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<tr>
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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.
- Use the search filter options to find specific employees.
- 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 Return to Portal from the Account Profile to return to the self service portal.
- 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.

![Message Center screen](image)

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

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

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

![Message Center](image)

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.

![Event Notification](image)

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

Due: 09/25/15

Acceptance
Did you read the company’s confidentiality requirement?

☑ Yes
☐ No

X Marie Adams

Draw Signature
Sign Here

Submit

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

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

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

Pending addition

Pending change

Pending deletion

**Saving Information**

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

Save the updated information and remain on the current screen.

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

Save the updated information and return to the previous screen.

Save the updated information and close the current screen

Discard the changes and return to the previous screen.

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.

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

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

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

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

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

**CHANGE FEDERAL OR STATE TAX EXEMPTIONS**

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

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

**Important Notes**

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

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

![Company News Table](image)

**DEDUCTION AMOUNTS**

View deduction information. Click the X in the top-right corner of your screen to close this screen and return to the self service portal.

- Click the **Deduction** link or **View Full Deductions List** to navigate to the Deductions screen.

![Deduction Table](image)

Depending on company configuration, users may be able to edit specific deductions.

1. Select the applicable **Calculation** from the drop down.
2. Enter the applicable **Amount or Percentage**.
3. Click **Save and Close** to save the updated information and return to the self service portal.
DEPENDENTS

Add, edit, or delete dependent 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 dependent, select Add New Dependent from the drop down.
2. Enter the Last Name (40 character limit), First Name (40 character limit), and Middle Name (20 character limit).
3. Select the Relationship from the drop down.
4. Select the Gender from the drop down.
5. Select or enter the Birth Date.
6. Enter the Social Security number in the SSN field.
7. Check the Emergency Contact box if the dependent is an emergency contact. This will enable the fields in the Emergency Contact section.
8. Select Primary or Secondary in the Priority field. Employees are permitted to have more than one primary and secondary emergency contact.
9. Select the Primary Phone from the drop down.
10. Enter additional information the Notes field (1000 character limit).
11. Check the Stay in sync with Employee Information box to automatically populate the dependent’s address with the employee’s information.
12. Enter the Address, Phone, and Email information.
13. Check the Full Time Student box, if applicable.
14. Save the updated information.
**DIRECT DEPOSIT ACCOUNT**

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

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

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

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

### Bank Account
- **Account Type**: Checking
- **Routing Number**: 
- **Account Number**: 
- **Bank Name**: 
- **Name on Account**: Julian J. Atwood
  - Name should match the name on file with your banking institution.

### Additional Deposit Account
- **Amount Type**
- **Amount**

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

<table>
<thead>
<tr>
<th>Routing</th>
<th>Account</th>
<th>Type</th>
<th>Bank Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>0710000013</td>
<td>0890927445</td>
<td>Checking</td>
<td>J.P. Morgan Chase Bank, NA</td>
</tr>
</tbody>
</table>

### Additional Deposit Account(s)

<table>
<thead>
<tr>
<th>Routing</th>
<th>Account</th>
<th>Type</th>
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<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>0710000013</td>
<td>1234</td>
<td>Savings</td>
<td>J.P. Morgan Chase Bank, NA</td>
<td>$500.00</td>
</tr>
<tr>
<td>0710000013</td>
<td>1232910</td>
<td>Checking</td>
<td>J.P. Morgan Chase Bank, NA</td>
<td>$175.00</td>
</tr>
</tbody>
</table>
EDIT EMPLOYEE PROFILE

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

- When users add a new education option to their employee profile, the option will be available to every user in the company.
- When users add a new skill or expertise to their employee profile, the option will be available to every user in the company.
**HIDE OR DISPLAY THE NET AMOUNT**

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

<table>
<thead>
<tr>
<th>Date</th>
<th>Check #</th>
<th>Net Amount</th>
<th>Dir Dep</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/14/2014</td>
<td>103006</td>
<td>$615.08</td>
<td></td>
</tr>
<tr>
<td>11/07/2014</td>
<td>102992</td>
<td>$615.07</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date</th>
<th>Check #</th>
<th>Net Amount</th>
<th>Dir Dep</th>
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<tr>
<td>11/14/2014</td>
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</tr>
<tr>
<td>11/07/2014</td>
<td>102992</td>
<td>hidden</td>
<td></td>
</tr>
</tbody>
</table>

**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.

Benefits enrollment must be completed by Monday.
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**.

---

**Employee Profile**

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

**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.

---

**Employee Profile**

**Details**

- **First Name** (required)
  - Mary
- **Last Name** (required)
  - Adams
- **Middle Name**
  - E
- **Preferred First Name**
  - 
- **Prior Last Name**
  - Twiliger

**Personal**

- **Social Security Number / EIN**
  - 455-78-4125
- **Birth Date**
  - 08/06/1973 (Age 42)
- **Ethnicity**
  - White
- **Sex**
  - Female

**Save** **Cancel Changes**
1. Enter applicable Phone and Email.
2. To edit an Address, click the Edit icon (✏).
3. From the Emergency Contact area, you are able to:
   a. Click the + Add Contact link to add an Emergency Contact.
   b. Click the contact's Name to edit an existing Emergency Contact.
4. Click Save when done editing.
- Social
  1. Update your Personal Image.
  2. Enter information in the About Me section.
  3. Click Save when done editing.
  4. Click Connect to connect your Employee Profile with your social media accounts.
Smart Tip
Click "Return to Portal" to return to
the Self Service Portal.
**SUBMIT TIME OFF REQUESTS**
Submit time off requests. Click the X in the top-right corner of your screen to close this screen and return to the self service portal.

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

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

**UPLOAD NEW PROFILE IMAGE**

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

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

View preferences. Add or edit profile information.

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

![User Preferences Interface](image)

- **Login Username**: madams
- **Defaults**
  - **Self Service Portal**
  - **Rows per page (maximum 50)**: 25
  - **Contact Email for Notifications**
    - Message Center only
    - Work Email
**VIEW PROFILE**

View the employee profile.

- Click the email link to send an email to the employee.
- Click **Add Impression** to submit an impression badge for the employee.
- Click **View Team** to view the employee's team.
- Click the applicable icon to access the linked profile.
- Click **View Impressions** to view the recognition impression badges the employee has received.
- Click **My Resume** to view the employee's resume.

---

**VIEW IMPRESSIONS**

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

- Click the email link to send an email to the employee.
- Click **Add Impression** to submit an impression badge for the employee.
- Click **View Team** to view the employee's team.
- Click the applicable icon to access the linked profile.
- Click **View Profile** to view the employee's profile.
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.

![Time Entry](image)

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

![Applications Menu](image)
**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.

### System Requirements

<table>
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<tr>
<th>Product Type</th>
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<th>Platform</th>
<th>Web Server</th>
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**Recommended Browsers:**
- Internet Explorer: 8.0+
- Firefox: 3.0+
- Chrome: 3.0+
- Safari: 3.0+
- 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.

### COPYRIGHT

View copyright information.

**Copyright**

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

**Open Source List**

<table>
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<th>Product / Version</th>
<th>Owner / Distributor</th>
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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 the Social Networks icon to access the linked profile.
- Click Profile to view the employee’s profile.
- Click Team to view the employee’s team.
- Click Impression to submit an impression badge for the employee.
- Click Portal to access the self service portal.

SEARCH FILTER OPTIONS

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

- Select a letter in the Last Name Filter to display only employees whose last name begins with the selected letter.
- Click All to display all employees.
- Enter the employee’s name in the **Search** field to find a specific employee.
- Enter information in the **Search** field to find specific employees who match the search criteria.
- Selected search criteria may appear at the top of the screen. Click the **X** to remove selected criteria.

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

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

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

- Click **Profile** to view the employee's profile.
- Click **Portal** to access the self service portal.
- Click **Team** to view the employee's team.
- Click **Impression** to submit an impression badge for the employee.
SUBMIT AN IMPRESSION BADGE
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 Badge. The selected badge displays a default title and comments.
2. Select Share with everyone or Share with employee only.
3. Customize the title and comment information in the Provide Comments field. Click the spell check icon to check the spelling.
4. Save the updated information.
GLOSSARY
View payroll terms and calculations to assist with questions about paychecks. This screen cannot be edited.

<table>
<thead>
<tr>
<th>Glossary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allowance or Exemptions</td>
</tr>
<tr>
<td>Bonus or Supplemental Wages</td>
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</tr>
<tr>
<td>Filing or Marital Status (Form W-4)</td>
</tr>
<tr>
<td>State Minimum Wage Rates</td>
</tr>
<tr>
<td>Garnishment</td>
</tr>
<tr>
<td>Gross Pay</td>
</tr>
<tr>
<td>Net Pay</td>
</tr>
<tr>
<td>Tips</td>
</tr>
<tr>
<td>State Unemployment Chart</td>
</tr>
</tbody>
</table>

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.
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. Select the applicable radio button to have notifications sent to the **Message Center only** or sent to the **Message Center and the specified email address**.
7. Select the number of rows that appear on a page in the **Paging Size** field.
8. Select a login challenge question from the **Question 1**, **Question 2**, and **Question 3** drop downs. Enter the answer to the respective login challenge question in the **Answer 1**, **Answer 2**, and **Answer 3** fields.
9. Select an image from the **Select Security Image** drop down. This image will appear on the login screen once the **Company Id** and **Username** are entered.
10. Enter a personal **Security Phrase**. This phrase will appear on the login screen once the **Company Id** and **Username** are entered.
11. Save the updated information.

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

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

Access online training documents and videos.

**WELCOME**

This screen welcomes users to Web Pay. This screen cannot be edited.
EMPLOYEES

EMPLOYEE INFO

PERSONAL INFO

DEMOGRAPHICS
Add or edit general employee information.

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

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

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

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

**DEPENDENTS**

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

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Relationship</th>
<th>Gender</th>
<th>SSN</th>
<th>Birth Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adams</td>
<td>Ben</td>
<td>Son</td>
<td>Male</td>
<td>907-65-4209</td>
<td>02/20/1999</td>
</tr>
<tr>
<td>Adams</td>
<td>Ed</td>
<td>Husband</td>
<td>Male</td>
<td>907-65-4076</td>
<td>08/12/1970</td>
</tr>
</tbody>
</table>

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

**Smart Tip**
Check the Stay in sync with Employee Information to automatically populate the dependent’s address with the employee’s information.
• Click the **Add** button to add a new emergency contact.
• Click the **Last Name** link to display or modify the emergency contact details.
• Check the box adjacent to the **Last Name** and click the **Delete** button to delete the dependent.

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

#### EMPLOYEE STATUS
View employee status information.

<table>
<thead>
<tr>
<th>Current Employee Status</th>
<th>Adjusted Seniority Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Status: Active</td>
<td>Adjusted Seniority Date:</td>
</tr>
<tr>
<td>Hire Date: 05/03/2002</td>
<td></td>
</tr>
<tr>
<td>Rehire Date:</td>
<td></td>
</tr>
<tr>
<td>Length Of Service:</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Termination</th>
<th>Eligible for Rehire?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Date:</td>
<td>User Account</td>
</tr>
<tr>
<td>termination Date:</td>
<td>Deposition Date</td>
</tr>
</tbody>
</table>

#### DEPT/POSITION
View supervisor, reviewer, position, home department cost center, pay settings, and union information.

### Current

<table>
<thead>
<tr>
<th>Effective Date</th>
<th>03/24/2014</th>
<th>Change Reason</th>
</tr>
</thead>
</table>

#### Supervisor / Reviewer

<table>
<thead>
<tr>
<th>Supervisor</th>
<th>Reviewer</th>
</tr>
</thead>
<tbody>
<tr>
<td>BLACK, LAURIE [1][2][3][4]</td>
<td>BLACK, LAURIE [1][2][3][4]</td>
</tr>
</tbody>
</table>

#### Cost Center(s)

<table>
<thead>
<tr>
<th>Division</th>
<th>Branch</th>
</tr>
</thead>
<tbody>
<tr>
<td>400 - Central</td>
<td>201 - Business Development</td>
</tr>
</tbody>
</table>

#### Is Supervisor / Reviewer

<table>
<thead>
<tr>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>120 - Sales - Outside</td>
</tr>
</tbody>
</table>

#### Position

<table>
<thead>
<tr>
<th>Employment Type</th>
<th>Regular Full Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position</td>
<td>HOST - Home Region Sales Staff</td>
</tr>
</tbody>
</table>

#### Pay Settings

<table>
<thead>
<tr>
<th>Pay Group</th>
<th>S - Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>OT Exempt?</td>
<td>Tipped</td>
</tr>
<tr>
<td>Maximum Wage Exempt?</td>
<td></td>
</tr>
</tbody>
</table>

#### Union

<table>
<thead>
<tr>
<th>Affiliation Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exit Date</td>
</tr>
<tr>
<td>Initiation Collected?</td>
</tr>
</tbody>
</table>

#### Dept / Position History

<table>
<thead>
<tr>
<th>Effective Date</th>
<th>Check Date</th>
<th>Change Reason</th>
<th>Changed By</th>
<th>Edited</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2/24/2014</td>
<td>Current</td>
<td></td>
<td>Emily Alba</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9/10/2013</td>
<td>History</td>
<td>Change Reviewer</td>
<td>Emily Alba</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11/5/2010</td>
<td>History</td>
<td>Initial</td>
<td>Database Import</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
WORK LOCATION
View work site information.

<table>
<thead>
<tr>
<th>Work Location</th>
<th>Work Phone / Email / Mail Stop</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Location</td>
<td>Work Phone</td>
</tr>
<tr>
<td>Address 1</td>
<td>Phone</td>
</tr>
<tr>
<td>Address 2</td>
<td>Mobile</td>
</tr>
<tr>
<td>City / State</td>
<td>Email</td>
</tr>
<tr>
<td>Country</td>
<td>Mail Stop</td>
</tr>
<tr>
<td>Postal Code</td>
<td></td>
</tr>
</tbody>
</table>

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.

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

Reports
- Audit Trail Detail
**AUTHORIZATION TRACKING**

View work authorization status.

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

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

**STATUTORY**

- Assign employees to a Vets 100 or Vets 100A hiring location to be included in VETS-100/VETS-100A reports.
  1. Check the **Enable** box to enable the fields on this screen.
  2. Select a Hiring Location from the drop down.
  3. Select a **Job Category** from the applicable drop down.
  4. Select one or more **Covered Veteran** options.
  5. **Save** the updated information.
  6. Select either the Vets-100 or Vets-100A report in the Reports Library.
  7. Run the report to display the results. The report will appear in User Requested.

- Track medical coverage availability for states that require this information to be included in new hire reporting.
  1. Check the **Medical Coverage Available** box if the employee qualifies for medical benefits that can be used to cover the child.
  2. Select or enter the **Medical Coverage Date**.

**Important Notes**

- Medical coverage information must be populated before the first payroll that includes the new hire is processed.

**Reports**

- Audit Trail Detail
- VETS-100
- VETS-100A
PAYROLL SETUP

**RATES**

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

<table>
<thead>
<tr>
<th>Dates</th>
<th>Effective</th>
<th>Check Date</th>
<th>Change Reason</th>
<th>Pay Type</th>
<th>Salary</th>
<th>Rate / Per</th>
<th>Freq</th>
<th>Annual Salary</th>
<th>Rate Pay</th>
<th>Amount</th>
<th>%</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>3/7/2014</td>
<td>Current</td>
<td>3/7/2014</td>
<td>Hourly</td>
<td>$5.00</td>
<td>20.0000</td>
<td>Hour</td>
<td>W</td>
<td>$41.600.00</td>
<td>✔️</td>
<td>1.0000</td>
<td>5.2632</td>
<td></td>
</tr>
<tr>
<td>1/1/2013</td>
<td>History</td>
<td>1/1/2013</td>
<td>Hourly</td>
<td>$5.00</td>
<td>19.0000</td>
<td>Hour</td>
<td>W</td>
<td>$39.520.00</td>
<td>✔️</td>
<td>1.0000</td>
<td>5.3396</td>
<td></td>
</tr>
<tr>
<td>1/1/2011</td>
<td>History</td>
<td>1/1/2011</td>
<td>Hourly</td>
<td>$5.00</td>
<td>18.0000</td>
<td>Hour</td>
<td>W</td>
<td>$37.440.00</td>
<td>✔️</td>
<td>1.0000</td>
<td>5.3978</td>
<td></td>
</tr>
<tr>
<td>1/1/2010</td>
<td>History</td>
<td>1/1/2010</td>
<td>Hourly</td>
<td>$5.00</td>
<td>17.0000</td>
<td>Hour</td>
<td>W</td>
<td>$35.360.00</td>
<td>✔️</td>
<td>1.0000</td>
<td>5.4561</td>
<td></td>
</tr>
<tr>
<td>1/1/2009</td>
<td>History</td>
<td>1/1/2009</td>
<td>Hourly</td>
<td>$5.00</td>
<td>16.0000</td>
<td>Hour</td>
<td>W</td>
<td>$33.280.00</td>
<td>✔️</td>
<td>1.0000</td>
<td>5.5144</td>
<td></td>
</tr>
</tbody>
</table>

**TAXES**

View or edit tax information.

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

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

<table>
<thead>
<tr>
<th>Amount Type</th>
<th>Default Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Amount</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Percentage</strong></td>
<td></td>
</tr>
</tbody>
</table>

---

**EARNINGS**

View regularly scheduled recurring earnings.

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

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

View regularly scheduled recurring deductions.

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

<table>
<thead>
<tr>
<th>Deduction Code</th>
<th>Type</th>
<th>Begin Check Date</th>
<th>End Check Date</th>
<th>Calc Code</th>
<th>Amount</th>
<th>Freq</th>
<th>Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>451k - 401(k) Traditional</td>
<td>451k</td>
<td>08/14/2013</td>
<td></td>
<td>Flat Amount</td>
<td>08/14/2013</td>
<td>20.00</td>
<td>Block Week</td>
</tr>
<tr>
<td>408(k) - 401(k) Traditional</td>
<td>408(k)</td>
<td>08/14/2013</td>
<td></td>
<td>Flat Amount</td>
<td>08/14/2013</td>
<td>10.00</td>
<td>Monthly</td>
</tr>
</tbody>
</table>

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

**Important Notes**

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

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

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

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

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

LABOR ALLOCATION

View specific distribution of wages.
**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 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 Section

<table>
<thead>
<tr>
<th>Employee Id</th>
<th>Division</th>
<th>Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>690</td>
<td>$1,600.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Department</th>
<th>Branch</th>
</tr>
</thead>
<tbody>
<tr>
<td>400</td>
<td>101</td>
</tr>
</tbody>
</table>

### Check Information

<table>
<thead>
<tr>
<th>The Garner Group</th>
<th>Check Date</th>
<th>Voucher #</th>
</tr>
</thead>
<tbody>
<tr>
<td>3855 South Ave.</td>
<td>02/14/2014</td>
<td>102200</td>
</tr>
<tr>
<td>HILLTON HEIGHTS, IL 60040</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Direct Deposit</td>
<td>Amount</td>
<td></td>
</tr>
<tr>
<td>Emily J. Allen</td>
<td>$1,116.71</td>
<td></td>
</tr>
</tbody>
</table>

### Direct Deposits

<table>
<thead>
<tr>
<th>Bank</th>
<th>Amount</th>
<th>Type</th>
<th>Amount</th>
<th>YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>JPMorgan Chase Bank, AIA</td>
<td>$25.00</td>
<td>Checking</td>
<td>$75.00</td>
<td></td>
</tr>
<tr>
<td>JPMorgan Chase Bank, AIA</td>
<td>$55.04</td>
<td>Savings</td>
<td>$167.02</td>
<td></td>
</tr>
<tr>
<td>JPMorgan Chase Bank, AIA</td>
<td>$1,028.87</td>
<td>Checking</td>
<td>$2,167.21</td>
<td></td>
</tr>
</tbody>
</table>

### Earnings Table

<table>
<thead>
<tr>
<th>Description</th>
<th>Hours</th>
<th>Rate</th>
<th>Current</th>
<th>YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>DIRECT</strong></td>
<td></td>
<td></td>
<td>$90.00</td>
<td>$270.00</td>
</tr>
<tr>
<td><strong>VOTIVE</strong></td>
<td>$20.00</td>
<td>$60.00</td>
<td>$1,200.00</td>
<td>$3,600.00</td>
</tr>
<tr>
<td><strong>REGULAR</strong></td>
<td>$180.00</td>
<td>$50.00</td>
<td>$9,000.00</td>
<td>$27,000.00</td>
</tr>
<tr>
<td><strong>TOTALS</strong></td>
<td>$1,460.00</td>
<td>$5,640.00</td>
<td>$45,600.00</td>
<td>$136,800.00</td>
</tr>
</tbody>
</table>

### Taxes

<table>
<thead>
<tr>
<th>Description</th>
<th>Current</th>
<th>YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal Income Tax</td>
<td>$700.81</td>
<td>$1,111.93</td>
</tr>
<tr>
<td>Social Security</td>
<td>$178.80</td>
<td>$3,180.00</td>
</tr>
<tr>
<td>Medicare</td>
<td>$24.40</td>
<td>$72.20</td>
</tr>
<tr>
<td>OASDI</td>
<td>$104.51</td>
<td>$315.55</td>
</tr>
<tr>
<td><strong>TOTALS</strong></td>
<td>$979.29</td>
<td>$1,437.87</td>
</tr>
</tbody>
</table>

### Deductions Table

<table>
<thead>
<tr>
<th>Description</th>
<th>Current</th>
<th>YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dental Insurance</td>
<td>$24.00</td>
<td>$72.00</td>
</tr>
<tr>
<td>HMO Medical</td>
<td>$90.00</td>
<td>$270.00</td>
</tr>
<tr>
<td><strong>TOTALS</strong></td>
<td>$114.00</td>
<td>$342.00</td>
</tr>
</tbody>
</table>

### Time Off Table

<table>
<thead>
<tr>
<th>Description</th>
<th>Available</th>
<th>Takes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacation</td>
<td>167.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

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.
View and print W2s that have been processed by Paylocity.

- Click the **Tax Year** link to view or print a copy of the W2.

- Close the PDF file to return to the main screen.
View and print 1099s that have been processed by Paylocity.

- Click the Tax Year link to view or print a copy of the 1099.

- Close the PDF file to return to the main screen.
**TIME OFF**

**SETUP & BALANCE**

View time off information.

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

<table>
<thead>
<tr>
<th>Time Off Types</th>
<th>Type</th>
<th>Start Date</th>
<th>Used Hours / Days</th>
<th>Available Hours / Days</th>
<th>Used #</th>
<th>Available #</th>
<th>Length Of Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>PTO – Personal</td>
<td>07/01/2003</td>
<td>0.000000 Days</td>
<td>1.461528 Days</td>
<td>$0.000000</td>
<td>$0.000000</td>
<td>04/04/2003</td>
<td></td>
</tr>
<tr>
<td>PTO – Sick</td>
<td>07/01/2003</td>
<td>1.000000 Days</td>
<td>2.639432 Days</td>
<td>$0.000000</td>
<td>$0.000000</td>
<td>05/26/2003</td>
<td></td>
</tr>
<tr>
<td>VAC – Vacation</td>
<td>07/01/2003</td>
<td>0.000000 Days</td>
<td>16.461528 Days</td>
<td>$0.000000</td>
<td>$0.000000</td>
<td>01/24/2003</td>
<td></td>
</tr>
</tbody>
</table>

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

- Click the **Trans Date** link to view the details.

<table>
<thead>
<tr>
<th>Transaction Date From</th>
<th>Transaction Date To</th>
<th>Time Off Type</th>
<th>Subtype</th>
<th>Hours/Days</th>
<th>$</th>
<th>Available $</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/16/2013</td>
<td>06/16/2013</td>
<td>Sick</td>
<td>Ongoing</td>
<td>0.00 Hours</td>
<td></td>
<td></td>
</tr>
<tr>
<td>05/19/2013</td>
<td>05/19/2013</td>
<td>Sick</td>
<td>Ongoing</td>
<td>0.00 Hours</td>
<td></td>
<td></td>
</tr>
<tr>
<td>05/04/2012</td>
<td>05/04/2012</td>
<td>Sick</td>
<td>Ongoing</td>
<td>0.00 Hours</td>
<td></td>
<td></td>
</tr>
<tr>
<td>04/20/2012</td>
<td>04/20/2012</td>
<td>Sick</td>
<td>Ongoing</td>
<td>0.00 Hours</td>
<td></td>
<td></td>
</tr>
<tr>
<td>04/20/2012</td>
<td>04/20/2012</td>
<td>Sick</td>
<td>Ongoing</td>
<td>0.00 Hours</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

PERSONAL INFO

DEMOGRAPHICS

Add or edit general employee information.

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

---

**Important Notes**

- Employees are not able to add or edit their own Social Security Number (**SSN**) or **Birth Date** information. Employees must contact the Company Administrator to make these changes.
• Click the **Add** button to add a new dependent.
• Click the **Last Name** link to display or modify the dependent details.
• Check the box adjacent to the **Last Name** and click the **Delete** button to delete the dependent.

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

<table>
<thead>
<tr>
<th>Emergency Contact</th>
<th>Address</th>
<th>Stay in sync with employee information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td>First Name</td>
<td>Relationship</td>
</tr>
<tr>
<td>John</td>
<td>Doe</td>
<td>Husband</td>
</tr>
</tbody>
</table>

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

**EMPLOYEE STATUS**

View employee status information.

<table>
<thead>
<tr>
<th>Current Employee Status</th>
<th>Adjusted Seniority Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Hire</strong></td>
<td><strong>Termination</strong></td>
</tr>
<tr>
<td>Hire Date: 08/15/2002</td>
<td>Terminated</td>
</tr>
<tr>
<td>Rehire Date:</td>
<td>Eligible for Rehire?</td>
</tr>
<tr>
<td>Length Of Service: 11 M</td>
<td>User Account</td>
</tr>
<tr>
<td></td>
<td>Deportation Date</td>
</tr>
</tbody>
</table>

**Employee Status History**

<table>
<thead>
<tr>
<th>Effective Date</th>
<th>Check Date</th>
<th>Status</th>
<th>Change Reason</th>
<th>Changed By</th>
<th>Edited</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/15/2002</td>
<td>Current</td>
<td>Active</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**DEPT/POSITION**

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

<table>
<thead>
<tr>
<th>Current</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Date: 03/24/2014</td>
</tr>
</tbody>
</table>

**Supervisor / Reviewer**

- Supervisor: BLACK, LAURIE [5]{CUN004}
- Reviewer: BLACK, LAURIE [5]{CUN004}

**Cost Center(s)**

- Division: 400 - Central
- Branch: 301 - Business Development
- Department: 120 - Sales - Outside

**Position**

- Employment Type: Regular Full Time
- Position: HOST - Home Region Sales Staff
- Job Title: Sales Specialist
- EEO Class: 4 - Sales Worker
- Work Comp: 9970 - Office
- Home Shift:

**Pay Settings**

- Pay Group: S - Salary
- OT Exempt?
- Tipped
- Minimum Wage Exempt?

**Union**

- Union
- Affiliation Date
- Union Option
- Initiation Collectable?
- Due Collected?

**Dept / Position History**

<table>
<thead>
<tr>
<th>Effective Date</th>
<th>Check Date</th>
<th>Change Reason</th>
<th>Changed By</th>
<th>Edited</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>03/24/2014</td>
<td>Current</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>09/10/2013</td>
<td>History</td>
<td>Change Reviewer</td>
<td>Emily Alba</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11/11/2013</td>
<td>History</td>
<td>Initial</td>
<td>Emily Alba</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**WORK LOCATION**

View work site information.

**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.

**EMPLOYEE I-9 EMPLOYMENT ELIGIBILITY**

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

**Reports**
- Audit Trail Detail
AUTHORIZATION TRACKING

View work authorization status.

- Click the Date link to display the details.

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

STATUTORY

- Assign employees to a Vets 100 or Vets 100A hiring location to be included in VETS-100/VETS-100A reports.
- Track medical coverage availability for states that require this information to be included in new hire reporting.

1. Check the Enable box to enable the fields on this screen.
2. Select a Hiring Location from the drop down.
3. Select a Job Category from the applicable drop down.
4. Select one or more Covered Veteran options.
5. Check the Medical Coverage Available box if the employee qualifies for medical benefits that can be used to cover the child.
6. Select or enter the Medical Coverage Date.
7. Save the updated information.
8. Select either the Vets-100 or Vets-100A report in the Reports Library.
9. Run the report to display the results. The report will appear in User Requested.

Important Notes

- Medical coverage information must be populated before the first payroll that includes the new hire is processed.

Reports

- Audit Trail Detail
- VETS-100
- VETS-100A
EMPLOYMENT

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

PREVIOUS EMPLOYMENT
View employment history prior to being employed by the company.

- Click the Employer Name link to display the details.

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

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

View events, awards, or disciplinary actions.

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

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

**COMPANY PROPERTY**

View the company property that has been issued.
**PAY HISTORY**

**CURRENT CHECKS**

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

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

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

<table>
<thead>
<tr>
<th>Employee</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employee Id</strong></td>
</tr>
<tr>
<td><strong>Department</strong></td>
</tr>
<tr>
<td><strong>Salary</strong></td>
</tr>
<tr>
<td><strong>Division</strong></td>
</tr>
<tr>
<td><strong>Branch</strong></td>
</tr>
<tr>
<td><strong>Department</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Check</th>
</tr>
</thead>
</table>
| **The Garver Group** | 3855 N Western Ave

ARLINGTON HEIGHTS, IL 60004 |  
| **Direct Deposit** |  
| **Employee Name** | Emily A. Baker |  
| **Check Date** | 02/14/2014 |  
| **Voucher #** | 012220 |  
| **Delivery Location** | Default |  
| **Check Date** | 02/14/2014 |  
| **Period Begin** | 02/02/2014 |  
| **End Date** | 02/08/2014 |  
| **Gross Earnings - YTD** | $1,800.00 |  
| **Net Earnings - YTD** | $1,116.71 |  
| **Net YTD** |  

<table>
<thead>
<tr>
<th>Direct Deposits</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bank</strong></td>
</tr>
<tr>
<td>JPMorgan Chase Bank, IA</td>
</tr>
<tr>
<td>JPMorgan Chase Bank, IA</td>
</tr>
<tr>
<td><strong>Total</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Earnings</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>withholding</td>
</tr>
<tr>
<td><strong>Employee Paid</strong> withheld</td>
</tr>
<tr>
<td><strong>Employee Paid</strong> withheld</td>
</tr>
<tr>
<td><strong>Regular</strong></td>
</tr>
<tr>
<td><strong>Total</strong></td>
</tr>
<tr>
<td><strong>Total</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Taxes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>Federal Income Tax</td>
</tr>
<tr>
<td>Medicare</td>
</tr>
<tr>
<td>OASDI</td>
</tr>
<tr>
<td><strong>Total</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Deductions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>Dental Insurance</td>
</tr>
<tr>
<td>HMO Medical</td>
</tr>
<tr>
<td><strong>Total</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Benefits</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>Personal</td>
</tr>
<tr>
<td>Sick</td>
</tr>
<tr>
<td>Vacation</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

**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.
View and print W2s that have been processed by Paylocity.

- Click the **Tax Year** link to view or print a copy of the W2.

- Close the PDF file to return to the main screen.
View and print 1099s that have been processed by Paylocity.

- Click the **Tax Year** link to view or print a copy of the 1099.

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

RETIREMENT PLANS

View retirement plan information.

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

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

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

View insurance plan information.

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

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

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

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

---

**Important Notes**

- This screen only appears when Web Benefits is enabled.
PERFORMANCE

ADVANCED HR REVIEWS

View performance reviews.

- Click the Review Date link to display its details.

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

View skill information.

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

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

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

**SETUP & BALANCE**

View time off information.

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

<table>
<thead>
<tr>
<th>Setup &amp; Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hours Per Work Day: 8:00:00</td>
</tr>
<tr>
<td>Last Updated:</td>
</tr>
<tr>
<td>Source:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Type</th>
<th>Start Date</th>
<th>Used Hours / Days</th>
<th>Available Hours / Days</th>
<th>Used #</th>
<th>Available #</th>
<th>Length Of Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>PPR</td>
<td>07/01/2003</td>
<td>0.00000 Days</td>
<td>1.461526 Days</td>
<td>$0.000000</td>
<td>$0.000000</td>
<td>04/04/2003</td>
</tr>
<tr>
<td>SICK</td>
<td>07/01/2003</td>
<td>0.00000 Days</td>
<td>1.461526 Days</td>
<td>$0.000000</td>
<td>$0.000000</td>
<td>04/04/2003</td>
</tr>
<tr>
<td>VAC</td>
<td>07/01/2003</td>
<td>0.00000 Days</td>
<td>1.461526 Days</td>
<td>$0.000000</td>
<td>$0.000000</td>
<td>04/04/2003</td>
</tr>
</tbody>
</table>

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

- Click the Trans Date link to view the details.

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

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

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

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

- Click the **Cancel** button to return to the main screen.
TIME OFF REQUESTS

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

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

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

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

**CURRENT CHECKS**

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

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

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

### Employee Information

<table>
<thead>
<tr>
<th>Employee Id</th>
<th>Division</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>600 - Southwest</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Salary</th>
<th>Branch</th>
</tr>
</thead>
<tbody>
<tr>
<td>$1,800.00</td>
<td>101 - Business Development</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Department</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>400 - Human Resources</td>
<td></td>
</tr>
</tbody>
</table>

### Check Information

- **Check Date**: 02/14/2014
- **Voucher #:** 002200
- **Delivery Location**: Default
- **Check Date**: 02/14/2014
- **Period Begin Date**: 02/02/2014
- **End Date**: 02/28/2014
- **Gross Earnings - YTD**: $8,460.00
- **Net Earnings - YTD**: $7,460.00

### Direct Deposits

<table>
<thead>
<tr>
<th>Bank</th>
<th>Amount</th>
<th>Type</th>
<th>Amount</th>
<th>YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donor: Chase Bank, RIA</td>
<td>12345678</td>
<td>Checking</td>
<td>$325.00</td>
<td>$75.00</td>
</tr>
<tr>
<td>Donor: Chase Bank, RIA</td>
<td>25346789</td>
<td>Savings</td>
<td>$55.00</td>
<td>$167.00</td>
</tr>
<tr>
<td>Donor: Chase Bank, RIA</td>
<td>37891254</td>
<td>Checking</td>
<td>$1,023.67</td>
<td>$2,047.34</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td>$1,516.67</td>
<td>$3,360.33</td>
</tr>
</tbody>
</table>

### Earnings

<table>
<thead>
<tr>
<th>Description</th>
<th>Hrs</th>
<th>Rate</th>
<th>Current</th>
<th>YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regular</td>
<td>40</td>
<td>$10.00</td>
<td>$400.00</td>
<td>$800.00</td>
</tr>
<tr>
<td>Regular</td>
<td>20</td>
<td>$15.00</td>
<td>$300.00</td>
<td>$600.00</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td>$700.00</td>
<td>$1,400.00</td>
</tr>
</tbody>
</table>

### Taxes

<table>
<thead>
<tr>
<th>Description</th>
<th>Current</th>
<th>YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal</td>
<td>$70.81</td>
<td>$111.81</td>
</tr>
<tr>
<td>State</td>
<td>$78.40</td>
<td>$128.40</td>
</tr>
<tr>
<td>Medicare</td>
<td>$24.60</td>
<td>$49.20</td>
</tr>
<tr>
<td>Social Security</td>
<td>$164.53</td>
<td>$153.53</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$478.79</td>
<td>$1,437.87</td>
</tr>
</tbody>
</table>

### Deductions

<table>
<thead>
<tr>
<th>Description</th>
<th>Current</th>
<th>YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dental Insurance</td>
<td>$24.00</td>
<td>$48.00</td>
</tr>
<tr>
<td>HMO Medical</td>
<td>$90.00</td>
<td>$180.00</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$144.00</td>
<td>$228.00</td>
</tr>
</tbody>
</table>

### Time Off

<table>
<thead>
<tr>
<th>Description</th>
<th>Available</th>
<th>Taken</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacation</td>
<td>167.08</td>
<td>0.00</td>
</tr>
</tbody>
</table>

### Benefits

<table>
<thead>
<tr>
<th>Description</th>
<th>Current</th>
<th>YTD</th>
</tr>
</thead>
</table>

Download **Printable Version**
PRINT A PAY STUB

1. Enter a **Password** to protect the PDF file or check the “Do not password protect this information: my computer is secure and free from spyware or other potential unauthorized access.” box.
2. Click the **View PDF** button.
3. Select the **Print** icon to print the check.

**Important Notes**

- Users who choose to password protect the PDF file will be required to enter the password a second time to view the PDF. The password will be required each time users access the file.
- The Password Protect screen cannot be disabled.
PERSONAL INFO

DEMOGRAPHICS
Add or edit general employee information.

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

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

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

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

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

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

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

EMPLOYEE STATUS
View employee status information.

Current Employee Status
- Employee Status: Active
- Hire Date: 02/13/2002
- Rehire Date
- Length Of Service: Hire Date - 11 Yrs, 1 Mos

Adjusted Seniority Date
- Adjusted Seniority Date

Hire
- Hire Date: 02/13/2002
- Eligible for Rehire?
- User Appoint

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

Current
- Effective Date: 02/24/2014

Supervisor / Reviewer
- Supervisor: BLACK, LAURIE [5] (CLT)[04]
- Reviewer: BLACK, LAURIE [5] (CLT)[04]

Cost Center(s)
- Division: 400 - Central
- Branch: 201 - Business Development
- Department: 120 - Sales - Outsides

Position
- Employment Type: Regular Full Time
- Position: HOST - Home Region Sales Staff
- Job Title: Sales Specialist
- EEO Class: 4 - Sales Workman
- Work Comp: 9870 - Office
- Home Shift
- Clerk / Badge Number: 16

Pay Settings
- Pay Group: S - Salary
- OT Exempt?:
- Tipped
- Minimum Wage Exempt?:
- Union
- Affiliation Date
- Union Option
- Initiation Completed?
- dues collected?

Dept / Position History
- Records: 3
- Effective Date: 02/24/2014
- Check Date: History
- Change Reason: Change Reviewer
- Changed By: Emily Alpa
- Edited: 9/10/2011
- Change Reason: Initial
- Changed By: Emily Alpa
- Edited: 11/5/2010
- Change Reason: Database Import

Recorded: 3
WORK LOCATION

View work site information.

<table>
<thead>
<tr>
<th>Work Location</th>
<th>Work Phone / Email / Mail Stop</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Location</td>
<td>Work Location: Use default Company Address</td>
</tr>
<tr>
<td>Address 1</td>
<td>Work Phone: (541) 531-1234 Ext</td>
</tr>
<tr>
<td>Address 2</td>
<td>Mobile Phone:</td>
</tr>
<tr>
<td>City / State / Zip</td>
<td>Pager:</td>
</tr>
<tr>
<td>Country</td>
<td>Email: <a href="mailto:devcorp@data.perfectly.com">devcorp@data.perfectly.com</a></td>
</tr>
<tr>
<td></td>
<td>Mail Stop:</td>
</tr>
</tbody>
</table>

**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**

<table>
<thead>
<tr>
<th>Work Authorization</th>
<th>Visa Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>USCIS or Admission Number</td>
<td>Expiry Date</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>I-9 Verification</th>
<th>SSN Verification</th>
</tr>
</thead>
<tbody>
<tr>
<td>I-9 Verified?</td>
<td>SSN XXX-XX-1047</td>
</tr>
<tr>
<td>Data Verified?</td>
<td>SSN Verified?</td>
</tr>
<tr>
<td>Notes</td>
<td>Data Verified?</td>
</tr>
<tr>
<td></td>
<td>Notes</td>
</tr>
</tbody>
</table>

**EMPLOYEE I-9 EMPLOYMENT ELIGIBILITY**

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

**Reports**

- Audit Trail Detail
**AUTHORIZATION TRACKING**

View work authorization status.

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

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

**STATUTORY**

- Assign employees to a Vets 100 or Vets 100A hiring location to be included in VETS-100/VETS-100A reports.
- Track medical coverage availability for states that require this information to be included in new hire reporting.

1. Check the **Enable** box to enable the fields on this screen.
2. Select a **Hiring Location** from the drop down.
3. Select a **Job Category** from the applicable drop down.
4. Select one or more **Covered Veteran** options.
5. Check the **Medical Coverage Available** box if the employee qualifies for medical benefits that can be used to cover the child.
6. Select or enter the **Medical Coverage Date**.
7. **Save** the updated information.
8. Select either the Vets-100 or Vets-100A report in the Reports Library.
9. Run the report to display the results. The report will appear in User Requested.

**Important Notes**

- Medical coverage information must be populated before the first payroll that includes the new hire is processed.

**Reports**

- Audit Trail Detail
- VETS-100
- VETS-100A
**EMPLOYMENT**

**RATES**

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

### Rates

<table>
<thead>
<tr>
<th>Effective</th>
<th>Check Date</th>
<th>Change Reason</th>
<th>Pay Type</th>
<th>Salary</th>
<th>Rate / Per</th>
<th>Freq</th>
<th>Annual Salary</th>
<th>Auto Pay</th>
<th>Amount</th>
<th>%</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>3/7/2014</td>
<td></td>
<td></td>
<td>Hourly</td>
<td>$6.00</td>
<td>20.0000 / Hour</td>
<td>W</td>
<td>$94,400.00</td>
<td>✔</td>
<td>1.0000</td>
<td>5.2632</td>
<td></td>
</tr>
<tr>
<td>2/1/2013</td>
<td></td>
<td>History</td>
<td>Hourly</td>
<td>$6.00</td>
<td>19.0000 / Hour</td>
<td>W</td>
<td>$93,920.00</td>
<td>✔</td>
<td>1.0000</td>
<td>5.5556</td>
<td></td>
</tr>
<tr>
<td>1/4/2011</td>
<td></td>
<td>History</td>
<td>Hourly</td>
<td>$6.00</td>
<td>18.0000 / Hour</td>
<td>W</td>
<td>$93,440.00</td>
<td>✔</td>
<td>1.0000</td>
<td>5.5075</td>
<td></td>
</tr>
<tr>
<td>3/10/2010</td>
<td></td>
<td>History</td>
<td>Hourly</td>
<td>$6.00</td>
<td>17.0000 / Hour</td>
<td>W</td>
<td>$93,060.00</td>
<td>✔</td>
<td>1.0000</td>
<td>5.4600</td>
<td></td>
</tr>
<tr>
<td>2/12/2008</td>
<td></td>
<td>History</td>
<td>Hourly</td>
<td>$6.00</td>
<td>16.0000 / Hour</td>
<td>W</td>
<td>$92,680.00</td>
<td>✔</td>
<td>1.0000</td>
<td>5.4125</td>
<td></td>
</tr>
</tbody>
</table>

### Additional Rates

<table>
<thead>
<tr>
<th>Effective</th>
<th>Check Date</th>
<th>End Check Date</th>
<th>Change Reason</th>
<th>Rate</th>
<th>Rate / Per</th>
<th>Department</th>
<th>Job</th>
<th>Shift</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>3/7/2014</td>
<td></td>
<td></td>
<td></td>
<td>$11.75</td>
<td>23.5506 / Hour</td>
<td>Customer Service (100)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**PREVIOUS EMPLOYMENT**

View employment history prior to being employed by the company.

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

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

<table>
<thead>
<tr>
<th>Effective Date</th>
<th>Description</th>
<th>Title</th>
<th>Rate</th>
<th>Per</th>
<th>Salary</th>
<th>Annual Salary</th>
<th>Notes</th>
<th>Capture Date</th>
<th>Edited</th>
</tr>
</thead>
<tbody>
<tr>
<td>03/16/2013</td>
<td>Change Cost Center</td>
<td>Customer Support Representative</td>
<td>15.00</td>
<td>Hour</td>
<td>0.00</td>
<td>31,240.00</td>
<td>03/16/2013</td>
<td></td>
<td></td>
</tr>
<tr>
<td>04/12/2013</td>
<td>Change Compensation</td>
<td>Customer Support Representative</td>
<td>15.50</td>
<td>Hour</td>
<td>0.00</td>
<td>32,240.00</td>
<td>03/16/2013</td>
<td></td>
<td></td>
</tr>
<tr>
<td>04/12/2013</td>
<td>Change Cost Center</td>
<td>Customer Support Representative</td>
<td>15.50</td>
<td>Hour</td>
<td>0.00</td>
<td>32,240.00</td>
<td>03/16/2013</td>
<td></td>
<td></td>
</tr>
<tr>
<td>04/12/2013</td>
<td>Change Supervisor</td>
<td>Customer Support Representative</td>
<td>15.00</td>
<td>Hour</td>
<td>0.00</td>
<td>31,200.00</td>
<td>02/04/2013</td>
<td></td>
<td></td>
</tr>
<tr>
<td>04/12/2013</td>
<td>Change Job</td>
<td>Customer Support Representative</td>
<td>15.00</td>
<td>Hour</td>
<td>0.00</td>
<td>31,200.00</td>
<td>02/04/2013</td>
<td></td>
<td></td>
</tr>
<tr>
<td>04/12/2013</td>
<td>Change Cost Center</td>
<td>Customer Support Representative</td>
<td>15.00</td>
<td>Hour</td>
<td>0.00</td>
<td>31,200.00</td>
<td>02/04/2013</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

EVENTS

View events, awards, or disciplinary actions.

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

<table>
<thead>
<tr>
<th>Code</th>
<th>Type</th>
<th>Event</th>
<th>Event Date From</th>
<th>Event Date To</th>
<th>Next Date From</th>
<th>Next Date To</th>
<th>Proficiency</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee of the month</td>
<td>Recognition</td>
<td>Employee of the Month</td>
<td>04/01/2013</td>
<td>04/01/2013</td>
<td>04/01/2013</td>
<td>04/01/2013</td>
<td>04/01/2013</td>
<td>04/01/2013</td>
</tr>
</tbody>
</table>

- Click the **Cancel** button to return to the main screen.
### COMPANY PROPERTY

View the company property that has been issued.

<table>
<thead>
<tr>
<th>Item Type</th>
<th>Issue Date</th>
<th>Description</th>
<th>Serial #</th>
<th>Return Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>Badge Issued</td>
<td>02/03/2009</td>
<td></td>
<td>6428876</td>
<td></td>
</tr>
<tr>
<td>Notebook Computer</td>
<td>02/03/2009</td>
<td></td>
<td>2375808130DFX023</td>
<td></td>
</tr>
<tr>
<td>Parking Spot Number</td>
<td>02/02/2006</td>
<td></td>
<td>677</td>
<td></td>
</tr>
</tbody>
</table>
## 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 Information

<table>
<thead>
<tr>
<th>Employee Id</th>
<th>Division</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>1000</td>
<td>600 - Southwest</td>
<td>400 - Human Resources</td>
</tr>
<tr>
<td>Salary</td>
<td></td>
<td>$1,800.00</td>
</tr>
</tbody>
</table>

### Check Details

<table>
<thead>
<tr>
<th>Check Date</th>
<th>Voucher #</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/14/2014</td>
<td>102220</td>
</tr>
</tbody>
</table>

### Direct Deposits

<table>
<thead>
<tr>
<th>Bank/Address</th>
<th>Type</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bank A/Bank B, A</td>
<td>Checking</td>
<td>$25.00</td>
</tr>
<tr>
<td>Bank C/Bank D, A</td>
<td>Savings</td>
<td>$55.04</td>
</tr>
<tr>
<td>Bank E/Bank F, A</td>
<td>Checking</td>
<td>$2,025.87</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td>$2,116.71</td>
</tr>
</tbody>
</table>

### Earnings

<table>
<thead>
<tr>
<th>Description</th>
<th>Rate</th>
<th>Current</th>
<th>YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hourly Match</td>
<td></td>
<td>$90.00</td>
<td>$270.00</td>
</tr>
<tr>
<td>Employer Paid Premium</td>
<td></td>
<td>$20.00</td>
<td>$60.00</td>
</tr>
<tr>
<td>Regular</td>
<td></td>
<td>$180.00</td>
<td>$540.00</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td>$1,460.00</td>
<td>$4,340.00</td>
</tr>
</tbody>
</table>

### Taxes

<table>
<thead>
<tr>
<th>Description</th>
<th>Current</th>
<th>YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal Income Tax</td>
<td>$270.81</td>
<td>$811.93</td>
</tr>
<tr>
<td>Social Security</td>
<td>$79.80</td>
<td>$238.40</td>
</tr>
<tr>
<td>Medicare</td>
<td>$164.40</td>
<td>$532.20</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td>$479.09</td>
</tr>
</tbody>
</table>

### Deductions

<table>
<thead>
<tr>
<th>Description</th>
<th>Current</th>
<th>YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dental Insurance</td>
<td>$24.00</td>
<td>$72.00</td>
</tr>
<tr>
<td>HMO Premium</td>
<td>$90.00</td>
<td>$270.00</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$114.00</td>
<td>$342.00</td>
</tr>
</tbody>
</table>

### Time Off

<table>
<thead>
<tr>
<th>Description</th>
<th>Available</th>
<th>Takes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sick</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>Vacation</td>
<td>167.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

### Benefits

<table>
<thead>
<tr>
<th>Description</th>
<th>Current</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[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.
View and print W2s that have been processed by Paylocity.

- Click the **Tax Year** link to view or print a copy of the W2.

- Close the PDF file to return to the main screen.
View and print 1099s that have been processed by Paylocity.

- Click the **Tax Year** link to view or print a copy of the 1099.

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

RETIREMENT PLANS

View retirement plan information.

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

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

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

<table>
<thead>
<tr>
<th>Web Site</th>
<th>Click to View</th>
<th>Description</th>
<th>Plan Type</th>
<th>Start Date</th>
<th>End Date</th>
<th>Employee Code</th>
<th>Employer Code</th>
<th>Rate Type</th>
<th>Waited</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td></td>
<td>Dental Plan</td>
<td>DNTL - Dental</td>
<td>01/01/2013</td>
<td>1230</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td></td>
<td>ESMIP Plan</td>
<td>MED - Medical</td>
<td>01/01/2013</td>
<td></td>
<td>BMSL7</td>
<td>HLMH</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td></td>
<td>Life Insurance APE Rate</td>
<td>LPI - Life Insurance</td>
<td>01/04/2013</td>
<td></td>
<td></td>
<td></td>
<td>LPI</td>
<td></td>
</tr>
</tbody>
</table>

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

### Employee Insurance Plan Details

- **Active:** Yes
- **Plan:** MCIP Plan - 122910
- **Plan Type:** Medical
- **Plan Effective Date:** 1/1/2013
- **Web Site:** View

### Coverage

- **Eligibility Date:** 3/1/2002
- **Coverage Start Date:** 1/1/2013
- **Coverage End Date:**
- **Wave Coverage?** No

### Employee Deduction or Earning

- **Calculation Code:** BMSL7
- **Flat Amount:**
- **Pay Frequency:** Employee Frequency
- **Begin Check Date:** 01/04/2013
- **End Check Date:**

### Employer Deduction or Earning

- **Calculation Code:** HLMH
- **Flat Amount:**
- **Pay Frequency:** Employee Frequency
- **Begin Check Date:** 01/04/2013
- **End Check Date:**

### Premium Contribution Amounts Per Payroll

<table>
<thead>
<tr>
<th>Rate Type</th>
<th>Rate Factor</th>
<th>Premium</th>
<th>Date Factor</th>
<th>Pay Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family</td>
<td>0.25</td>
<td>100.00</td>
<td>01/04/2013</td>
<td>Employee Frequency</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>200.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### DependentsCovered

- **Bean**
  - **Last Name:** Mary Ann
  - **First Name:** Daniel
  - **Relationship:** Wife
- **Bean**
  - **Last Name:** Son

### 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:**
  - **Status Date:**

**Cancel**
**BENEFITS SETUP**

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

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

### BENEFITS SETUP Table

<table>
<thead>
<tr>
<th>Effective Date</th>
<th>Benefit Class</th>
<th>Benefit Location</th>
<th>Benefit Division</th>
<th>Part Time</th>
<th>Benefit Termination Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>05/01/2015</td>
<td>Full Time Benefit Eligible</td>
<td>Corporate Office</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Benefit Categories

<table>
<thead>
<tr>
<th>Benefit Category</th>
<th>Effective Date</th>
<th>Benefit Class</th>
<th>Benefit Location</th>
<th>Benefit Division</th>
<th>Part Time</th>
<th>Benefit Termination Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>5/1/2015</td>
<td>Full Time Benefit Eligible</td>
<td>Corporate Office</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Benefit Integration

<table>
<thead>
<tr>
<th>Benefit Name</th>
<th>Part Time</th>
<th>Benefit Termination Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Benefit Salary

- **Benefit Salary**
  - Benefit Salary Effective Date
  - Benefit Salary: $2,000.00
  - Current Rate Annual Salary: $2,000.00 as of 05/02/2008
  - Benefit Hours per Week: [Salary]
PERFORMANCE

ADVANCED HR REVIEWS

View performance reviews.

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

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

SKILLS

View skill information.

- Click the Skill link to display the details.

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

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

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

<table>
<thead>
<tr>
<th>School</th>
<th>Degree / Course of Study</th>
<th>Major / License</th>
<th>GPA / Scale</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>University of Illinois</td>
<td>Bachelor of Arts</td>
<td>2.75/4.0</td>
<td>C - Complete</td>
<td></td>
</tr>
</tbody>
</table>

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

**SETUP & BALANCE**

View time off information.

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

<table>
<thead>
<tr>
<th>Setup &amp; Balance Details</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Time Off Type</strong>: VAC - Vacation</td>
<td><strong>Start Date</strong>: 7/1/2003</td>
</tr>
<tr>
<td><strong>Accrued Ongoing</strong></td>
<td><strong>Clear and Transfer Balances</strong></td>
</tr>
<tr>
<td><strong>Enabled</strong></td>
<td><strong>Enabled</strong></td>
</tr>
<tr>
<td><strong>Hours Worked</strong>: 0.000000</td>
<td><strong>Max Carry Over</strong>: 100.00 Hours</td>
</tr>
<tr>
<td><strong>Accrual Rate</strong>: 0.000000</td>
<td><strong>Hours</strong>: 0.000000</td>
</tr>
<tr>
<td><strong>Max Balance</strong>: 0.000000</td>
<td><strong>Override?</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Current Balance</strong></th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Available</strong>: 18.465000 Days</td>
<td><strong>Dollars Available</strong>: 0.00</td>
</tr>
<tr>
<td><strong>Used</strong>: 0.000000 Days</td>
<td><strong>Dollars Used</strong>: 0.00</td>
</tr>
<tr>
<td><strong>Total</strong>: 18.465000 Days</td>
<td><strong>Dollars Total</strong>: 0.00</td>
</tr>
</tbody>
</table>

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

- Click the **Trans Date** link to view the details.

<table>
<thead>
<tr>
<th>Transaction Date From</th>
<th>Begin Date From</th>
<th>Time Off Type</th>
<th>Subtype</th>
<th>Hours/Days</th>
<th>Avail Hours/Days</th>
<th>$</th>
<th>Available $</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/16/2013</td>
<td>08/16/2013</td>
<td>Sick</td>
<td>Ongoing</td>
<td>0.00 Hours</td>
<td>0.00 Hours</td>
<td></td>
<td></td>
</tr>
<tr>
<td>09/16/2013</td>
<td>09/16/2013</td>
<td>Vacation</td>
<td>Ongoing</td>
<td>4.50 Hours</td>
<td>161.54 Hours</td>
<td>$115.29</td>
<td>$4,630.43</td>
</tr>
<tr>
<td>08/18/2013</td>
<td>08/18/2013</td>
<td>Sick</td>
<td>Ongoing</td>
<td>0.00 Hours</td>
<td>176.92 Hours</td>
<td>20.00</td>
<td>$3,029.05</td>
</tr>
<tr>
<td>09/19/2013</td>
<td>09/19/2013</td>
<td>Vacation</td>
<td>Ongoing</td>
<td>0.00 Hours</td>
<td>0.00 Hours</td>
<td></td>
<td></td>
</tr>
<tr>
<td>09/19/2013</td>
<td>09/19/2013</td>
<td>Sick</td>
<td>Ongoing</td>
<td>3.00 Hours</td>
<td>156.92 Hours</td>
<td>$76.92</td>
<td>$3,920.05</td>
</tr>
<tr>
<td>09/19/2013</td>
<td>09/19/2013</td>
<td>Vacation</td>
<td>Ongoing</td>
<td>3.00 Hours</td>
<td>156.92 Hours</td>
<td>$76.92</td>
<td>$3,920.05</td>
</tr>
<tr>
<td>09/20/2013</td>
<td>09/20/2013</td>
<td>Sick</td>
<td>Ongoing</td>
<td>3.00 Hours</td>
<td>156.92 Hours</td>
<td>$76.92</td>
<td>$3,920.05</td>
</tr>
</tbody>
</table>

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

**Manual Adjustment Details**

- **Time Off Type**: Vacation
- **Transaction Type**: H - Manual Adjustment
- **Transaction Subtype**: A - Adjustment

**Manual Adjustment**

<table>
<thead>
<tr>
<th>Starting Hours</th>
<th>Change</th>
<th>Adjusted Hours</th>
<th>Starting Dollars</th>
<th>Change</th>
<th>Adjusted Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available</td>
<td>177.85 Hours</td>
<td>+8.00</td>
<td>185.85 Hours</td>
<td>Available</td>
<td>8,005.00</td>
</tr>
<tr>
<td>Used</td>
<td>8.00 Hours</td>
<td></td>
<td>8.00 Hours</td>
<td></td>
<td>Used</td>
</tr>
</tbody>
</table>

Total: 185.85 Hours $193.85 Hours Total: $8,263.00 $8,263.00
**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 1,250 hours within the past year to be eligible for FMLA Leave. A company may calculate an FMLA year based on a rolling 12-month period or a calendar year.

<table>
<thead>
<tr>
<th>FMLA Eligibility</th>
<th>FMLA Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year Calculated</td>
<td>Total Hours</td>
</tr>
<tr>
<td></td>
<td>Hours Used</td>
</tr>
<tr>
<td>Length of Service:</td>
<td>Hours Available</td>
</tr>
<tr>
<td>11 Yrs. 1 Mos.</td>
<td>Hours Used</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Non-FMLA Hours</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hours Used</td>
<td>Approved</td>
</tr>
</tbody>
</table>
```

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

```
**FMLA Leave Tracking Details**

- Leave Request Type: FMLA
- Start Date: 3/4/2013
- End Date: 3/29/2013
- FMLA Reason: Serious health condition of spouse, son, daughter, or parent
- Intermittent Leave?:

<table>
<thead>
<tr>
<th>Return To Work</th>
<th>Status Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expected Date</td>
<td>Approved</td>
</tr>
<tr>
<td>Actual Date</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tracking Item</th>
<th>Start Date</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>FMLA Time Off Used</td>
<td>03/04/2013</td>
<td>120.00</td>
</tr>
</tbody>
</table>
```

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

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

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

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

<table>
<thead>
<tr>
<th>Start Date</th>
<th>End Date</th>
<th>Hours Per Day</th>
<th>Start Time</th>
<th>End Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/30/2014</td>
<td>12/31/2014</td>
<td>8:00</td>
<td>AM</td>
<td>PM</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date</th>
<th>Hours</th>
<th>Start Time</th>
<th>End Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/30/2014</td>
<td>8:00</td>
<td>AM</td>
<td>PM</td>
</tr>
<tr>
<td>12/31/2014</td>
<td>8:00</td>
<td>AM</td>
<td>PM</td>
</tr>
<tr>
<td>12/31/2014</td>
<td>8:00</td>
<td>AM</td>
<td>PM</td>
</tr>
</tbody>
</table>
# PAYROLL

## CHECK CALCULATOR SETUP

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

1. Select **Test Mode** to test possible payroll changes.
2. Select Standard, Use Supplemental Tax Rate, or Block All Income Tax Withholding from the **Taxation** drop down.
3. Clear the **Block Recurring Earnings** box to allow all recurring earnings. Use the Check Calculator Earnings screen to allow or block individual earnings.
4. Clear the **Block Recurring Deductions** box to allow all recurring deductions. Use the Check Calculator Deductions screen to allow or block individual deductions.
5. Select **Gross to Net** to calculate a check based on the employee’s gross pay. Check the applicable box if the employee is to receive the base **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

<table>
<thead>
<tr>
<th>Mode</th>
<th>Test</th>
<th>Block Recurring Earnings</th>
<th>Block Recurring Deductions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Taxation</strong></td>
<td>Standard</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Gross To Net

<table>
<thead>
<tr>
<th>Salary</th>
<th>Base Rate</th>
<th>Default Hours</th>
<th>Auto Pay</th>
<th>Allow Negative Net</th>
<th>Adjustment - No Tax amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1,000.00</td>
<td>10.00</td>
<td>0.00</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Net To Gross

<table>
<thead>
<tr>
<th>Net Pay</th>
<th>Default Earnings Code</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>EG2 - REGULAR</strong></td>
</tr>
</tbody>
</table>

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

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

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

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

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

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

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

---

**TAXES**

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

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

- Close this screen to return to the main screen.
MY PERFORMANCE REVIEW

Access performance reviews, goals, and feedback.

- Click View to complete the review or modify the details.
- Click View All Goals to add or edit goals.
- Click View All Feedback to view or provide feedback.
HOW TO COMPLETE A PERFORMANCE REVIEW AS AN EMPLOYEE

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

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

1. To navigate to a specific screen, click the desired tab.
2. Select a rating from the drop down.
3. Enter justification for the rating in the **Comments from Employee** field.
4. Save the updated information.
5. Complete each review items screen.
GOALS

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

- Input Comments for Existing Goals
  1. Select a rating from the drop down for each goal.
  2. Enter justification for the rating given in the Comments from Employee field.
Add a New Goal or Edit an Existing Goal

1. Enter the **Goal** name (100 character limit).
2. Enter the **Description** (8000 character limit).
3. Select or enter the **Start Date**.
4. Select or enter the applicable **End Date**.
5. Select the **Status**.
6. Select the goal **Category** from the drop-down.
7. Enter additional information in the **Employee Notes** field.
8. **Save** the updated information.
1. Verify the ratings.
2. Click Complete to complete the self appraisal and submit the review.

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

![Performance Review Image]

2. Click **Employee** or **Reviewer** to view corresponding appraisal details.
3. Enter applicable information in the **Your Comments** field.
4. Click **Sign Review** to sign the performance review.

![Summary Image]

5. A confirmation message will display once complete.
GOALS
Add or edit goals.

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

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

SMART TIP
If a goal was created with the Reviewer Edit Only box checked in the Assign Goal to Employee Screen, the employee will not be able to edit the goal.
1. Enter the **Goal** (100 character limit).
2. Enter the **Description** (8000 character limit).
3. Select or enter the **Start Date**.
4. Select or enter the applicable **End Date**.
5. Select the **Status**.
6. Select the goal Category.
7. Enter additional information in the **Notes** field.
8. Save the updated information.
9. Click **Delete** to delete the goal.
**FEEDBACK**

Provide feedback for an employee.

- Provide feedback using My Performance Review.

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

---

Feedback

<table>
<thead>
<tr>
<th>Feedback</th>
<th>Feedback For</th>
<th>Request Sent From</th>
<th>Request Date</th>
<th>Due Date</th>
<th>Status</th>
<th>Share With</th>
<th>Feedback Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>Shappard Allerdice [89]</td>
<td>Jayne Halverson [99]</td>
<td>01/27/2015</td>
<td>01/30/2015</td>
<td>Complete</td>
<td></td>
<td>01/27/2015</td>
</tr>
<tr>
<td>Provide Feedback</td>
<td>Rebecca Bloom [18]</td>
<td>Jayne Halverson [99]</td>
<td>01/27/2015</td>
<td>01/50/2015</td>
<td>Pending</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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.
**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**.

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

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

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

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

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

**C**

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

**D**

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

**E**

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

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

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

**F**

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

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

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

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