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REDEFINING THE WORLD OF PAYROLL + HR

Revised 10/23/2015

# WEB PAY EMPLOYEE GUIDE

Client Resource

[WWW.PAYLOCITY.COM](http://WWW.PAYLOCITY.COM)

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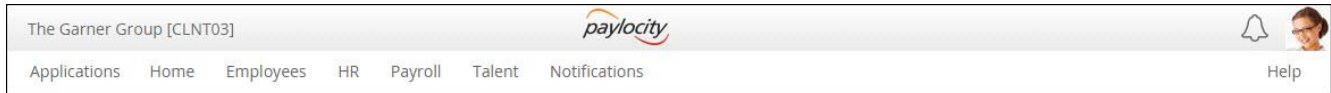
## WEB PAY

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

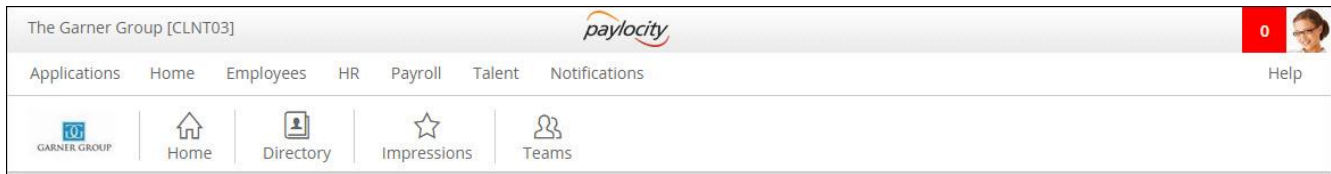
Users may not have access to all of the options described in this guide. Each company determines which options are available and each user's security group determines the display of information.

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

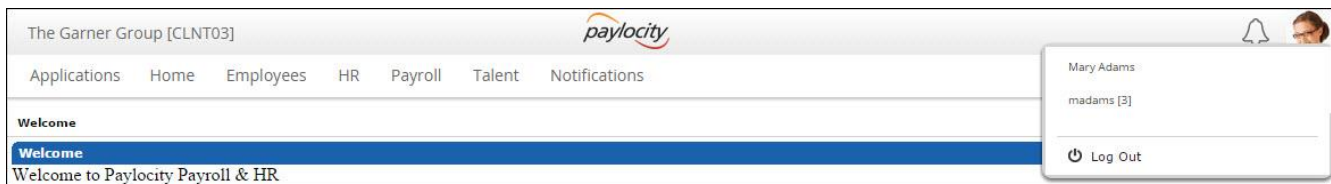
- Click the Paylocity logo in the middle of the header to return to the default home page.
- Access messages in the header section of the screen. The bell indicates there are no messages. When there are messages, the red box displays the number of messages.
- Click **Help** to view help text for each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



- Use the self service portal or the menus across the top of the application to navigate through Web Pay.
- Select **Self Service Portal** from the Applications menu.
- 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.

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

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

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

**Message Details**

**Congratulations, You've been Recognized with an Impression!**

Date	08/07/2014 - 11:20 AM (CST)	Category	Peer Recognition
To	Employee	Send Notification	Occurrence

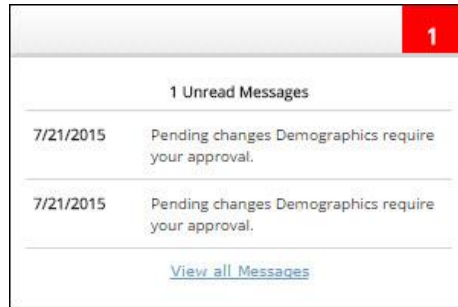
Marie Adams,  
 Congratulations, Julian Atwood has submitted an Impression for you!  
 Click this [link](#) to view your Impression.  
 Regards  
 Company: CLNT04 - The Garner Group

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



## MESSAGES

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



## EVENT NOTIFICATION

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

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

Message Details			
Verify Reading and Accepting Confidentiality Statement			
Date	09/10/2015 - 11:10 AM (CST)	Category	Employee Event
To	Employee	Send Notification	Occurrence
Hello, Please verify that you have read agree with the company's confidentiality statement.  Thank You, The HR Team  <b><u>Please access the event here</u></b>  Company: CLNT03 - The Gamer Group			
<a href="#">Print</a> <a href="#">Keep as Unread</a> <a href="#">Return</a>			

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

## Confidentiality Agreement

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

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### Acceptance

Did you read the company's confidentiality requirement?

Yes

No

*X Marie Adams*

---

Marie Adams


[Draw Signature](#)

Sign Here

[Return to Portal](#)

### SIDEBAR MENU

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



Company Id

Username

Password

Remember My Credentials


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


Info ⋮


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

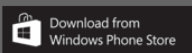
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**Download our Mobile App**

GET IT ON  


 Download on the  
**App Store**

 Available at  
**amazon**



 Download from  
Windows Phone Store

## 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 

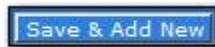
### **Saving Information**

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

Save the updated information and remain on the current screen.



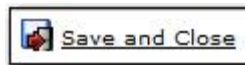
Save the updated information and open a new screen to add additional information.



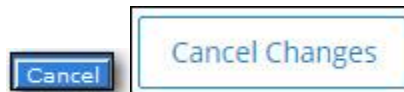
Save the updated information and return to the previous screen.



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.

Are you sure you want to leave this page?

Message from webpage:

All unsaved changes will be lost!

→ Leave this page

→ Stay on this page

Confirm Navigation



Your changes will not be saved.

Are you sure you want to leave this page?

Leave this Page

Stay on this Page

## SORTING

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

Time Off History									
Transaction Date From					Time Off Type	-- All --			
Transaction Date To					Transaction Type	-- All --			
Begin Date From								Show Totals?	
Begin Date To					Transaction Subtype	-- All --			
Search	Show All	Reset					Save Search		
Trans Date	Begin Date	Type	Trans Type	Subtype	Hours/Days	Avail Hours/Days	\$	Available \$	
08/16/2013	08/16/2013	PERS	Earned	Ongoing	0.00 Hours	0.00 Hours			
08/16/2013	08/16/2013	SICK	Earned	Ongoing	0.00 Hours	0.00 Hours			
08/16/2013	08/16/2013	VAC	Earned	Ongoing	4.62 Hours	204.62 Hours	\$69.23	\$3,069.23	
08/16/2013	08/16/2013	VAC	Cleared	Above carry over maximum	100.00 Hours	200.00 Hours	\$1,500.00	\$3,000.00	
08/16/2013	08/16/2013	SICK	Cleared		0.00 Hours	0.00 Hours			
08/16/2013	08/16/2013	PERS	Cleared		0.00 Hours	0.00 Hours			
01/18/2013	01/18/2013	VAC	Earned	Ongoing	0.00 Hours	300.00 Hours	\$0.00	\$4,500.00	
06/15/2012	06/15/2012	VAC	Earned	Ongoing	4.62 Hours	241.54 Hours	\$69.23	\$3,623.08	
06/01/2012	06/01/2012	VAC	Earned	Ongoing	4.62 Hours	236.92 Hours	\$69.23	\$3,553.85	
05/18/2012	05/18/2012	VAC	Earned	Ongoing	4.62 Hours	232.31 Hours	\$69.23	\$3,484.62	
05/04/2012	05/04/2012	VAC	Earned	Ongoing	4.62 Hours	227.69 Hours	\$69.23	\$3,415.39	
04/20/2012	04/20/2012	VAC	Earned	Ongoing	4.62 Hours	223.08 Hours	\$69.23	\$3,346.16	

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

Time Off History									
Transaction Date From					Time Off Type	-- All --			
Transaction Date To					Transaction Type	-- All --			
Begin Date From								Show Totals?	
Begin Date To					Transaction Subtype	-- All --			
Search	Show All	Reset					Save Search		
Trans Date	Begin Date	Type	Trans Type	Subtype	Hours/Days	Avail Hours/Days	\$	Available \$	
12/21/2012	12/21/2012	VAC	Earned	Ongoing	3.08 Hours	300.00 Hours	\$46.15	\$4,500.00	
01/04/2013	01/04/2013	VAC	Earned	Ongoing	0.00 Hours	300.00 Hours	\$0.00	\$4,500.00	
01/18/2013	01/18/2013	VAC	Earned	Ongoing	0.00 Hours	300.00 Hours	\$0.00	\$4,500.00	
11/30/2012	11/30/2012	VAC	Earned	Ongoing	4.62 Hours	296.92 Hours	\$69.23	\$4,453.85	
11/16/2012	11/16/2012	VAC	Earned	Ongoing	4.62 Hours	292.31 Hours	\$69.23	\$4,384.62	
11/02/2012	11/02/2012	VAC	Earned	Ongoing	4.62 Hours	287.69 Hours	\$69.23	\$4,315.39	
05/18/2012	05/18/2012	VAC	Earned	Ongoing	4.62 Hours	232.31 Hours	\$69.23	\$3,484.62	
05/04/2012	05/04/2012	VAC	Earned	Ongoing	4.62 Hours	227.69 Hours	\$69.23	\$3,415.39	
04/20/2012	04/20/2012	VAC	Earned	Ongoing	4.62 Hours	223.08 Hours	\$69.23	\$3,346.16	
04/06/2012	04/06/2012	VAC	Earned	Ongoing	4.62 Hours	218.46 Hours	\$69.23	\$3,276.92	
02/17/2006	02/17/2006	VAC	Transferred		60.00 Hours	216.00 Hours	\$0.00	\$0.00	
03/23/2012	03/23/2012	VAC	Earned	Ongoing	4.62 Hours	213.85 Hours	\$69.23	\$3,207.69	
03/09/2012	03/09/2012	VAC	Earned	Ongoing	4.62 Hours	209.23 Hours	\$69.23	\$3,138.46	
02/10/2012	02/10/2012	VAC	Earned	Ongoing	4.62 Hours	206.92 Hours	\$69.23	\$3,133.85	

## 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.

The screenshot displays the Message Center interface. At the top, there are search filters: Unread Only (checkbox), Subject (text input), From Date (dropdown), Category (Peer Recognition dropdown), To Date (dropdown), Email Sent? (dropdown), and Priority (All dropdown). Below the filters are buttons for Search, Show All, and Reset. The main area shows a list of messages with columns for Received (CST), Priority, Subject, Category, and Email?. The messages are as follows:

Received (CST)	Priority	Subject	Category	Email?
<input checked="" type="checkbox"/> 03/07/2014 - 1:34 PM	High	Congratulations, You've been Recognized with an Impression!	Peer Recognition	
<input type="checkbox"/> 03/07/2014 - 1:31 PM	High	Your Impression for Julian Atwood has been Approved!	Peer Recognition	
<input type="checkbox"/> 03/07/2014 - 1:31 PM	High	Your Impression for Robert April has been Approved!	Peer Recognition	
<input type="checkbox"/> 03/07/2014 - 1:30 PM	High	Your Impression for Laurie Black has been Approved!	Peer Recognition	
<input type="checkbox"/> 02/26/2014 - 12:29 PM	High	Your Impression for Tobias Harrison has been Approved!	Peer Recognition	

At the bottom left, there is a Delete button.

## SELF SERVICE PORTAL


### *SELF SERVICE PORTAL*

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





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

Use the self service portal to manage Web Pay information.

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

The Garner Group [CLNT03] paylocity 0 

Applications Home Employees HR Payroll Talent Notifications Help

 Home  Directory  Impressions  Teams

### Company

[Who Are We?](#)  
[Garner Group](#)

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### News

Please check your W-2 forms.

[Picnic](#)  
[Fun Run](#)

---

### Career

[Apply for Open Position](#)  
[Advanced HR Reviews](#)  
[Skills](#)  
[Education](#)  
[Reviews](#)

---

### Employment

[Employee Status](#)  
[Dept / Position](#)  
[Work Location](#)  
[Eligibility](#)  
[Authorization Tracking](#)  
[Previous Employment](#)  
[Employment History](#)  
[Events](#)  
[Company Property](#)

---

### Application

[User Preferences](#)  
[Employee Training Documents](#)  
[About](#)  
[Glossary](#)

### Personal

Welcome back! You were last here on August 12, 2015.

[Personal Information](#) Less

[Personal Information](#)  
[Employee Profile](#)  
[Demographics](#)  
[Dependents](#)  
[Emergency Contacts](#)

---

### Time Off


Type	Balance	Used	Availabl
<a href="#">PERS - Personal</a>	0.00 Hours	0.00 Hours	0.00 Ho
<a href="#">SICK - Sick</a>	0.00 Hours	0.00 Hours	0.00 Ho
<a href="#">VAC - Vacation</a>	-0.62 Hours	0.00 Hours	-0.62 Ho

[Time Off History](#) Less

[Setup & Balance](#)  
[Time Off History](#)  
[Leave Tracking](#)  
[Time Off Documents](#)  
[Submit Time Off Request](#)  
[Time Off Request History](#)

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### Benefits

  
YTD Compensation

[Manage my Benefits](#) Less

[Deduction Amounts](#)  
[Dependents](#)  
[Retirement Plans](#)  
[Insurance Plans](#)  
[Benefits Setup](#)

### Compensation

[View Current Check](#)

Date	Check #	Net Amount	Dir Dep
<a href="#">11/04/2014</a>	207	hidden	
<a href="#">08/16/2013</a>	102165	hidden	✓

[Check History](#) Less

[Direct Deposit Accounts](#)  
[Change Federal or State Tax Exemptions](#)  
[Current Check](#)  
[Check History](#)  
[W2](#)  
[Rates](#)  
[Taxes](#)  
[Earnings](#)  
[Deductions](#)  
[Direct Deposit](#)  
[Labor Allocation](#)  
[Check Calculator](#)

---

### Time Entry

Clocked in since 05:32 PM on 05/14/2015

37

# 11:31

CST AM

Notes

[Clock In](#)

[Clock Out](#)

[Transfer](#)

[Manual](#)

[Launch Time & Attendance](#)

**Smart Tip**  
Click **Launch Time & Attendance** from the Time Entry card to access Web Time.



## APPLY FOR AN OPEN POSITION

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

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

Apply for an open position	
Open Position	Internal Trainer [INTRN]
Supervisor	
Application Status	
Application Date	

## CHANGE FEDERAL OR STATE TAX EXEMPTIONS

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

1. Select a **Filing Status** from the drop down.
2. Enter the number of exemptions in the **Exemption 1** field and in the **Exemption 2** field (*if applicable*).
3. The **Amount Type** defaults to Default Amount. If applicable, select another Amount Type from the drop down.
4. Enter an **Amount (\$)**. 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.

Tax	Filing Status	Exemption 1	Exemption 2	Amount Type	Amount (\$)	Percent (%)
FITW - Federal Income Tax	Single	5	0	Flat Dollar Amount	15.00	0
IL - Illinois SITW	Single	3	0	Default Amount	0	0

**Smart Tip**  
The **Percent (%)** field is enabled when a percentage Amount Type is selected from the drop down.

### Important Notes

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



## COMPANY NEWS ITEMS

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

The screenshot shows the 'Company News' interface. At the top, there is a search bar with 'All News Items' selected. Below it are filters for 'Publish Date', 'End Date', 'Topic' (set to '-- All --'), and 'Headline'. A 'Search' button is on the left, and a 'Save Search' button is on the right. Below the search bar is a table with the following data:

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

At the bottom right of the table, there is a 'Records: 3' indicator.

## 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.

The screenshot shows the 'Deduction Amounts' screen. It features a table with the following data:

Deduction	Frequency	Calculation	Amount or Percentage
401K - 401(k) Traditional		Percentage of Gross	5.00
401L - 401(k) Loan		Flat Amount	25.00
INSDN - Dental Insurance		Flat Amount	24.00
INSHM - HMO Medical		Flat Amount	90.00

Below the table are buttons for 'Save' and 'Save and Close'. At the bottom, there is a link for 'View Full Deductions List'.

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

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

The screenshot shows the 'Deduction Amounts' screen with the '401K - 401(k) Traditional' deduction selected and edited. The table now shows:

Deduction	Frequency	Calculation	Amount or Percentage
401K - 401(k) Traditional		Percentage of Gross	7.00
INSDN - Dental Insurance		Flat Amount	18.00
INSHM - HMO Medical		Flat Amount	60.00

The 'Calculation' dropdown is set to 'Percentage of Gross' and the 'Amount or Percentage' is 7.00. The 'Save' and 'Save and Close' buttons are visible at the bottom.

## 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.

**Dependents** Add New Dependent

**Dependent**

Last Name  
First Name  
Middle Name  
Relationship -- Select --  
Gender -- Select --  
Birth Date  
SSN

**Address** Stay in sync with Employee Information

Address 1  
Address 2  
City / State / Zip  
Country UNITED STATES  
County / Province

**Emergency Contact**

Emergency Contact?   
Priority  Primary  Secondary  
Primary Phone -- Select --  
Notes

**Other Contact Information**

Home Phone  
Email  
Work Phone Ext  
Mobile Phone  
Pager

**Student**

Full Time Student?

Save Save and Close Delete

**Smart Tip**  
To edit or delete a dependent, select the dependent from the drop down.

## 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.

**Direct Deposit Accounts**
Add New Direct Deposit Account  
Savings - Bank Of America, N.A. [898435]  
Checking - Citibank NA [92956624]

I hereby authorize my employer to deposit or adjust any amounts owed to me by initiating entries to my account at the financial institution.

**Bank Account**

Account Type:

Routing Number:

Account Number:

Bank Name:

Name on Account:   
Name should match the name on file with your banking institution

**Additional Deposit Account**

Amount Type:

Amount:

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

DATE \_\_\_\_\_

PAY TO THE ORDER OF \_\_\_\_\_ \$ \_\_\_\_\_ DOLLARS

Your Bank  
Your Town, IL 61000

MEMO \_\_\_\_\_

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

**Smart Tip**

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

Save
Save and Close
Delete

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

Routing	Account	Type	Bank Name
021000089	92956624	Checking	Citibank NA

**Additional Deposit Account(s)**

<input type="radio"/>	Routing	Account	Type	Bank Name	Amount
<input checked="" type="radio"/>	081904808	898435	Savings	Bank Of America, N.A.	\$75.00

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

\$ **Direct Deposit Accounts**
Add New Direct Deposit Account

Direct Deposit Account order successfully changed!

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

**Bank Account**

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

**Additional Deposit Account**

- Amount Type
- Amount

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

Date

PAY TO THE ORDER OF  \$   
 \_\_\_\_\_ DOLLARS

**Your Bank**  
 Your Town, IL 61000

MEMO

@123456789@ @1234567@ 1234

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

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


Routing	Account	Type	Bank Name
071000013	889092745	Checking	Jpmorgan Chase Bank, NA

**Additional Deposit Account(s)**

<input type="checkbox"/>	Routing	Account	Type	Bank Name	Amount	<input type="button" value="v"/>
<input checked="" type="checkbox"/>	071000013	1234	Savings	Jpmorgan Chase Bank, NA	\$50.00	<input type="button" value="v"/>
<input type="checkbox"/>	071000013	132910	Checking	Jpmorgan Chase Bank, NA	\$175.00	<input type="button" value="v"/>

## EDIT EMPLOYEE PROFILE

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



Click to Change

## Marie Adams

Save Profile Changes

Preview

View

Employee Profile   Personal Information   User Preferences

Resume

No Resume Uploaded

Upload Resume

About Me Characters remaining 1957

I have worked for the company for 10 years.

Schools / Education

Add

Baylor University
Class Of


✖
📄

Skills / Expertise

Add

Microsoft Excel X
Spanish X

Interests

Activities/Fitness

Hobbies

Travel

Music

Movies/TV

Sports Teams

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

**Important Notes**

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

### HIDE OR DISPLAY THE NET AMOUNT

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

Date	Check #	Net Amount	▲	Dir Dep
<a href="#">11/14/2014</a>	103006	\$615.08		✓
<a href="#">11/07/2014</a>	102992	\$615.07		✓

Date	Check #	Net Amount	▼	Dir Dep
<a href="#">11/14/2014</a>	103006	hidden		✓
<a href="#">11/07/2014</a>	102992	hidden		✓

### NEWS ITEM

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

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

The screenshot shows a window titled "News Item" with a close button (X) in the top right corner. On the left, there is a "Latest News" section with a thumbnail for "Linux in World". The main content area features a blue header "Benefits Enrollment Ends Soon" with a sub-header "Benefits Enrollment Ends Soon". Below this, the "Publish Date" is listed as "11/12/2014" and the "Posted By" is "Alba, Emily". The main text of the article reads: "Benefits enrollment must be completed by Monday." At the bottom of the window, there is a blue bar labeled "External links and attachments".



## PERSONAL INFORMATION

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

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

Employee Profile

About Mary >

Return to Portal

Details | Contact | Social

First Name (required): Mary

Last Name (required): Adams

Middle Name: E

Title: Mr, Mrs, Ms, etc

Suffix: -- select --

Preferred First Name:

Prior Last Name: Twilliger

**Personal**

Social Security Number / EIN: 455-78-4125

Marital Status: Married

Birth Date: 08/06/1973 (Age 42)

Disability:

Ethnicity: White

Sex:  Female  Male

Save | Cancel Changes

**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.

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



- Contact

**Employee Profile**

About Mary >

Return to Portal

Details | **Contact** | Social

**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.

**Phone & Email**

Work Phone: (847) 555-1234 | Extension: 548 | Work Email: madams@email.com

Home Phone: (847) 254-2011 | Personal Email: madams@myemail.com

Mobile Phone: (224) 987-3456

Save | Cancel Changes

**Address**

**Home**  
3117 Ashbard Lane  
Arlington Heights, Lake, IL 60005  
United States

**Work**  
3850 N Wilke Rd  
ARLINGTON HEIGHTS, COOK, IL 60004  
United States

**Emergency Contacts**

+ Add Contact

EA  
★ Ed  
Spouse

JM  
★ Judy  
Mother-in-Law  
H: (312) 555-8752

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

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

## New Emergency Contact ✕

Priority (required)  
 Primary  Secondary

First Name (required)

Last Name (required)

Relationship (required)

Notes

Primary Phone

Home Phone

Mobile Phone

Work Phone  Extension

Email

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

# Employee Profile

About Mary >

Return to Portal

Details Contact **Social**



### About Me

[Empty text input area for 'About Me']

1999 Characters Remaining

Save Cancel Changes

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

### Connect

Type	URL	
Twitter	<a href="https://twitter.com/intent/user?user_id=17566709">twitter.com/intent/user?user_id=17566709</a>	✓ Connected ✕
Facebook		Connect
LinkedIn		Connect
Google+		Connect

## SUBMIT TIME OFF REQUESTS

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

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

Submit Time Off Request

Select Time Off Request Type

Request Type -- Select --

Optionally Enter Employee Comments

Employee Comments

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

Single Day Multiple Days Include Weekends?

Start Date

End Date

Hours Per Day 8.00

Start Time AM

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

Save and Add New Save and Close

Discard changes and go to the Time Off Request History

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

## UPLOAD NEW PROFILE IMAGE

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

Upload New Profile Image

Use Default Image

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

Employee Profile Personal Information

Click to Change

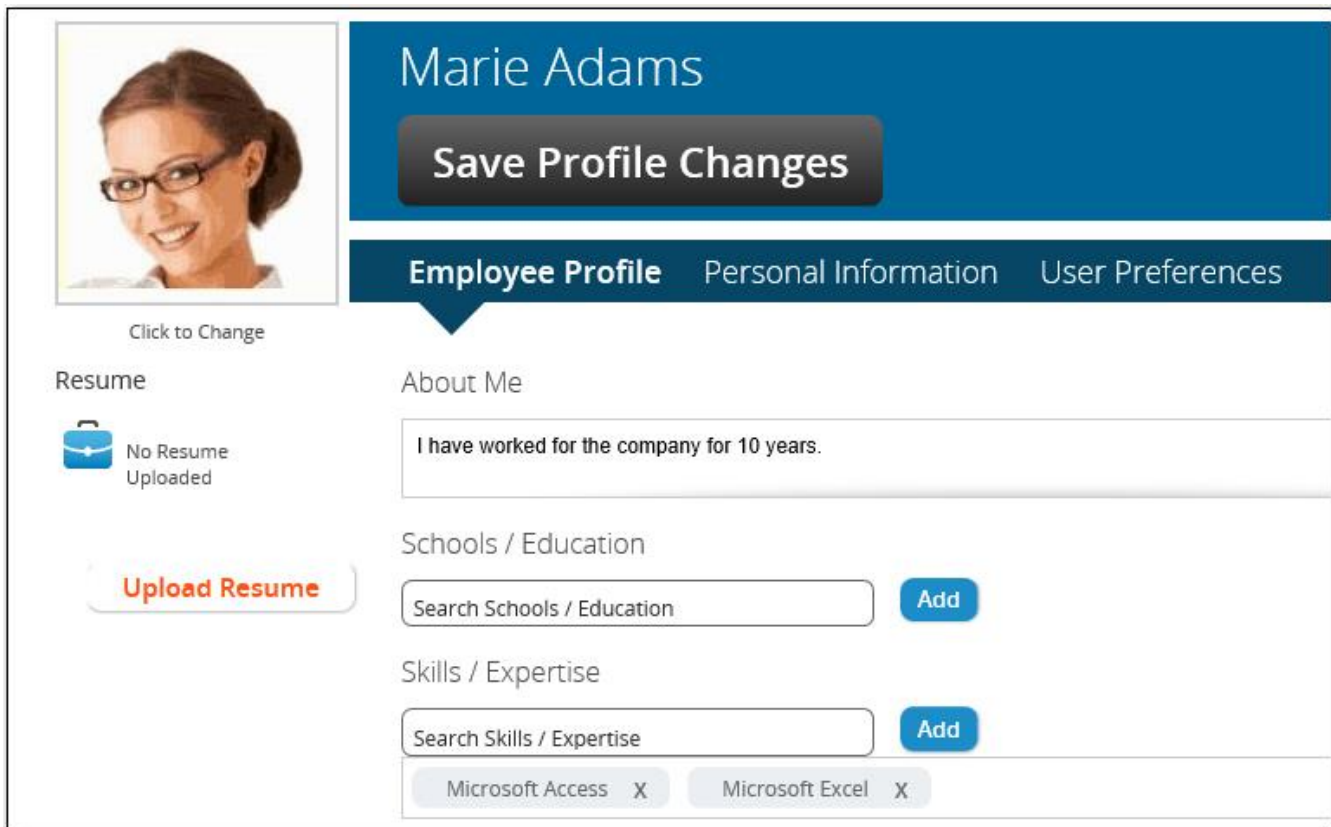
Resume

No Resume Uploaded

About Me

## UPLOAD RESUME

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



Marie Adams

Save Profile Changes

Employee Profile Personal Information User Preferences

Click to Change

Resume

No Resume Uploaded

Upload Resume

About Me

I have worked for the company for 10 years.

Schools / Education

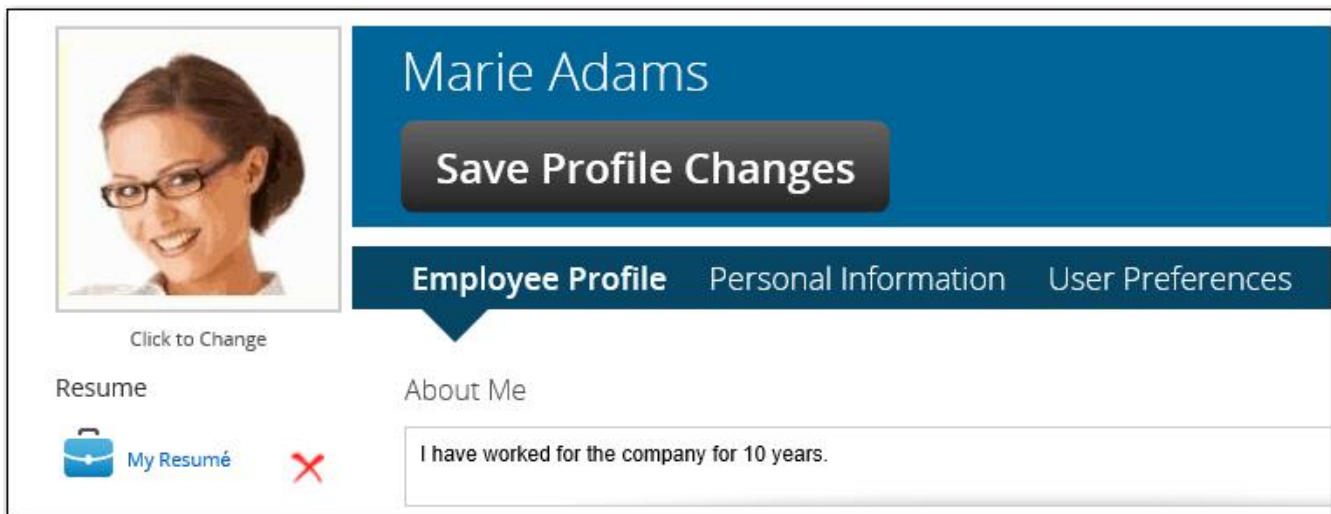
Search Schools / Education Add

Skills / Expertise

Search Skills / Expertise Add

Microsoft Access X Microsoft Excel X

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



Marie Adams

Save Profile Changes

Employee Profile Personal Information User Preferences

Click to Change

Resume

My Resumé X

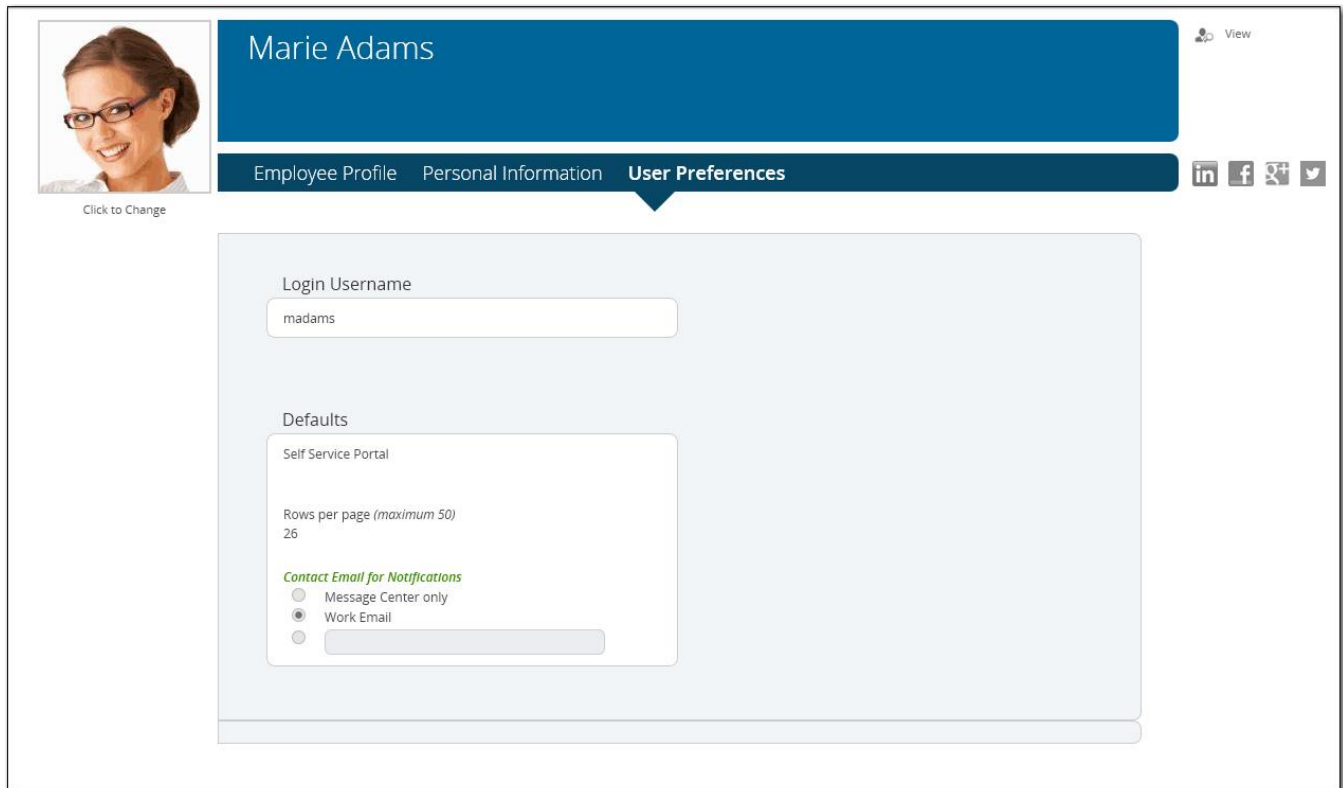
About Me

I have worked for the company for 10 years.

## USER PREFERENCES

View preferences. Add or edit profile information.

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



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

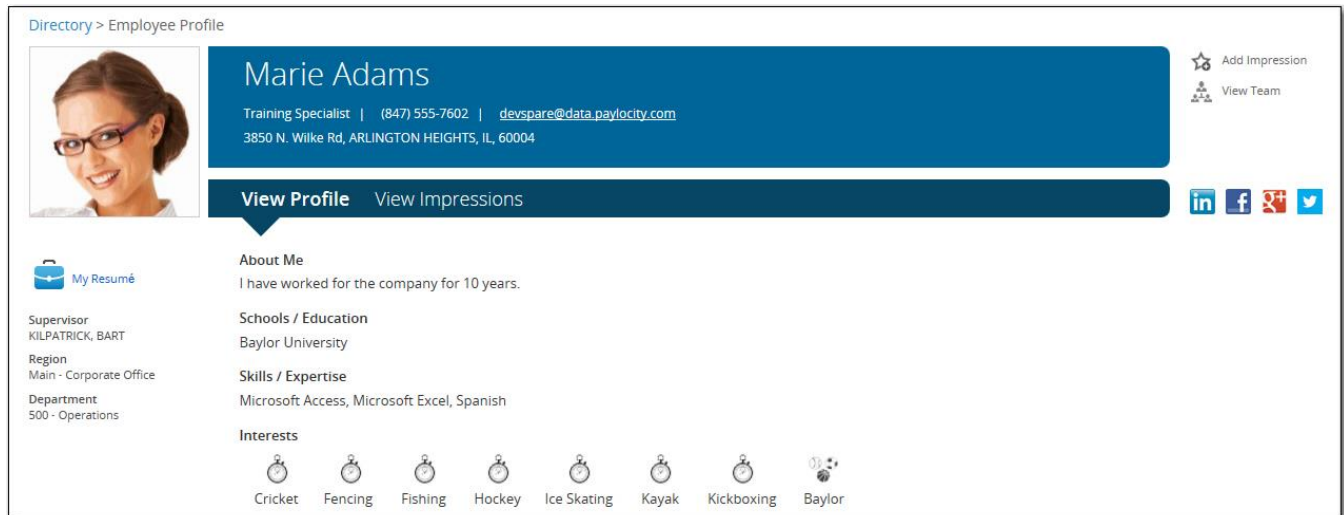
- Login Username:** A text input field containing 'madams'.
- Defaults:**
  - Self Service Portal:** A text input field.
  - Rows per page (maximum 50):** A text input field containing '26'.
  - Contact Email for Notifications:** A section with three radio button options:
    - Message Center only
    - Work Email
    - [Empty text input field]

## 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.

Directory > Employee Profile



The screenshot shows the employee profile for Marie Adams. At the top left is a profile picture of Marie Adams, a woman with glasses. To the right of the picture is her name 'Marie Adams' in a large font, followed by her title 'Training Specialist', phone number '(847) 555-7602', and email 'devspare@data.paylocity.com'. Below this is her address: '3850 N. Wilke Rd, ARLINGTON HEIGHTS, IL, 60004'. To the right of the profile information are two buttons: 'Add Impression' (with a star icon) and 'View Team' (with a group of people icon). Below the profile information is a dark blue bar with two buttons: 'View Profile' and 'View Impressions'. To the right of this bar are social media icons for LinkedIn, Facebook, and Twitter. Below the profile information is a 'My Resume' button. To the left of the 'About Me' section are several key-value pairs: Supervisor (KILPATRICK, BART), Region (Main - Corporate Office), and Department (500 - Operations). The 'About Me' section contains the text 'I have worked for the company for 10 years.' Below this are sections for 'Schools / Education' (Baylor University), 'Skills / Expertise' (Microsoft Access, Microsoft Excel, Spanish), and 'Interests' (Cricket, Fencing, Fishing, Hockey, Ice Skating, Kayak, Kickboxing, Baylor). Each interest is represented by a small icon.

Marie Adams  
Training Specialist | (847) 555-7602 | [devspare@data.paylocity.com](mailto:devspare@data.paylocity.com)  
3850 N. Wilke Rd, ARLINGTON HEIGHTS, IL, 60004

[Add Impression](#)  
[View Team](#)

[View Profile](#) [View Impressions](#)

[My Resume](#)

Supervisor  
KILPATRICK, BART

Region  
Main - Corporate Office

Department  
500 - Operations

About Me  
I have worked for the company for 10 years.

Schools / Education  
Baylor University

Skills / Expertise  
Microsoft Access, Microsoft Excel, Spanish

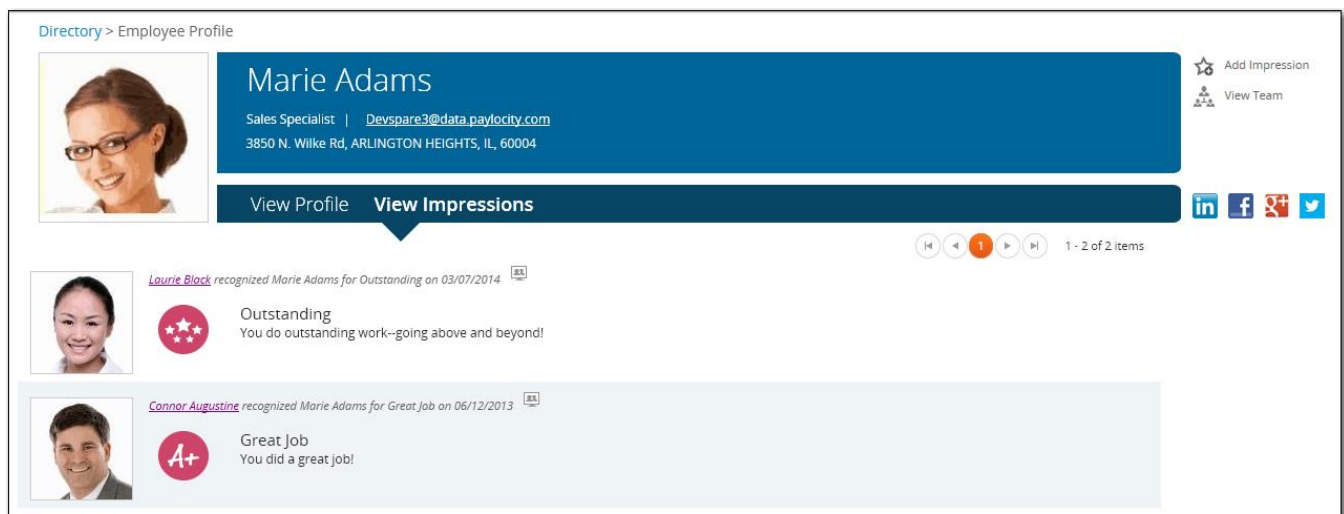
Interests  
Cricket Fencing Fishing Hockey Ice Skating Kayak Kickboxing Baylor

## 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.

Directory > Employee Profile



The screenshot shows the employee profile for Marie Adams, similar to the previous one, but with the 'View Impressions' button highlighted. Below the profile information is a pagination bar with a left arrow, a red circle containing the number '1', a right arrow, and the text '1 - 2 of 2 Items'. Below the profile information are two impression badges. The first badge is from Laurie Block, dated 03/07/2014, with a red star icon and the text 'Outstanding You do outstanding work--going above and beyond!'. The second badge is from Connor Augustine, dated 06/12/2013, with a red 'A+' icon and the text 'Great Job You did a great job!'. To the right of the impression badges are social media icons for LinkedIn, Facebook, and Twitter.

Marie Adams  
Sales Specialist | [Devspare3@data.paylocity.com](mailto:Devspare3@data.paylocity.com)  
3850 N. Wilke Rd, ARLINGTON HEIGHTS, IL, 60004

[Add Impression](#)  
[View Team](#)

[View Profile](#) [View Impressions](#)

1 - 2 of 2 Items

[Laurie Block](#) recognized Marie Adams for Outstanding on 03/07/2014

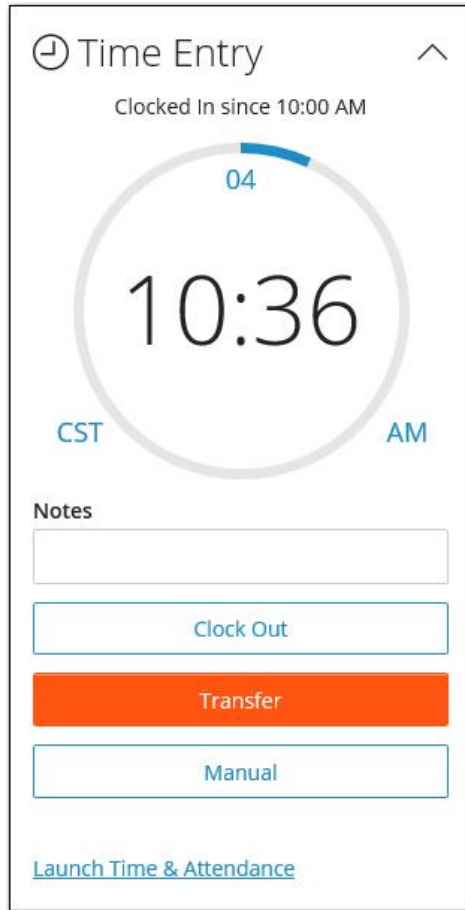
Outstanding  
You do outstanding work--going above and beyond!

[Connor Augustine](#) recognized Marie Adams for Great Job on 06/12/2013

Great Job  
You did a great job!

## WEB TIME

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



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

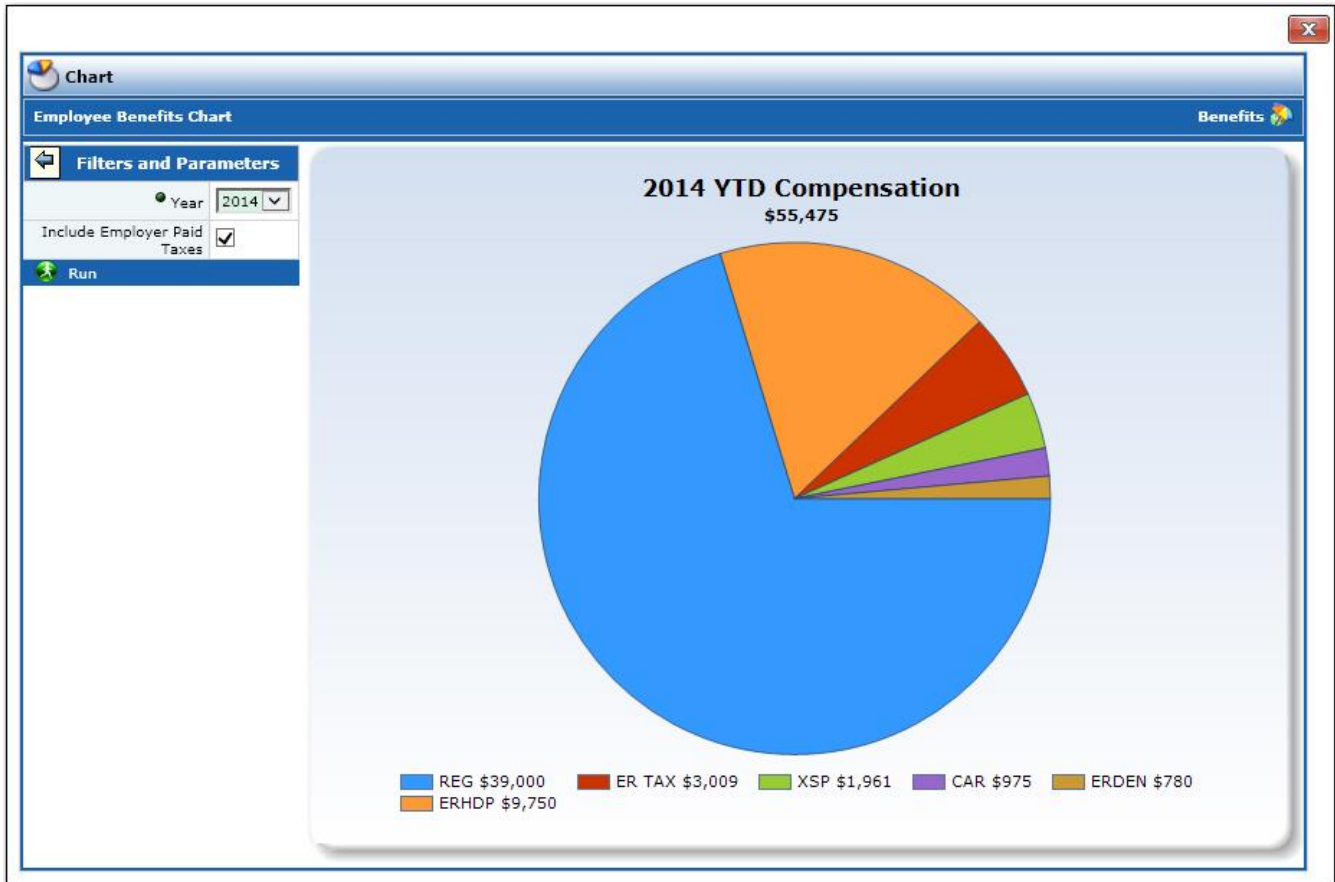




## YEAR TO DATE COMPENSATION

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

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



### Important Notes

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

## HOME

## ABOUT

View product information and system requirements.

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

About	
Application	Paylocity Payroll + HR
Version	15.3.7.180
Web Server	demo.paylocity.com / DEMO000WEB1
Environment	Escher
Company ID	CLNT03
Product Type	
Product Type	Web Pay Entry
Licensed Users	1000000
System Requirements	
Recommended Browsers	Internet Explorer 8.0+ Firefox 3.0+ Chrome 8.0+ Safari 5.0+ Opera 10.0+
JavaScript	Required and Enabled - Version 1.1+
Cookies	Required and Enabled
SSL	Required
Adobe Reader	Required to view printable version of Employee Checks and some Reports: Click <a href="#">here</a> to download the latest version.
<a href="#">Verify your system setup</a>	

## COPYRIGHT

View copyright information.

Copyright		
Paylocity Web Pay is Copyright © by Paylocity Corporation 2003 - 2015. All rights reserved.		
Open Source List		
Product	Owner / Distributor	Available At
AutoMapper	Jimmy Bogard	<a href="https://github.com/AutoMapper/AutoMapper/blob/master/LICENSE.txt">https://github.com/AutoMapper/AutoMapper/blob/master/LICENSE.txt</a>
ClosedXML	Manuel De Leon	<a href="https://closedxml.codeplex.com/license">https://closedxml.codeplex.com/license</a>
Enyim.Caching	Robert Mircea	<a href="https://github.com/enyim/EnyimMemcached">https://github.com/enyim/EnyimMemcached</a>
ExcelDataReader	ExcelDataReader	<a href="https://exceldatareader.codeplex.com/license">https://exceldatareader.codeplex.com/license</a>
FastMember	Marc Gravell	<a href="https://www.nuget.org/packages/FastMember">https://www.nuget.org/packages/FastMember</a>
FJCore	Occipital Open Source	<a href="http://code.google.com/p/fjcore/">http://code.google.com/p/fjcore/</a>
Independent JPEG Group Software	Thomas G. Lane	<a href="http://code.google.com/p/fjcore/">http://code.google.com/p/fjcore/</a>
Java Advanced Imaging IO	Sun Microsystems	<a href="http://code.google.com/p/fjcore/">http://code.google.com/p/fjcore/</a>
Jayrock	Atif Aziz	<a href="http://jayrock.berlios.de/">http://jayrock.berlios.de/</a>
jQuery	The jQuery Foundation	<a href="http://jquery.com/">http://jquery.com/</a>
jQuery Print Element plug-in	Erik Zaadi	<a href="http://projects.erikzaadi.com/iQueryPlugins/iQuery.printElement/">http://projects.erikzaadi.com/iQueryPlugins/iQuery.printElement/</a>
jQuery Templates Plugin	Software Freedom Conservancy, Inc.	<a href="http://github.com/jquery/jquery-tmpl">http://github.com/jquery/jquery-tmpl</a>
JSON-js	Douglas Crockford	<a href="https://github.com/douglascrockford/JSON-js/">https://github.com/douglascrockford/JSON-js/</a>
Knockout	Steven Sanderson	<a href="http://knockoutjs.com/">http://knockoutjs.com/</a>
LiquidControls	VectorLight.Net	<a href="http://www.vectorlight.net/default.aspx">http://www.vectorlight.net/default.aspx</a>
Log4net	Apache	<a href="http://logging.apache.org/log4net/">http://logging.apache.org/log4net/</a>
Newtonsoft.Json	James Newton-King	<a href="https://github.com/chrisnr/Newtonsoft.Json">https://github.com/chrisnr/Newtonsoft.Json</a>
Quartz.NET	Marko Lahma	<a href="http://www.quartz-scheduler.net/license.html">http://www.quartz-scheduler.net/license.html</a>
Style	Todd Fahrmer	<a href="http://style.tigris.org/">http://style.tigris.org/</a>
Thinkecture.IdentityModel	Thinkecture	<a href="http://identitymodel.codeplex.com/">http://identitymodel.codeplex.com/</a>
Thinkecture.IdentityServer	Thinkecture	<a href="http://startersts.codeplex.com">http://startersts.codeplex.com</a>
Web Protection Library	Microsoft	<a href="http://wpl.codeplex.com/">http://wpl.codeplex.com/</a>
WIX	Microsoft	<a href="http://wixtoolset.org/about/license/">http://wixtoolset.org/about/license/</a>

## 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.

The screenshot shows the Garner Group Directory interface. At the top, there are navigation icons for Home, Directory, Impressions, and Teams. A search bar is located in the top right corner. Below the navigation, there is a filter for 'Last Name' with a dropdown menu set to 'All' and a list of letters from A to Z. The main content area displays a table of employees with the following columns: Employee, Contact Info, Social Networks, and Actions. The table lists five employees: Marie Adams, Emily Alba, Sheppard Allerdyce, Robert April, and Julian Atwood. Each row includes a profile picture, name, phone number, email address, social network icons, and action buttons for Profile, Team, and Impression.

Employee	Contact Info	Social Networks	Actions
Marie Adams	phone: (847) 555-5555 email: <a href="mailto:madams@garnergroupp.com">madams@garnergroupp.com</a>		Profile  Team  Impression
Emily Alba	phone: (847) 555-5555 email: <a href="mailto:ealba@garnergroupp.com">ealba@garnergroupp.com</a>		Profile  Team  Impression
Sheppard Allerdyce	phone: (847) 555-5555 email: <a href="mailto:sallerdyce@garnergroupp.com">sallerdyce@garnergroupp.com</a>		Profile  Team  Impression
Robert April	phone: (847) 555-5555		Profile  Team  Impression
Julian Atwood	phone: (847) 555-5555 email: <a href="mailto:jatwood@garnergroupp.com">jatwood@garnergroupp.com</a>		Profile  Team  Impression

## SEARCH FILTER OPTIONS

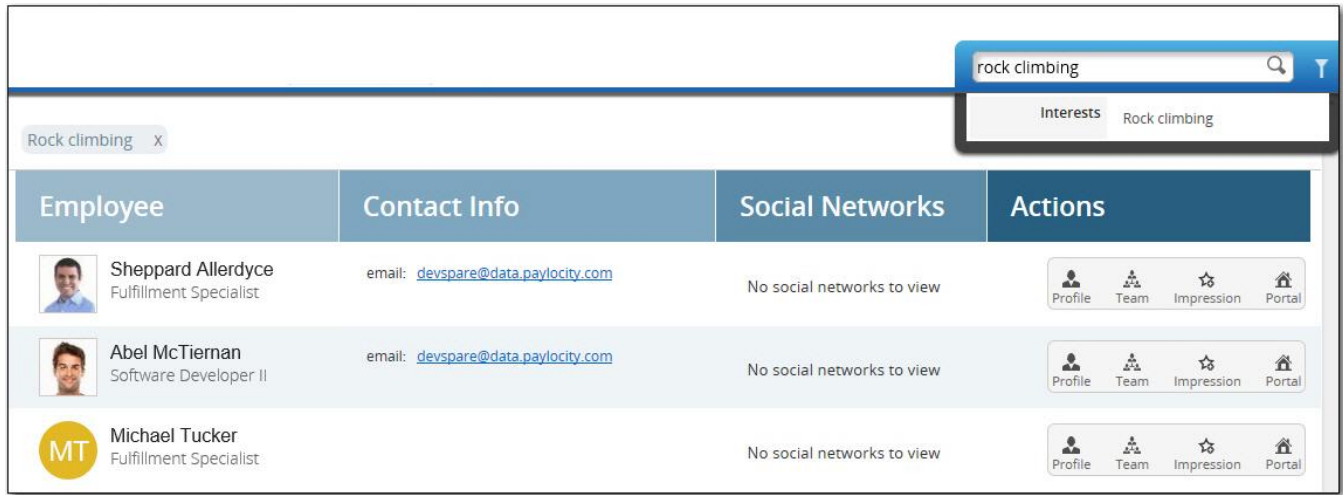
Search for employees in Web Pay self service and social collaboration.

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

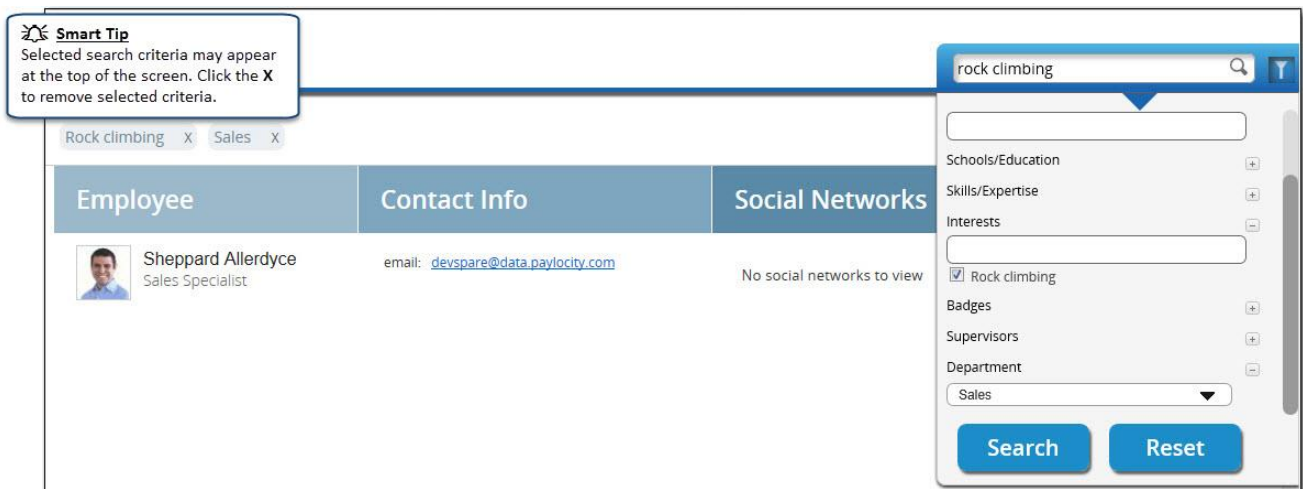
The screenshot shows the Garner Group Directory interface with the search filter set to 'K'. The 'Filter: Last Name' dropdown is set to 'K', and the list of letters below it has 'K' highlighted. The main content area displays a table of employees with the following columns: Employee, Contact Info, Social Networks, and Actions. The table lists four employees: Amir Khan, Bart Kilpatrick, Janel Kiowa, and Saul Koenig. Each row includes a profile picture, name, email address, social network information, and action buttons for Profile, Team, Impression, and Portal.

Employee	Contact Info	Social Networks	Actions
Amir Khan	email: <a href="mailto:devspare@data.paylocity.com">devspare@data.paylocity.com</a>	No social networks to view	Profile  Team  Impression  Portal
Bart Kilpatrick	email: <a href="mailto:devspare@data.paylocity.com">devspare@data.paylocity.com</a>	No social networks to view	Profile  Team  Impression  Portal
Janel Kiowa	email: <a href="mailto:devspare@data.paylocity.com">devspare@data.paylocity.com</a>	No social networks to view	Profile  Team  Impression  Portal
Saul Koenig	email: <a href="mailto:devspare@data.paylocity.com">devspare@data.paylocity.com</a>	No social networks to view	Profile  Team  Impression  Portal

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



- 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.

The screenshot displays the 'web pay' Impressions page. The navigation bar includes 'Home', 'Directory', 'Impressions', and 'Teams'. A search bar is located in the top right. Below the navigation bar, there are pagination controls showing '1 - 3 of 13 items'. A filter section is set to 'Last Name' with an alphabetical index from 'All' to 'Z'. Three employee profiles are visible:

- Marie Adams — Sales Specialist**: Recognized by Laurie Black for 'Outstanding' on 03/07/2014. The badge description is 'You do outstanding work--going above and beyond!'. Action buttons: Profile, Portal, Team.
- Laurie Black — Manager**: Recognized by Marie Adams for 'Mentor' on 03/07/2014. The badge description is 'You share your knowledge, skills, and experience as a mentor!'. Action buttons: Profile, Team, Impression.
- Tobias Harrison**: Recognized by Marie Adams for 'Top Gun' on 02/26/2014. The badge description is 'You generate top sales by bringing in the big money--winning new clients or deals!'. Action buttons: Profile, Team, Impression.

## 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.

The screenshot shows a web interface titled "Impressions" with a sub-header "Employee Impressions Badges". On the left, the employee profile for Robert April, Customer Service Specialist, is shown. Below the profile, there is a "Share with" dropdown menu set to "Share with everyone" and a "Provide Comments" text area containing the text "Great Job". A spell check icon is visible next to the text area. On the right, a grid of 16 impression badges is displayed, each with a unique icon and label. The "Great Job" badge, featuring a red circle with a white "A+", is highlighted with a grey border. At the bottom of the interface, there are two buttons: "Save" (orange) and "Close" (blue).

Communication	Customer Satisfaction	Efficiency	Get It Done
Great Job	Help	Innovation	Leadership
Mentor	Motivation	Outstanding	Presentation
Problem Solver	Team Player	Thanks	Top Gun



## GLOSSARY

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

### Glossary

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

## TEAMS

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

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

The screenshot displays the 'Teams' page in the 'web pay' system. The navigation bar at the top includes 'Home', 'Directory', 'Impressions', and 'Teams' (selected), along with a search bar. The main content area shows a team structure starting with Emily Alba, Vice President of Human Resources, who has 5 direct reports. Below her are six team members, each with a profile card showing their initials and name: Rebecca Bloom (RB), Darius Bell (DB), Magdalena Castillo, Blake O'Hara (BO), Abel McTiernan (with 2 direct reports), and Elijah Oppenheimer (EO). A 'My Team' icon is visible in the top right corner.

## PREFERENCES

1. Enter the **User Name**.
2. To change the password, check the **Change Password** box.
3. Enter the **Current Password**.
4. Enter the **New Password** and enter the new password a second time in the **Confirm New Password** field.
5. Select the **Default Home Page** at login.
6. 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.

The screenshot shows a web form with two main sections: "Login User Name and Password" and "Login Challenge Questions and Security Image".

**Login User Name and Password:**

- User Name: madams
- Change Password:
- Current Password: [blacked out]
- New Password: [blacked out]
- Confirm New Password: [blacked out]

**Default Home Page:**

- Default Home Page: Self Service Portal

**Notifications - Email Preferences:**

- Never Email:  Message Center Only
- Work Email: Devspare3@data.paylocity.com
- Personal Email: [blacked out]

**Application:**

- Paging Size: 10 (Max 50 rows per page) [Reset]

**Login Challenge Questions and Security Image:**

- Question 1: What is your favorite hobby? (Dropdown)
- Answer 1: Ice fishing
- Question 2: Who is your favorite artist? (Dropdown)
- Answer 2: Magritt3
- Question 3: Where did you meet your spouse? (Dropdown)
- Answer 3: Japanese class in North Hall
- Select Security Image: [Dropdown]
- Selected Security Image:
- Security Phrase: Mon3t and D3ga\$ and Magritt3

**Smart Tip:** Users 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.

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

This screenshot is identical to the previous one, but with a "Please Enter User Password" dialog box overlaid at the bottom. The dialog box contains a "Password" field with masked characters (dots) and "Save" and "Cancel" buttons.

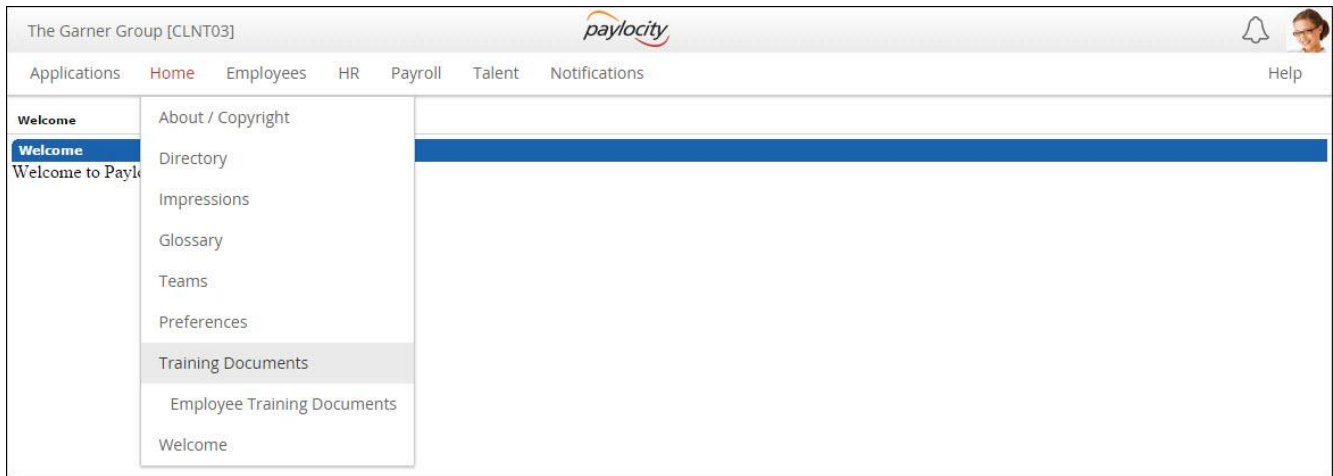
### Important Notes

- 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.

Name		Demographic Information	
Last Name	Adams	SSN / FEIN	987-65-4091
First Name	Marie	Birth Date	8/6/1973 Age 40
Middle Name	E	Gender	Female
Salutation		Ethnicity	White
Suffix	-- Select --	Marital Status	Married
Nickname		Smoker	<input type="checkbox"/>
Prior Last Name		Disability	
Address		Veteran	
Address 1	3117 Hubbard Lane	Personal Phone & Email	
Address 2		Home Phone	(847) 555-2011
City / State / Zip	Arlington Heights IL 60005	Mobile Phone	(224) 555-3456
Country	UNITED STATES	Email Address	personaladdress@yahoo.com
County / Province	Lake		
Additional Address			
Additional Address Type	-- Select --		
Additional Address Country	-- Select --		
<input type="button" value="Save"/>			

### Important Notes

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

## IN THE ADDRESS SECTION

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

### Important Notes

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

## DEPENDENTS

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

Dependents						
<input checked="" type="checkbox"/>	Last Name	First Name	Relationship	Gender	SSN	Birth Date
<input type="checkbox"/>	Adams	Ben	Son	Male	987-65-4309	03/20/1999
<input type="checkbox"/>	Adams	Ed	Husband	Male	987-65-4076	06/12/1970

[Add](#) [Delete](#)

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

Dependent	Address	<input checked="" type="checkbox"/> Stay in sync with Employee Information
<p><b>Dependent</b></p> <p>Last Name: Ambrosia</p> <p>First Name: Annie</p> <p>Middle Name: </p> <p>Relationship: Daughter</p> <p>Gender: -- Select --</p> <p>Birth Date: 7/14/2009 Age 5</p> <p>SSN: </p> <p><b>Emergency Contact</b></p> <p>Emergency Contact? <input checked="" type="checkbox"/></p> <p>Priority: <input checked="" type="radio"/> Primary <input type="radio"/> Secondary</p> <p>Primary Phone: -- Select --</p> <p>Notes: </p>	<p>Address 1: 117 Bayview Circle</p> <p>Address 2: </p> <p>City / State / Zip: Hermosa Beach CA 90254</p> <p>Country: -- Select --</p> <p>County: </p> <p><b>Other Dependent Information</b></p> <p>Home Phone: (647) 956-4850</p> <p>Email: </p> <p>Work Phone: Exit: </p> <p>Mobile Phone: </p> <p>Pager: </p> <p><b>Student</b></p> <p>Full Time Student: <input type="checkbox"/></p>	<p><b>Smart Tip</b></p> <p>Check the <b>Stay in sync with Employee Information</b> to automatically populate the dependent's address with the employee's information.</p>
<p><a href="#">Save</a> <a href="#">Save &amp; Add New</a> <a href="#">Save &amp; Return</a> <a href="#">Cancel</a></p>		

## EMERGENCY CONTACTS

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

Emergency Contacts							
<input checked="" type="checkbox"/>	Last Name ▾	First Name	Relationship	Priority	Primary Phone	Email	Notes
<input type="checkbox"/>	Adams	Ed	Husband	Primary	(847) 555-2011		

[Add](#) [Delete](#)

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.

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

**Emergency Contact**

• Priority:  Primary  Secondary

• Last Name:

• First Name:

• Relationship:

**Other Emergency Contact Information**

Primary Phone:  ▾

Home Phone:

Work Phone:  Ext.

Mobile Phone:

Pager:

Email:

**Address**  Stay in sync with Employee Information

Address 1:

Address 2:

City / State / Zip:

Country:  ▾

County:

**Notes**

Notes:

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

[Save](#) [Save & Add New](#) [Save & Return](#) [Cancel](#)

## WORK INFO

### EMPLOYEE STATUS

View employee status information.

Current Employee Status		Adjusted Seniority Date				
Employee Status	Active	Adjusted Seniority Date				
Hire		Termination				
Hire Date	02/15/2002	Termination Date				
Rehire Date		Eligible for Rehire?				
Length Of Service	Hire Date - 11 Yrs, 1 Mos	User Account Deactivation Date				
Records: 1						
Employee Status History						
Show <input type="text" value="All"/>						
Effective Date	Check Date	Status	Change Reason	Changed By	Edited	Action
2/15/2002	Current	Active	Hire	Database Import		

### DEPT/POSITION

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

Current		Change Reason			
Effective Date	03/24/2014	Change Reason			
Supervisor / Reviewer		Cost Center(s)			
Supervisor	BLACK, LAURIE [5][CLNT04]	Division	400 - Central		
Reviewer	BLACK, LAURIE [5][CLNT04]	Branch	201 - Business Development		
Is Supervisor / Reviewer?		Department	120 - Sales - Outside		
Position		Pay Settings			
Employment Type	Regular Full Time	Pay Group	S - Salary		
Position	HOST - Home Region Sales Staff	OT Exempt?			
Job Title	Sales Specialist	Tipped			
EEO Class	4 - Sales Workers	Minimum Wage Exempt?			
Work Comp	9870 - Office	Union			
Home Shift		Union			
Clock / Badge Number	16	Affiliation Date			
		Union Position			
		Initiation Collected?			
		Dues Collected?			
Records: 3					
Dept / Position History					
Show <input type="text" value="All"/>					
Effective Date	Check Date	Change Reason	Changed By	Edited	Action
3/24/2014	Current		Emily Alba	✓	
9/10/2013	History	Change Reviewer	Emily Alba		
11/5/2010	History	Initial	Database Import		

## WORK LOCATION

View work site information.

Work Location		Work Phone / Email / Mail Stop	
Work Location	-- Use default Company Address	Work Phone	(847) 555-1234 Ext
Address 1	3850 N. Wilke Rd	Mobile Phone	
Address 2		Pager	
City / State / Zip	ARLINGTON HEIGHTS IL 60004	Email	devspare@data.paylocity.com
Country	UNITED STATES	Mail Stop	
County	COOK		

## Important Notes

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

## ELIGIBILITY

View information regarding eligibility for work.

Work Authorization		I-9 Verification		SSN Verification	
Work Authorization		I-9 Verified?	<input type="checkbox"/>	SSN	xxx-xx-1047
USCIS or Admission Number		Date Verified		SSN Verified?	<input type="checkbox"/>
Visa Type		Notes		Date Verified	
Expiry Date				Notes	

## EMPLOYEE I-9 EMPLOYMENT ELIGIBILITY

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

Work Authorization		I-9	
Work Authorization	A citizen of the United States	Document Name	Generated I9 Document.pdf
USCIS Number		Received Date	01/16/2015
Visa Type		Uploaded Date	01/16/2015
Foreign Passport Number		Action	<a href="#">View</a>
Attested By	Emily Alba 1/1/0001		
Expiration Date			
194 Admission Number			
Country of Issuance			

## Reports

- Audit Trail Detail

## AUTHORIZATION TRACKING

View work authorization status.

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

Authorization Activity Tracking							
<input checked="" type="checkbox"/>	Date ▲	Type	Status	Attorney	Attorney Phone	Notes	Updated By
<input type="checkbox"/>	03/15/2013	Citizenship / Naturalization Application	Verified				Alba, Emily [16]

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

Authorization Activity Tracking Details			
Work Authorization Type	Citizenship / Naturalization Application		
Date	3/15/2013		
Status	Verified		
Attorney Name			
Attorney Phone			
		Notes	
<input type="button" value="Cancel"/>			

## 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**.

Vets 100/100A Tracking		New Hire Medical Availability	
Enable?	<input checked="" type="checkbox"/>	Medical Coverage Available?	<input checked="" type="checkbox"/>
Hiring Location	Headquarters ▼	Medical Coverage Date	3/1/2010 ▼
<b>Vets 100</b>		<b>Vets 100A</b>	
Job Category	5 - Office and Clerical ▼	Job Category	-- Select -- ▼
Covered Veteran	<input type="checkbox"/> Special Disabled Veterans <input type="checkbox"/> Vietnam Era Veterans <input type="checkbox"/> Recently Separated Veterans <input checked="" type="checkbox"/> Other Protected Veterans	Covered Veteran	<input type="checkbox"/> Disabled Veterans <input type="checkbox"/> Other Protected Veterans <input type="checkbox"/> Armed Forces Service Medal Veterans <input type="checkbox"/> Recently Separated Veterans
<input type="button" value="Save"/>			

### 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.

Rates											
Effective	Check Date	Change Reason	Pay Type	Salary	Rate / Per	Freq	Annual Salary	Auto Pay	Amount	%	Action
3/7/2014	Current	Merit Increase	Hourly	\$0.00	20.0000 / Hour	W	\$41,600.00	<input checked="" type="checkbox"/>	1.0000	5.2632	
3/1/2013	History	Merit Increase	Hourly	\$0.00	19.0000 / Hour	W	\$39,520.00	<input checked="" type="checkbox"/>	1.0000	5.5556	
3/4/2011	History	New Pay Grade	Hourly	\$0.00	18.0000 / Hour	W	\$37,440.00		2.1000	13.2075	
3/5/2010	History	Merit Increase	Hourly	\$0.00	15.9000 / Hour	W	\$33,072.00		0.9000	6.00	
3/6/2009	History		Hourly	\$0.00	15.0000 / Hour	W	\$31,200.00				

Records: 1

Additional Rates											
Effective	Check Date	End Check Date	Change Reason	Rate	Rate / Per	Department	Job	Shift	Action		
3/7/2014	Current		2 - Rate Code 2		23.5000 / Hour	Customer Service [100]					

### TAXES

View or edit tax information.

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

State Tax Details			
Tax Code	IL - Illinois SITW		
Filing Status	Single	Amount Type	Default Amount
Exemption 1	3	Amount	0
Exemption 2	0	Percentage	0
Notes	STATUS: S = single M = married EXEMPTIONS: number of allowances claimed on IL-W-4 Line 1 EXEMPTIONS 2: number of allowances claimed on IL-W-4		
<input type="button" value="Save"/> <input type="button" value="Save &amp; Return"/> <input type="button" value="Cancel"/>			

Taxes									
<input checked="" type="checkbox"/>	Tax Code	Filing Status	Exemptions 1	Exemptions 2	Type	Amount	Percentage	Pre-Filled Tax Forms	
<input type="checkbox"/>	FITW - Federal Income Tax	Single	1	N/A	Default	Default	Default	Federal W-4	
<input type="checkbox"/>	IL - Illinois SITW	Single	3	0	Default	Default	Default		

Additional Tax Information	
SUI State	IL
Tax Form	W2
1099R Distribution Code	-- Select --
SSN / FEIN	xxxxx4124
943 Agricultural Employee	<input type="checkbox"/>
Retirement Plan	<input type="checkbox"/>
Statutory	<input type="checkbox"/>

## AMOUNT TYPES

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

Amount Type	Default Amount
Amount	Additional Flat
	Additional Flat plus Additional Percentage
	Additional Percentage
Percentage	Blocked
	Default Amount
	Flat Dollar Amount
	Flat Dollar Amount plus Fixed Percentage
	Flat Percentage

## EARNINGS

View regularly scheduled recurring earnings.

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

Earnings										
Filter: Show Active										
<input checked="" type="checkbox"/>	Code	Type	Begin Check Date	End Check Date	Calc Code	Rate	Amount	Frequency	Goal	Paid
<input type="checkbox"/>	CAR	Standard	04/01/2005			0.00	25.00		\$0.00	\$0.00
<input type="checkbox"/>	ERDEN	Memo	12/14/2012			0.00	20.00			
<input type="checkbox"/>	ERHDP	Memo	12/14/2012			0.00	250.00			

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

Earnings Details	Effective Date
Earning Code: CAR - Auto Allowance	Effective Date: 6/3/2006
Earning Type: Standard	Begin Check Date: 6/3/2006
Frequency: -- All --	End Check Date:
Amount: 25.00	
Calculation	Distribution
Rate: 0.00	Job Code:
Calculation Code:	Department:
Hours / Units: 0.00	
Rate Code:	Limits
Pay Period Minimum: 0.00	Goal: 0.00
Pay Period Maximum: 0.00	Paid to Date: 0.00
	Annual Maximum: 0.00
	Paid Year to Date: 375.00
Agency Info	Automatic Employee Record Updates
Agency:	Source: None
Miscellaneous Info:	
<input type="button" value="Cancel"/>	

## DEDUCTIONS

View regularly scheduled recurring deductions.

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

Deductions											
Filter											Show Active
<input checked="" type="checkbox"/>	Priority	Code	Type	Begin Check Date	End Check Date	Calc Code	Amount	Freq	Goal	Paid	
<input type="checkbox"/>	Benefit - 0	<a href="#">125D</a>	125	08/14/2015		Flat Amount	24.00	Block Week 5			
<input type="checkbox"/>	Benefit - 0	<a href="#">401K</a>	401k	08/14/2015		Flat Amount	10.00				
<input type="checkbox"/>	Benefit - 0	<a href="#">INSHM</a>	125	08/14/2015		Flat Amount	75.00	Monthly take First Week			

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

Deduction Details		Effective Date	
Deduction Code	401K - 401(k) Traditional	Effective Date	7/25/2015
Deduction Type	401k	Begin Check Date	08/14/2015
Calculation Code	Flat Amount	End Check Date	
Rate / Amount	10.00	<b>Deduction Priority</b>	
Frequency	-- All --	Deduction Category	Benefit
Goal		Priority	0
Paid to Date		<b>Child Support</b>	
Agency	401K - Smith Barney	To enable the Child Support section, select a Deduction Code of Type "EFT Child Support" or "Non-EFT Child Support"	
Pay Period Minimum	0.00	State	
Pay Period Maximum	0.00	Case Identifier	
Annual Maximum	0.00	FIPS Code	
Paid Year to Date	0.00	Medical Support?	<input type="checkbox"/>
Misc Info		Report as Terminated?	<input type="checkbox"/>
Notes		<b>401K Loan</b>	
Self Insured Plan	<input type="checkbox"/>	Loan Number	
<b>Automatic Employee Record Updates</b>		Issue Date	
Source	None	First Payment Date	
		<b>Cost Centers</b>	
		Division	
		Branch	
		Department	

[Cancel](#)

### Important Notes

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

## DIRECT DEPOSIT

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

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

**Direct Deposit Accounts**
Add New Direct Deposit Account  
Savings - Bank Of America, N.A. [898435]  
Checking - Citibank NA [92956624]

I hereby authorize my employer to deposit or adjust any amounts owed to me by initiating entries to my account at the financial institution.

**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: -- Select --

Amount:

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

DATE \_\_\_\_\_

PAY TO THE ORDER OF \_\_\_\_\_ \$ \_\_\_\_\_ DOLLARS

Your Bank  
Your Town, IL 61000

MEMO \_\_\_\_\_

1234567891 1234567891 1234

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

**Smart Tip**

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

Save
Save and Close
Delete

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

Routing	Account	Type	Bank Name
021000089	92956624	Checking	Citibank NA

**Additional Deposit Account(s)**

	Routing	Account	Type	Bank Name	Amount
<input checked="" type="radio"/>	081904808	898435	Savings	Bank Of America, N.A.	\$75.00

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

**Direct Deposit Accounts** Add New Direct Deposit Account

Direct Deposit Account order successfully changed!

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

**Bank Account**

Account Type:  Checking

Routing Number:

Account Number:

Bank Name:

Name on Account:   
Name should match the name on file with your banking institution

**Additional Deposit Account**

Amount Type:

Amount:

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

Date:

PAY TO THE ORDER OF:  \$

Yours Bank  
 Your Town, IL 61000

MEMO:

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

Save   Save and Close   Delete

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

Routing	Account	Type	Bank Name
071000013	889092745	Checking	Jpmorgan Chase Bank, NA

**Additional Deposit Account(s)**

	Routing	Account	Type	Bank Name	Amount
<input checked="" type="radio"/>	071000013	1234	Savings	Jpmorgan Chase Bank, NA	\$50.00
<input type="radio"/>	071000013	132910	Checking	Jpmorgan Chase Bank, NA	\$175.00

**Important Notes**

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

**LABOR ALLOCATION**

View specific distribution of wages.

**Labor Allocation** Select Job Code / Cost Center(s)

Allocation %:

**Select Earning Code / Code Group**

An Earning Code or Code Group is Required

Earning Code:

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

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

Override	Home
Division	600 - Southwest
Branch	301 - Finance
Department	600 - Client Support
Job Code	
Workers Comp Code	

Records: 0

**Total Allocation: 100.00 %**

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

<input checked="" type="checkbox"/>	%	Division	Branch	Department	Job Code	Workers Comp	Earning Code or Code Group
<input type="checkbox"/>	40.0000				112348 - Project 112348		Gross Earnings
<input type="checkbox"/>	60.0000				112345 - Project 112345		Gross Earnings

## PAY HISTORY

### CURRENT CHECKS

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

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

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

Employee							
Employee Id	16	Division	600 - Southwest				
Salary	\$1,800.00	Branch	201 - Business Development				
		Department	400 - Human Resources				
Check							
Show Adjustment Checks <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes <b>Check Date</b> 02/14/2014 - V102220							
<b>The Garner Group</b> 3850 N Wilke Rd ARLINGTON HEIGHTS, IL 60004  Direct Deposit		<b>Check Date</b> 02/14/2014	<b>Voucher #</b> 102220	<b>Voucher # - Delivery Location</b> 102220 Default			
<b>Emily T Alba</b> 117 Bayview Circle Hermosa Beach, CA 90254		<b>Amount</b> \$1,116.71	<b>Check Date</b> 02/14/2014		<b>Period Begin Date - End Date</b> 02/02/2014 02/08/2014		
		<b>Gross Earnings - YTD</b> \$1,800.00	<b>Gross Earnings - YTD</b> \$5,400.00		<b>Net Earnings - YTD</b> \$3,350.13		
		<b>Net Earnings - YTD</b> \$1,116.71			<b>Net Earnings - YTD</b> \$3,350.13		
Direct Deposits							
Bank	Account	Type	Amount	YTD			
Jpmorgan Chase Bank, NA	###2312	Checking	\$25.00	\$75.00			
Jpmorgan Chase Bank, NA	2653	Savings	\$55.84	\$167.52			
Jpmorgan Chase Bank, NA	3678	Checking	\$1,035.87	\$3,107.61			
Totals			\$1,116.71	\$3,350.13			
Earnings					Taxes		
Description	Hrs	Rate	Current	YTD	Description	Current	YTD
401K MATCH			\$90.00	\$270.00	Federal Income Tax	\$270.51	\$811.53
Employer Paid Dental			\$20.00	\$60.00	Illinois SITW	\$79.80	\$239.40
Employer Paid HMO			\$180.00	\$540.00	Medicare	\$24.45	\$73.35
REGULAR			\$1,800.00	\$5,400.00	OASDI	\$104.53	\$313.59
Totals			\$1,800.00	\$5,400.00	Totals	\$479.29	\$1,437.87
Deductions				Time Off			
Description	Current	YTD		Description	Available	Taken	
Dental Insurance	\$24.00	\$72.00		Personal			
HMO Medical	\$90.00	\$270.00		Sick	0.00		
Totals	\$114.00	\$342.00		Vacation	187.08	0.00	
Benefits							
Description	Current	YTD					
<a href="#">Download Printable Version</a>							



## CHECK HISTORY

Search for checks in a specific date range.

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

Search				Summary			
Year	2012			Reg Hours	0.00	Reg Pay	\$4,000.00
Quarter / YTD	<input type="radio"/> Q1 <input checked="" type="radio"/> Q2 <input type="radio"/> Q3 <input type="radio"/> Q4 <input type="radio"/> YTD			OT Hours	0.00	OT Pay	\$0.00
Date Range From	4/1/2012			Other Hours	0.00	Other Pay	\$2,441.00
Date Range To	6/30/2012			Total Hours	0.00	Gross Pay	\$4,100.00
<input type="button" value="Submit"/>				Taxes	\$800.36	Net Pay	\$2,070.20
				Deductions	\$1,576.00	Direct Deposit	\$2,070.20
				Weeks Worked	0	Net Check	\$0.00

Results							Detailed Pay Information		
<input checked="" type="checkbox"/>	Check Date	Pay Type	Check/VCR #	Gross	Net	Dir Dep	Description	Hours or Taxable	Amount
<input checked="" type="checkbox"/>	06/29/2012	Regular	101943	\$1,025.00	\$517.54	\$517.54	401K MATCH	0.00	\$205.00
<input checked="" type="checkbox"/>	06/15/2012	Regular	101933	\$1,225.00	\$653.44	\$653.44	Auto Allowance	0.00	\$100.00
<input checked="" type="checkbox"/>	06/01/2012	Regular	101923	\$1,025.00	\$517.58	\$517.58	Employer Paid Dental	0.00	\$136.00
<input checked="" type="checkbox"/>	05/18/2012	Regular	101913	\$1,025.00	\$517.54	\$517.54	Employer Paid HDHP	0.00	\$2,000.00
<input type="checkbox"/>	05/04/2012	Regular	101903	\$1,225.00	\$653.44	\$653.44	REGULAR	0.00	\$4,000.00
<input checked="" type="checkbox"/>	04/20/2012	Regular	101893	\$1,025.00	\$517.54	\$517.54	401(k) Traditional	0.00	\$328.00
<input type="checkbox"/>	04/06/2012	Regular	101883	\$1,225.00	\$653.44	\$653.44	Dental Insurance	0.00	\$248.00
							HDHP PPO Medical	0.00	\$1,000.00
							Dir Dep 898435	0.00	\$300.00
							Dir Dep 92956624	0.00	\$1,770.20
							Federal Income Tax	2524.00	\$174.36
							Fed Unemployment Tax	713.00	\$4.28
							Illinois SITW	2524.00	\$118.32
							Illinois SUI	2852.00	\$124.08
							Medicare	2852.00	\$41.36
							Medicare - Employer	2852.00	\$41.36



**W2**

View and print W2s that have been processed by Paylocity.

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

Tax Year	Fed Wages	Fed Withholding	SS Wages	SS Withholding	Medicare Wages	Medicare Withholding
2012	\$40,268.00	\$6,740.06	\$42,698.00	\$1,793.33	\$42,698.00	\$619.12
2011	\$3,220.00	\$564.62	\$3,400.00	\$142.80	\$3,400.00	\$49.30
2011	\$46,380.00	\$8,229.68	\$48,900.00	\$2,053.80	\$48,900.00	\$709.06

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

Copy C - FOR EMPLOYEE'S RECORDS ONLY		2012		OMB No. 1545-0008	
a Control number PROC1 1		1 Wages, tips, other comp. 40,268.00		2 Federal income tax withheld 6,740.06	
b Employer ID number 00-5554442		3 Social security wages 42,698.00		4 Social security tax withheld 1,793.33	
		5 Medicare wages and tips 42,698.00		6 Medicare tax withheld 619.12	
c Employer's name, address, and ZIP code The Garner Group 3850 N Wilke Rd ARLINGTON HEIGHTS, IL 60004					
d Employee's social security number 987-65-4321					
e Employee's name, address, and ZIP code Emily I Alba 117 Bayview Circle Hermosa Beach, CA 90254					
7 Social security tips 0.00		8 Allocated tips 0.00		9 Advance EIC payment 0.00	
10 Dependent care benefits 0.00		11 Nonqualified plans 0.00			
12a D	2,430.00		13 Statutory employee Retirement plan 3rd-party sick pay X		
12b DD	11,032.00		14 Other		
12c					
12d					
IL	00000000000000	40,268.00		2,013.40	
15 State Employer's State ID#		16 State wages, tips, etc.		17 State income tax	
18 Local wages, tips, etc. N/A		19 Local income tax N/A		20 Locality name N/A	

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

This information is being furnished to the IRS. If you are required to file a tax return, a negligence penalty/other sanction may be imposed on you if this income is taxable and you fail to report it. Printed by Paylocity Payroll  
Page 2 of 2

View and print 1099s that have been processed by Paylocity.

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

1099	Tax Year	Gross Wages	Federal Withholding	State Withholding
	2011	\$2,000.00	\$0.00	\$0.00
	2009	\$6,050.00	\$0.00	\$0.00
	2008	\$16,704.06	\$0.00	\$0.00
	2007	\$24,940.00	\$0.00	\$0.00
	2006	\$18,700.00	\$0.00	\$0.00
	2005	\$36,000.00	\$0.00	\$0.00

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

VOID     CORRECTED

**Miscellaneous Income**  
**Copy A For Internal Revenue Service Center**  
**File with Form 1096.**

PAYER'S name, address, and ZIP code, and telephone no. BENJAMINS BACKYARD BBQ 123 HAMBURGER LANE ARLINGTON HEIGHTS IL, 60005  (847) 555-5555		1 Rents \$	OMB No. 1545-0115 <b>2011</b> <b>Form 1099-MISC</b>	4 Federal income tax withheld \$	For Privacy Act and Paperwork Reduction Act Notice, see the 2010 General Instructions for Certain Information Returns.
PAYER'S Federal identification number 00-0000000		2 Royalties \$		5 Medical and health care payments \$	
RECIPIENT'S identification number 557-89-6521		3 Other income \$	6 Substitute payments in lieu of dividends or interest \$		
RECIPIENT'S name Contractor Constance		7 Nonemployee compensation \$ 2000.00	9 Payer made direct sales of \$5,000 or more of consumer products to a buyer (recipient) for resale \$		
Street address (including apt. no.) 111 E Independence Way		10 Crop insurance proceeds \$	11		
City, state, and ZIP code Arlington Heights IL, 60005		12	13 Excess golden parachute payments \$		
Account number (optional) PROC1 23		14 Gross proceeds paid to an attorney \$	15a Section 409A deferrals \$		
15b Section 409A income \$		16 State tax withheld \$	17 State/Payer's state no. ---		
Form 1099-MISC		18 State income \$	Department of the Treasury - Internal Revenue Service		

VOID     CORRECTED

**Miscellaneous Income**  
**Copy B For Recipient**

PAYER'S name, address, and ZIP code, and telephone no. BENJAMINS BACKYARD BBQ 123 HAMBURGER LANE ARLINGTON HEIGHTS IL, 60005  (847) 555-5555		1 Rents \$	OMB No. 1545-0115 <b>2011</b> <b>Form 1099-MISC</b>	4 Federal income tax withheld \$	This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.
PAYER'S Federal identification number 00-0000000		2 Royalties \$		5 Medical and health care payments \$	
RECIPIENT'S identification number 557-89-6521		3 Other income \$	6 Substitute payments in lieu of dividends or interest \$		
RECIPIENT'S name Contractor Constance		7 Nonemployee compensation \$ 2000.00	9 Payer made direct sales of \$5,000 or more of consumer products to a buyer (recipient) for resale \$		
Street address (including apt. no.) 111 E Independence Way		10 Crop insurance proceeds \$	11		
City, state, and ZIP code Arlington Heights IL, 60005		12	13 Excess golden parachute payments \$		
Account number (optional) PROC1 23		14 Gross proceeds paid to an attorney \$	15a Section 409A deferrals \$		
15b Section 409A income \$		16 State tax withheld \$	17 State/Payer's state no. ---		
Form 1099-MISC		18 State income \$	Department of the Treasury - Internal Revenue Service		

BENJAMINS BACKYARD BBQ  
 123 HAMBURGER LANE  
 ARLINGTON HEIGHTS IL, 60005  
  
 (847) 555-5555

PROC1 23  
 Contractor Constance  
 111 E Independence Way  
 Arlington Heights IL, 60005

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## TIME OFF

### SETUP & BALANCE

View time off information.

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

Setup & Balance						
Hours Per Work Day	8.0000	<input type="checkbox"/> Override?	Last Updated			
			Source			
Time Off Types						
Type	Start Date	Used Hours / Days	Available Hours / Days	Used \$	Available \$	Length Of Service
PERS - Personal	07/01/2003	0.000000 Days	1.461528 Days	\$0.000000	\$0.000000	01/04/2003
SICK - Sick	07/01/2003	1.000000 Days	2.653843 Days	\$0.000000	\$0.000000	01/04/2003
VAC - Vacation	07/01/2003	0.000000 Days	18.461528 Days	\$0.000000	\$0.000000	01/04/2003

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

Setup & Balance Details			
Time Off Type	VAC - Vacation	Length of Service Date	1/4/2003 <input checked="" type="checkbox"/> Override?
Start Date	7/1/2003	Months of Service	126.49 as of 07/19/2013
Accrue End Date			
Accrue Ongoing		Clear and Transfer Balances	
Enabled	<input checked="" type="checkbox"/>	Enabled	<input type="checkbox"/>
Hours Worked	0.000000 <input type="checkbox"/> Override?	Max Carry Over	0.00 Hours <input type="checkbox"/> Override?
Accrual Rate	0.000000 Hours <input type="checkbox"/> Override?		
Max Balance	0.000000 Hours <input type="checkbox"/> Override?		
Time off accrues : Annual Month 1			
Current Balance			
Available	18.461500 Days	Dollars Available	0.00
Used	0.000000 Days	Dollars Used	0.00
<b>Total</b>	<b>18.461500 Days</b>	<b>Dollars Total</b>	<b>0.00</b>
<input type="button" value="Cancel"/>			

## 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.

Time Off History									
Transaction Date From	<input type="text"/>	Time Off Type	-- All --						
Transaction Date To	<input type="text"/>	Transaction Type	-- All --						
Begin Date From	<input type="text"/>	<input type="checkbox"/> Show Totals?							
Begin Date To	<input type="text"/>	Transaction Subtype	-- All --						
<a href="#">Search</a>	<a href="#">Show All</a>	<a href="#">Reset</a>						<a href="#">Save Search</a>	
Trans Date	Begin Date	Type	Trans Type	Subtype	Hours/Days	Avail Hours/Days	\$	Available \$	
08/16/2013	08/16/2013	SICK	Earned	Ongoing	0.00 Hours	0.00 Hours			
08/16/2013	08/16/2013	VAC	Earned	Ongoing	4.62 Hours	161.54 Hours	\$115.39	\$4,038.43	
08/16/2013	08/16/2013	VAC	Cleared		0.00 Hours	156.92 Hours	\$0.00	\$3,923.05	
08/16/2013	08/16/2013	SICK	Cleared		0.00 Hours	0.00 Hours			
01/18/2013	01/18/2013	VAC	Earned	Ongoing	3.08 Hours	156.92 Hours	\$76.92	\$3,923.05	
06/15/2012	06/15/2012	VAC	Earned	Ongoing	3.08 Hours	110.77 Hours	\$76.92	\$2,769.21	
06/01/2012	06/01/2012	VAC	Earned	Ongoing	3.08 Hours	107.69 Hours	\$76.92	\$2,692.29	
05/18/2012	05/18/2012	VAC	Earned	Ongoing	3.08 Hours	104.61 Hours	\$76.92	\$2,615.37	
05/04/2012	05/04/2012	VAC	Earned	Ongoing	3.08 Hours	101.54 Hours	\$76.92	\$2,538.44	
05/04/2012	05/04/2012	SICK	Earned	Ongoing	0.00 Hours	0.00 Hours			
05/04/2012	05/04/2012	SICK	Cleared		0.00 Hours	0.00 Hours			
05/04/2012	05/04/2012	VAC	Cleared		0.00 Hours	98.46 Hours	\$0.00	\$2,461.52	
04/20/2012	04/20/2012	VAC	Earned	Ongoing	3.08 Hours	98.46 Hours	\$76.92	\$2,461.52	

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

Manual Adjustment Details							
Time Off Type	VAC			Created By	Emily Alba [*]		
Transaction Type	M - Manual Adjustment			Created Date/Time	03/19/2013 - 11:49:54 AM		
Transaction Subtype	A - Adjustment			Process Id	2013040501		
Notes							
Manual Adjustment							
	Starting Hours	Change	Adjusted Hours	Starting Dollars	Change	Adjusted Dollars	
Available	177.85 Hours	+8.00	185.85 Hours	Available 8,003.08		8,003.08	
Used	8.00 Hours		8.00 Hours	Used 360.00		360.00	
<b>Total</b>	<b>185.85 Hours</b>		<b>193.85 Hours</b>	<b>Total 8,363.08</b>		<b>8,363.08</b>	
<a href="#">Return</a>							

## 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.

Name	Demographic Information
Last Name: Adams	SSN / FEIN: 987-65-4091
First Name: Marie	Birth Date: 8/6/1973      Age: 40
Middle Name: E	Gender: Female
Salutation:	Ethnicity: White
Suffix: -- Select --	Marital Status: Married
Nickname:	Smoker: <input type="checkbox"/>
Prior Last Name:	Disability:
	Veteran:
Address	Personal Phone & Email
Address 1: 3117 Hubbard Lane	Home Phone: (847) 555-2011
Address 2:	Mobile Phone: (224) 555-3456
City / State / Zip: Arlington Heights IL 60005	Email Address: personaladdress@yahoo.com
Country: UNITED STATES	
County / Province: Lake	
Additional Address:	
Additional Address Type: -- Select --	
Additional Address Country: -- Select --	
<input type="button" value="Save"/>	

#### Important Notes

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

## DEPENDENTS

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

<input checked="" type="checkbox"/>	Last Name	First Name	Relationship	Gender	SSN	Birth Date
<input type="checkbox"/>	Adams	Ben	Son	Male	987-65-4309	03/20/1999
<input type="checkbox"/>	Adams	Ed	Husband	Male	987-65-4076	06/12/1970

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

Dependent	Address
<p><input checked="" type="checkbox"/> Last Name: Ambrosia</p> <p><input checked="" type="checkbox"/> First Name: Annie</p> <p>Middle Name: </p> <p><input checked="" type="checkbox"/> Relationship: Daughter</p> <p>Gender: -- Select --</p> <p>Birth Date: 7/14/2009 Age 5</p> <p>SSN: </p>	<p><input checked="" type="checkbox"/> Stay in sync with Employee Information</p> <p>Address 1: 117 Bayview Circle</p> <p>Address 2: </p> <p>City / State / Zip: Hermosa Beach CA 90254</p> <p>Country: -- Select --</p> <p>County: </p>
<p><b>Emergency Contact</b></p> <p>Emergency Contact? <input checked="" type="checkbox"/></p> <p>Priority: <input checked="" type="radio"/> Primary <input type="radio"/> Secondary</p> <p><input checked="" type="checkbox"/> Primary Phone: -- Select --</p> <p>Notes: </p>	<p><b>Other Dependent Information</b></p> <p>Home Phone: (647) 956-4850</p> <p>Email: </p> <p>Work Phone: Exit: </p> <p>Mobile Phone: </p> <p>Pager: </p>
<p><b>Student</b></p> <p>Full Time Student: <input type="checkbox"/></p>	

**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.

Emergency Contacts							
<input checked="" type="checkbox"/>	Last Name ▾	First Name	Relationship	Priority	Primary Phone	Email	Notes
<input type="checkbox"/>	Adams	Ed	Husband	Primary	(847) 555-2011		

[Add](#) [Delete](#)

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

**Emergency Contact**

Priority:  Primary  Secondary

Last Name:

First Name:

Relationship:

---

**Other Emergency Contact Information**

Primary Phone:

Home Phone:

Work Phone:  Ext.

Mobile Phone:

Pager:

Email:

**Address**  Stay in sync with Employee Information

Address 1:

Address 2:

City / State / Zip:

Country:

County:

---

**Notes**

Notes:

[Save](#) [Save & Add New](#) [Save & Return](#) [Cancel](#)

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

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



## WORK INFO

### EMPLOYEE STATUS

View employee status information.

Current Employee Status		Adjusted Seniority Date				
Employee Status	Active	Adjusted Seniority Date				
Hire		Termination				
Hire Date	02/15/2002	Termination Date				
Rehire Date		Eligible for Rehire?				
Length Of Service	Hire Date - 11 Yrs, 1 Mos	User Account Deactivation Date				
Records: 1						
Employee Status History						
Show <input type="text" value="All"/>						
Effective Date	Check Date	Status	Change Reason	Changed By	Edited	Action
2/15/2002	Current	Active	Hire	Database Import		

### DEPT/POSITION

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

Current		Change Reason			
Effective Date	03/24/2014	Change Reason			
Supervisor / Reviewer		Cost Center(s)			
Supervisor	BLACK, LAURIE [5][CLNT04]	Division	400 - Central		
Reviewer	BLACK, LAURIE [5][CLNT04]	Branch	201 - Business Development		
Is Supervisor / Reviewer?		Department	120 - Sales - Outside		
Position		Pay Settings			
Employment Type	Regular Full Time	Pay Group	S - Salary		
Position	HOST - Home Region Sales Staff	OT Exempt?			
Job Title	Sales Specialist	Tipped			
EEO Class	4 - Sales Workers	Minimum Wage Exempt?			
Work Comp	9870 - Office	Union			
Home Shift		Union			
Clock / Badge Number	16	Affiliation Date			
		Union Position			
		Initiation Collected?			
		Dues Collected?			
Records: 3					
Dept / Position History					
Show <input type="text" value="All"/>					
Effective Date	Check Date	Change Reason	Changed By	Edited	Action
3/24/2014	Current		Emily Alba	✓	
9/10/2013	History	Change Reviewer	Emily Alba		
11/5/2010	History	Initial	Database Import		

## WORK LOCATION

View work site information.

Work Location		Work Phone / Email / Mail Stop	
Work Location	-- Use default Company Address	Work Phone	(847) 555-1234 Ext
Address 1	3850 N. Wilke Rd	Mobile Phone	
Address 2		Pager	
City / State / Zip	ARLINGTON HEIGHTS IL 60004	Email	devspare@data.paylocity.com
Country	UNITED STATES	Mail Stop	
County	COOK		

### Important Notes

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

## ELIGIBILITY

View information regarding eligibility for work.

Work Authorization		I-9 Verification		SSN Verification	
Work Authorization		I-9 Verified?	<input type="checkbox"/>	SSN	xxx-xx-1047
USCIS or Admission Number		Date Verified		SSN Verified?	<input type="checkbox"/>
Visa Type		Notes		Date Verified	
Expiry Date				Notes	

## EMPLOYEE I-9 EMPLOYMENT ELIGIBILITY

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

Work Authorization		I-9	
Work Authorization	A citizen of the United States	Document Name	Generated I9 Document.pdf
USCIS Number		Received Date	01/16/2015
Visa Type		Uploaded Date	01/16/2015
Foreign Passport Number		Action	<a href="#">View</a>
Attested By	Emily Alba 1/1/0001		
Expiration Date			
194 Admission Number			
Country of Issuance			

### Reports

- Audit Trail Detail

## AUTHORIZATION TRACKING

View work authorization status.

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

Authorization Activity Tracking							
<input checked="" type="checkbox"/>	Date ▲	Type	Status	Attorney	Attorney Phone	Notes	Updated By
<input type="checkbox"/>	03/15/2013	Citizenship / Naturalization Application	Verified				Alba, Emily [16]

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

Authorization Activity Tracking Details			
Work Authorization Type	Citizenship / Naturalization Application		
Date	3/15/2013		
Status	Verified		
Attorney Name			
Attorney Phone			
		Notes	<div style="border: 1px solid gray; height: 40px;"></div>
<input type="button" value="Cancel"/>			

## 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.

Vets 100/100A Tracking		New Hire Medical Availability	
Enable?	<input checked="" type="checkbox"/>	Medical Coverage Available?	<input checked="" type="checkbox"/>
Hiring Location	Headquarters ▼	Medical Coverage Date	3/1/2010 ▼
<b>Vets 100</b>	Job Category: 5 - Office and Clerical ▼	<b>Vets 100A</b>	Job Category: -- Select -- ▼
Covered Veteran	<input type="checkbox"/> Special Disabled Veterans <input type="checkbox"/> Vietnam Era Veterans <input type="checkbox"/> Recently Separated Veterans <input checked="" type="checkbox"/> Other Protected Veterans	Covered Veteran	<input type="checkbox"/> Disabled Veterans <input type="checkbox"/> Other Protected Veterans <input type="checkbox"/> Armed Forces Service Medal Veterans <input type="checkbox"/> Recently Separated Veterans
<input type="button" value="Save"/>			

- Check the **Enable** box to enable the fields on this screen.
- Select a Hiring Location from the drop down.
- Select a **Job Category** from the applicable drop down.
- Select one or more **Covered Veteran** options.
- Check the **Medical Coverage Available** box if the employee qualifies for medical benefits that can be used to cover the child.
- Select or enter the **Medical Coverage Date**.
- Save** the updated information.
- Select either the Vets-100 or Vets-100A report in the Reports Library.
- 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												
Show: <span>All</span>												
Effective	Check Date	Change Reason	Pay Type	Salary	Rate / Per	Freq	Annual Salary	Auto Pay	Amount	%	Action	
3/7/2014	Current	Merit Increase	Hourly	\$0.00	20.0000 / Hour	W	\$41,600.00	✓	1.0000	5.2632		
3/1/2013	History	Merit Increase	Hourly	\$0.00	19.0000 / Hour	W	\$39,520.00	✓	1.0000	5.5556		
3/4/2011	History	New Pay Grade	Hourly	\$0.00	18.0000 / Hour	W	\$37,440.00		2.1000	13.2075		
3/5/2010	History	Merit Increase	Hourly	\$0.00	15.9000 / Hour	W	\$33,072.00		0.9000	6.00		
3/6/2009	History		Hourly	\$0.00	15.0000 / Hour	W	\$31,200.00					

Records: 1

Additional Rates										
Show: <span>Current and Future</span>										
Effective	Check Date	End Check Date	Change Reason	Rate	Rate / Per	Department	Job	Shift	Action	
3/7/2014	Current			2 - Rate Code 2	23,5000 / Hour	Customer Service [100]				

### PREVIOUS EMPLOYMENT

View employment history prior to being employed by the company.

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

Previous Employment								
<input checked="" type="checkbox"/>	Employer Name	Contact Phone	Job Title	Start Date	End Date	Rate/Per	Can Contact?	Status
<input type="checkbox"/>	<a href="#">Account Temps</a>		CSR Representative	02/10/1990	06/08/1999	\$11.75	✓	U - Unverified

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

Previous Employment Details	Job
<p><b>Employer Name</b> Account Temps</p> <p><b>Business Type</b> Staffing Agency</p> <p><b>Address 1</b></p> <p><b>Address 2</b></p> <p><b>City / State / Zip</b> --</p> <p><b>Country</b> UNITED STATES</p> <p><b>County</b></p> <p><b>Phone</b></p> <p><b>Fax</b></p>	<p><b>Title</b> CSR Representative</p> <p><b>Start Date</b> 2/10/1990</p> <p><b>End Date</b> 6/8/1999</p> <p><b>Supervisor Name</b> Bob</p> <p><b>Supervisor Title</b></p> <p><b>Duties</b></p> <p><b>Pay Rate</b> 11.750000</p> <p><b>Rate Per</b></p>
<p><b>Contact Information</b></p> <p><b>Can Contact?</b> <input checked="" type="checkbox"/></p> <p><b>Contact Name</b> Bob from Account Temps</p> <p><b>Title</b></p> <p><b>Phone</b></p> <p><b>Email</b></p>	<p><b>Verification</b></p> <p><b>Verification Status</b> Unverified</p> <p><b>Term Reason</b></p> <p><b>Eligible for Rehire?</b> <input type="checkbox"/></p> <p><b>Comments</b></p>

## EMPLOYMENT HISTORY

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

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

Employment History										
<input checked="" type="checkbox"/>	Effective Date	Description	Title	Rate	Per	Salary	Annual Salary	Notes	Capture Date	Edited
<input type="checkbox"/>	<a href="#">03/15/2013</a>	Change Cost Center	Customer Support Representative	15.5000	Hour	0.0000	32,240.0000		03/16/2013	
<input type="checkbox"/>	<a href="#">03/15/2013</a>	Change Compensation	Customer Support Representative	15.5000	Hour	0.0000	32,240.0000		03/16/2013	
<input type="checkbox"/>	<a href="#">12/12/2012</a>	Change Cost Center	Customer Support Representative	15.0000	Hour	0.0000	31,200.0000		02/04/2013	
<input type="checkbox"/>	<a href="#">12/12/2012</a>	Change Supervisor	Customer Support Representative	15.0000	Hour	0.0000	31,200.0000		02/04/2013	
<input type="checkbox"/>	<a href="#">12/12/2012</a>	Change Job	Customer Support Representative	15.0000	Hour	0.0000	31,200.0000		02/04/2013	
<input type="checkbox"/>	<a href="#">12/10/2012</a>	Change Cost Center	Customer Support Representative	15.0000	Hour	0.0000	31,200.0000		02/04/2013	

Employment History Event

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

Employment History Details			
Effective Date	3/15/2013	Changed By	Database Import
Description	Change Cost Center	Edited	
Change Reason		Notes	
Capture Date	03/16/2013		
Record Type: Change Cost Center			
Division	600 - Southwest	Base Rate	15.50
Branch	301 - Finance	Rate Per	Hour - Per Hour
Department	600 - Client Support	Pay Frequency	W - Weekly
Supervisor	Bart Kilpatrick [2]	Annual Salary	32240.00
Job Title	Customer Support Representative		
Salary	0.00		
<a href="#">Cancel</a>			

## EVENTS

View events, awards, or disciplinary actions.

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

Events						
Event Type	-- All --	Event Date From				
Event Code		Event Date To				
Description		Next Date From				
Event		Next Date To				
Search   Show All   Reset						Save Search
<input checked="" type="checkbox"/>	Code	Type	Event	Event Date	Next Date	Proficiency
<input type="checkbox"/>	EmpMonth - Employee of the month	Recognition	Employee of the Month	04/01/2015		

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

Event Details		Additional Information	
Code	EmpMonth - Employee of the month	Nominated By	Sarah Walker
Type	None	Nomination Date	2/28/2013
Event	February Employee of the Month		
Date	3/15/2013		
Next Date			
Proficiency			
Notes			
<input type="button" value="Cancel"/>			

## COMPANY PROPERTY

View the company property that has been issued.

Company Property					
<input checked="" type="checkbox"/>	Item Type	Issue Date	Description	Serial #	Return Due
<input type="checkbox"/>	Badge Issued	02/03/2009		6428976	
<input type="checkbox"/>	Notebook Computer	02/03/2009		2375898HGFXX23	
<input type="checkbox"/>	Parking Spot Number	02/03/2009	677		

## PAY HISTORY

### CURRENT CHECKS

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

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

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

Employee							
Employee Id	16	Division	600 - Southwest				
Salary	\$1,800.00	Branch	201 - Business Development				
		Department	400 - Human Resources				
Check							
Show Adjustment Checks <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes <input type="checkbox"/> Check Date 02/14/2014 - V102220							
<b>The Garner Group</b> 3850 N Wilke Rd ARLINGTON HEIGHTS, IL 60004  Direct Deposit		Check Date 02/14/2014	Voucher # 102220	Voucher # - Delivery Location 102220 Default			
Emily T Alba 117 Bayview Circle Hermosa Beach, CA 90254		Amount \$1,116.71	Check Date 02/14/2014	Period Begin Date - End Date 02/02/2014 02/08/2014			
				Gross Earnings - YTD \$1,800.00	\$5,400.00		
				Net Earnings - YTD \$1,116.71	\$3,350.13		
Direct Deposits							
Bank	Account	Type	Amount	YTD			
Jpmorgan Chase Bank, NA	###2312	Checking	\$25.00	\$75.00			
Jpmorgan Chase Bank, NA	2653	Savings	\$55.84	\$167.52			
Jpmorgan Chase Bank, NA	3678	Checking	\$1,035.87	\$3,107.61			
Totals			\$1,116.71	\$3,350.13			
Earnings					Taxes		
Description	Hrs	Rate	Current	YTD	Description	Current	YTD
401K MATCH			\$90.00	\$270.00	Federal Income Tax	\$270.51	\$811.53
Employer Paid Dental			\$20.00	\$60.00	Illinois SITW	\$79.80	\$239.40
Employer Paid HMO			\$180.00	\$540.00	Medicare	\$24.45	\$73.35
REGULAR			\$1,800.00	\$5,400.00	OASDI	\$104.53	\$313.59
Totals			\$1,800.00	\$5,400.00	Totals	\$479.29	\$1,437.87
Deductions				Time Off			
Description	Current	YTD		Description	Available	Taken	
Dental Insurance	\$24.00	\$72.00		Personal			
HMO Medical	\$90.00	\$270.00		Sick	0.00		
Totals	\$114.00	\$342.00		Vacation	187.08	0.00	
Benefits							
Description	Current	YTD					
<a href="#">Download Printable Version</a>							



## CHECK HISTORY

Search for checks in a specific date range.

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

Search				Summary			
Year	2012			Reg Hours	0.00	Reg Pay	\$4,000.00
Quarter / YTD	<input type="radio"/> Q1 <input checked="" type="radio"/> Q2 <input type="radio"/> Q3 <input type="radio"/> Q4 <input type="radio"/> YTD			OT Hours	0.00	OT Pay	\$0.00
Date Range From	4/1/2012			Other Hours	0.00	Other Pay	\$2,441.00
Date Range To	6/30/2012			Total Hours	0.00	Gross Pay	\$4,100.00
<b>Submit</b>				Taxes	\$800.36	Net Pay	\$2,070.20
				Deductions	\$1,576.00	Direct Deposit	\$2,070.20
				Weeks Worked	0	Net Check	\$0.00

Results							Detailed Pay Information		
<input checked="" type="checkbox"/>	Check Date	Pay Type	Check/VCR #	Gross	Net	Dir Dep	Description	Hours or Taxable	Amount
<input checked="" type="checkbox"/>	06/29/2012	Regular	101943	\$1,025.00	\$517.54	\$517.54	401K MATCH	0.00	\$205.00
<input checked="" type="checkbox"/>	06/15/2012	Regular	101933	\$1,225.00	\$653.44	\$653.44	Auto Allowance	0.00	\$100.00
<input checked="" type="checkbox"/>	06/01/2012	Regular	101923	\$1,025.00	\$517.58	\$517.58	Employer Paid Dental	0.00	\$136.00
<input checked="" type="checkbox"/>	05/18/2012	Regular	101913	\$1,025.00	\$517.54	\$517.54	Employer Paid HDHP	0.00	\$2,000.00
<input type="checkbox"/>	05/04/2012	Regular	101903	\$1,225.00	\$653.44	\$653.44	REGULAR	0.00	\$4,000.00
<input checked="" type="checkbox"/>	04/20/2012	Regular	101893	\$1,025.00	\$517.54	\$517.54	401(k) Traditional	0.00	\$328.00
<input type="checkbox"/>	04/06/2012	Regular	101883	\$1,225.00	\$653.44	\$653.44	Dental Insurance	0.00	\$248.00
							HDHP PPO Medical	0.00	\$1,000.00
							Dir Dep 898435	0.00	\$300.00
							Dir Dep 92956624	0.00	\$1,770.20
							Federal Income Tax	2524.00	\$174.36
							Fed Unemployment	713.00	\$4.28
							Illinois SITW	2524.00	\$118.32
							Illinois SUI	2852.00	\$124.08
							Medicare	2852.00	\$41.36
							Medicare - Employer	2852.00	\$41.36

**W2**

View and print W2s that have been processed by Paylocity.

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

Tax Year	Fed Wages	Fed Withholding	SS Wages	SS Withholding	Medicare Wages	Medicare Withholding
2012	\$40,268.00	\$6,740.06	\$42,698.00	\$1,793.33	\$42,698.00	\$619.12
2011	\$3,220.00	\$564.62	\$3,400.00	\$142.80	\$3,400.00	\$49.30
2011	\$46,380.00	\$8,229.68	\$48,900.00	\$2,053.80	\$48,900.00	\$709.06

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

<b>Copy C - FOR EMPLOYEE'S RECORDS ONLY</b>		<b>2012</b>		OMB No. 1545-0008
a Control number PROC1 1	1 Wages, tips, other comp. 40,268.00	2 Federal income tax withheld 6,740.06		
b Employer ID number 00-5554442	3 Social security wages 42,698.00	4 Social security tax withheld 1,793.33		
	5 Medicare wages and tips 42,698.00	6 Medicare tax withheld 619.12		
c Employer's name, address, and ZIP code The Garner Group 3850 N Wilke Rd ARLINGTON HEIGHTS, IL 60004				
d Employee's social security number 987-65-4321				
e Employee's name, address, and ZIP code Emily I Alba 117 Bayview Circle Hermosa Beach, CA 90254				
7 Social security tips 0.00	8 Allocated tips 0.00	9 Advance EIC payment 0.00		
10 Dependent care benefits 0.00	11 Nonqualified plans 0.00			
12a D 2,430.00	13 Statutory employee Retirement plan 3rd-party sick pay X			
12b DD 11,032.00	14 Other			
12c				
12d				
IL   00000000000000	40,268.00	2,013.40		
15 State Employer's State ID#	16 State wages, tips, etc.	17 State income tax		
18 Local wages, tips, etc. N/A	19 Local income tax N/A	20 Locality name N/A		

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

This information is being furnished to the IRS. If you are required to file a tax return, a negligence penalty/other sanction may be imposed on you if this income is taxable and you fail to report it. Printed by Paylocity Payroll  
Page 2 of 2

View and print 1099s that have been processed by Paylocity.

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

1099	Tax Year	Gross Wages	Federal Withholding	State Withholding
	2011	\$2,000.00	\$0.00	\$0.00
	2009	\$6,050.00	\$0.00	\$0.00
	2008	\$16,704.06	\$0.00	\$0.00
	2007	\$24,940.00	\$0.00	\$0.00
	2006	\$18,700.00	\$0.00	\$0.00
	2005	\$36,000.00	\$0.00	\$0.00

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

VOID     CORRECTED

**Miscellaneous Income**  
**Copy A For Internal Revenue Service Center**  
**File with Form 1096.**

PAYER'S name, address, and ZIP code, and telephone no. BENJAMINS BACKYARD BBQ 123 HAMBURGER LANE ARLINGTON HEIGHTS IL, 60005  (847) 555-5555		1 Rents \$	OMB No. 1545-0115  <b>2011</b> <b>Form 1099-MISC</b>	4 Federal income tax withheld \$	For Privacy Act and Paperwork Reduction Act Notice, see the 2010 General Instructions for Certain Information Returns.
PAYER'S Federal identification number 00-0000000		2 Royalties \$		5 Medical and health care payments \$	
RECIPIENT'S identification number 557-89-6521		3 Other income \$	6 Substitute payments in lieu of dividends or interest \$		
RECIPIENT'S name Contractor Constance		7 Nonemployee compensation \$ 2000.00	9 Payer made direct sales of \$5,000 or more of consumer products to a buyer (recipient) for resale \$		
Street address (including apt. no.) 111 E Independence Way		10 Crop insurance proceeds \$	11		
City, state, and ZIP code Arlington Heights IL, 60005		12	13 Excess golden parachute payments \$		
Account number (optional) PROC1 23		14 Gross proceeds paid to an attorney \$	15a Section 409A deferrals \$		
15b Section 409A income \$		16 State tax withheld \$	17 State/Payer's state no. _____		
Form 1099-MISC		18 State income \$	Department of the Treasury - Internal Revenue Service		

VOID     CORRECTED

**Miscellaneous Income**  
**Copy B For Recipient**

PAYER'S name, address, and ZIP code, and telephone no. BENJAMINS BACKYARD BBQ 123 HAMBURGER LANE ARLINGTON HEIGHTS IL, 60005  (847) 555-5555		1 Rents \$	OMB No. 1545-0115  <b>2011</b> <b>Form 1099-MISC</b>	4 Federal income tax withheld \$	This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.
PAYER'S Federal identification number 00-0000000		2 Royalties \$		5 Medical and health care payments \$	
RECIPIENT'S identification number 557-89-6521		3 Other income \$	6 Substitute payments in lieu of dividends or interest \$		
RECIPIENT'S name Contractor Constance		7 Nonemployee compensation \$ 2000.00	9 Payer made direct sales of \$5,000 or more of consumer products to a buyer (recipient) for resale \$		
Street address (including apt. no.) 111 E Independence Way		10 Crop insurance proceeds \$	11		
City, state, and ZIP code Arlington Heights IL, 60005		12	13 Excess golden parachute payments \$		
Account number (optional) PROC1 23		14 Gross proceeds paid to an attorney \$	15a Section 409A deferrals \$		
15b Section 409A income \$		16 State tax withheld \$	17 State/Payer's state no. _____		
Form 1099-MISC		18 State income \$	Department of the Treasury - Internal Revenue Service		

BENJAMINS BACKYARD BBQ  
 123 HAMBURGER LANE  
 ARLINGTON HEIGHTS IL, 60005  
 (847) 555-5555

PROC1 23  
 Contractor Constance  
 111 E Independence Way  
 Arlington Heights IL, 60005

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## BENEFITS

### RETIREMENT PLANS

View retirement plan information.

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

Retirement Plans						
<input checked="" type="checkbox"/>	Deduction ▲	Plan Name	Begin Check Date	End Check Date	% / Amount	Status
<input type="checkbox"/>	401(k) Traditional	Principal 401k	07/25/2003		10.00	Active

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

Retirement Plan Details		Compliance Info	
Plan	P4500 - Principal 401k	Highly Compensated?	<input type="checkbox"/>
Participation Status	Active Participant	Begin Date	
Eligibility Date	4/1/2002	End Date	
<b>Matching Status</b>		Owner?	<input type="checkbox"/>
Eligible for Match?	<input checked="" type="checkbox"/>	Ownership %	
Begin Check Date	4/1/2002	Owner Related?	<input type="checkbox"/>
<b>Contribution</b>		<b>Make Up Over 50</b>	
Deduction	401K	Do Not Participate in Make Up	<input type="checkbox"/>
Begin Check Date	07/25/2003	Eligibility Date	05/16/2021
End Check Date		Federal Limit	\$5,500.00
Calculation Code		Calculation Code	
Contribution	10.00	Amount	
<b>Match Details &amp; Allocations</b>			
<b>Roth Contribution</b>		<b>Roth Make Up Over 50</b>	
Roth Contribution	<input type="checkbox"/>	Eligibility Date	05/16/2021
Deduction		Federal Limit	\$5,500.00
Begin Check Date		Calculation Code	
End Check Date		Amount	
Calculation Code			
Contribution			
<input type="button" value="Cancel"/>			

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

Matching Rules For Principal 401k						
Employees	Range Type	Range From / To	Match Type	Match	Limit Type	Limit
Active Participants	% of Contribution	0.00 / 5.00	% of Contribution	100.00		5.00

## INSURANCE PLANS

View insurance plan information.

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

Insurance Plans									
Filter: Show Active ▾									
<input checked="" type="checkbox"/>	Web Site Click to View	Description /	Plan Type	Start Date	End Date	Employee Code	Employer Code	Rate Type	Waived
<input type="checkbox"/>	<a href="#">View</a>	<a href="#">Dental Plan</a>	DNTL - Dental	01/01/2013		125D		FM - Family	
<input type="checkbox"/>	<a href="#">View</a>	<a href="#">HDHP Plan</a>	MED - Medical	01/01/2013		EEHLT	HLTH	FM - Family	
<input type="checkbox"/>	<a href="#">View</a>	<a href="#">Life Insurance Age Rate</a>	LFI - Life Insurance	01/01/2013		LIFE			

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

Employee Insurance Plan Details		Coverage	
Active?	<input checked="" type="checkbox"/>	Eligibility Date	3/1/2002
Plan	HDHP Plan - 132910	Coverage Start Date	1/1/2013
Change Reason		Coverage End Date	
Plan Type	Medical	Waive Coverage?	<input type="checkbox"/>
Plan Effective Date	1/1/2013	Waive Coverage Date	
Plan Expiration Date		<b>Employee Deduction or Earning</b>	
Web Site Link	<a href="#">View</a>	Deduction or Earning	EEHLT
Beneficiary		Calculation Code	Flat Amount
<b>Premium Contribution Amounts Per Payroll</b>		Pay Frequency	Use Employee Frequency
How Are Premiums Paid?	Employee and Employer Contribution	Begin Check Date	01/04/2013
Rate Setup Per Rate Type	Flat Amount	End Check Date	
Rate Type	FM - Family	<b>Employer Deduction or Earning</b>	
Employee	89.25	Deduction or Earning	HLTH
Employer	110.75	Calculation Code	Flat Amount
Total	200.00	Pay Frequency	Use Employee Frequency
		Begin Check Date	01/04/2013
		End Check Date	
<b>Dependents Covered</b>			
<input checked="" type="checkbox"/>	Last Name	First Name	Relationship
<input checked="" type="checkbox"/>	Bean	Mary Ann	Wife
<input checked="" type="checkbox"/>	Bean	Daniel	Son
<b>Evidence of Insurability Status</b>			
Evidence of Insurability Status may be specified when any Coverage Amount exceeds a Guaranteed Issue Amount			
Provide Evidence of Insurability		Status	
		Status Date	
<a href="#">Cancel</a>			



## BENEFITS SETUP

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

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

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

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

### 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.

Advanced HR Reviews						
<input checked="" type="checkbox"/>	Review Date	Reviewer	Rating	New Job Title	Effective Date	Next Review
<input type="checkbox"/>	<a href="#">03/04/2013</a>	Bart Simms	6		05/01/2013	03/04/2014

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

Review Details	Job & Salary Adjustments (Reference only)
Review Date: 3/4/2013	HR Summary: A
Reviewer: Bart Simms	New Job Title:
Appraisal Type: Annual	Raise Amount: 75.00
Rating: 6	Raise Percentage:
Next Review: 3/4/2014	New Pay Amount: 1575.00
	Pay Per: Per Week
	Effective Date: 5/1/2013

Notes	
Reviewer	
Excellent work ethic. Technical skills meet expectations.	
Employee	
Happy with current position.	



## TRAINING

### SKILLS

View skill information.

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

Skill	Type	Proficiency	Complete Date	Renew Date	Notes
<a href="#">Forklift - Forklift Safe Operation</a>	License		02/07/2011		
<a href="#">Motivate - How to Motivate Your Employees</a>	Education		09/22/2010		

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

Skill Details	Additional Information
<p>● Skill Forklift - Forklift Safe Operation</p> <p>Type License</p> <p>Proficiency</p> <p>Notes</p>	<p>Skill Custom Text</p> <p>Skill Custom Drop Down</p> <p>Skill Custom Date</p> <p>Skill Custom Numeric</p> <p>Skill Custom Y/N</p>
<p><b>Completion / Renewal</b></p> <p>Training Class</p> <p>Completion Date 2/7/2011</p> <p>Training Score / Scale /</p> <p>Renewal Date</p>	
<p><a href="#">Cancel</a></p>	

## EDUCATION

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

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

Education							
<input checked="" type="checkbox"/>	School ▲	Start Date	End Date	Degree / Course of Study	Major / License	GPA / Scale	Status
<input type="checkbox"/>	University of Illinois			Bachelor of Arts		3.78/4.0	C - Complete

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

School		Degree / Course of Study	
Type	University	Degree / Course of Study	Bachelor of Arts
Name	University of Illinois	Start Date	
Address 1		End Date	
Address 2		GPA / Scale	3.78 / 4
City / State / Zip	IL	Major / License	
Country	UNITED STATES	2nd Major	
Phone		Minor	
<b>Verification / Contact</b>		Key Classes	
Verification Status	Complete	Awards	
Contact Name		<b>Expiration / Renewal</b>	
Title		Expiration Date	<input type="checkbox"/> Create Event
Phone		Renewal Date	<input type="checkbox"/> Create Event
Email		<b>Tuition Reimbursement</b>	
<b>Notes</b>		Eligible	<input type="checkbox"/>
Notes		Paid Date	
		Amount	0.00
<input type="button" value="Cancel"/>			

## TIME OFF

### SETUP & BALANCE

View time off information.

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

Setup & Balance						
Hours Per Work Day	8.0000	<input type="checkbox"/> Override?	Last Updated			
			Source			
Time Off Types						
Type ^	Start Date	Used Hours / Days	Available Hours / Days	Used \$	Available \$	Length Of Service
PERS - Personal	07/01/2003	0.000000 Days	1.461528 Days	\$0.000000	\$0.000000	01/04/2003
SICK - Sick	07/01/2003	1.000000 Days	2.653843 Days	\$0.000000	\$0.000000	01/04/2003
VAC - Vacation	07/01/2003	0.000000 Days	18.461528 Days	\$0.000000	\$0.000000	01/04/2003

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

Setup & Balance Details			
Time Off Type	VAC - Vacation	Length of Service Date	1/4/2003 <input checked="" type="checkbox"/> Override?
Start Date	7/1/2003	Months of Service	126.49 as of 07/19/2013
Accrue End Date			
Accrue Ongoing		Clear and Transfer Balances	
Enabled	<input checked="" type="checkbox"/>	Enabled	<input type="checkbox"/>
Hours Worked	0.000000 <input type="checkbox"/> Override?	Max Carry Over	0.00 Hours <input type="checkbox"/> Override?
Accrual Rate	0.000000 Hours <input type="checkbox"/> Override?		
Max Balance	0.000000 Hours <input type="checkbox"/> Override?		
Time off accrues : Annual Month 1			
Current Balance			
Available	18.461500 Days	Dollars Available	0.00
Used	0.000000 Days	Dollars Used	0.00
<b>Total</b>	<b>18.461500 Days</b>	<b>Dollars Total</b>	<b>0.00</b>
<input type="button" value="Cancel"/>			

## 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.

Time Off History									
Transaction Date From	<input type="text"/>	Time Off Type	-- All --						
Transaction Date To	<input type="text"/>	Transaction Type	-- All --						
Begin Date From	<input type="text"/>	<input type="checkbox"/> Show Totals?							
Begin Date To	<input type="text"/>	Transaction Subtype	-- All --						
<a href="#">Search</a>	<a href="#">Show All</a>	<a href="#">Reset</a>						<a href="#">Save Search</a>	
Trans Date	Begin Date	Type	Trans Type	Subtype	Hours/Days	Avail Hours/Days	\$	Available \$	
08/16/2013	08/16/2013	SICK	Earned	Ongoing	0.00 Hours	0.00 Hours			
08/16/2013	08/16/2013	VAC	Earned	Ongoing	4.62 Hours	161.54 Hours	\$115.39	\$4,038.43	
08/16/2013	08/16/2013	VAC	Cleared		0.00 Hours	156.92 Hours	\$0.00	\$3,923.05	
08/16/2013	08/16/2013	SICK	Cleared		0.00 Hours	0.00 Hours			
01/18/2013	01/18/2013	VAC	Earned	Ongoing	3.08 Hours	156.92 Hours	\$76.92	\$3,923.05	
06/15/2012	06/15/2012	VAC	Earned	Ongoing	3.08 Hours	110.77 Hours	\$76.92	\$2,769.21	
06/01/2012	06/01/2012	VAC	Earned	Ongoing	3.08 Hours	107.69 Hours	\$76.92	\$2,692.29	
05/18/2012	05/18/2012	VAC	Earned	Ongoing	3.08 Hours	104.61 Hours	\$76.92	\$2,615.37	
05/04/2012	05/04/2012	VAC	Earned	Ongoing	3.08 Hours	101.54 Hours	\$76.92	\$2,538.44	
05/04/2012	05/04/2012	SICK	Earned	Ongoing	0.00 Hours	0.00 Hours			
05/04/2012	05/04/2012	SICK	Cleared		0.00 Hours	0.00 Hours			
05/04/2012	05/04/2012	VAC	Cleared		0.00 Hours	98.46 Hours	\$0.00	\$2,461.52	
04/20/2012	04/20/2012	VAC	Earned	Ongoing	3.08 Hours	98.46 Hours	\$76.92	\$2,461.52	

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

Manual Adjustment Details							
Time Off Type	VAC			Created By	Emily Alba [*]		
Transaction Type	M - Manual Adjustment			Created Date/Time	03/19/2013 - 11:49:54 AM		
Transaction Subtype	A - Adjustment			Process Id	2013040501		
Notes							
Manual Adjustment							
	Starting Hours	Change	Adjusted Hours	Starting Dollars	Change	Adjusted Dollars	
Available	177.85 Hours	+8.00	185.85 Hours	Available 8,003.08		8,003.08	
Used	8.00 Hours		8.00 Hours	Used 360.00		360.00	
<b>Total</b>	<b>185.85 Hours</b>		<b>193.85 Hours</b>	<b>Total 8,363.08</b>		<b>8,363.08</b>	
<a href="#">Return</a>							

## LEAVE TRACKING

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

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

FMLA					
An employee must have a Length of Service of at least one year and must have worked a minimum of 1250 hours within the past year to be eligible for FMLA Leave. A company may calculate an FMLA year based on a rolling 12-month total or a calendar year.					
FMLA Eligibility			FMLA Hours		
Year Calculation	Rolling 12 Month		Total Hours	480.00	<input type="checkbox"/> Override
Length of Service	11 Yrs, 1 Mos		Hours Used	120.00	
FMLA Eligible?	<input checked="" type="checkbox"/>		Hours Available	360.00	
Ineligibility Reason			Non-FMLA Hours		
			Hours Used	0.00	
Leave Tracking					
<input checked="" type="checkbox"/>	Start Date	End Date	Request Type	FMLA Reason	Status
<input type="checkbox"/>	03/04/2013	03/29/2013	FMLA	Serious health condition of spouse, son, daughter, or parent	Approved

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

FMLA									
Leave Tracking Details			Status						
• Leave Request Type	FMLA		Request Received Date	3/1/2013					
• Start Date	3/4/2013		Response Due Date						
End Date	3/29/2013		Response Date						
FMLA Reason	Serious health condition of spouse, son, daughter, or parent		Status	Approved					
Intermittent Leave?	<input type="checkbox"/>		Status Notes						
Return To Work									
Expected Date	4/1/2013								
Actual Date									
<input type="button" value="Cancel"/>									
Tracking Items									
<input checked="" type="checkbox"/>	Tracking Type	Due Date	Complete Date	Check #	Amount	Applied	Notes	Start Date	Hours
<input type="checkbox"/>	FMLA Time Off Used							03/04/2013	120.00

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

FMLA					
Leave Tracking Item Details			Insurance Plan Payment		
• Tracking Item Type	FMLA Time Off Used		Check Number		
Due Date			Amount		
Complete Date			Month / Year Applied		
Notes			Time Off Used Hours		
			Start Date	3/4/2013	
			End Date		
			Hours		
<input type="button" value="Cancel"/>					

## TIME OFF REQUESTS

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

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

Time Off Requests									
Start Date	<input type="text"/>	Time Off Type	-- Select --						
End Date	<input type="text"/>	Request Status	-- All --						
Request Type	-- All --	Include Partially Taken?	<input type="checkbox"/>						
<input type="checkbox"/> Search <input type="checkbox"/> Show All <input type="button" value="Reset"/> <input type="button" value="Save Search"/>									
<input checked="" type="checkbox"/>	Start Date	End Date	Request Type	Amount	Time Off Type	Current Status	By	Status Date	
<input type="checkbox"/>	12/10/2014	12/12/2014	Vacation	24 Hours	VAC	Submitted	Alba, Emily	01/21/2014	
<input type="checkbox"/>	07/02/2014	07/03/2014	Vacation	16 Hours	VAC	Approved	Black, Laurie	01/21/2014	
<input type="button" value="Add"/> <input type="button" value="Delete"/>									

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

Time Off Request Details	Balances for Vacation								
Request Type: <input type="text" value="Vacation"/>	Balance as of Last Payroll: 80.00 hour(s)								
FMLA Related?: <input type="checkbox"/>	Used since Last Payroll: 0.00 hour(s)								
Employee Comments: <input type="text"/>	Available balance as of Today: 80.00 hour(s)								
	Approved for Future Use: 0.00 hour(s)								
<b>Add Request Date(s) / Hours</b>	<b>Requested: 0 day(s) - 0.00 hour(s)</b>								
<input type="radio"/> Single Day <input checked="" type="radio"/> Multiple Days <input type="checkbox"/> Include Weekends?	<table border="1"> <thead> <tr> <th>Date</th> <th>Hours</th> <th>Start Time</th> <th>End Time</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table>	Date	Hours	Start Time	End Time				
Date	Hours	Start Time	End Time						
Start Date: 12/10/2014									
End Date: 12/12/2014									
Hours Per Day: 8.00									
Start Time: <input type="text"/> AM									
End Time: <input type="text"/> PM									
<input type="button" value="Add Request Date(s) &gt;&gt;"/>									
<input type="button" value="Cancel"/>									

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

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

Time Off Request Details		Balances for Vacation	
Request Type	Vacation	Balance as of Last Payroll	80.00 hour(s)
FMLA Related?	<input type="checkbox"/>	Used since Last Payroll	0.00 hour(s)
Employee Comments	<input type="text"/>	Available balance as of Today	80.00 hour(s)
		Approved for Future Use	0.00 hour(s)
Add Request Date(s) / Hours		Requested: 3 day(s) - 24.00 hour(s)	
<input type="radio"/> Single Day <input checked="" type="radio"/> Multiple Days <input type="checkbox"/> Include Weekends?			
Start Date	12/10/2014	Date	Hours
End Date	12/12/2014	12/10/2014	8.00
Hours Per Day	8.00	12/11/2014	8.00
Start Time	AM	12/12/2014	8.00
End Time	PM		
		Start Time	End Time
		AM	PM
		AM	PM
		AM	PM
		Delete All	
Submit Request: Cancel			

**Important Notes**

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



## CURRENT CHECKS

### CURRENT CHECKS

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

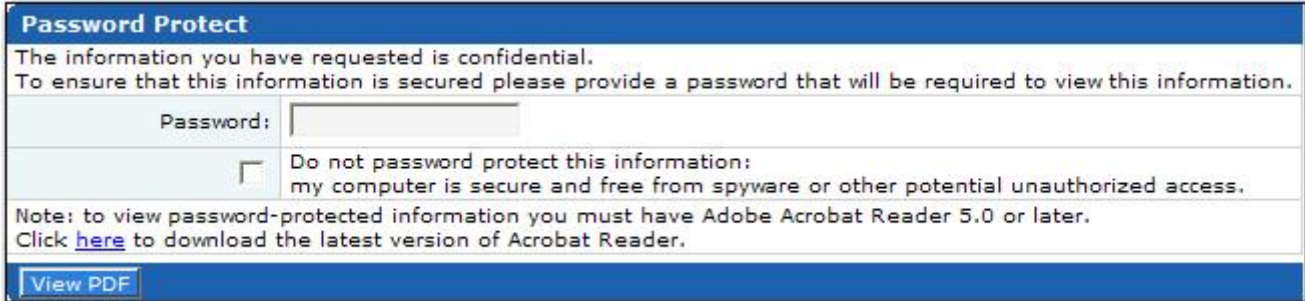
To view a paycheck or direct deposit voucher issued prior to the current check, click the **Check Date** drop down and select the applicable check date to display the check or voucher.

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

Employee							
Employee Id	16	Division	600 - Southwest				
Salary	\$1,800.00	Branch	201 - Business Development				
		Department	400 - Human Resources				
Check							
		Show Adjustment Checks		No	Check Date		
					02/14/2014 - V102220		
<b>The Garner Group</b> 3850 N Wilke Rd ARLINGTON HEIGHTS, IL 60004		Check Date	Voucher # - Delivery Location		102220		
		02/14/2014	102220		Default		
Direct Deposit		<b>Emily T Alba</b> 117 Bayview Circle Hermosa Beach, CA 90254	Check Date		02/14/2014		
		Amount	Period Begin Date - End Date		02/02/2014 - 02/08/2014		
		\$1,116.71	Gross Earnings - YTD		\$1,800.00 - \$5,400.00		
			Net Earnings - YTD		\$1,116.71 - \$3,350.13		
Direct Deposits							
Bank	Account	Type	Amount	YTD			
Jpmorgan Chase Bank, NA	###2312	Checking	\$25.00	\$75.00			
Jpmorgan Chase Bank, NA	2653	Savings	\$55.84	\$167.52			
Jpmorgan Chase Bank, NA	3678	Checking	\$1,035.87	\$3,107.61			
Totals			\$1,116.71	\$3,350.13			
Earnings					Taxes		
Description	Hrs	Rate	Current	YTD	Description	Current	YTD
401K MATCH			\$90.00	\$270.00	Federal Income Tax	\$270.51	\$811.53
Employer Paid Dental			\$20.00	\$60.00	Illinois SITW	\$79.80	\$239.40
Employer Paid HMO			\$180.00	\$540.00	Medicare	\$24.45	\$73.35
REGULAR			\$1,800.00	\$5,400.00	OASDI	\$104.53	\$313.59
Totals			\$1,800.00	\$5,400.00	Totals	\$479.29	\$1,437.87
Deductions				Time Off			
Description	Current	YTD		Description	Available	Taken	
Dental Insurance	\$24.00	\$72.00		Personal			
HMO Medical	\$90.00	\$270.00		Sick	0.00		
Totals	\$114.00	\$342.00		Vacation	187.08	0.00	
Benefits							
Description	Current	YTD					
<a href="#">Download Printable Version</a>							

## 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.



The screenshot shows a dialog box titled "Password Protect". The text inside reads: "The information you have requested is confidential. To ensure that this information is secured please provide a password that will be required to view this information." Below this is a text input field labeled "Password:". To the right of the input field is a checkbox. Below the checkbox is the text: "Do not password protect this information: my computer is secure and free from spyware or other potential unauthorized access." At the bottom of the dialog box, there is a note: "Note: to view password-protected information you must have Adobe Acrobat Reader 5.0 or later. Click [here](#) to download the latest version of Acrobat Reader." At the very bottom of the dialog box, there is a blue button labeled "View PDF".

### 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.

Name		Demographic Information	
Last Name	Adams	SSN / FEIN	987-65-4091
First Name	Marie	Birth Date	8/6/1973 Age 40
Middle Name	E	Gender	Female
Salutation		Ethnicity	White
Suffix	-- Select --	Marital Status	Married
Nickname		Smoker	<input type="checkbox"/>
Prior Last Name		Disability	
		Veteran	
Address		Personal Phone & Email	
Address 1	3117 Hubbard Lane	Home Phone	(847) 555-2011
Address 2		Mobile Phone	(224) 555-3456
City / State / Zip	Arlington Heights IL 60005	Email Address	personaladdress@yahoo.com
Country	UNITED STATES		
County / Province	Lake		
Additional Address			
Additional Address Type	-- Select --		
Additional Address Country	-- Select --		
<a href="#">Save</a>			

**Important Notes**

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

## DEPENDENTS

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

Dependents						
<input checked="" type="checkbox"/>	Last Name	First Name	Relationship	Gender	SSN	Birth Date
<input type="checkbox"/>	Adams	Ben	Son	Male	987-65-4309	03/20/1999
<input type="checkbox"/>	Adams	Ed	Husband	Male	987-65-4076	06/12/1970

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

Dependent	Address
<p><input checked="" type="checkbox"/> Last Name: Ambrosia</p> <p><input checked="" type="checkbox"/> First Name: Annie</p> <p>Middle Name:</p> <p><input checked="" type="checkbox"/> Relationship: Daughter</p> <p>Gender: -- Select --</p> <p>Birth Date: 7/14/2009 Age 5</p> <p>SSN:</p>	<p><input checked="" type="checkbox"/> Stay in sync with Employee Information</p> <p>Address 1: 117 Bayview Circle</p> <p>Address 2:</p> <p>City / State / Zip: Hermosa Beach CA 90254</p> <p>Country: -- Select --</p> <p>County:</p>
<p><b>Emergency Contact</b></p> <p>Emergency Contact? <input checked="" type="checkbox"/></p> <p>Priority: <input checked="" type="radio"/> Primary <input type="radio"/> Secondary</p> <p><input checked="" type="checkbox"/> Primary Phone: -- Select --</p> <p>Notes:</p>	<p><b>Other Dependent Information</b></p> <p>Home Phone: (647) 956-4850</p> <p>Email:</p> <p>Work Phone: Exit:</p> <p>Mobile Phone:</p> <p>Pager:</p>
<p><b>Student</b></p> <p>Full Time Student: <input type="checkbox"/></p>	

**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.

Emergency Contacts							
<input checked="" type="checkbox"/>	Last Name ▾	First Name	Relationship	Priority	Primary Phone	Email	Notes
<input type="checkbox"/>	Adams	Ed	Husband	Primary	(847) 555-2011		

[Add](#) [Delete](#)

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.

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

**Emergency Contact**

Priority:  Primary  Secondary

Last Name:

First Name:

Relationship:

**Other Emergency Contact Information**

Primary Phone:

Home Phone:

Work Phone:  Ext.

Mobile Phone:

Pager:

Email:

**Address**  Stay in sync with Employee Information

Address 1:

Address 2:

City / State / Zip:

Country:

County:

**Notes**

Notes:

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

[Save](#) [Save & Add New](#) [Save & Return](#) [Cancel](#)

## WORK INFO

### EMPLOYEE STATUS

View employee status information.

Current Employee Status		Adjusted Seniority Date				
Employee Status	Active	Adjusted Seniority Date				
Hire		Termination				
Hire Date	02/15/2002	Termination Date				
Rehire Date		Eligible for Rehire?				
Length Of Service	Hire Date - 11 Yrs, 1 Mos	User Account Deactivation Date				
Records: 1						
Employee Status History						
Show <input type="text" value="All"/>						
Effective Date	Check Date	Status	Change Reason	Changed By	Edited	Action
2/15/2002	Current	Active	Hire	Database Import		

### DEPT/POSITION

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

Current		Change Reason			
Effective Date	03/24/2014	Change Reason			
Supervisor / Reviewer		Cost Center(s)			
Supervisor	BLACK, LAURIE [5][CLNT04]	Division	400 - Central		
Reviewer	BLACK, LAURIE [5][CLNT04]	Branch	201 - Business Development		
Is Supervisor / Reviewer?		Department	120 - Sales - Outside		
Position		Pay Settings			
Employment Type	Regular Full Time	Pay Group	S - Salary		
Position	HOST - Home Region Sales Staff	OT Exempt?			
Job Title	Sales Specialist	Tipped			
EEO Class	4 - Sales Workers	Minimum Wage Exempt?			
Work Comp	9870 - Office	Union			
Home Shift		Union			
Clock / Badge Number	16	Affiliation Date			
		Union Position			
		Initiation Collected?			
		Dues Collected?			
Records: 3					
Dept / Position History					
Show <input type="text" value="All"/>					
Effective Date	Check Date	Change Reason	Changed By	Edited	Action
3/24/2014	Current		Emily Alba	✓	
9/10/2013	History	Change Reviewer	Emily Alba		
11/5/2010	History	Initial	Database Import		

## WORK LOCATION

View work site information.

Work Location		Work Phone / Email / Mail Stop	
Work Location	-- Use default Company Address	Work Phone	(847) 555-1234 Ext
Address 1	3850 N. Wilke Rd	Mobile Phone	
Address 2		Pager	
City / State / Zip	ARLINGTON HEIGHTS IL 60004	Email	devspare@data.paylocity.com
Country	UNITED STATES	Mail Stop	
County	COOK		

## Important Notes

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

## ELIGIBILITY

View information regarding eligibility for work.

Work Authorization		I-9 Verification		SSN Verification	
Work Authorization		I-9 Verified?	<input type="checkbox"/>	SSN	xxx-xx-1047
USCIS or Admission Number		Date Verified		SSN Verified?	<input type="checkbox"/>
Visa Type		Notes		Date Verified	
Expiry Date				Notes	

## EMPLOYEE I-9 EMPLOYMENT ELIGIBILITY

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

Work Authorization		I-9	
Work Authorization	A citizen of the United States	Document Name	Generated I9 Document.pdf
USCIS Number		Received Date	01/16/2015
Visa Type		Uploaded Date	01/16/2015
Foreign Passport Number		Action	<a href="#">View</a>
Attested By	Emily Alba 1/1/0001		
Expiration Date			
I94 Admission Number			
Country of Issuance			

## Reports

- Audit Trail Detail



## AUTHORIZATION TRACKING

View work authorization status.

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

Authorization Activity Tracking							
<input checked="" type="checkbox"/>	Date ▲	Type	Status	Attorney	Attorney Phone	Notes	Updated By
<input type="checkbox"/>	03/15/2013	Citizenship / Naturalization Application	Verified				Alba, Emily [16]

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

Authorization Activity Tracking Details			
Work Authorization Type	Citizenship / Naturalization Application		
Date	3/15/2013		
Status	Verified		
Attorney Name			
Attorney Phone			
		Notes	
<input type="button" value="Cancel"/>			

## 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.

Vets 100/100A Tracking		New Hire Medical Availability	
Enable?	<input checked="" type="checkbox"/>	Medical Coverage Available?	<input checked="" type="checkbox"/>
Hiring Location	Headquarters ▼	Medical Coverage Date	3/1/2010 ▼
<b>Vets 100</b>		<b>Vets 100A</b>	
Job Category	5 - Office and Clerical ▼	Job Category	-- Select -- ▼
Covered Veteran	<input type="checkbox"/> Special Disabled Veterans <input type="checkbox"/> Vietnam Era Veterans <input type="checkbox"/> Recently Separated Veterans <input checked="" type="checkbox"/> Other Protected Veterans	Covered Veteran	<input type="checkbox"/> Disabled Veterans <input type="checkbox"/> Other Protected Veterans <input type="checkbox"/> Armed Forces Service Medal Veterans <input type="checkbox"/> Recently Separated Veterans
<input type="button" value="Save"/>			

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												
Effective	Check Date	Change Reason	Pay Type	Salary	Rate / Per	Freq	Annual Salary	Auto Pay	Amount	%	Action	
3/7/2014	Current	Merit Increase	Hourly	\$0.00	20.0000 / Hour	W	\$41,600.00	<input checked="" type="checkbox"/>	1.0000	5.2632		
3/1/2013	History	Merit Increase	Hourly	\$0.00	19.0000 / Hour	W	\$39,520.00	<input checked="" type="checkbox"/>	1.0000	5.5556		
3/4/2011	History	New Pay Grade	Hourly	\$0.00	18.0000 / Hour	W	\$37,440.00		2.1000	13.2075		
3/5/2010	History	Merit Increase	Hourly	\$0.00	15.9000 / Hour	W	\$33,072.00		0.9000	6.00		
3/6/2009	History		Hourly	\$0.00	15.0000 / Hour	W	\$31,200.00					

Records: 1

Additional Rates												
Effective	Check Date	End Check Date	Change Reason	Rate	Rate / Per	Department	Job	Shift	Action			
3/7/2014	Current			2 - Rate Code 2	23.5000 / Hour	Customer Service [100]						

### PREVIOUS EMPLOYMENT

View employment history prior to being employed by the company.

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

Previous Employment									
<input checked="" type="checkbox"/>	Employer Name	Contact Phone	Job Title	Start Date	End Date	Rate/Per	Can Contact?	Status	
<input type="checkbox"/>	<a href="#">Account Temps</a>		CSR Representative	02/10/1990	06/08/1999	\$11.75	<input checked="" type="checkbox"/>	U - Unverified	

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

Previous Employment Details		Job	
Employer Name	Account Temps	Title	CSR Representative
Business Type	Staffing Agency	Start Date	2/10/1990
Address 1		End Date	6/8/1999
Address 2		Supervisor Name	Bob
City / State / Zip	--	Supervisor Title	
Country	UNITED STATES	Duties	
County		Pay Rate	11.750000
Phone		Rate Per	
Fax		<b>Verification</b>	
<b>Contact Information</b>		Verification Status	Unverified
Can Contact?	<input checked="" type="checkbox"/>	Term Reason	
Contact Name	Bob from Account Temps	Eligible for Rehire?	<input type="checkbox"/>
Title		Comments	
Phone			
Email			

## EMPLOYMENT HISTORY

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

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

Employment History										
<input checked="" type="checkbox"/>	Effective Date	Description	Title	Rate	Per	Salary	Annual Salary	Notes	Capture Date	Edited
<input type="checkbox"/>	<a href="#">03/15/2013</a>	Change Cost Center	Customer Support Representative	15.5000	Hour	0.0000	32,240.0000		03/16/2013	
<input type="checkbox"/>	<a href="#">03/15/2013</a>	Change Compensation	Customer Support Representative	15.5000	Hour	0.0000	32,240.0000		03/16/2013	
<input type="checkbox"/>	<a href="#">12/12/2012</a>	Change Cost Center	Customer Support Representative	15.0000	Hour	0.0000	31,200.0000		02/04/2013	
<input type="checkbox"/>	<a href="#">12/12/2012</a>	Change Supervisor	Customer Support Representative	15.0000	Hour	0.0000	31,200.0000		02/04/2013	
<input type="checkbox"/>	<a href="#">12/12/2012</a>	Change Job	Customer Support Representative	15.0000	Hour	0.0000	31,200.0000		02/04/2013	
<input type="checkbox"/>	<a href="#">12/10/2012</a>	Change Cost Center	Customer Support Representative	15.0000	Hour	0.0000	31,200.0000		02/04/2013	

Employment History Event

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

Employment History Details	
Effective Date	3/15/2013
Description	Change Cost Center
Change Reason	
Capture Date	03/16/2013
Changed By	Database Import
Edited	
Notes	
<b>Record Type: Change Cost Center</b>	
Division	600 - Southwest
Branch	301 - Finance
Department	600 - Client Support
Supervisor	Bart Kilpatrick [2]
Job Title	Customer Support Representative
Salary	0.00
Base Rate	15.50
Rate Per	Hour - Per Hour
Pay Frequency	W - Weekly
Annual Salary	32240.00

[Cancel](#)

## EVENTS

View events, awards, or disciplinary actions.

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

Events							
Event Type	-- All --	Event Date From		Event Date To		Next Date From	
Event Code		Event Date To		Next Date From		Next Date To	
Description							
Event							
<input type="checkbox"/> <a href="#">EmpMonth - Employee of the month</a>							
Code	EmpMonth - Employee of the month	Type	Recognition	Event	Employee of the Month	Event Date	04/01/2015
						Next Date	
						Proficiency	
						Notes	

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

Event Details		Additional Information	
Code	EmpMonth - Employee of the month	Nominated By	Sarah Walker
Type	None	Nomination Date	2/28/2013
Event	February Employee of the Month		
Date	3/15/2013		
Next Date			
Proficiency			
Notes			

[Cancel](#)

## COMPANY PROPERTY

View the company property that has been issued.

Company Property					
<input checked="" type="checkbox"/>	Item Type ▲	Issue Date	Description	Serial #	Return Due
<input type="checkbox"/>	Badge Issued	02/03/2009		6428976	
<input type="checkbox"/>	Notebook Computer	02/03/2009		2375898HGFXX23	
<input type="checkbox"/>	Parking Spot Number	02/03/2009	677		

## PAY HISTORY

### CURRENT CHECKS

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

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

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

Employee							
Employee Id	16	Division	600 - Southwest				
Salary	\$1,800.00	Branch	201 - Business Development				
		Department	400 - Human Resources				
Check							
Show Adjustment Checks <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes <input type="checkbox"/> Check Date 02/14/2014 - V102220							
<b>The Garner Group</b> 3850 N Wilke Rd ARLINGTON HEIGHTS, IL 60004  Direct Deposit		Check Date 02/14/2014	Voucher # 102220	Voucher # - Delivery Location 102220 Default			
Emily T Alba 117 Bayview Circle Hermosa Beach, CA 90254		Amount \$1,116.71	Check Date 02/14/2014	Period Begin Date - End Date 02/02/2014 02/08/2014			
			Gross Earnings - YTD \$1,800.00	\$5,400.00			
			Net Earnings - YTD \$1,116.71	\$3,350.13			
Direct Deposits							
Bank	Account	Type	Amount	YTD			
Jpmorgan Chase Bank, NA	###2312	Checking	\$25.00	\$75.00			
Jpmorgan Chase Bank, NA	2653	Savings	\$55.84	\$167.52			
Jpmorgan Chase Bank, NA	3678	Checking	\$1,035.87	\$3,107.61			
Totals			\$1,116.71	\$3,350.13			
Earnings					Taxes		
Description	Hrs	Rate	Current	YTD	Description	Current	YTD
401K MATCH			\$90.00	\$270.00	Federal Income Tax	\$270.51	\$811.53
Employer Paid Dental			\$20.00	\$60.00	Illinois SITW	\$79.80	\$239.40
Employer Paid HMO			\$180.00	\$540.00	Medicare	\$24.45	\$73.35
REGULAR			\$1,800.00	\$5,400.00	OASDI	\$104.53	\$313.59
Totals			\$1,800.00	\$5,400.00	Totals	\$479.29	\$1,437.87
Deductions				Time Off			
Description	Current	YTD		Description	Available	Taken	
Dental Insurance	\$24.00	\$72.00		Personal			
HMO Medical	\$90.00	\$270.00		Sick	0.00		
Totals	\$114.00	\$342.00		Vacation	187.08	0.00	
Benefits							
Description	Current	YTD					
<a href="#">Download Printable Version</a>							

## CHECK HISTORY

Search for checks in a specific date range.

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

Search				Summary			
Year	2012			Reg Hours	0.00	Reg Pay	\$4,000.00
Quarter / YTD	<input type="radio"/> Q1 <input checked="" type="radio"/> Q2 <input type="radio"/> Q3 <input type="radio"/> Q4 <input type="radio"/> YTD			OT Hours	0.00	OT Pay	\$0.00
Date Range From	4/1/2012			Other Hours	0.00	Other Pay	\$2,441.00
Date Range To	6/30/2012			Total Hours	0.00	Gross Pay	\$4,100.00
<input type="button" value="Submit"/>				Taxes	\$800.36	Net Pay	\$2,070.20
				Deductions	\$1,576.00	Direct Deposit	\$2,070.20
				Weeks Worked	0	Net Check	\$0.00

Results							Detailed Pay Information		
<input checked="" type="checkbox"/>	Check Date	Pay Type	Check/VCR #	Gross	Net	Dir Dep	Description	Hours or Taxable	Amount
<input checked="" type="checkbox"/>	06/29/2012	Regular	101943	\$1,025.00	\$517.54	\$517.54	401K MATCH	0.00	\$205.00
<input checked="" type="checkbox"/>	06/15/2012	Regular	101933	\$1,225.00	\$653.44	\$653.44	Auto Allowance	0.00	\$100.00
<input checked="" type="checkbox"/>	06/01/2012	Regular	101923	\$1,025.00	\$517.58	\$517.58	Employer Paid Dental	0.00	\$136.00
<input checked="" type="checkbox"/>	05/18/2012	Regular	101913	\$1,025.00	\$517.54	\$517.54	Employer Paid HDHP	0.00	\$2,000.00
<input type="checkbox"/>	05/04/2012	Regular	101903	\$1,225.00	\$653.44	\$653.44	REGULAR	0.00	\$4,000.00
<input checked="" type="checkbox"/>	04/20/2012	Regular	101893	\$1,025.00	\$517.54	\$517.54	401(k) Traditional	0.00	\$328.00
<input type="checkbox"/>	04/06/2012	Regular	101883	\$1,225.00	\$653.44	\$653.44	Dental Insurance	0.00	\$248.00
							HDHP PPO Medical	0.00	\$1,000.00
							Dir Dep 898435	0.00	\$300.00
							Dir Dep 92956624	0.00	\$1,770.20
							Federal Income Tax	2524.00	\$174.36
							Fed Unemployment	713.00	\$4.28
							Illinois SITW	2524.00	\$118.32
							Illinois SUI	2852.00	\$124.08
							Medicare	2852.00	\$41.36
							Medicare - Employer	2852.00	\$41.36



**W2**

View and print W2s that have been processed by Paylocity.

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

Tax Year	Fed Wages	Fed Withholding	SS Wages	SS Withholding	Medicare Wages	Medicare Withholding
2012	\$40,268.00	\$6,740.06	\$42,698.00	\$1,793.33	\$42,698.00	\$619.12
2011	\$3,220.00	\$564.62	\$3,400.00	\$142.80	\$3,400.00	\$49.30
2011	\$46,380.00	\$8,229.68	\$48,900.00	\$2,053.80	\$48,900.00	\$709.06

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

<b>Copy C - FOR EMPLOYEE'S RECORDS ONLY</b>		<b>2012</b>		OMB No. 1545-0008	
a Control number PROC1 1		1 Wages, tips, other comp. 40,268.00		2 Federal income tax withheld 6,740.06	
b Employer ID number 00-5554442		3 Social security wages 42,698.00		4 Social security tax withheld 1,793.33	
		5 Medicare wages and tips 42,698.00		6 Medicare tax withheld 619.12	
c Employer's name, address, and ZIP code The Garner Group 3850 N Wilke Rd ARLINGTON HEIGHTS, IL 60004					
d Employee's social security number 987-65-4321					
e Employee's name, address, and ZIP code Emily I Alba 117 Bayview Circle Hermosa Beach, CA 90254					
7 Social security tips 0.00		8 Allocated tips 0.00		9 Advance EIC payment 0.00	
10 Dependent care benefits 0.00		11 Nonqualified plans 0.00			
12a D	2,430.00	13 Statutory employee Retirement plan 3rd-party sick pay X			
12b DD	11,032.00	14 Other			
12c					
12d					
IL	00000000000000	40,268.00		2,013.40	
15 State Employer's State ID#		16 State wages, tips, etc.		17 State income tax	
18 Local wages, tips, etc. N/A		19 Local income tax N/A		20 Locality name N/A	

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

This information is being furnished to the IRS. If you are required to file a tax return, a negligence penalty/other sanction may be imposed on you if this income is taxable and you fail to report it. Printed by Paylocity Payroll  
Page 2 of 2



View and print 1099s that have been processed by Paylocity.

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

1099	Tax Year	Gross Wages	Federal Withholding	State Withholding
	2011	\$2,000.00	\$0.00	\$0.00
	2009	\$6,050.00	\$0.00	\$0.00
	2008	\$16,704.06	\$0.00	\$0.00
	2007	\$24,940.00	\$0.00	\$0.00
	2006	\$18,700.00	\$0.00	\$0.00
	2005	\$36,000.00	\$0.00	\$0.00

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

VOID     CORRECTED

**Miscellaneous Income**  
**Copy A For Internal Revenue Service Center**  
**File with Form 1096.**  
For Privacy Act and Paperwork Reduction Act Notice, see the 2010 General Instructions for Certain Information Returns.

PAYER'S name, address, and ZIP code, and telephone no. BENJAMINS BACKYARD BBQ 123 HAMBURGER LANE ARLINGTON HEIGHTS IL, 60005 (847) 555-5555		1 Rents \$	OMB No. 1545-0115 <b>2011</b> <b>Form 1099-MISC</b>	4 Federal income tax withheld \$
PAYER'S Federal identification number 00-0000000		2 Royalties \$		6 Medical and health care payments \$
RECIPIENT'S identification number 557-89-6521		3 Other income \$	7 Nonemployee compensation \$ 2000.00	
RECIPIENT'S name Contractor Constance		9 Payer made direct sales of \$5,000 or more of consumer products to a buyer (recipient) for resale \$		10 Crop insurance proceeds \$
Street address (including apt. no.) 111 E Independence Way		11		12
City, state, and ZIP code Arlington Heights IL, 60005		13 Excess golden parachute payments \$		14 Gross proceeds paid to an attorney \$
Account number (optional) PROC1 23		2nd TIN not		15a Section 409A deferrals \$
15b Section 409A income \$		16 State tax withheld \$		17 State/Payer's state no. _____
18 State income \$		Department of the Treasury - Internal Revenue Service		

VOID     CORRECTED

**Miscellaneous Income**  
**Copy B For Recipient**  
This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

PAYER'S name, address, and ZIP code, and telephone no. BENJAMINS BACKYARD BBQ 123 HAMBURGER LANE ARLINGTON HEIGHTS IL, 60005 (847) 555-5555		1 Rents \$	OMB No. 1545-0115 <b>2011</b> <b>Form 1099-MISC</b>	4 Federal income tax withheld \$
PAYER'S Federal identification number 00-0000000		2 Royalties \$		6 Medical and health care payments \$
RECIPIENT'S identification number 557-89-6521		3 Other income \$	7 Nonemployee compensation \$ 2000.00	
RECIPIENT'S name Contractor Constance		9 Payer made direct sales of \$5,000 or more of consumer products to a buyer (recipient) for resale \$		10 Crop insurance proceeds \$
Street address (including apt. no.) 111 E Independence Way		11		12
City, state, and ZIP code Arlington Heights IL, 60005		13 Excess golden parachute payments \$		14 Gross proceeds paid to an attorney \$
Account number (optional) PROC1 23		2nd TIN not		15a Section 409A deferrals \$
15b Section 409A income \$		16 State tax withheld \$		17 State/Payer's state no. _____
18 State income \$		Department of the Treasury - Internal Revenue Service		

BENJAMINS BACKYARD BBQ  
 123 HAMBURGER LANE  
 ARLINGTON HEIGHTS IL, 60005  
 (847) 555-5555

PROC1 23  
 Contractor Constance  
 111 E Independence Way  
 Arlington Heights IL, 60005

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## BENEFITS

### RETIREMENT PLANS

View retirement plan information.

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

Retirement Plans						
<input checked="" type="checkbox"/>	Deduction ▲	Plan Name	Begin Check Date	End Check Date	% / Amount	Status
<input type="checkbox"/>	<b>401(k) Traditional</b>	Principal 401k	07/25/2003		10.00	Active

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

Retirement Plan Details		Compliance Info	
Plan	P4500 - Principal 401k	Highly Compensated?	<input type="checkbox"/>
Participation Status	Active Participant	Begin Date	
Eligibility Date	4/1/2002	End Date	
<b>Matching Status</b>		Owner?	<input type="checkbox"/>
Eligible for Match?	<input checked="" type="checkbox"/>	Ownership %	
Begin Check Date	4/1/2002	Owner Related?	<input type="checkbox"/>
<b>Contribution</b>		<b>Make Up Over 50</b>	
Deduction	401K	Do Not Participate in Make Up	<input type="checkbox"/>
Begin Check Date	07/25/2003	Eligibility Date	05/16/2021
End Check Date		Federal Limit	\$5,500.00
Calculation Code		Calculation Code	
Contribution	10.00	Amount	
<b>Match Details &amp; Allocations</b>			
<b>Roth Contribution</b>		<b>Roth Make Up Over 50</b>	
Roth Contribution	<input type="checkbox"/>	Eligibility Date	05/16/2021
Deduction		Federal Limit	\$5,500.00
Begin Check Date		Calculation Code	
End Check Date		Amount	
Calculation Code			
Contribution			
<input type="button" value="Cancel"/>			

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

Matching Rules For Principal 401k						
Employees	Range Type	Range From / To	Match Type	Match	Limit Type	Limit
Active Participants	% of Contribution	0.00 / 5.00	% of Contribution	100.00		5.00
<input type="button" value="Return"/>						

## INSURANCE PLANS

View insurance plan information.

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

Insurance Plans									
Filter: Show Active ▾									
<input checked="" type="checkbox"/>	Web Site Click to View	Description /	Plan Type	Start Date	End Date	Employee Code	Employer Code	Rate Type	Waived
<input type="checkbox"/>	<a href="#">View</a>	<a href="#">Dental Plan</a>	DNTL - Dental	01/01/2013		125D		FM - Family	
<input type="checkbox"/>	<a href="#">View</a>	<a href="#">HDHP Plan</a>	MED - Medical	01/01/2013		EEHLT	HLTH	FM - Family	
<input type="checkbox"/>	<a href="#">View</a>	<a href="#">Life Insurance Age Rate</a>	LFI - Life Insurance	01/01/2013		LIFE			

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

Employee Insurance Plan Details		Coverage	
Active?	<input checked="" type="checkbox"/>	Eligibility Date	3/1/2002
Plan	HDHP Plan - 132910	Coverage Start Date	1/1/2013
Change Reason		Coverage End Date	
Plan Type	Medical	Waive Coverage?	<input type="checkbox"/>
Plan Effective Date	1/1/2013	Waive Coverage Date	
Plan Expiration Date		<b>Employee Deduction or Earning</b>	
Web Site Link	<a href="#">View</a>	Deduction or Earning	EEHLT
Beneficiary		Calculation Code	Flat Amount
<b>Premium Contribution Amounts Per Payroll</b>		Pay Frequency	Use Employee Frequency
How Are Premiums Paid?	Employee and Employer Contribution	Begin Check Date	01/04/2013
Rate Setup Per Rate Type	Flat Amount	End Check Date	
Rate Type	FM - Family	<b>Employer Deduction or Earning</b>	
Employee	89.25	Deduction or Earning	HLTH
Employer	110.75	Calculation Code	Flat Amount
Total	200.00	Pay Frequency	Use Employee Frequency
		Begin Check Date	01/04/2013
		End Check Date	
<b>Dependents Covered</b>			
<input checked="" type="checkbox"/>	Last Name	First Name	Relationship
<input checked="" type="checkbox"/>	Bean	Mary Ann	Wife
<input checked="" type="checkbox"/>	Bean	Daniel	Son
<b>Evidence of Insurability Status</b>			
Evidence of Insurability Status may be specified when any Coverage Amount exceeds a Guaranteed Issue Amount			
Provide Evidence of Insurability		Status	
		Status Date	
<a href="#">Cancel</a>			

## BENEFITS SETUP

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

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

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

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

## PERFORMANCE

### ADVANCED HR REVIEWS

View performance reviews.

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

Advanced HR Reviews						
<input checked="" type="checkbox"/>	Review Date	Reviewer	Rating	New Job Title	Effective Date	Next Review
<input type="checkbox"/>	<a href="#">03/04/2013</a>	Bart Simms	6		05/01/2013	03/04/2014

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

Review Details	Job & Salary Adjustments (Reference only)
Review Date: 3/4/2013	HR Summary: A
Reviewer: Bart Simms	New Job Title:
Appraisal Type: Annual	Raise Amount: 75.00
Rating: 6	Raise Percentage:
Next Review: 3/4/2014	New Pay Amount: 1575.00
	Pay Per: Per Week
	Effective Date: 5/1/2013

Notes	
Reviewer	
Excellent work ethic. Technical skills meet expectations.	
Employee	
Happy with current position.	

## TRAINING

### SKILLS

View skill information.

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

Skill	Type	Proficiency	Complete Date	Renew Date	Notes
<a href="#">Forklift - Forklift Safe Operation</a>	License		02/07/2011		
<a href="#">Motivate - How to Motivate Your Employees</a>	Education		09/22/2010		

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

Skill Details	Additional Information
<p>Skill: Forklift - Forklift Safe Operation</p> <p>Type: License</p> <p>Proficiency:</p> <p>Notes:</p>	<p>Skill Custom Text</p> <p>Skill Custom Drop Down</p> <p>Skill Custom Date</p> <p>Skill Custom Numeric</p> <p>Skill Custom Y/N</p>
<p><b>Completion / Renewal</b></p> <p>Training Class:</p> <p>Completion Date: 2/7/2011</p> <p>Training Score / Scale: /</p> <p>Renewal Date:</p>	
<p><a href="#">Cancel</a></p>	

## EDUCATION

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

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

Education							
<input checked="" type="checkbox"/>	School ▲	Start Date	End Date	Degree / Course of Study	Major / License	GPA / Scale	Status
<input type="checkbox"/>	University of Illinois			Bachelor of Arts		3.78/4.0	C - Complete

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

School		Degree / Course of Study	
Type	University	Degree / Course of Study	Bachelor of Arts
Name	University of Illinois	Start Date	
Address 1		End Date	
Address 2		GPA / Scale	3.78 / 4
City / State / Zip	IL	Major / License	
Country	UNITED STATES	2nd Major	
Phone		Minor	
<b>Verification / Contact</b>		Key Classes	
Verification Status	Complete	Awards	
Contact Name		<b>Expiration / Renewal</b>	
Title		Expiration Date	<input type="checkbox"/> Create Event
Phone		Renewal Date	<input type="checkbox"/> Create Event
Email		<b>Tuition Reimbursement</b>	
<b>Notes</b>		Eligible	<input type="checkbox"/>
Notes		Paid Date	
		Amount	0.00
<input type="button" value="Cancel"/>			



## TIME OFF

### SETUP & BALANCE

View time off information.

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

Setup & Balance						
Hours Per Work Day	8.0000	<input type="checkbox"/> Override?	Last Updated			
			Source			
Time Off Types						
Type	Start Date	Used Hours / Days	Available Hours / Days	Used \$	Available \$	Length Of Service
PERS - Personal	07/01/2003	0.000000 Days	1.461528 Days	\$0.000000	\$0.000000	01/04/2003
SICK - Sick	07/01/2003	1.000000 Days	2.653843 Days	\$0.000000	\$0.000000	01/04/2003
VAC - Vacation	07/01/2003	0.000000 Days	18.461528 Days	\$0.000000	\$0.000000	01/04/2003

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

Setup & Balance Details			
Time Off Type	VAC - Vacation	Length of Service Date	1/4/2003 <input checked="" type="checkbox"/> Override?
Start Date	7/1/2003	Months of Service	126.49 as of 07/19/2013
Accrue End Date			
Accrue Ongoing		Clear and Transfer Balances	
Enabled	<input checked="" type="checkbox"/>	Enabled	<input type="checkbox"/>
Hours Worked	0.000000 <input type="checkbox"/> Override?	Max Carry Over	0.00 Hours <input type="checkbox"/> Override?
Accrual Rate	0.000000 Hours <input type="checkbox"/> Override?		
Max Balance	0.000000 Hours <input type="checkbox"/> Override?		
Time off accrues : Annual Month 1			
Current Balance			
Available	18.461500 Days	Dollars Available	0.00
Used	0.000000 Days	Dollars Used	0.00
<b>Total</b>	<b>18.461500 Days</b>	<b>Dollars Total</b>	<b>0.00</b>
<input type="button" value="Cancel"/>			

## 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.

Time Off History									
Transaction Date From	<input type="text"/>	Time Off Type	-- All --						
Transaction Date To	<input type="text"/>	Transaction Type	-- All --						
Begin Date From	<input type="text"/>	<input type="checkbox"/> Show Totals?							
Begin Date To	<input type="text"/>	Transaction Subtype	-- All --						
<a href="#">Search</a>	<a href="#">Show All</a>	<a href="#">Reset</a>						<a href="#">Save Search</a>	
Trans Date	Begin Date	Type	Trans Type	Subtype	Hours/Days	Avail Hours/Days	\$	Available \$	
08/16/2013	08/16/2013	SICK	Earned	Ongoing	0.00 Hours	0.00 Hours			
08/16/2013	08/16/2013	VAC	Earned	Ongoing	4.62 Hours	161.54 Hours	\$115.39	\$4,038.43	
08/16/2013	08/16/2013	VAC	Cleared		0.00 Hours	156.92 Hours	\$0.00	\$3,923.05	
08/16/2013	08/16/2013	SICK	Cleared		0.00 Hours	0.00 Hours			
01/18/2013	01/18/2013	VAC	Earned	Ongoing	3.08 Hours	156.92 Hours	\$76.92	\$3,923.05	
06/15/2012	06/15/2012	VAC	Earned	Ongoing	3.08 Hours	110.77 Hours	\$76.92	\$2,769.21	
06/01/2012	06/01/2012	VAC	Earned	Ongoing	3.08 Hours	107.69 Hours	\$76.92	\$2,692.29	
05/18/2012	05/18/2012	VAC	Earned	Ongoing	3.08 Hours	104.61 Hours	\$76.92	\$2,615.37	
05/04/2012	05/04/2012	VAC	Earned	Ongoing	3.08 Hours	101.54 Hours	\$76.92	\$2,538.44	
05/04/2012	05/04/2012	SICK	Earned	Ongoing	0.00 Hours	0.00 Hours			
05/04/2012	05/04/2012	SICK	Cleared		0.00 Hours	0.00 Hours			
05/04/2012	05/04/2012	VAC	Cleared		0.00 Hours	98.46 Hours	\$0.00	\$2,461.52	
04/20/2012	04/20/2012	VAC	Earned	Ongoing	3.08 Hours	98.46 Hours	\$76.92	\$2,461.52	

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

Manual Adjustment Details							
Time Off Type	VAC			Created By	Emily Alba [*]		
Transaction Type	M - Manual Adjustment			Created Date/Time	03/19/2013 - 11:49:54 AM		
Transaction Subtype	A - Adjustment			Process Id	2013040501		
Notes							
Manual Adjustment							
	Starting Hours	Change	Adjusted Hours	Starting Dollars	Change	Adjusted Dollars	
Available	177.85 Hours	+8.00	185.85 Hours	Available 8,003.08		8,003.08	
Used	8.00 Hours		8.00 Hours	Used 360.00		360.00	
<b>Total</b>	<b>185.85 Hours</b>		<b>193.85 Hours</b>	<b>Total 8,363.08</b>		<b>8,363.08</b>	
<a href="#">Return</a>							

## LEAVE TRACKING

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

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

FMLA					
An employee must have a Length of Service of at least one year and must have worked a minimum of 1250 hours within the past year to be eligible for FMLA Leave. A company may calculate an FMLA year based on a rolling 12-month total or a calendar year.					
FMLA Eligibility			FMLA Hours		
Year Calculation	Rolling 12 Month		Total Hours	480.00	<input type="checkbox"/> Override
Length of Service	11 Yrs, 1 Mos		Hours Used	120.00	
FMLA Eligible?	<input checked="" type="checkbox"/>		Hours Available	360.00	
Ineligibility Reason			Non-FMLA Hours		
			Hours Used	0.00	
Leave Tracking					
<input checked="" type="checkbox"/>	Start Date	End Date	Request Type	FMLA Reason	Status
<input type="checkbox"/>	03/04/2013	03/29/2013	FMLA	Serious health condition of spouse, son, daughter, or parent	Approved

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

FMLA									
Leave Tracking Details			Status						
• Leave Request Type	FMLA		Request Received Date	3/1/2013					
• Start Date	3/4/2013		Response Due Date						
End Date	3/29/2013		Response Date						
FMLA Reason	Serious health condition of spouse, son, daughter, or parent		Status	Approved					
Intermittent Leave?	<input type="checkbox"/>		Status Notes						
Return To Work									
Expected Date	4/1/2013								
Actual Date									
<input type="button" value="Cancel"/>									
Tracking Items									
<input checked="" type="checkbox"/>	Tracking Type	Due Date	Complete Date	Check #	Amount	Applied	Notes	Start Date	Hours
<input type="checkbox"/>	FMLA Time Off Used							03/04/2013	120.00

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

FMLA					
Leave Tracking Item Details			Insurance Plan Payment		
• Tracking Item Type	FMLA Time Off Used		Check Number		
Due Date			Amount		
Complete Date			Month / Year Applied		
Notes			Time Off Used Hours		
			Start Date	3/4/2013	
			End Date		
			Hours		
<input type="button" value="Cancel"/>					

## TIME OFF REQUESTS

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

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

Time Off Requests									
Start Date		End Date		Request Type		Time Off Type		Request Status	
<input type="text"/>		<input type="text"/>		-- All --		-- Select --		-- All --	
<input type="text"/>		<input type="text"/>		-- All --		-- Select --		<input type="checkbox"/>	
Request Type		Include Partially Taken?							
<input type="checkbox"/>		<input type="checkbox"/>							
Search Show All Reset Save Search									
<input checked="" type="checkbox"/>	Start Date	End Date	Request Type	Amount	Time Off Type	Current Status	By	Status Date	
<input type="checkbox"/>	12/10/2014	12/12/2014	Vacation	24 Hours	VAC	Submitted	Alba, Emily	01/21/2014	
<input type="checkbox"/>	07/02/2014	07/03/2014	Vacation	16 Hours	VAC	Approved	Black, Laurie	01/21/2014	
Add Delete									

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

Time Off Request Details		Balances for Vacation	
Request Type	Vacation	Balance as of Last Payroll	80.00 hour(s)
FMLA Related?	<input type="checkbox"/>	Used since Last Payroll	0.00 hour(s)
Employee Comments	<input type="text"/>	Available balance as of Today	80.00 hour(s)
		Approved for Future Use	0.00 hour(s)
Add Request Date(s) / Hours		Requested: 0 day(s) - 0.00 hour(s)	
<input type="radio"/> Single Day <input checked="" type="radio"/> Multiple Days <input type="checkbox"/> Include Weekends?		Date	Hours
Start Date	12/10/2014	Start Time	End Time
End Date	12/12/2014		
Hours Per Day	8.00		
Start Time	<input type="text"/> AM		
End Time	<input type="text"/> PM		
Add Request Date(s) >>			
Cancel			

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

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



**CHECK CALCULATOR SETUP**

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

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

Check Calculator Defaults	
Mode	Test
Taxation	Standard
Block Recurring Earnings	<input checked="" type="checkbox"/>
Block Recurring Deductions	<input checked="" type="checkbox"/>
Gross To Net	
Salary	\$1,000.00 <input type="checkbox"/> Auto Pay <input type="checkbox"/> Allow Negative Net <input type="checkbox"/> Adjustment - No tax amount calc
Base Rate	25.0000
Default Hours	0.00 <input type="checkbox"/> Auto Pay
Fringe Benefit "Gross-Up"	
Fringe Amount	0
Fringe Earnings Code	-- Select --
Tax Offset Earnings Code	REG - REGULAR
Net to Gross	
Net Pay	0
Default Earnings Code	REG - REGULAR

**Important Notes**

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

## EARNINGS

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

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

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

Earnings	
Salary	\$1,000.00
Auto Pay	<input checked="" type="checkbox"/>
Base Rate	25.0000
Default Hours	0.00
Auto Pay	<input type="checkbox"/>
Earning Code	REG

Line Items									
Block	Earning Code	Hours	Amount	Calc Code	Rate Code	Rate	Detail	Action	
<input checked="" type="checkbox"/>	ECAR - Auto Allowance	0.00	25.00	-- Select --	-- Select --	0.0000	Edit		
<input checked="" type="checkbox"/>	EERDEN - Employer Paid Dental	0.00	20.00	-- Select --	-- Select --	0.0000	Edit		
<input checked="" type="checkbox"/>	EERHDP - Employer Paid HDHP	0.00	250.00	-- Select --	-- Select --	0.0000	Edit		
<input type="checkbox"/>	EREG - REGULAR	0.00	1000.00	-- Select --	-- Select --	25.0000	Edit	Delete	
<input type="checkbox"/>	-- Select --	0	0	-- Select --	-- Select --	0	Edit	Delete	

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

Earning Detail					
Earning Code	EERDEN - Employer Paid Dental	Division	-- Select --	Shift	-- Select --
Hours	0.00	Branch	-- Select --	Job	-- Select --
Amount	20.00	Department	-- Select --	Workers Comp Code	-- Select --
Calc Code	-- Select --	Override State	-- Select --	Begin Date	<input type="text"/>
Rate Code	-- Select --	Override Local 1	-- Select --	End Date	<input type="text"/>
Rate	0.00	Override Local 2	-- Select --		
		Override Local 3	-- Select --		

Save Save & Return Cancel



## DEDUCTIONS

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

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

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

Deductions						
Deduction Multiplier: <input type="text" value="1"/>						
Line Items						
Block	Deduction Code	Type	Rate/Amount	Calc Code	Detail	Action
<input checked="" type="checkbox"/>	D401K - 401(k) Traditional	401k	8.00	% - Percentage of Gross		
<input checked="" type="checkbox"/>	DHSA - HSA	HSAEE125PT	100.00	Flat - Flat Amount		
<input checked="" type="checkbox"/>	DINSDN - Dental Insurance	125	31.50	Flat - Flat Amount		
<input checked="" type="checkbox"/>	DINSHD - HDHP PPO Medical	125	125.00	Flat - Flat Amount		
	-- Select --		0	-- Select --		<a href="#">Delete</a>

## TAXES

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

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

Taxes										
Taxation: <input type="text" value="Standard"/>										
Tax Frequency: <input type="text" value="W - Weekly"/>										
Line Items										
Block	Tax Code	Filing Status	Exemptions	Exemptions2	Amount Type	Amount	Percentage	Reciprocity	Primary	Action
<input type="checkbox"/>	TFITW - Federal Income Tax	Married	1		Default Amount	0.00	0.00			
<input type="checkbox"/>	TIL - Illinois SITW	Married	1	0	Default Amount	0.00	0.00	-- Select --	<input checked="" type="checkbox"/>	
	-- Select --	--Select--	0	0	-- Select --	0	0	-- Select --	<input type="checkbox"/>	<a href="#">Delete</a>

**PREVIEW/SUMMARY**

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

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

Preview / Summary				Gross \$1,000.00		Net \$592.25	
Earnings				Deductions			
Earning	Rate	Hours	Amount	Deduction	Amount		
REG	25.0000	0.00	1000.00	HSA	100.00		
		Total: 0.00	\$1,000.00	INSDN	31.50		
				INSHD	125.00		
					Total: \$256.50		
Taxes							
Tax	Taxable Wages	Amount					
FITW	743.50	59.17					
IL	743.50	35.20					
MED	743.50	10.78					
SS	743.50	46.10					
		Total: \$151.25					
<a href="#">Print Test Earnings Statement</a>							

- Close this screen to return to the main screen.

The Garner Group				Earnings Statement			
3850 N Wilke Rd				Check Date April 24, 2013			
ARLINGTON HEIGHTS, IL 60004				Period Ending April 20, 2013			
				Net Pay 592.25			
				Check Number			
Marie E Adams		Employee Number	3	Division	400		
3117 Ashbard Lane				Branch	401		
Arlington Heights, IL 60005				Department	600		
Earnings	Rate	Hours	Amount	Deductions	Amount		
REG	25.00		1,000.00	HSA	100.00		
Total Gross Pay			1,000.00	INSDN	31.50		
				INSHD	125.00		
				Total Voluntary Deductions	256.50		
Taxes	Filing Status	Amount					
FITW	M-1	59.17					
IL	M-1	35.20					
MED		10.78					
SS		46.10					
Total Tax Withholding		151.25					

**MY PERFORMANCE REVIEW**

Access performance reviews, goals, and feedback.

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

The screenshot displays a user interface for performance management, organized into three main vertical panels:

- Performance Reviews:** Shows an "Annual Performance Appra..." with a status bar indicating "Review is In Progress" and a "View" button. Below this, it lists "Reviewer: Alba, Emily" and "Due Date: 07/01/2015". It also shows "Reviewer Appraisal: Pending Appraisal" and "My Appraisal: Appraisal In Progress".
- Goals:** Features a goal titled "Open 5 New Accounts" with the description "Establish and maintain 5 new account relationships during the calendar year." It includes "Category: Professional Development" and "Start Date: 01/01/2015". A "View All Goals" button is located at the bottom.
- Feedback:** Displays a "Request for Suzanne Watson" from "Emily Alba" with a due date of "06/30/2015". It includes a "Share with:" icon and a "More" link. There are input fields for "Title" and "Comments", and "Submit" and "Save Draft" buttons. A "View All Feedback" button is at the bottom.

## 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.

Annual Perform...

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

**Core Values**  
Completed

Role Specific  
Incomplete

**Job Goals**  
Completed

Summary  
Incomplete

[Print my Review](#)

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

### Core Values

Demonstrate core company values.

### Communication Skills

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

**Comments from Reviewer**  
[Pending Reviewer Appraisal](#)

**Comments from Employee**  
3 - Meets Expectations

Characters left 14898

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

## GOALS

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

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

**Annual Perform...**

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

**Core Values** Completed

**Role Specific** Completed

**Job Goals** Completed

Summary Incomplete

[Print my Review](#)

### Job Goals

Add goals for this fiscal year.

Total Goal Weighting: 0%

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

#### Learn new software.

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

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

**Comments from Reviewer**  
⌚ Pending Reviewer Appraisal

**Comments from Employee**

3 - Meets Expectations

Characters left: 14845

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

Section Weight: ⌚ Pending


**Save** **Save & Exit** Cancel **Previous** **Next**


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

### Goal Details ✕


**Goal (required)**

**Description (required)**

**Start Date (required)**  
 

**End Date**  
 

**Status**  
 Incomplete  Complete

**Category**  
 

**Employee Notes**

**Save** **Cancel** **Delete**



## REVIEW SUMMARY

1. Verify the ratings.
2. Click **Complete** to complete the self appraisal and submit the review.

Annual Perform...

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

**Core Values**  
Completed

**Role Specific**  
Completed

**Job Goals**  
Completed

**Summary**  
Incomplete

Print my Review

### Summary

Annual Performance Appraisal 🕒 Review is In Progress

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

---

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

**Employee Appraisal**

**Core Values**

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

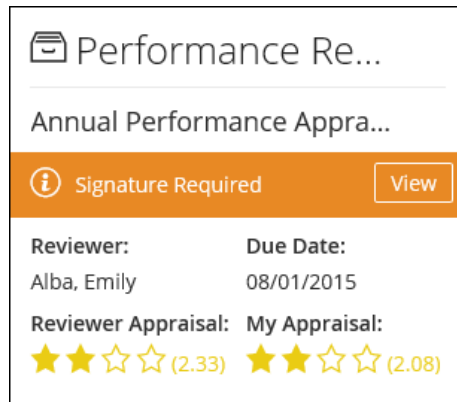
**Role Specific**

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

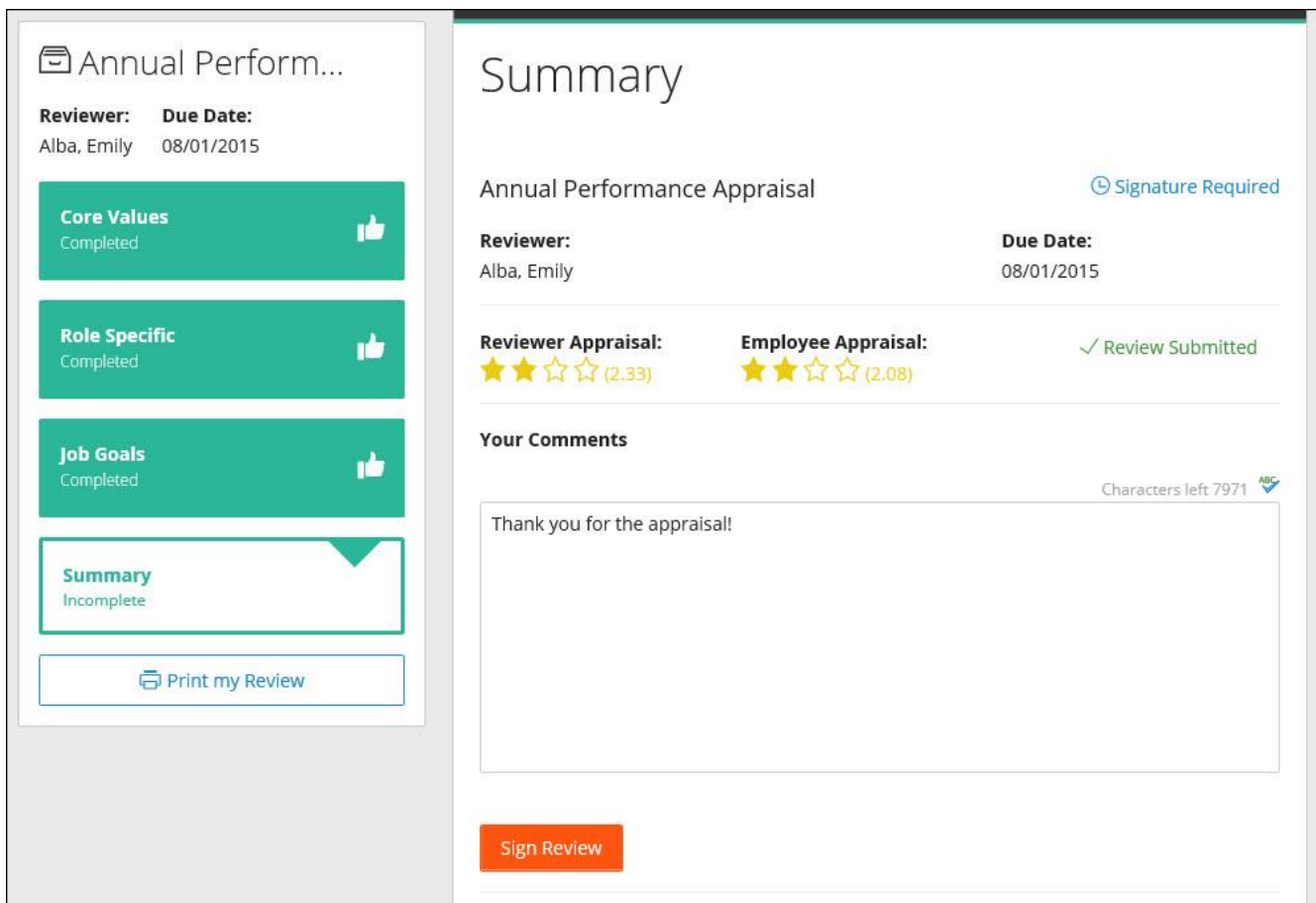
3. **Review Submitted** will appear once the review is submitted.
4. After the reviewer section is complete, the review may be returned to the employee to sign.

## SIGN THE REVIEW

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



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.



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.

### Goals

Subject matter expert i... ^

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

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

Learn new software. v

SME v

[View All Goals](#)

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

Goal ^	Start Date	End Date	Category	Description	Status	Notes	Live
<a href="#">Learn new software.</a>	01/29/2015		Team Goals	Learn how to use the new software the team will be using to track monthly statistics.	Incomplete		✓
<a href="#">SME</a>	01/01/2015		Job Specific Goals	Become Customer Service SME	Incomplete		
<a href="#">Subject matter expert in talent solutions.</a>	01/07/2015		Job Specific Goals	Master the new talent solutions project to become the subject matter expert for the team.	Incomplete		

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

1 - 3 of 3 items

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

## Goal Details ✕

<b>Goal (required)</b> <input type="text" value="Open 5 New Accounts"/>	<b>Status</b> <input checked="" type="radio"/> Incomplete <input type="radio"/> Complete
<b>Description (required)</b> <input type="text" value="Establish and maintain 5 new account relationships during the calendar year."/>	<b>Category</b> <input style="border-bottom: 1px solid #ccc;" type="text" value="Unassigned"/>
<b>Start Date (required)</b> <input style="border-bottom: 1px solid #ccc;" type="text" value="02/15/2015"/> <input type="button" value="📅"/>	<b>Employee Notes</b> <input style="border-bottom: 1px solid #ccc;" type="text"/>
<b>End Date</b> <input style="border-bottom: 1px solid #ccc;" type="text" value="02/14/2016"/> <input type="button" value="📅"/>	

---

## FEEDBACK

Provide feedback for an employee.

- Provide feedback using My Performance Review.

### Feedback

Request for Suzanne Watson ^

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

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

**Due:** 06/01/2015

**Title**

**Comments**

Request for Suzanne Watson v

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

Feedback							
Feedback	Feedback For	Request Sent From	Request Date	Due Date	Status	Share With	Feedback Date
<a href="#">View</a>	Sheppard Allerdyce [89]	Jayne Halverson [99]	01/27/2015	01/30/2015	Complete		01/27/2015
<a href="#">Provide Feedback</a>	Rebecca Bloom [18]	Jayne Halverson [99]	01/27/2015	01/30/2015	Pending		

1 - 2 of 2 items


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

## Provide Feedback ✕

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

Please provide feedback for your recent experience with Becky.

**Request Sent From:** Jayne Halverson

**Share With:**  Confidential: Employee cannot view feedback

**Feedback Title (required)**

**Feedback (required)**

## NOTIFICATIONS

### MESSAGE CENTER

View or delete messages.

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

The screenshot shows the Message Center interface. At the top, there are filters for 'Unread Only', 'From Date' (5/12/2015), 'To Date' (8/12/2015), and 'Priority' (-- All --). A 'Smart Tip' callout points to the 'Show All' button, stating: 'The Message Center defaults to showing messages from the previous three months. To show all messages, click Show All.' Below the filters is a table with columns: 'Received (CST)', 'Priority', 'Subject', 'Category', and 'Email?'. The table contains two rows of messages. A second 'Smart Tip' callout points to the checkboxes in the 'Received (CST)' column, stating: 'Select the check box next to a message (or messages) and click Delete to delete or Mark As Read to mark the message(s) as read.' At the bottom of the table are buttons for 'Delete' and 'Mark As Read'.

Received (CST)	Priority	Subject	Category	Email?
<input type="checkbox"/> 05/28/2015 - 11:24 AM		Company CLNT03 The Garner Group Employee direct deposit account updated.	Payroll	✓
<input type="checkbox"/> 05/20/2015 - 2:34 PM		Company CLNT03 The Garner Group Employee Mary Adams [3] submitted a time off request from 6/4/2015 to 6/4/2015	Time Off	✓

- 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.

The screenshot shows the Message Details page. The subject is 'Congratulations, You've been Recognized with an Impression!'. The date is '08/07/2014 - 11:20 AM (CST)' and the category is 'Peer Recognition'. The recipient is 'Employee'. The message content reads: 'Marie Adams, Congratulations, Julian Atwood has submitted an Impression for you! Click this link to view your Impression. Regards Company: CLNT04 - The Garner Group'. At the bottom, there are buttons for 'Print', 'Keep as Unread', and 'Return'.

Date	Category
08/07/2014 - 11:20 AM (CST)	Peer Recognition

To	Send Notification
Employee	Occurrence

Marie Adams,  
Congratulations, Julian Atwood has submitted an Impression for you!  
Click this [link](#) to view your Impression.  
Regards  
Company: CLNT04 - The Garner Group



## EVENT NOTIFICATION

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

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

Message Details			
Verify Reading and Accepting Confidentiality Statement			
Date	09/10/2015 - 11:10 AM (CST)	Category	Employee Event
To	Employee	Send Notification	Occurrence

Hello,  
Please verify that you have read agree with the company's confidentiality statement.

Thank You,  
The HR Team

**[Please access the event here](#)**

Company: CLNT03 - The Garner Group

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

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

### Confidentiality Agreement

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

#### Acceptance

Did you read the company's confidentiality requirement?

Yes

No

X *Marie Adams*

---

Marie Adams

[Draw Signature](#)

Sign Here

[Return to Portal](#)

**B**

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

**C**

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

**D**

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

**E**

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

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

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

**F**

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

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

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

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

**G**

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

## M

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

## O

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

## P

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

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

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

## S

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

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

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

## T

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

## W

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