



# Welcome to Paylocity

Employee Self-Service Guide



# Welcome

Welcome to Paylocity, your employer's trusted human capital management provider! What's that, you ask? We bring the power of modern technology to all things HR and payroll. For you, that includes quick and convenient mobile solutions that make your life easier!

Like your company, our employees are our most valued resource. We create our services with them in mind and now they're available to you. This guide will help you explore how easy it is to use our powerful tools to manage, explore, and connect.

## Scanning QR Codes

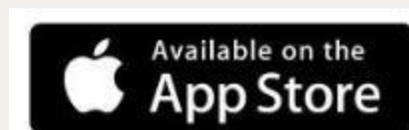
You can quickly access our video content via hyperlink or scan the QR codes with your mobile device. Never scanned a QR code? It's easy! Just take a picture on your Android or Apple device!

### Apple

- Open the camera app from the home screen, control center, or lock screen.
- Select the rear-facing camera. Hold your device so the QR code appears in the viewfinder. Your device will recognize the QR code and display a link to the video.
- Finally, tap the pop-up notification to view some awesome content!

### Android

- Press and hold the Home button. Then tap Lens. Note: A prompt appears if it's the first time you've used this feature. If it does, choose Allow.
- Select the rear-facing camera. Hold your device so the QR code appears in the viewfinder. Then tap the magnifying glass icon to scan the QR code
- Lastly, tap the pop-up notification to view some fantastic content!



# Mobile registration

Registration is a snap in the app!



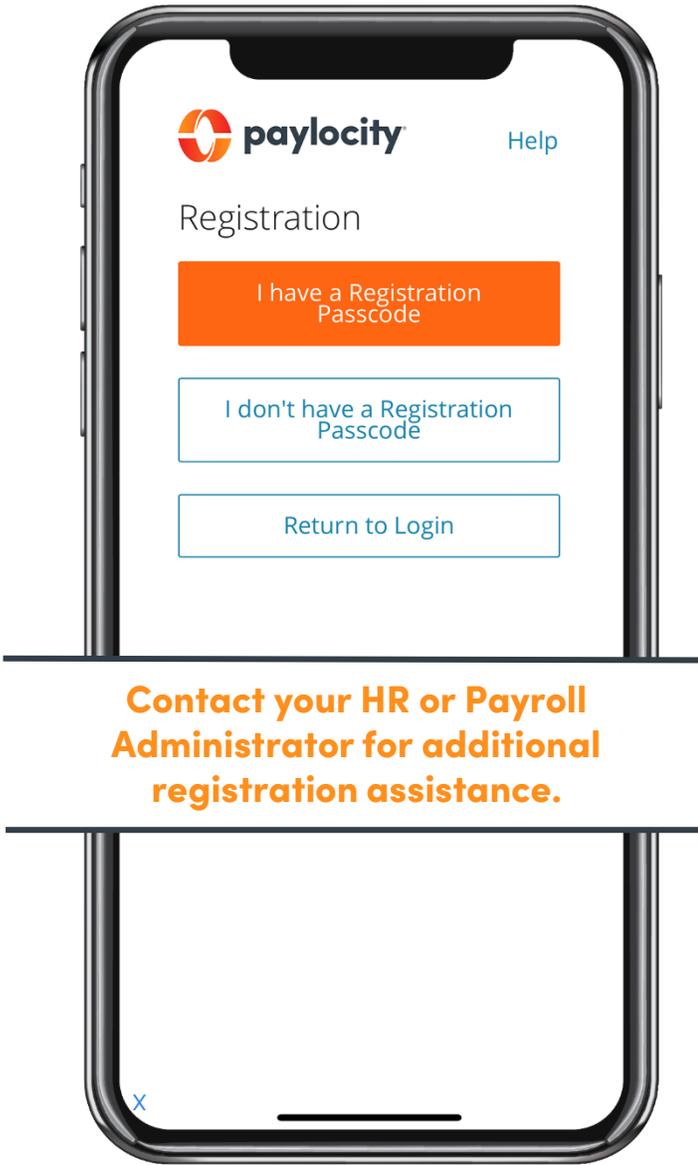
Open the Paylocity app and tap **Register New User**.



Enter the Registration Passcode you received from your employer. If you don't have a Passcode, enter the Company ID provided by your location's payroll administrator.



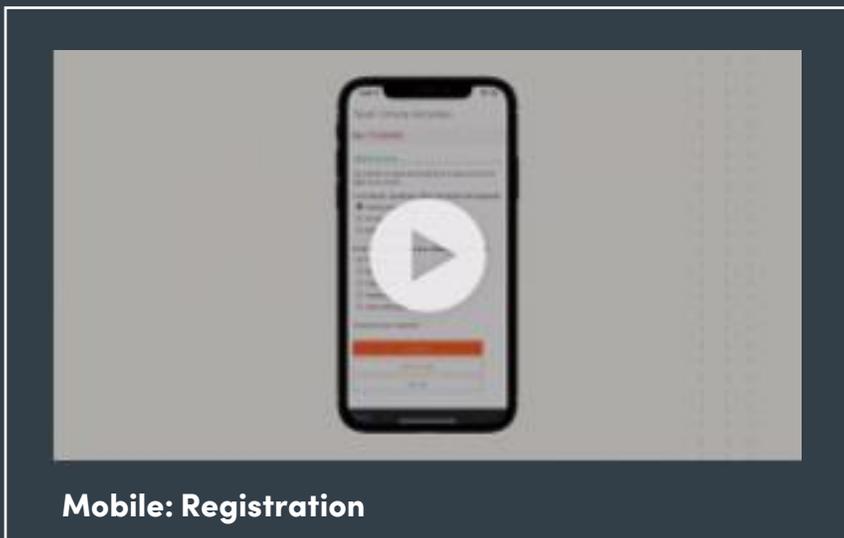
Then follow the prompts and enter the info required to complete your registration.



**Contact your HR or Payroll Administrator for additional registration assistance.**



You can also register online at <https://access.paylocity.com>



**Mobile: Registration**

## Learn More

Click on the image to the left or scan the QR code below to see how easy it is to register via Paylocity's mobile app!



## Explore the App

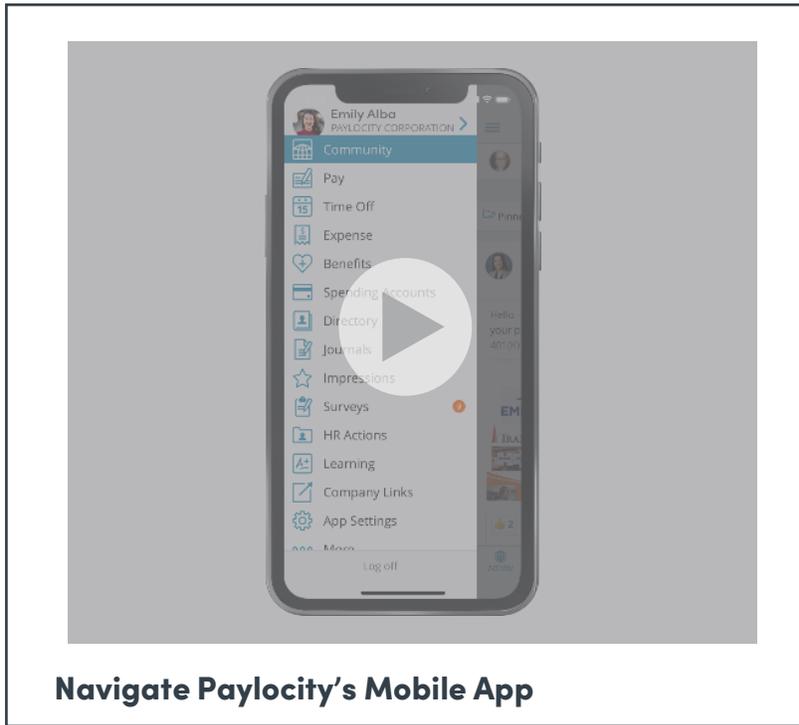
Let's take a brief tour of what you can find in the app.

 To move between products, tap the hamburger button to open the menu.

 Tap your name to view and edit your profile, personal info, and emergency contacts.

 Tap **App Settings** to set your language preference, or toggle your Biometric Login, and Stay Logged In settings.

 Tap **More** to access Paylocity Education and Knowledge (PEAK), our helpful knowledge base.



### Learn More

Click on the image above to tour the Paylocity Mobile App



# Access Pay Info



You work hard for your money, so naturally, you want to see the wages that come in and what goes out for benefits, taxes, and more! The Paylocity app makes it easy and transparent and eliminates the guesswork.



Open the Paylocity app and tap **Pay** to view your most recent pay stub.



Tap on the interactive chart to view earnings, deductions, benefits, or tax amounts.



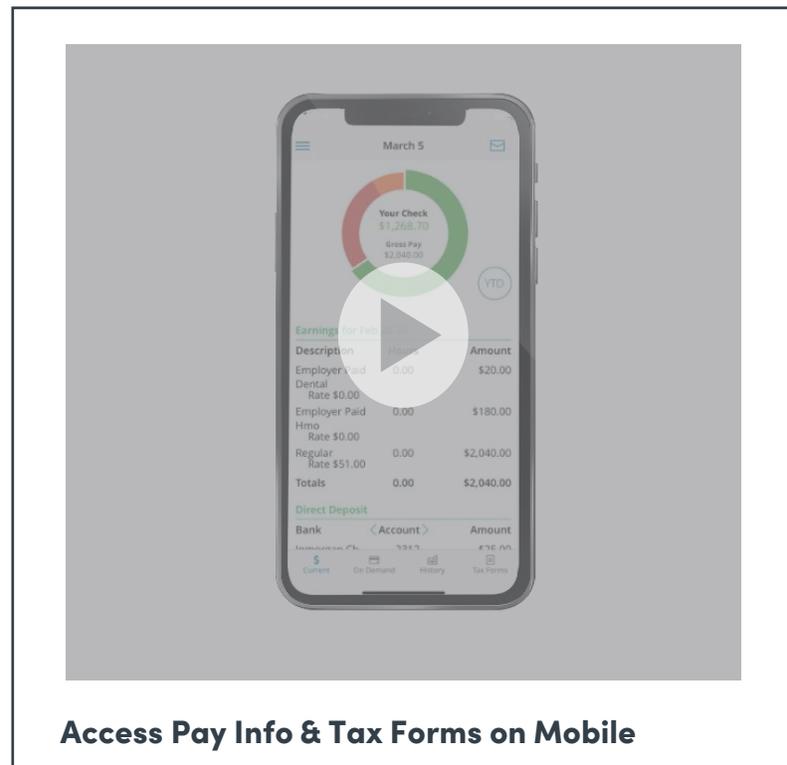
Tap **History** to view your previous pay stubs.



Tap **Tax Forms** to review your W-2s or other year-end forms.



Tap the envelop to securely email pay stub information electronically.



**Access Pay Info & Tax Forms on Mobile**

[Learn More](#)

Click the image to see how to access pay info and tax forms



# View Personal Info

Take control of your personal info, dependents, and emergency contacts with a few quick taps!



Tap your name at the top of the main menu.



Tap **Edit** at the top of the screen to make changes.



Swipe up to view and edit your Emergency Contacts.

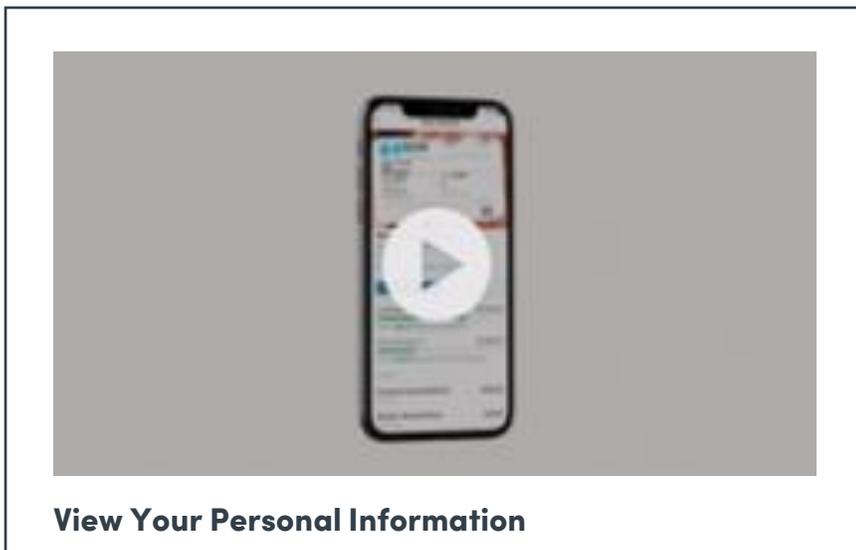


Tap **Save** when done.



## Learn More

Click on the image to the right or scan the QR code to see how easy it is to update your personal info with Paylocity's mobile.



**View Your Personal Information**



# Self Service Portal

Get easy access to your info anytime! With your Self Service Portal, you have secure 24/7 access in one convenient place. From your desktop, navigate to <https://access.paylocity.com/> and use the same credentials used for the Paylocity mobile app. Info is grouped in cards that make it easy to find.



In the Pay card, click **Go Paperless** to get your pay stubs and W-2s sooner!



View and print recent pay stubs and details in the Pay card.



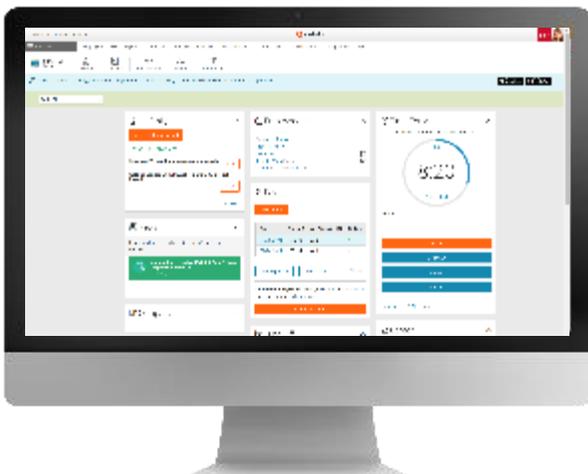
Check your balances from the Time Off card.



Confirm your contact info is up to date by reviewing your Payroll File



Edit your Taxes and Direct Deposit information in your Payroll File



# Add Direct Deposit

Avoid lines at the bank and never worry about a lost or delayed paycheck. It's quick and easy to sign up for direct deposit! You can even direct money to multiple accounts.



To get started, locate the Pay file in your [Self Service Portal](#), click **More.**, then click **Direct Deposit Accounts**.



Adding or Editing Direct Deposit

## Learn More

Click on the image to the left or scan the QR code below to see how easy it is to add or edit your direct deposit info!



# Manage Notifications



Looking to stay informed on new updates and important information shared in Paylocity? Notifications will keep you on the top of your game!

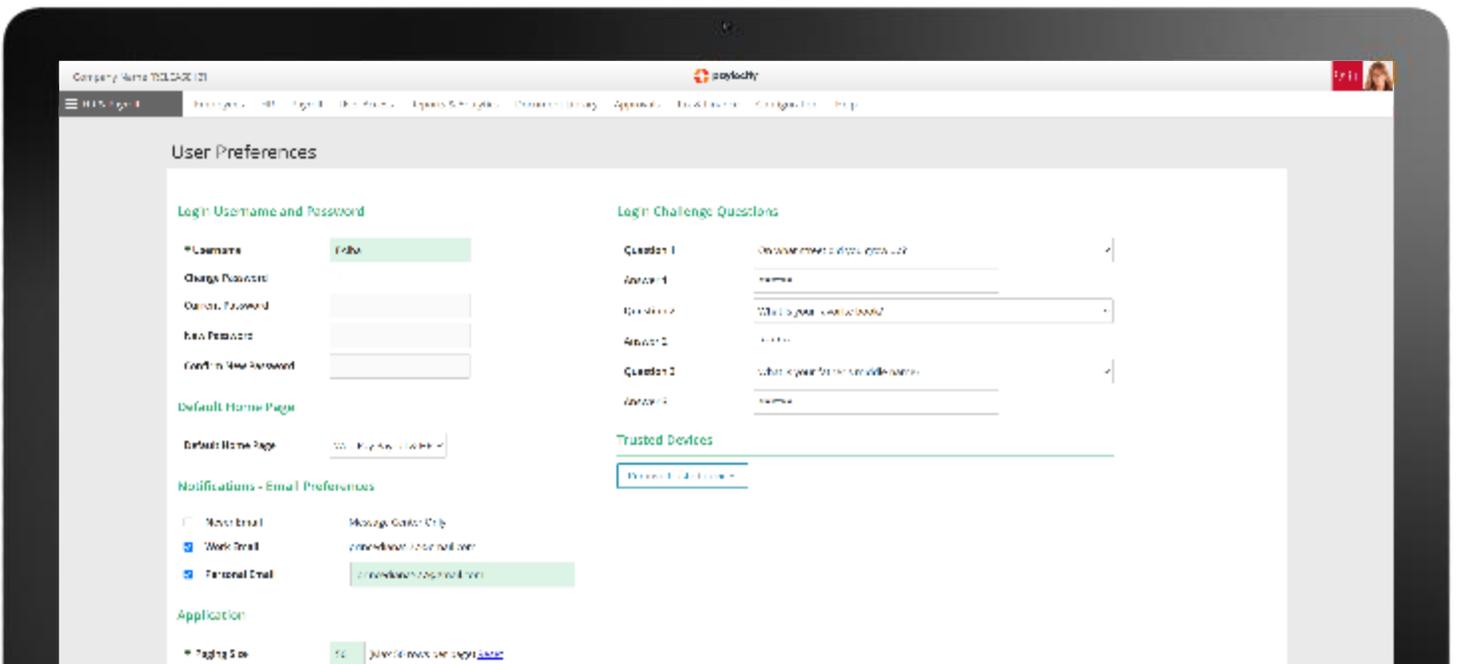
On your desktop, go to the **HR & Payroll** main menu and select **Preferences** from the **User Access** dropdown.



If you check **Never Email**, you will only receive notifications through your Message Center.



If you prefer notifications by email, select **Work Email** and/or **Personal Email**.





# Login Help

Forgot your password, username, or Company ID? It happens! Get back online in no time directly from your desktop or mobile device.



In the app or your desktop, select **Help** in the upper right of the screen. Then select **Forgot Password, Forgot Username, or Forgot Company ID.**



Follow the prompts, then select **Continue** to trigger a one-time passcode to be sent via text or email.



Enter the **One-Time Passcode** and select **Continue** to choose a new **Password/ Username.**



Select **Finish** and you're back in business.

