarters	Medical Coverage Date	1/1/2015
Vets 100		Vets 100A	
Job Category	2 - Professionals	Job Category	
Covered Veteran	<input type="checkbox"/> Special Disabled Veterans <input type="checkbox"/> Vietnam Era Veterans <input type="checkbox"/> Recently Separated Veterans <input checked="" type="checkbox"/> Other Protected Veterans	Covered Veteran	<input type="checkbox"/> Disabled Veterans <input type="checkbox"/> Active Duty Wartime Or Campaign Badge Veteran <input type="checkbox"/> Armed Forces Service Medal Veterans <input type="checkbox"/> Recently Separated Veterans

EMPLOYMENT

RATES

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

Rates

Show

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

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

<input checked="" type="checkbox"/>	Employer Name	Contact Phone	Job Title	Start Date	End Date	Rate/Per	Can Contact?	Status
<input type="checkbox"/>	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										
<input checked="" type="checkbox"/>	Effective Date ▾	Description	Title	Rate	Per	Salary	Annual Salary	Notes	Capture Date	Edited
<input type="checkbox"/>	05/14/2015	Change Supervisor	Financial Analyst	0.0000		1,000.0000	52,000.0000		05/15/2015	
<input type="checkbox"/>	01/31/2011	Change Job		0.0000		1,000.0000	52,000.0000		07/31/2013	
<input type="checkbox"/>	01/31/2011	Change Supervisor		0.0000		1,000.0000	52,000.0000		07/31/2013	
<input type="checkbox"/>	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.

Employment History Details				
• Effective Date	5/14/2015	Changed By	Database Import	
• Description	Change Supervisor	Edited		
Change Reason	Change Reviewer	Notes	<div style="border: 1px solid #ccc; height: 50px;"></div>	
Capture Date	05/15/2015			
Record Type: Change Supervisor				
Division	200 - Mid-Atlantic	Base Rate	0.00	
Branch	301 - Finance	Rate Per		
Department	110 - Sales - Inside	Pay Frequency	W - Weekly	
Supervisor	Emma Frost [62] 	Annual Salary	52000.00	
Job Title	Financial Analyst			
Salary	1000.00			
<div style="background-color: #f44336; color: white; padding: 5px; display: inline-block;">Cancel</div>				

EVENTS

View events, awards, or disciplinary actions.

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

Events

Event Type:

Event Code:

Description:

Event:

Event Date From:

Event Date To:

Next Date From:

Next Date To:

Code	Type	Event	Event Date	Next Date	Proficiency	Notes
WELL - Wellness Seminar	None	Wellness Seminar	11/01/2015	11/01/2016		

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

Event Details

- Code: WELL - Wellness Seminar
- Type: None
- Event: Wellness Seminar
- Date: 11/1/2015
- Next Date: 11/1/2016
- Proficiency:
- Notes:

Additional Information

Event Custom Text	<input type="text"/>
Event Custom Drop Down	<input type="text"/>
Event Custom Date	<input type="text"/>
Event Custom Numeric	<input type="text"/>
Event Custom Y/N	<input type="checkbox"/>

COMPANY PROPERTY

View the company property that has been issued.

Company Property					
<input checked="" type="checkbox"/>	Item Type	Issue Date	Description	Serial #	Return Due
<input type="checkbox"/>	AMEX	12/31/2008	American Express Card		
<input type="checkbox"/>	Cell phone	02/01/2009	BlackBerry		01/01/2010

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.

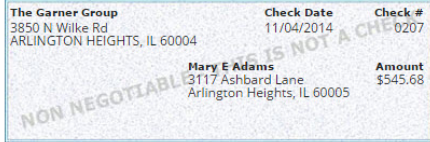
The Employee section, which displays the **Employee Id** and **Department**, can be expanded or collapsed by clicking the double arrows. The **Check or Voucher #**, **Delivery Location**, **Check Date**, **Period Begin and End Dates**, **Gross Earnings**, **Gross YTD**, **Net Earnings**, and **Net YTD** 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 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.

Search		Summary	
Year	2014 ▾	Reg Hours	0.00
Quarter / YTD	<input type="radio"/> Q1 <input type="radio"/> Q2 <input type="radio"/> Q3 <input type="radio"/> Q4 <input checked="" type="radio"/> YTD	OT Hours	0.00
Date Range From	1/1/2014	Other Hours	0.00
Date Range To	12/31/2014	Total Hours	0.00
<input type="button" value="Submit"/>		Taxes	\$238.80
		Deductions	\$338.50
		Weeks Worked	0
		Reg Pay	\$1,000.00
		OT Pay	\$0.00
		Other Pay	\$346.25
		Gross Pay	\$1,025.00
		Net Pay	\$545.68
		Direct Deposit	\$0.00
		Net Check	\$545.68

Results							Detailed Pay Information		
<input checked="" type="checkbox"/>	Check Date	Pay Type	Check/VCR #	Gross	Net	Dir Dep	Description	Hours or Taxable	Amount
<input checked="" type="checkbox"/>	11/04/2014	Regular	0207	\$1,025.00	\$545.68	\$0.00	401K MATCH	0.00	\$51.25
							Auto Allowance	0.00	\$25.00
							Employer Paid Dental	0.00	\$20.00
							Employer Paid HDHP	0.00	\$250.00
							REGULAR	0.00	\$1,000.00
							401(k) Traditional	0.00	\$82.00

<input type="button" value="Calculate Summary"/>	<input type="button" value="Print 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 Withholding	SS Wages	SS Withholding	Medicare Wages	Medicare Withholding	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 PROCI 1		1 Wages, tips, other comp. 40,268.00		2 Federal income tax withheld 6,740.06
b Employer ID number 00-5554442		3 Social security wages 42,698.00		4 Social security tax withheld 1,793.33
		5 Medicare wages and tips 42,698.00		6 Medicare tax withheld 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 0.00		8 Allocated tips 0.00		9 Advance EIC payment 0.00
10 Dependent care benefits 0.00		11 Nonqualified plans 0.00		
12a D	2,430.00		13 Statutory employee Retirement plan 3rd-party sick pay X	
12b DD	11,032.00		14 Other	
12c				
12d				
IL	00000000000000		40,268.00	
15 State Employer's State ID#		16 State wages, tips, etc.		2,013.40
18 Local wages, tips, etc. N/A		19 Local income tax N/A		17 State income tax N/A
				20 Locality name 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

BENEFITS

RETIREMENT PLANS

View retirement plan information.

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

Retirement Plans						
<input checked="" type="checkbox"/>	Deduction ^	Plan Name	Begin Check Date	End Check Date	% / Amount	Status
<input type="checkbox"/>	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		Compliance Info	
• Plan	P4500 - Principal 401k	Highly Compensated?	<input type="checkbox"/>
• Participation Status	Active Participant	Begin Date	
Eligibility Date		End Date	
Matching Status		Owner?	<input type="checkbox"/>
Eligible for Match?	<input checked="" type="checkbox"/>	Ownership %	
Begin Check Date		Owner Related?	<input type="checkbox"/>
Contribution		Make Up Over 50	
Deduction	401K	Do Not Participate in Make Up	<input type="checkbox"/>
• Begin Check Date	08/14/2015	Eligibility Date	12/23/1999
End Check Date		Federal Limit	\$6,000.00
Calculation Code	Flat Amount	Calculation Code	
Contribution	10.00	Amount	
Match Details & Allocations			
Roth Contribution		Roth Make Up Over 50	
Roth Contribution	<input type="checkbox"/>	Eligibility Date	12/23/1999
Deduction		Federal Limit	\$6,000.00
Begin Check Date		Calculation Code	
End Check Date		Amount	
Calculation Code			
Contribution			
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.

Insurance Plans									
Filter Show Active ▾									
<input checked="" type="checkbox"/>	Web Site Click to View	Description ▾	Plan Type	Start Date	End Date	Employee Code	Employer Code	Rate Type	Waived
<input type="checkbox"/>	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		Coverage	
Active?	<input checked="" type="checkbox"/>	• Eligibility Date	1/1/2015
• Plan	BCBS PPO Standard - MD10034556	• Coverage Start Date	11/13/2015
Change Reason	Marriage	• Coverage End Date	
Plan Type	Medical	Waive Coverage?	<input type="checkbox"/>
Plan Effective Date	1/1/2011	Waive Coverage Date	
Plan Expiration Date			
Web Site Link	View		
Beneficiary			
Premium Contribution Amounts Per Payroll		Employee Deduction or Earning	
How Are Premiums Paid?	Employee and Employer Contribution	Deduction or Earning	INSMD
Rate Setup Per Rate Type	Flat Amount	Calculation Code	Flat Amount
Rate Type	PPOFM - PPO Family	Pay Frequency	Use Employee Frequency
Employee	170.00	• Begin Check Date	11/13/2015
Employer	340.00	End Check Date	
Total	510.00		
		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			
<input checked="" type="checkbox"/>	Last Name	First Name	Relationship
<input checked="" type="checkbox"/>	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	
<input type="button" value="Cancel"/>			

CLASSES

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

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

<input checked="" type="checkbox"/>	Effective Date ▾	Benefit Class	Benefit Location	Benefit Division	Part Time	Benefit Termination Date
<input type="checkbox"/>	05/01/2015	Full Time Benefit Eligible	Corporate Office			

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

Benefit Categories	Benefit Salary
• Effective Date 5/1/2015	Benefit Salary Effective Date
• Benefit Class	Benefit Salary 52,000.00 <input type="checkbox"/> Override?
Benefit Location Corporate Office	Current Rate Annual Salary \$ 52,000.00 as of 05/02/2008 (Salary)
Benefit Division	Benefit Hours per Week
Benefit Integration	
Part Time? <input type="checkbox"/>	
Benefit Termination Date	
<input type="button" value="Cancel"/>	

PERFORMANCE

ADVANCED HR REVIEWS

View performance reviews.

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

Advanced HR Reviews						
<input checked="" type="checkbox"/>	Review Date ↕	Reviewer	Rating	New Job Title	Effective Date	Next Review
<input type="checkbox"/>	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		Job & Salary Adjustments (Reference only)	
• Review Date	11/1/2015	HR Summary	A
• Reviewer	Mary Adams	New Job Title	
Appraisal Type	Annual	Raise Amount	
Rating	4.5/5.0	Raise Percentage	
Next Review	11/1/2016	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.

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.

Skill Details		Additional Information	
• Skill	CMPTR - Computer Skill	Skill	Custom Text
Type	None	Skill	Custom Drop Down
Proficiency	C++ Cert.	Skill	Custom Date
Notes	<input type="text"/>	Skill	Custom Numeric
		Skill	Custom Y/N
Completion / Renewal			
Training Class			
Completion Date	8/15/2015		
Training Score / Scale	/		
Renewal Date			
<input type="button" value="Cancel"/>			

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

TIME OFF

BALANCES

View time off information.

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

Setup & Balance

• Hours Per Work Day 8.0000 Override?

Time Off Types

Type /	Start Date	Used Hours / Days	Available Hours / Days	Used \$	Available \$	Length Of Service
SICK - Sick	05/02/2008	0.00 Hours	0.00 Hours	\$0.00	\$0.00	05/02/2008
VAC - Vacation	05/02/2008	0.00 Hours	166.15 Hours	\$0.00	\$4,153.82	05/02/2008

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

Setup & Balance Details

• Time Off Type VAC - Vacation Length of Service Date 5/2/2008 Override?

• Start Date 5/2/2008 Months of Service 90.41 as of 11/13/2015

Accrue End Date

Accrue Ongoing

Enabled

Hours Worked 0.000000 Override?

Accrual Rate 4.615400 Hours Override?

Max Balance 300.000000 Hours Override?

Time off accrues : Bi-Weekly

Clear and Transfer Balances

Enabled

Max Carry Over 200.000000 Hours Override?

Available balance above carry over max is cleared on Emp Anniversary Date.
Used balance is reset to zero when available balance is cleared.

Current Balance

Available	166.15 Hours	Dollars Available	4,153.82
Used	0.00 Hours	Dollars Used	0.00
Total	166.15 Hours	Dollars Total	4,153.82

[Cancel](#)

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

Transaction Date To

Begin Date From

Begin Date To

Time Off Type

Transaction Type

Show Totals?

Transaction Subtype

Search
Show All
Reset

↓

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.

FMLA 🔍

An employee must have a Length of Service of at least one year and must have worked a minimum of 1250 hours within the past year to be eligible for FMLA Leave. A company may calculate an FMLA year based on a rolling 12-month total or a calendar year.

FMLA Eligibility

Year Calculation: Rolling 12 Month

Length of Service: 7 Yrs, 6 Mos

FMLA Eligible?

Ineligibility Reason

FMLA Hours

Total Hours: 480.00 Override

Hours Used: 80.00

Hours Available: 400.00

Non-FMLA Hours

Hours Used: 0.00

Leave Tracking

<input checked="" type="checkbox"/>	Start Date	End Date	Request Type	FMLA Reason	Status
<input type="checkbox"/>	08/01/2015	09/15/2015	FMLA	Serious health condition of spouse, son, daughter, or parent	

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

FMLA 🔍

Leave Tracking Details

- Leave Request Type: FMLA
- Start Date: 8/1/2015
- End Date: 9/15/2015
- FMLA Reason: Serious health condition of spouse, son, daughter, or parent
- Intermittent Leave?

Return To Work

Expected Date: 9/15/2015

Actual Date: 9/15/2015

Cancel

Status

Request Received Date: 7/15/2015

Response Due Date

Response Date

Status

Status Notes

Tracking Items

<input checked="" type="checkbox"/>	Tracking Type	Due Date	Complete Date	Check #	Amount	Applied	Notes	Start Date	Hours
<input type="checkbox"/>	FMLA Time Off Used			0001				08/14/2015	80.00

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

FMLA ⌵

Leave Tracking Item Details

• Tracking Item Type FMLA Time Off Used

Due Date

Complete Date

Notes

Insurance Plan Payment

Check Number

Amount

Month / Year Applied

Time Off Used Hours

Start Date	8/14/2015
End Date	9/14/2015
Hours	


Cancel


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.

Time Off Requests

Start Date 


End Date 

Request Type

Time Off Type

Request Status

Include Partially Taken?



<input checked="" type="checkbox"/>	Start Date ▾	End Date	Request Type	Amount	Time Off Type	Current Status	By	Status Date
<input type="checkbox"/>	06/04/2015	06/04/2015	VACATION	4 Hours	VAC	Submitted	Adams, Mary	05/20/2015
<input type="checkbox"/>	01/07/2013	01/07/2013	VACATION	16 Hours	VAC	Taken	Processing	01/07/2013
<input type="checkbox"/>	01/07/2013	01/07/2013	VACATION	40 Hours	VAC	Taken	Processing	01/07/2013
<input type="checkbox"/>	01/04/2013	01/04/2013	VACATION	8 Hours	VAC	Submitted	Wertschnig, Andy	12/19/2012
<input type="checkbox"/>	02/02/2010	02/02/2010	VACATION	40 Hours	VAC	Taken	Processing	02/02/2010

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.

Time Off Request Details

- Request Type: VACATION
- FMLA Related?
- Employee Comments:

Add Request Date(s) / Hours

Single Day
 Multiple Days
 Include Weekends?

- Start Date: 11/23/2015
- End Date: 11/25/2015
- Hours Per Day: 8.00
- Start Time: AM
- End Time: PM

Add Request Date(s) >>

Cancel

Balances for Vacation

- Balance as of Last Payroll: 161.54 hour(s)
- Used since Last Payroll: 0.00 hour(s)
- Available balance as of Today: 0.00 hour(s)
- Approved for Future Use: 0.00 hour(s)

Requested: 0 day(s) - 0.00 hour(s)

Date	Hours	Start Time	End Time

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

- Verify all information.
- Click the **Submit Request** button.

Time Off Request Details

- Request Type: VACATION
- FMLA Related?
- Employee Comments:

Add Request Date(s) / Hours

Single Day
 Multiple Days
 Include Weekends?

- Start Date: 11/23/2015
- End Date: 11/25/2015
- Hours Per Day: 8.00
- Start Time: AM
- End Time: PM

Submit Request Cancel

Balances for Vacation

- Balance as of Last Payroll: 161.54 hour(s)
- Used since Last Payroll: 0.00 hour(s)
- Available balance as of Today: 161.54 hour(s)
- Approved for Future Use: 0.00 hour(s)

Requested: 3 day(s) - 24.00 hour(s)

Date	Hours	Start Time	End Time
11/23/2015	8.00	AM	PM
11/24/2015	8.00	AM	PM

Delete All

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.

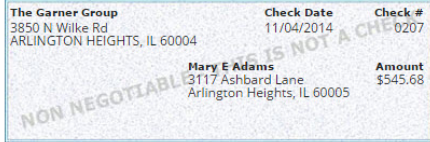
The Employee section, which displays the **Employee Id** and **Department**, can be expanded or collapsed by clicking the double arrows. The **Check or Voucher #**, **Delivery Location**, **Check Date**, **Period Begin and End Dates**, **Gross Earnings**, **Gross YTD**, **Net Earnings**, and **Net YTD** 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 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.

Name		Demographic Information	
Last Name	<input type="text" value="Baker"/>	SSN / FEIN	773-24-1047
First Name	<input type="text" value="Chet"/>	Birth Date	12/23/1949 Age 65
Middle Name	<input type="text"/>	Gender	<input type="text" value="Male"/>
Salutation	<input type="text"/>	Ethnicity	<input type="text" value="White"/>
Suffix	<input type="text" value="-- Select --"/>	Marital Status	<input type="text" value="Single"/>
Nickname	<input type="text"/>	Smoker	<input type="checkbox"/>
Prior Last Name	<input type="text"/>	Disability	<input type="text"/>
		Veteran	<input type="text"/>
Address		Personal Phone & Email	
Address 1	<input type="text" value="17 Redling Avenue"/>	Home Phone	<input type="text" value="(847) 555-8795"/>
Address 2	<input type="text"/>	Mobile Phone	<input type="text"/>
City / State / Zip	<input type="text" value="Greenville"/> <input type="text" value="SC"/> <input type="text" value="29602"/>	Email Address	<input type="text"/>
Country	<input type="text" value="UNITED STATES"/>		
County / Province	<input type="text"/>		
Additional Address	<input type="text"/>		
Additional Address Type	<input type="text" value="-- Select --"/>		
Additional Address Country	<input type="text" value="-- Select --"/>		
<input type="button" value="Save"/>			

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							
<input checked="" type="checkbox"/>	Last Name <small>▲</small>	First Name	Relationship	Gender	SSN	Birth Date	
<input type="checkbox"/>	Adams	Ben	Son	Male	654-87-3216	03/20/1999	
<input type="checkbox"/>	Adams	Ed	Husband	Male	345769987	06/12/1970	

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.

Dependent

- Last Name:
- First Name:
- Middle Name:
- Relationship:
- Gender:
- Birth Date: Age 16
- SSN:

Emergency Contact

Emergency Contact?

Priority: Primary Secondary

Primary Phone:

Notes:

Address

Stay in sync with Employee Information

Address 1:

Address 2:

City / State / Zip:

Country:

County:

Other Dependent Information

Home Phone:

Email:

Work Phone: Ext.

Mobile Phone:

Pager:

Student

Full Time Student:

Records: 0

Coverage Dates

<input checked="" type="checkbox"/>	Coverage Begin	Coverage End
<input type="button" value="Add"/>	<input type="button" value="Delete"/>	

Smart Tip
 Check **Stay in sync with Employee Information** to automatically populate the dependent's address with the employee's information.

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**.

Coverage Details

- Coverage Begin:
- Coverage End:

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.

Emergency Contacts							
<input checked="" type="checkbox"/>	Last Name ^	First Name	Relationship	Priority	Primary Phone	Email	Notes
<input type="checkbox"/>	Buns	Kelly	Mother	Primary	(626) 333-5555		

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.

Emergency Contact

Smart Tip
Users may select more than one **Primary** contact.

- Priority: Primary Secondary
- Last Name:
- First Name:
- Relationship:

Other Emergency Contact Information

Primary Phone:

Home Phone:

Work Phone: Ext.

Mobile Phone:

Pager:

Email:

Address

Stay in sync with Employee Information

Smart Tip
Check **Stay in sync with Employee Information** to automatically populate the dependent's address with the employee's information.

Address 1:

Address 2:

City / State / Zip: --

Country: -- Select --

County:

Notes

Notes:

WORK

EMPLOYEE STATUS

View employee status information.

Current Employee Status		Adjusted Seniority Date					
Employee Status	Active	Adjusted Seniority Date					
Hire		Termination					
Hire Date	05/02/2008	Termination Date					
Rehire Date		Eligible for Rehire?					
Length Of Service	Hire Date - 7 Yrs, 6 Mos	User Account Deactivation Date					
Records: 1							
Employee Status History							
Show	<input type="text" value="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		Cost Center(s)	
Supervisor	FROST, EMMA [62]	Division	200 - Mid-Atlantic
Reviewer	FROST, EMMA [62]	Branch	301 - Finance
Is Supervisor / Reviewer?		Department	110 - Sales - Inside
Position		Pay Settings	
Employment Type	Regular Full Time (30+ Hours)	Pay Group	
Position	FINANALYST - Financial Analyst	OT Exempt?	
Job Title	Financial Analyst	Tipped	
EEO Class	1 - Officials and Managers	Minimum Wage Exempt?	
Work Comp	8810 - Clerical	Union	
Home Shift		Union	
		Affiliation Date	
		Union Position	
		Initiation Collected?	
		Dues Collected?	

Records: 5

Dept / Position History

Show

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 Phone / Email / Mail Stop	
Work Location	-- Use default Company Address	Work Phone	Ext
Address 1	3850 N Wilke Rd	Mobile Phone	
Address 2		Pager	
City / State / Zip	ARLINGTON HEIGHTS IL 60004	Email	
Country	UNITED STATES	Mail Stop	
County	COOK		

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		SSN Verification	
Work Authorization	Visa Type	SSN	xxx-xx-1047
USCIS or Admission Number	Expiry Date	SSN Verified?	<input type="checkbox"/>
I-9 Verification		SSN Verification	
I-9 Verified?	<input type="checkbox"/>	Date Verified	
Date Verified		Notes	
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							
<input checked="" type="checkbox"/>	Date	Type	Status	Attorney	Attorney Phone	Notes	Updated By
<input type="checkbox"/>	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	Notes	
• Status	Verified		
Attorney Name			
Attorney Phone			
<input type="button" value="Cancel"/>			

STATUTORY

Vets 100/100A Tracking		New Hire Medical Availability	
Enable?	<input checked="" type="checkbox"/>	Medical Coverage Available?	<input checked="" type="checkbox"/>
Hiring Location	Headquarters	Medical Coverage Date	1/1/2015
Vets 100		Vets 100A	
Job Category	2 - Professionals	Job Category	
Covered Veteran	<input type="checkbox"/> Special Disabled Veterans <input type="checkbox"/> Vietnam Era Veterans <input type="checkbox"/> Recently Separated Veterans <input checked="" type="checkbox"/> Other Protected Veterans	Covered Veteran	<input type="checkbox"/> Disabled Veterans <input type="checkbox"/> Active Duty Wartime Or Campaign Badge Veteran <input type="checkbox"/> Armed Forces Service Medal Veterans <input type="checkbox"/> Recently Separated Veterans

EMPLOYMENT

RATES

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

Rates

Show

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

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

<input checked="" type="checkbox"/>	Employer Name	Contact Phone	Job Title	Start Date	End Date	Rate/Per	Can Contact?	Status
<input type="checkbox"/>	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										
<input checked="" type="checkbox"/>	Effective Date ▾	Description	Title	Rate	Per	Salary	Annual Salary	Notes	Capture Date	Edited
<input type="checkbox"/>	05/14/2015	Change Supervisor	Financial Analyst	0.0000		1,000.0000	52,000.0000		05/15/2015	
<input type="checkbox"/>	01/31/2011	Change Job		0.0000		1,000.0000	52,000.0000		07/31/2013	
<input type="checkbox"/>	01/31/2011	Change Supervisor		0.0000		1,000.0000	52,000.0000		07/31/2013	
<input type="checkbox"/>	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.

Employment History Details			
• Effective Date	5/14/2015	Changed By	Database Import
• Description	Change Supervisor	Edited	
Change Reason	Change Reviewer		
Capture Date	05/15/2015	Notes	
Record Type: Change Supervisor			
Division	200 - Mid-Atlantic	Base Rate	0.00
Branch	301 - Finance	Rate Per	
Department	110 - Sales - Inside	Pay Frequency	W - Weekly
Supervisor	Emma Frost [62] ✎	Annual Salary	52000.00
Job Title	Financial Analyst		
Salary	1000.00		
Cancel			

EVENTS

View events, awards, or disciplinary actions.

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

Events

Event Type:

Event Code:

Description:

Event:

Event Date From:

Event Date To:

Next Date From:

Next Date To:

Code	Type	Event	Event Date	Next Date	Proficiency	Notes
WELL - Wellness Seminar	None	Wellness Seminar	11/01/2015	11/01/2016		

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

Event Details

- Code: WELL - Wellness Seminar
- Type: None
- Event: Wellness Seminar
- Date: 11/1/2015
- Next Date: 11/1/2016
- Proficiency:
- Notes:

Additional Information

Event Custom Text	<input type="text"/>
Event Custom Drop Down	<input type="text"/>
Event Custom Date	<input type="text"/>
Event Custom Numeric	<input type="text"/>
Event Custom Y/N	<input type="checkbox"/>

COMPANY PROPERTY

View the company property that has been issued.

Company Property					
<input checked="" type="checkbox"/>	Item Type	Issue Date	Description	Serial #	Return Due
<input type="checkbox"/>	AMEX	12/31/2008	American Express Card		
<input type="checkbox"/>	Cell phone	02/01/2009	BlackBerry		01/01/2010

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.

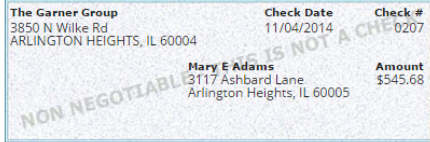
The Employee section, which displays the **Employee Id** and **Department**, can be expanded or collapsed by clicking the double arrows. The **Check or Voucher #**, **Delivery Location**, **Check Date**, **Period Begin and End Dates**, **Gross Earnings**, **Gross YTD**, **Net Earnings**, and **Net YTD** 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 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.

Search							Summary			
Year	2014 ▾						Reg Hours	0.00	Reg Pay	\$1,000.00
Quarter / YTD	<input type="radio"/> Q1 <input type="radio"/> Q2 <input type="radio"/> Q3 <input type="radio"/> Q4 <input checked="" type="radio"/> YTD						OT Hours	0.00	OT Pay	\$0.00
Date Range From	1/1/2014						Other Hours	0.00	Other Pay	\$346.25
Date Range To	12/31/2014						Total Hours	0.00	Gross Pay	\$1,025.00
Submit							Taxes	\$238.80	Net Pay	\$545.68
							Deductions	\$338.50	Direct Deposit	\$0.00
							Weeks Worked	0	Net Check	\$545.68
Results							Detailed Pay Information			
<input checked="" type="checkbox"/>	Check Date	Pay Type	Check/VCR #	Gross	Net	Dir Dep	Description	Hours or Taxable	Amount	
<input checked="" type="checkbox"/>	11/04/2014	Regular	0207	\$1,025.00	\$545.68	\$0.00	401K MATCH	0.00	\$51.25	
							Auto Allowance	0.00	\$25.00	
							Employer Paid Dental	0.00	\$20.00	
							Employer Paid HDHP	0.00	\$250.00	
							REGULAR	0.00	\$1,000.00	
							401(k) Traditional	0.00	\$82.00	
Calculate Summary							Print 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 Withholding	SS Wages	SS Withholding	Medicare Wages	Medicare Withholding	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 PROCI 1		1 Wages, tips, other comp. 40,268.00		2 Federal income tax withheld 6,740.06
b Employer ID number 00-5554442		3 Social security wages 42,698.00		4 Social security tax withheld 1,793.33
		5 Medicare wages and tips 42,698.00		6 Medicare tax withheld 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 0.00		8 Allocated tips 0.00		9 Advance EIC payment 0.00
10 Dependent care benefits 0.00		11 Nonqualified plans 0.00		
12a D	2,430.00		13 Statutory employee Retirement plan 3rd-party sick pay X	
12b DD	11,032.00		14 Other	
12c				
12d				
IL	00000000000000		40,268.00	
15 State Employer's State ID#		16 State wages, tips, etc.		17 State income tax 2,013.40
18 Local wages, tips, etc. N/A		19 Local income tax N/A		20 Locality name 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

BENEFITS

RETIREMENT PLANS

View retirement plan information.

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

Retirement Plans						
<input checked="" type="checkbox"/>	Deduction	Plan Name	Begin Check Date	End Check Date	% / Amount	Status
<input type="checkbox"/>	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		Compliance Info	
• Plan	P4500 - Principal 401k	Highly Compensated?	<input type="checkbox"/>
• Participation Status	Active Participant	Begin Date	
Eligibility Date		End Date	
Matching Status		Owner?	<input type="checkbox"/>
Eligible for Match?	<input checked="" type="checkbox"/>	Ownership %	
Begin Check Date		Owner Related?	<input type="checkbox"/>
Contribution		Make Up Over 50	
Deduction	401K	Do Not Participate in Make Up	<input type="checkbox"/>
• Begin Check Date	08/14/2015	Eligibility Date	12/23/1999
End Check Date		Federal Limit	\$6,000.00
Calculation Code	Flat Amount	Calculation Code	
Contribution	10.00	Amount	
Match Details & Allocations			
Roth Contribution		Roth Make Up Over 50	
Roth Contribution	<input type="checkbox"/>	Eligibility Date	12/23/1999
Deduction		Federal Limit	\$6,000.00
Begin Check Date		Calculation Code	
End Check Date		Amount	
Calculation Code			
Contribution			
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.

Insurance Plans									
Filter Show Active ▾									
<input checked="" type="checkbox"/>	Web Site Click to View	Description ▾	Plan Type	Start Date	End Date	Employee Code	Employer Code	Rate Type	Waived
<input type="checkbox"/>	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		Coverage	
Active?	<input checked="" type="checkbox"/>	• Eligibility Date	1/1/2015
• Plan	BCBS PPO Standard - MD10034556	• Coverage Start Date	11/13/2015
Change Reason	Marriage	• Coverage End Date	
Plan Type	Medical	Waive Coverage?	<input type="checkbox"/>
Plan Effective Date	1/1/2011	Waive Coverage Date	
Plan Expiration Date			
Web Site Link	View		
Beneficiary			
Premium Contribution Amounts Per Payroll		Employee Deduction or Earning	
How Are Premiums Paid?	Employee and Employer Contribution	Deduction or Earning	INSMD
Rate Setup Per Rate Type	Flat Amount	Calculation Code	Flat Amount
Rate Type	PPOFM - PPO Family	Pay Frequency	Use Employee Frequency
Employee	170.00	• Begin Check Date	11/13/2015
Employer	340.00	End Check Date	
Total	510.00		
		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			
<input checked="" type="checkbox"/>	Last Name	First Name	Relationship
<input checked="" type="checkbox"/>	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	
<input type="button" value="Cancel"/>			

CLASSES

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

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

<input checked="" type="checkbox"/>	Effective Date ▾	Benefit Class	Benefit Location	Benefit Division	Part Time	Benefit Termination Date
<input type="checkbox"/>	05/01/2015	Full Time Benefit Eligible	Corporate Office			

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

Benefit Categories	Benefit Salary
• Effective Date 5/1/2015	Benefit Salary Effective Date
• Benefit Class	Benefit Salary 52,000.00 <input type="checkbox"/> Override?
Benefit Location Corporate Office	Current Rate Annual Salary \$ 52,000.00 as of 05/02/2008 (Salary)
Benefit Division	Benefit Hours per Week
Benefit Integration	
Part Time? <input type="checkbox"/>	
Benefit Termination Date	
<input type="button" value="Cancel"/>	

PERFORMANCE

ADVANCED HR REVIEWS

View performance reviews.

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

Advanced HR Reviews						
<input checked="" type="checkbox"/>	Review Date ↕	Reviewer	Rating	New Job Title	Effective Date	Next Review
<input type="checkbox"/>	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	Job & Salary Adjustments (Reference only)
<ul style="list-style-type: none">• Review Date: 11/1/2015• Reviewer: Mary Adams Appraisal Type: Annual Rating: 4.5/5.0 Next Review: 11/1/2016	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.	
<input type="button" value="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							
<input checked="" type="checkbox"/>	School ^	Start Date	End Date	Degree / Course of Study	Major / License	GPA / Scale	Status
<input type="checkbox"/>	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

Cancel

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

TIME OFF

BALANCE

View time off information.

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

Setup & Balance

• Hours Per Work Day 8.0000 Override?

Time Off Types

Type /	Start Date	Used Hours / Days	Available Hours / Days	Used \$	Available \$	Length Of Service
SICK - Sick	05/02/2008	0.00 Hours	0.00 Hours	\$0.00	\$0.00	05/02/2008
VAC - Vacation	05/02/2008	0.00 Hours	166.15 Hours	\$0.00	\$4,153.82	05/02/2008

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

Setup & Balance Details

• Time Off Type VAC - Vacation Length of Service Date 5/2/2008 Override?

• Start Date 5/2/2008 Months of Service 90.41 as of 11/13/2015

Accrue End Date

Accrue Ongoing

Enabled

Hours Worked 0.000000 Override?

Accrual Rate 4.615400 Hours Override?

Max Balance 300.000000 Hours Override?

Time off accrues : Bi-Weekly

Clear and Transfer Balances

Enabled

Max Carry Over 200.000000 Hours Override?

Available balance above carry over max is cleared on Emp Anniversary Date.
Used balance is reset to zero when available balance is cleared.

Current Balance

Available	166.15 Hours	Dollars Available	4,153.82
Used	0.00 Hours	Dollars Used	0.00
Total	166.15 Hours	Dollars Total	4,153.82

Cancel

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

Transaction Date To

Begin Date From

Begin Date To

Time Off Type

Transaction Type

Show Totals?

Transaction Subtype

Search
Show All
Reset

↓

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.

FMLA 🔍

An employee must have a Length of Service of at least one year and must have worked a minimum of 1250 hours within the past year to be eligible for FMLA Leave. A company may calculate an FMLA year based on a rolling 12-month total or a calendar year.

FMLA Eligibility

Year Calculation: Rolling 12 Month

Length of Service: 7 Yrs, 6 Mos

FMLA Eligible?

Ineligibility Reason

FMLA Hours

Total Hours: 480.00 Override

Hours Used: 80.00

Hours Available: 400.00

Non-FMLA Hours

Hours Used: 0.00

Leave Tracking

<input checked="" type="checkbox"/>	Start Date	End Date	Request Type	FMLA Reason	Status
<input type="checkbox"/>	08/01/2015	09/15/2015	FMLA	Serious health condition of spouse, son, daughter, or parent	

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

FMLA 🔍

Leave Tracking Details

- Leave Request Type: FMLA
- Start Date: 8/1/2015
- End Date: 9/15/2015
- FMLA Reason: Serious health condition of spouse, son, daughter, or parent
- Intermittent Leave?

Return To Work

Expected Date: 9/15/2015

Actual Date: 9/15/2015

Cancel

Status

Request Received Date: 7/15/2015

Response Due Date

Response Date

Status

Status Notes

Tracking Items

<input checked="" type="checkbox"/>	Tracking Type	Due Date	Complete Date	Check #	Amount	Applied	Notes	Start Date	Hours
<input type="checkbox"/>	FMLA Time Off Used			0001				08/14/2015	80.00

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

FMLA ⌵

Leave Tracking Item Details

• Tracking Item Type FMLA Time Off Used

Due Date

Complete Date

Notes

Insurance Plan Payment

Check Number

Amount

Month / Year Applied

Time Off Used Hours

Start Date	8/14/2015
End Date	9/14/2015
Hours	


Cancel


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.

Time Off Requests

Start Date 


End Date 

Request Type

Time Off Type

Request Status

Include Partially Taken?



<input checked="" type="checkbox"/>	Start Date ▾	End Date	Request Type	Amount	Time Off Type	Current Status	By	Status Date
<input type="checkbox"/>	06/04/2015	06/04/2015	VACATION	4 Hours	VAC	Submitted	Adams, Mary	05/20/2015
<input type="checkbox"/>	01/07/2013	01/07/2013	VACATION	16 Hours	VAC	Taken	Processing	01/07/2013
<input type="checkbox"/>	01/07/2013	01/07/2013	VACATION	40 Hours	VAC	Taken	Processing	01/07/2013
<input type="checkbox"/>	01/04/2013	01/04/2013	VACATION	8 Hours	VAC	Submitted	Wertschnig, Andy	12/19/2012
<input type="checkbox"/>	02/02/2010	02/02/2010	VACATION	40 Hours	VAC	Taken	Processing	02/02/2010

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.

Time Off Request Details

- Request Type: VACATION
- FMLA Related?
- Employee Comments:

Add Request Date(s) / Hours

Single Day
 Multiple Days
 Include Weekends?

- Start Date: 11/23/2015
- End Date: 11/25/2015
- Hours Per Day: 8.00
- Start Time: AM
- End Time: PM

Add Request Date(s) >>

Cancel

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

Balances for Vacation

- Balance as of Last Payroll: 161.54 hour(s)
- Used since Last Payroll: 0.00 hour(s)
- Available balance as of Today: 0.00 hour(s)
- Approved for Future Use: 0.00 hour(s)

Requested: 0 day(s) - 0.00 hour(s)

Date	Hours	Start Time	End Time

- Verify all information.
- Click the **Submit Request** button.

Time Off Request Details

- Request Type: VACATION
- FMLA Related?
- Employee Comments:

Add Request Date(s) / Hours

Single Day
 Multiple Days
 Include Weekends?

- Start Date: 11/23/2015
- End Date: 11/25/2015
- Hours Per Day: 8.00
- Start Time: AM
- End Time: PM

Submit Request Cancel

Balances for Vacation

- Balance as of Last Payroll: 161.54 hour(s)
- Used since Last Payroll: 0.00 hour(s)
- Available balance as of Today: 161.54 hour(s)
- Approved for Future Use: 0.00 hour(s)

Requested: 3 day(s) - 24.00 hour(s)

Date	Hours	Start Time	End Time
11/23/2015	8.00	AM	PM
11/24/2015	8.00	AM	PM

Delete All

Important Notes

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

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 **Salary** 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**.

Check Calculator Defaults

• **Mode** Test ▼

• **Taxation** Standard ▼

Block Recurring Earnings

Block Recurring Deductions

● **Gross To Net**

Salary \$1,000.00 Auto Pay Allow Negative Net
Adjustment - No tax amount calc

Base Rate 0.0000

Default Hours 0.00 Auto Pay

● **Fringe Benefit "Gross-Up"**

Fringe Amount 0

Fringe Earnings Code -- Select -- ▼

Tax Offset Earnings Code REG - REGULAR ▼

● **Net to Gross**

Net Pay 0

Default Earnings Code REG - REGULAR ▼

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.

Earnings

Salary	\$1,152.00	<input type="checkbox"/> Auto Pay	Base Rate	25.0000
Default Hours	0.00	<input type="checkbox"/> Auto Pay	Earning Code	REG

Line Items

Block <input checked="" type="checkbox"/>	Earning Code	Hours	Amount	Calc Code	Rate Code	Rate	Detail	Action
<input checked="" type="checkbox"/>	ECAR - Auto Allowance	0.00	25.00	-- Select --	-- Select --	0.0000	Edit	
<input checked="" type="checkbox"/>	EERDEN - Employer Paid Dental	0.00	20.00	-- Select --	-- Select --	0.0000	Edit	
<input checked="" type="checkbox"/>	EERHDP - Employer Paid HDHP	0.00	250.00	-- Select --	-- Select --	0.0000	Edit	
<input checked="" type="checkbox"/>	EERHMO - Employer Paid HMO	0.00	270.00	-- Select --	-- Select --	0.0000	Edit	
<input checked="" type="checkbox"/>	EERLTD - Employer Paid LTD	0.00	0.00	-- Select --	-- Select --	25.0000	Edit	
<input type="checkbox"/>	-- Select --	0	0	-- Select --	-- Select --	0	Edit	Delete

- 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 be able to allocate wages between Cost Centers.

Earning Detail

Earning Code	EERHDP - Employer Paid HDHP	Division	-- Select --	Begin Date	<input type="text"/>
Hours	<input type="text" value="0.00"/>			End Date	<input type="text"/>
Amount	<input type="text" value="250.00"/>				
Calc Code	-- Select --				
Rate Code	-- Select --				
Rate	<input type="text" value="0.00"/>				

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.

Deductions

Deduction Multiplier

Line Items

Block <input checked="" type="checkbox"/>	Deduction Code	Type	Rate/Amount	Calc Code	Detail	Action
<input checked="" type="checkbox"/>	D401K - 401(k) Traditional	401k	8.00	% - Percentage of Gross		
<input checked="" type="checkbox"/>	DHSA - HSA	HSAAE125PT	100.00	Flat - Flat Amount		
<input checked="" type="checkbox"/>	DINSDN - Dental Insurance	125	31.50	Flat - Flat Amount		
<input checked="" type="checkbox"/>	DINSHD - HDHP PPO Medical	125	125.00	Flat - Flat Amount		
<input checked="" type="checkbox"/>	DINSHM - HMO Medical	125	127.50	Flat - Flat Amount		
<input checked="" type="checkbox"/>	DINSLD - LongTerm Disability	Standard	0.00	Flat - Flat Amount		
	-- Select --		0	-- Select --		Delete

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
<input type="checkbox"/>	TFITW - Federal Income Tax	Married	1		Default Amount	0.00	0.00			
<input type="checkbox"/>	TIL - Illinois SITW	Married	1	0	Default Amount	0.00	0.00	-- Select --	<input checked="" type="checkbox"/>	

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 Employee Number 3 Division 400
 3117 Ashbard Lane Branch 401
 Arlington Heights, IL 60005 Department 600

<u>Earnings</u>	<u>Rate</u>	<u>Hours</u>	<u>Amount</u>	<u>Deductions</u>	<u>Amount</u>
REG	25.00		1,000.00	HSA	100.00
Total Gross Pay			1,000.00	INSDN	31.50
				INSHD	125.00
				Total Voluntary Deductions	256.50

<u>Taxes</u>	<u>Filing Status</u>	<u>Amount</u>
FITW	M-1	59.17
IL	M-1	35.20
MED		10.78
SS		46.10
Total Tax Withholding		151.25

TALENT

MY PERFORMANCE REVIEW

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.

Performance R...

Annual Performance Appra...

Review is In Progress [View](#)

Reviewer:	Due Date:
Alba, Emily	07/01/2015
Reviewer Appraisal:	My Appraisal:
Pending Appraisal	Appraisal In Progress

Goals

Open 5 New Accounts

Establish and maintain 5 new account relationships during the calendar year.

Category:	Start Date:
Professional Development	01/01/2015

[View All Goals](#)

Feedback

Request for Suzanne Watson

Please provide feedback for Becky regarding the most recent project you worked on together [More](#)

Request from: Emily Alba **Share with:**

Due: 06/30/2015

Title

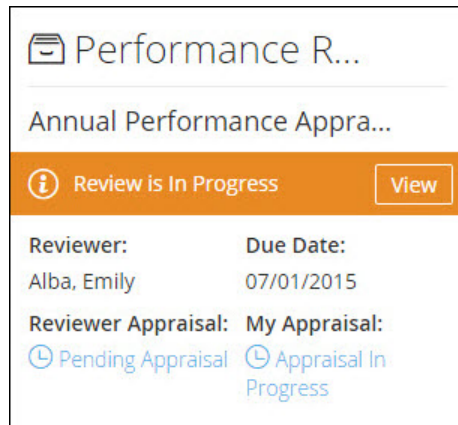
Comments

[Submit](#) [Save Draft](#)

[View All 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.*

Annual Perform...

Reviewer: Alba, Emily **Due Date:** 08/01/2015

- Core Values**
Completed
- Role Specific
Incomplete
- Job Goals**
Completed
- Summary
Incomplete

[Print my Review](#)

Smart Tip
Click **Print my Review** to print a copy of the review.

Core Values

Demonstrate core company values.

Communication Skills

Understand and communicate effectively with others using a variety of contexts and formats, which include writing, speaking, reading listening and interpersonal skills.

Comments from Reviewer
[Pending Reviewer Appraisal](#)

Comments from Employee

3 - Meets Expectations ⓘ

Characters left 14898 [ABC](#)

I work to ensure that all communications (both internal and external) are free of errors and concise.

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.

Annual Perform...

Reviewer: Alba, Emily
Due Date: 08/01/2015

Core Values
Completed

Role Specific
Completed

Job Goals
Completed

Summary
Incomplete

[Print my Review](#)

Job Goals

[Add Goal](#)

Smart Tip
Click **Add Goal** to create a new goal.

Add goals for this fiscal year.
Total Goal Weighting: 0%

Learn new software.

Learn how to use the new software the team will be using to track monthly statistics.

Category:	Start Date:	Status
Team Goals	01/29/2015	Incomplete

Comments from Reviewer
[Pending Reviewer Appraisal](#)

Comments from Employee

3 - Meets Expectations

Characters left 14845

I have worked to ensure I know how to utilize the new customer tracking system within our database, and have become somewhat proficient with its features.

Section Weight: Pending


[Save](#) [Save & Exit](#) [Cancel](#) [Previous](#) [Next](#)


- 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.

Goal Details ✕


Goal (required)

Description (required)

Start Date (required)
 

End Date
 

Status
 Incomplete Complete

Category
 

Employee Notes

Save **Cancel** **Delete**

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.

Annual Perform...

Reviewer: Alba, Emily **Due Date:** 08/01/2015

Core Values
Completed 👍

Role Specific
Completed 👍

Job Goals
Completed 👍

Summary
Incomplete

[Print my Review](#)

Summary

Annual Performance Appraisal 🕒 Review is In Progress

Reviewer: Alba, Emily **Due Date:** 08/01/2015

Reviewer Appraisal: ☆☆☆☆ (0) **Employee Appraisal:** ★★☆☆ (2.08) Complete

Employee Appraisal

Core Values

Name	Rating	Section Weight	Weight Score
Communication Skills	3 - Meets Expectations		
Customer Service	3 - Meets Expectations		
Teamwork	3 - Meets Expectations		
Integrity	4 - Exceeds Expectations		
Total:	3.25 / 4.00	33.33%	1.08

Role Specific

Name	Rating	Section Weight	Weight Score
Dependability	4 - Exceeds Expectations		
Problem Solving	2 - Needs Development		
Total:	3.00 / 4.00	33.33%	1.00

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.

Performance Re...

Annual Performance Appra...

Signature Required [View](#)

Reviewer: Alba, Emily **Due Date:** 08/01/2015

Reviewer Appraisal: ★★☆☆☆ (2.33) **My Appraisal:** ★★☆☆☆ (2.08)

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.

Annual Perform...

Reviewer: Alba, Emily **Due Date:** 08/01/2015

Core Values Completed

Role Specific Completed

Job Goals Completed

Summary Incomplete

[Print my Review](#)

Summary

Annual Performance Appraisal [Signature Required](#)

Reviewer: Alba, Emily **Due Date:** 08/01/2015

Reviewer Appraisal: ★★☆☆☆ (2.33) **Employee Appraisal:** ★★☆☆☆ (2.08) [Review Submitted](#)

Your Comments Characters left 7971

Thank you for the appraisal!

[Sign Review](#)

5. A confirmation message will display once complete.

Review successfully signed.

GOALS

Add or edit goals.

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

Goals

Subject matter expert i... ^

Master the new talent solutions project to become the subject matter expert for the team.

Category: Job Specific Goals **Start Date:** 01/07/2015

Learn new software. v

SME v

[View All Goals](#)

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

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		

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 - 3 of 3 items


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.

Goal Details ✕

Goal (required)

Description (required)

Start Date (required)
 

End Date
 

Status
 Incomplete Complete

Category
 ▼

Employee Notes

Save **Cancel** **Delete**

FEEDBACK

Provide feedback for an employee.

- Provide feedback using My Performance Review.

Feedback

Request for Suzanne Watson ^

Please provide feedback on how Suzanne has been able to work with your team.

Request from: Emily Alba **Share with:**

Due: 06/01/2015

Title

Comments

 [Save Draft](#)

Request for Suzanne Watson v

[View All Feedback](#)

- Click **View All Feedback** to display all feedback.
 - Click the **View** link to view the submitted feedback.
 - 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 Allerdycce [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.

Provide Feedback ✕

Feedback For: Rebecca Bloom **Due Date: 01/30/2015**

Please provide feedback for your recent experience with Becky.

Request Sent From: Jayne Halverson

Share With:  Confidential: Employee cannot view feedback

Feedback Title (required)

Feedback (required)

NOTIFICATIONS

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.

Smart Tip
The Message Center defaults to showing messages from the previous three months. To show all messages, click **Show All**.

Message Center

Unread Only

From Date: 7/8/2015

To Date: 10/8/2015

Priority: -- All --

Subject:

Category: -- All --

Email Sent?: -- All --

Search **Show All** **Reset**

<input checked="" type="checkbox"/>	Received (CST) ▾	Priority	Subject	Category	Email?
<input type="checkbox"/>	10/08/2015 - 3:02 PM		Company CLNT03 The Garner Group Employee Chet Baker [72] submitted a time off request from 10/12/2015 to 10/15/2015	Time Off	
<input type="checkbox"/>	10/08/2015 - 3:02 PM		Paylocity Payroll + HR: Security Alert	User Admin	
<input type="checkbox"/>	10/08/2015 - 2:18 PM		Paylocity Payroll + HR: Login Success	User Admin	<input checked="" type="checkbox"/>
<input type="checkbox"/>	10/08/2015 - 2:18 PM		Paylocity Payroll + HR: Security Alert	User Admin	
<input type="checkbox"/>	10/08/2015 - 2:06 PM		Company CLNT03 The Garner Group has new Imports	Pending	

Delete **Mark As Read**

Smart Tip
Select the check box next to a message (or messages) and click **Delete** to delete or **Mark As Read** to mark the message(s) as read.

- 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.

Message Details

Paylocity Payroll + HR: Login Success

Date: 10/02/2015 - 8:42 AM (CST) Category: User Admin
To: Employee Send Notification Occurrence

Hi Emily,

It looks like you recently answered your security questions and successfully logged in to your Paylocity Payroll + HR account.

Date/Time: Friday, October 2, 2015 8:42:01 AM
IP Address: 10.10.113.225
User: 16 - ealba

If this was you, please disregard this notification.
If this wasn't you, please contact your HR Administrator immediately.

Thank you,
The Paylocity Team

Company: CLNT03 - The Garner Group

Print **Keep as Unread** **Return**

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.

Message Details

Medical coverage

Date	11/12/2015 - 10:33 AM (CST)	Category	Employee Event
To	Employee	Send Notification	Occurrence

Please log in to acknowledge an offer of medical coverage.

[Please access the event here](#)

Company: CLNT03 - The Garner Group

[Print](#) [Keep as Unread](#) [Return](#)

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

Confidentiality Agreement

Due: 09/25/15 Last Auto Saved at 09/10/15 11:10:03 AM

Acceptance

Did you read the company's confidentiality requirement?

Yes
 No

X *Marie Adams*

Marie Adams

[Draw Signature](#)

Sign Here

[Submit](#)

[Return to Portal](#)

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.