



# Welcome to Paylocity



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

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

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## Scanning QR Codes

You can quickly access our video content via hyperlink or scan the QR codes with your mobile device.

Never scanned a QR code ? It’s easy! Just take a picture on your Android or Apple device!

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### Apple

Open the camera app from the home screen, control center, or lock screen.

Select the rear-facing camera. Hold your device so the QR code appears in the viewfinder.

Your device will recognize the QR code and display a link to the video.

Finally, tap the pop-up notification to view some awesome content!

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### Android

Press and hold the Home button. Then tap Lens.

Note: A prompt appears if it’s the first time you’ve used this feature. If it does, choose Allow.

Select the rear-facing camera. Hold your device so the QR code appears in the viewfinder. Then tap the magnifying glass icon to scan the QR code

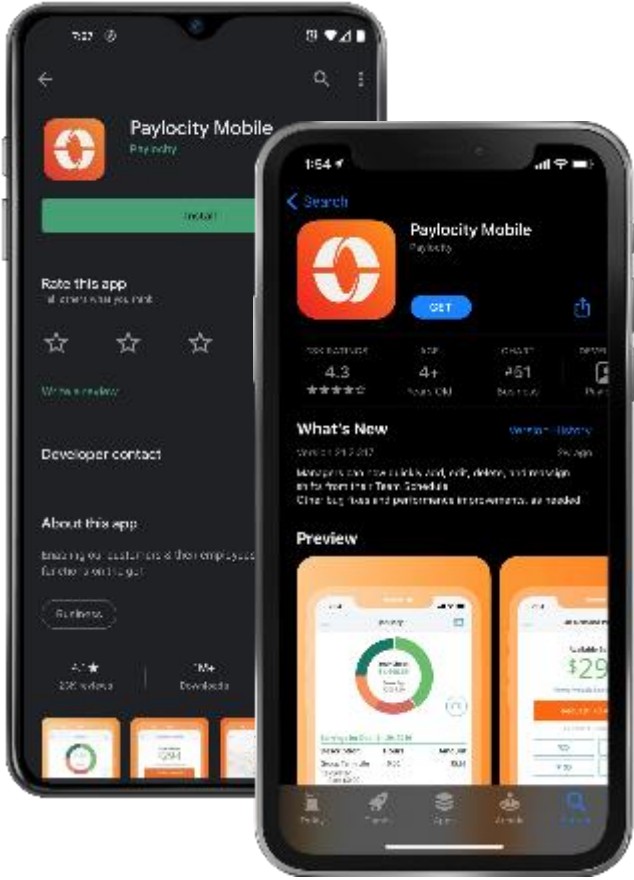
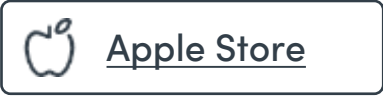
Lastly, tap the pop-up notification to view some fantastic content!



# Paylocity Mobile App

## Download the Paylocity Mobile App

It's easy to get the app. Just download it from your favorite app store with the links below or scan the QR code with your mobile device.





# Mobile registration

Registration is a snap in the app!



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



Enter the Company ID assigned to you by Paylocity.

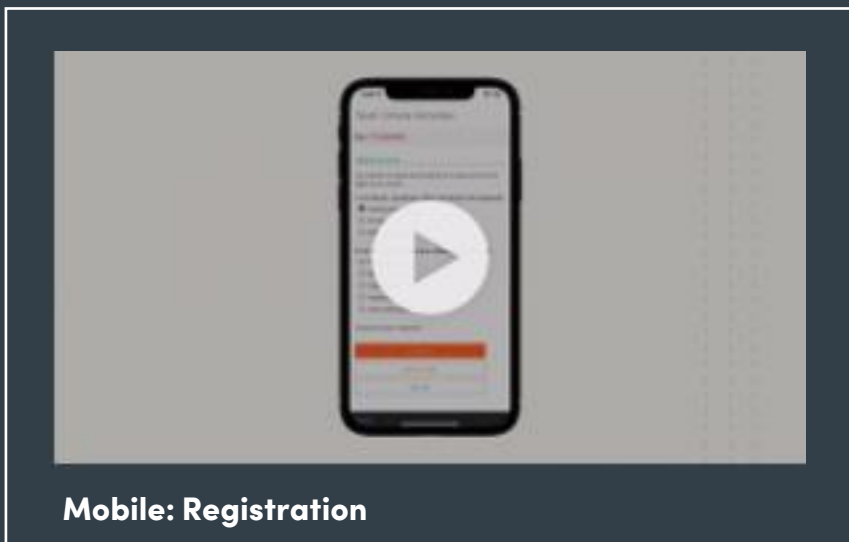


Then follow the prompts and enter the info required to complete your registration.

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



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







## Learn More

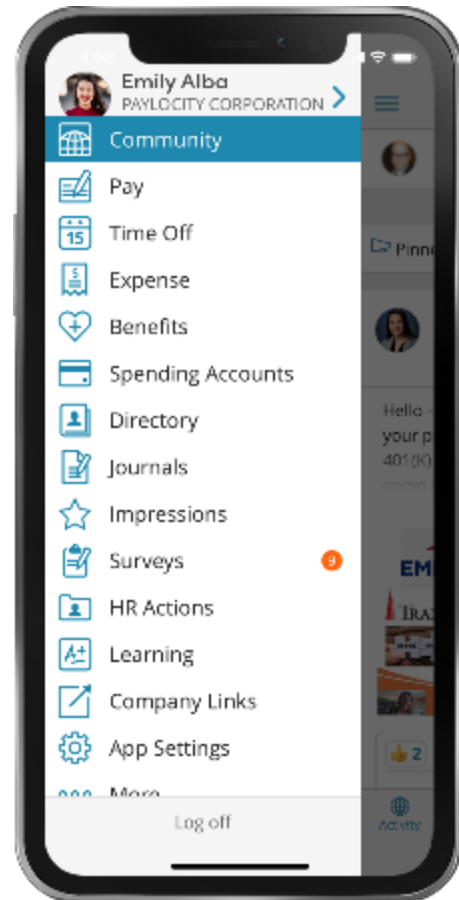
Click on the image to the left or scan the QR code below to see how easy it is to register via Paylocity's mobile app!



# Explore the App

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

-  To move between products, tap the hamburger button to open the menu.
-  Tap your name to view and edit your profile, personal info, and emergency contacts.
-  Tap **App Settings** to set your language preference, or toggle your Biometric Login, and Stay Logged In settings.
-  Tap **More** to access Paylocity Education and Knowledge (PEAK), our helpful knowledge base.



# Access Pay Info

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



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



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



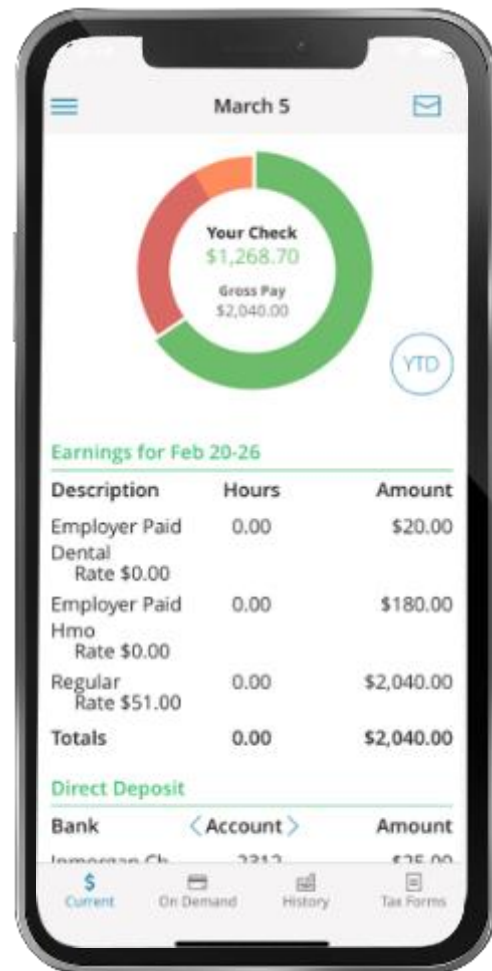
Tap **History** to view your previous pay stubs.



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



Tap the envelope to securely email pay stub information electronically.



# View Personal Info

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



Tap your name at the top of the main menu.



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



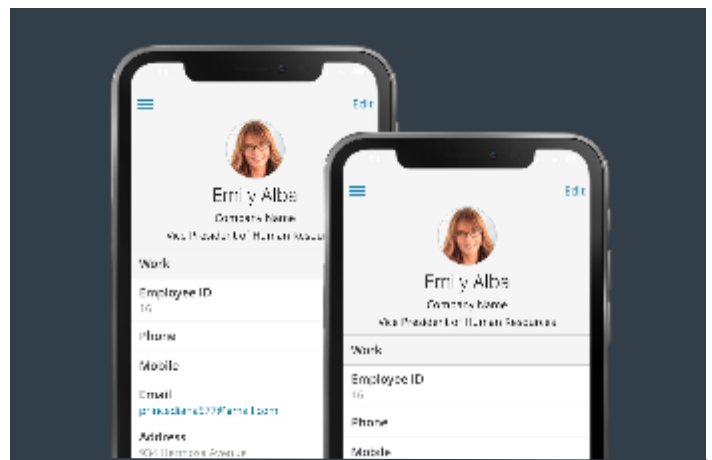
Swipe up to view and edit your Emergency Contacts.



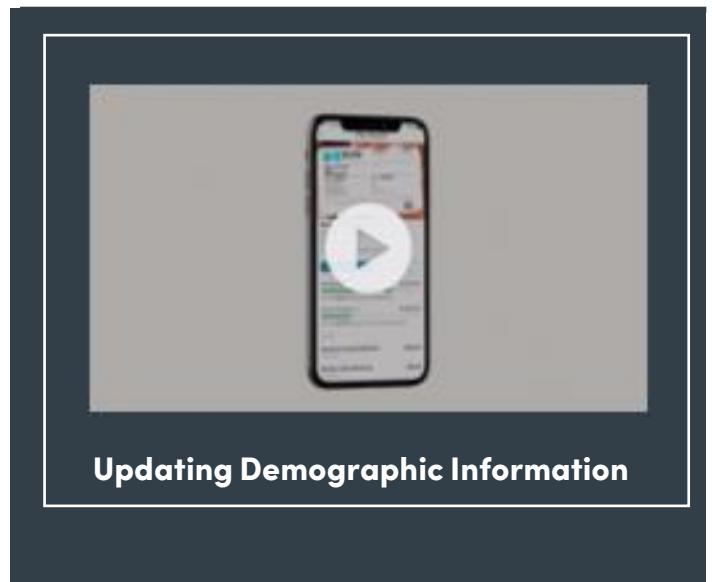
Tap **Save** when done.

## Learn More

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



**Reach out to HR or Payroll to update your work info.**







# Request Time Off

It's simple to request time off with the Paylocity mobile app or your Self Service Portal!

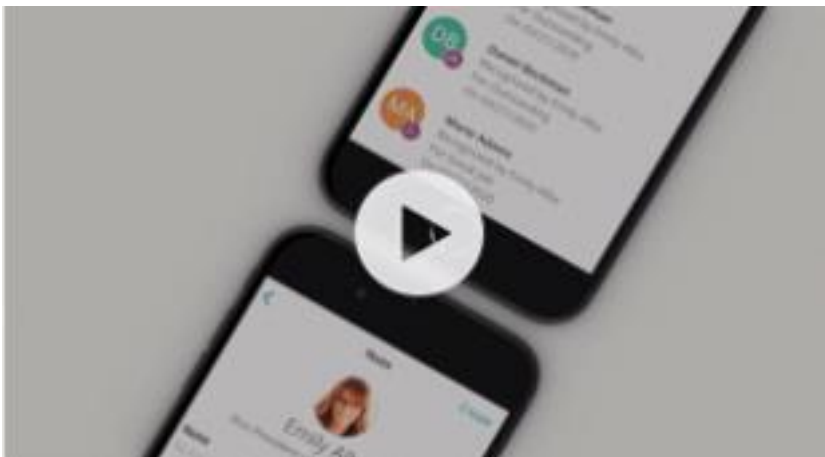


In the Paylocity mobile app tap **Time Off** to view your balances.



Tap **Request**, fill in the details, then tap **Confirm** and **Submit**.

Your request is instantly sent to your supervisor for approval. Check out our quick tutorial on time off requests for both mobile and your Self Service Portal in the below video.



**Time Off Requests**

## Learn More

Click the image or scan the QR code for our tutorials on how easy it is to request time off with the mobile app or your Self Service Portal!







# Join Community

Get timely announcements, connect with co-workers, share best practices, and join a group with shared interests! See the power of Community and access it directly from your mobile device.



From the mobile menu, tap **Community** to view pinned announcements and the activity feed.



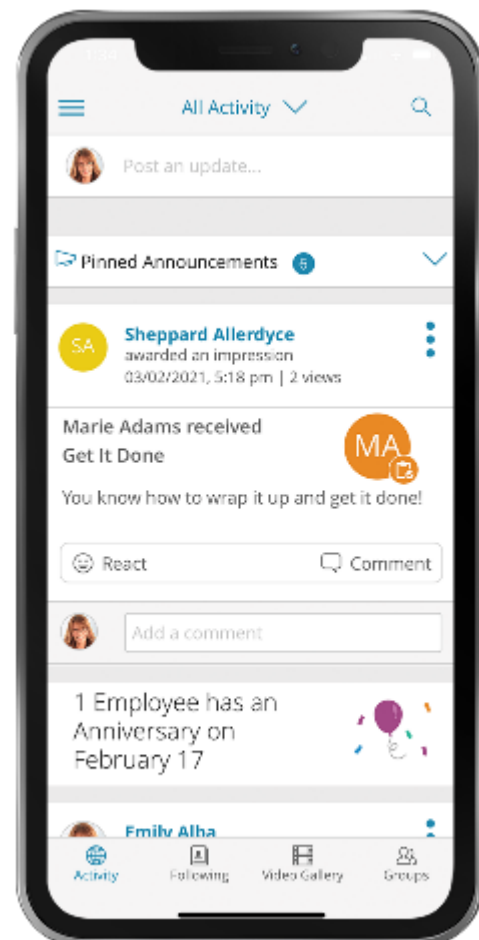
React, comment, and @mention your coworkers to be part of the conversation.



Tap **Explore** to see a list of all groups and join one or more that's right for you.



Tap **Groups** to catch up on the latest in the groups you join.



# Join a Group

Groups are a great way to collaborate on projects, discuss common interests, and connect with your coworkers.



From the mobile main menu, tap **Community**, then **Groups**.

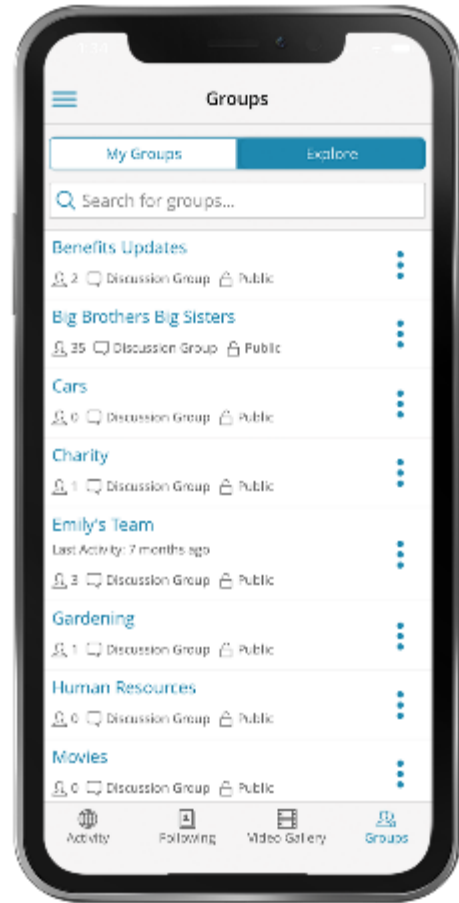


Tap **Explore** to find the groups right for you.



Tap the vertical dots (the fancy term is ellipsis) to the right of any group and tap **Join Group**.

Once you've joined a group, it will appear under **My Groups**.



# Manage Group Settings



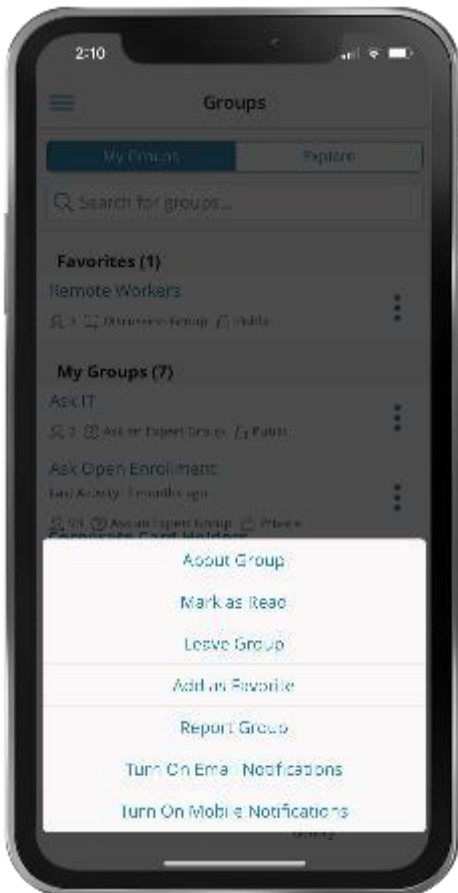
Tap **Add as Favorite** to pin the group at the top of your **My Groups** page.



To manage your notifications, tap **Turn On Mobile** and **Turn On Email Notifications**.



Groups with unread posts appear in bold. Tap **Mark as Read** to reset.



# Award Impressions

Impressions give you the opportunity to recognize and celebrate your co-workers anytime, any



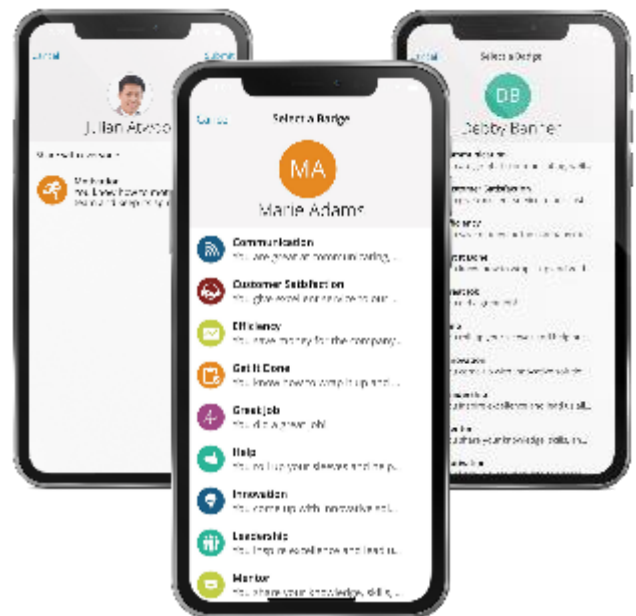
Tap **Impressions** to see co-workers already recognized.



Tap **Award** and select the recipient and their badge.



Customize with a personal message that celebrates their work and tap **Submit**.



Awarding Impressions

## Learn More

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







# Learning

## Browse Training

Not sure what you're looking for? You've got options. Find what's right for you.



To view available courses, tap **Catalog**.



Search for a topic or tap on one from the list.



Tap **Start** to take the course.

## Take Training

They say knowledge is power and with Learning, it's just a click away!



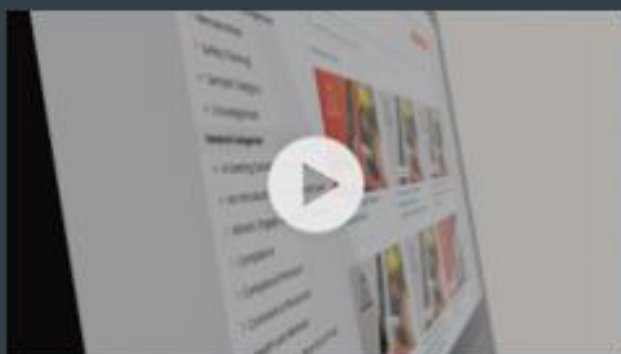
Open the menu and tap **Learning**.



You can choose a course from the list of assigned courses.



Tap any item under Training Content to open the course.



Independent Learning

## Learn More

Click on the video or scan the QR code below for more about how to use Learning!





# Self Service Portal

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



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



Manage your dependents from the Benefits card. Click **More**, then **Dependents**.



View recent pay stubs and details in the Pay card.



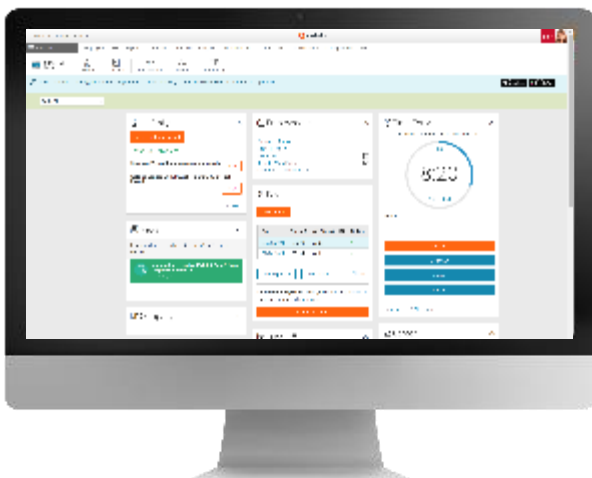
Check your balances and request time off from the Time Off card.



Work on tasks to complete such as assigned surveys or courses.



Access your company's policy documents like your employee handbook and other important resources.





# Manage Direct Deposit

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



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



SSP: Adding or Editing Direct Deposit

## Learn More

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





# Set Notifications

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

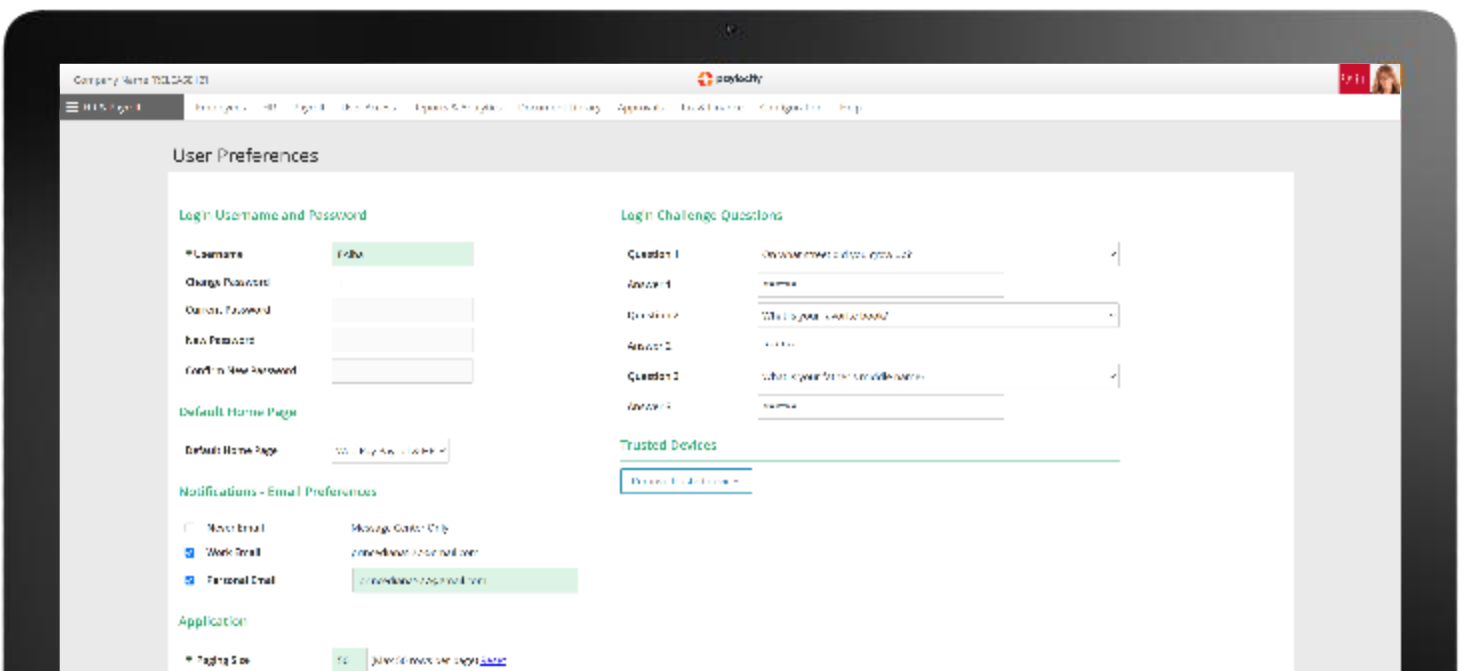
On your desktop, go to the **HR & Payroll** main menu and select **Preferences** from the **User Access** dropdown.



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



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





# Login Help

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



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



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



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



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

