

ONE

UNIFIED PLATFORM FOR THE
MODERN WORKFORCE



Engagement Overview

Response Rate: 87% (134 out of 175 responses)

Engagement Score: 85% (+23% above last)

Community

Activity | Groups

Following | My Groups | Me | Annou

Sam Malik
posted to Sam's Direct Reports
11/15, 10:23 AM - 230 views

Welcome to our Team Group!
This will be the place where we can connect, collaborate, and communicate as a team. Stay tuned for more updates from our team here!

10 comments, 1 share

React | Comment | Share

Time Card

Employee Time Cards | My Time Card

Jun 2-15 | Jun 16-29

Jay Brunner
Supervisor, [795]
Pending Approval

Regular	Overtime	7			
72.00h	5.25h	7			
S	M	T	W	T	F
1	2	3	4	5	6
8	9	10	11	12	13

Notes (0)

Submit for Approval



Real Results, Driven by Real Innovation

Here's What Sets Paylocity Apart

We deliver first-to-market innovations that solve complex challenges and drive business outcomes for our more than 40,000 clients. Building on our award-winning HCM suite, we're unifying work across HR, Finance, and IT into one connected experience so organizations can stop piecing things together and start moving forward faster. With a focus on the future, our solutions push the boundaries of traditional HR and finance technology to streamline processes, boost efficiency, simplify spend management, and deliver seamless, intuitive experiences to make leaders, administrators, and employees more productive.





One Platform for the Modern Workforce

Complete HCM Capabilities

Paylocity automates all the processes across the employee lifecycle in one place, so organizations save time, reduce administrative burden, and create a more seamless experience for employees and managers alike. From recruiting & onboarding to benefits and payroll, to performance management, our solution has the breadth to meet an organization's HR needs and the flexibility to scale as they grow.

Unified by a Powerful Core

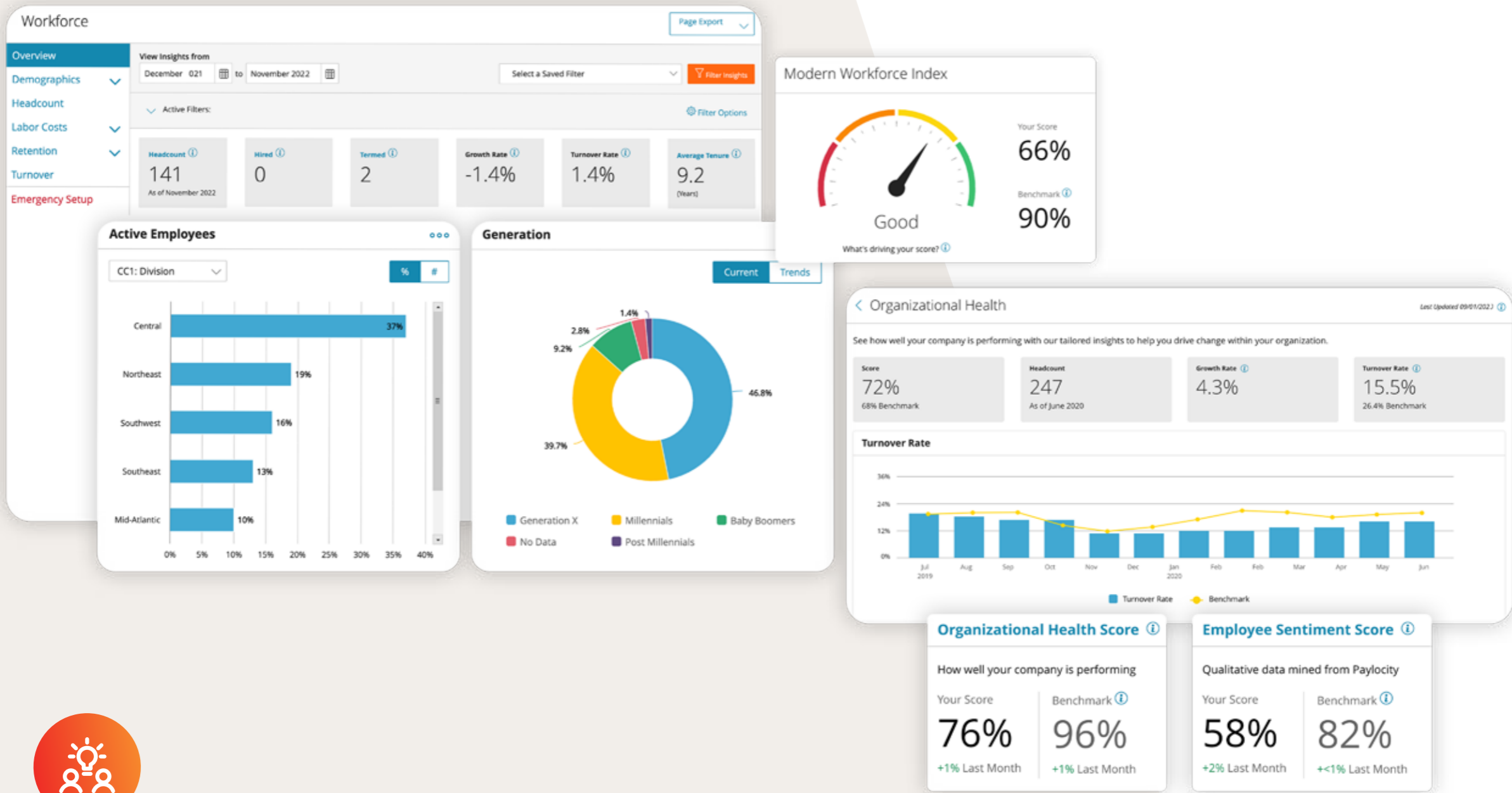
At the center of our platform is a single employee record with effortless workflows and integrations that automate work across teams and systems. A consistent, consumer-grade experience gives employees access to everything they need in a top-rated app that keeps them productive anywhere they work. And with AI, analytics, and reporting embedded throughout the platform, we give leaders a single pane of glass to see their entire business clearly.

Paylocity for Finance & IT

Our platform goes beyond HR, giving Finance and IT tools to support higher efficiency and compliance across the organization. For Finance, Paylocity centralizes payroll and non-payroll spend, including expense management, accounts payable, and procurement. For IT, we automate provisioning, access, and updates to software and hardware with a direct connection to the employee record.

Unmatched Customer Service

Since we were founded, we've provided service that our clients say is the best in the industry. We build deep, long-lasting partnerships from initial implementation to ongoing service — establishing a track record of going beyond the transactional to move clients toward strategic goals. We consider clients "co-creators," regularly soliciting and prioritizing their feedback in our product and service roadmaps.



Insights and Recommendations

The path to a more engaged workforce lies in the data you create every day just by using Paylocity. We empower you to visualize and interact with your data so you can stay on top of trends and compliance. But we don't stop there. Our prebuilt dashboards use advanced AI to deliver actionable next steps to improve efficiency and build a healthier workforce.

Make Effortless, Data-Driven Decisions

Modern Workforce Index

View insights distilled from every employee interaction into a playbook for higher efficiency and engagement. See your overall score and compare your performance to peers – then break down results across tool utilization, employee sentiment, and organizational health.

Demographics

Analyze ethnicity, gender, and generational data and filter by a variety of categories to identify patterns or trends over time.

Headcount

See how headcount and term count change over time; view active employees by department or generation.

Turnover

Identify turnover trends by manager, location, department, and more to improve retention and reduce costs.

Labor Costs

Access insights that help diagnose discrepancies, uncover hidden costs, and identify ways to take action on specific issues that raise your labor costs.

Retention

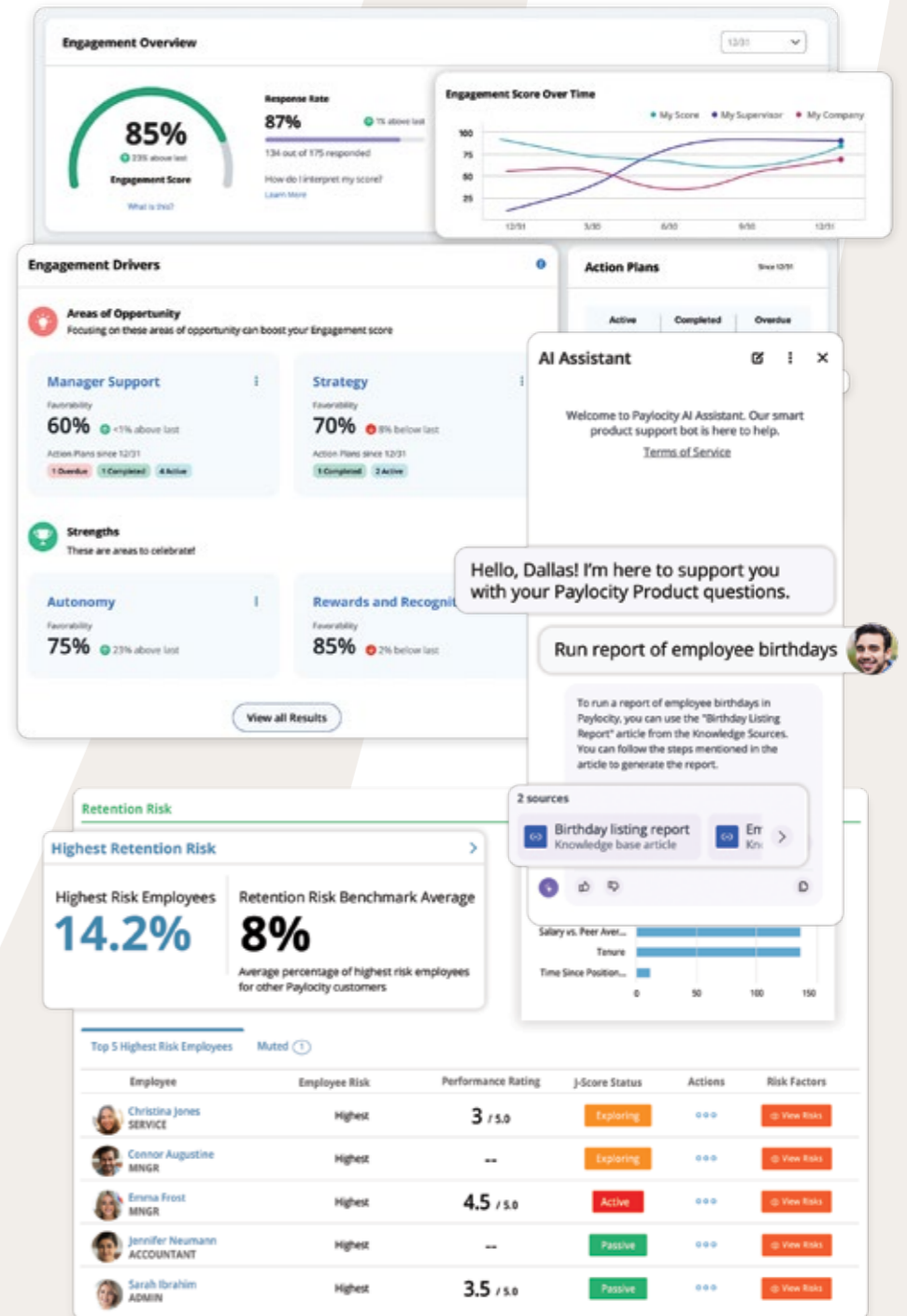
Leverage data on compensation, tenure, drive time, and more to understand signals associated with attrition and create strategies to retain top talent.

Customizable Dashboards

Create, view, edit, and share as many dashboards as you'd like in your My Insights dashboard library. Home in on specific business insights and employee trends to make more informed business decisions.

Reports

Build and customize reports across Paylocity workspaces; even tap into our AI Assistant to help. We also offer hundreds of standard reports you can use to suit your needs.



“We use Data Insights to track retention and hiring, ensuring all people have equal access to opportunities at NWEA and a work environment that sets them up to succeed.”

– Director of HR and Total Rewards, NWEA

The image displays a collage of various HR software interface components:

- Compliance Dashboard:** A central header for the HR system.
- I-9 Work Authorization:** A donut chart showing 'Employees with Work Authorization recorded' with categories: Authorized (119), Missing (9), and I-9 Event In Progress (25). Below it, a list of '6 Upcoming Employee Re-verifications' with employee avatars.
- Affordable Care Act:** A bar chart titled 'Offer Status last 6 Months' showing percentages for July through December. Below the chart, it shows 'Actions Required: 1744' and 'FTE Employees: 0'.
- Employee Notification:** A 'Good morning, Taylor.' message for Monday, June 30, with navigation buttons for Org chart, Give recognition, Community, Trainings, Employee voice, Surveys, and Company resources.
- 25th Anniversary:** A celebratory banner for 'CELEBRATING 25 YEARS' with an employee appreciation event announcement.
- Time Management:** A 'You're clocked in' widget showing '6:48' today's hours, a clock-in button, and a 'Clock in' button. Below it, a 'Time off' section shows '72.00h available' and a 'Request time off' button.
- Payroll:** A 'Pay' slip for June 27 showing a net pay of '\$2,078.84' (Take home) and a gross pay of '\$10,291.67'. It also lists taxes (\$3,054.99) and deductions (\$292.31).
- Tasks and Training:** A 'Tasks' list with items like 'Pay Change HR Action Form' (Due 10/20), 'Workplace Safety Training' (Due 4/25), and 'Employee Engagement Survey' (Due 4/25).
- Compliance Courses:** A section for assigning courses, including 'A Minimum Guide to System Requirements for Compliance Trainings'.



Human Resources

HR teams are often bogged down in tedious — but essential — tasks. We help HR automate processes and minimize compliance risk so they can focus on the strategic work they're passionate about and make a meaningful impact on their organization.

Simplify Management of Employees, Documents, and Compliance

Workflows

Workflows, Paylocity's self-serve automation engine, empowers you to implement routines for time-consuming manual tasks spanning the platform. Leverage a catalog of out-of-the-box compliance forms and templates for common tasks like offboarding, leaves of absence, and position/pay changes. Or create your own, bespoke flows. Easily collect digital signatures, automate workflows based on time, data, or user actions and generate audit trail reports.

Employee Self-Service

Employees have secure, 24/7 access to payroll and HR data through Home, available on both desktop and the Paylocity Mobile App. From a single dashboard, they can access paystubs and tax forms, request time off, update personal information, and even collaborate with their teammates. And wherever they are in the platform, our AI Assistant is just a click away — ready to surface product guidance or company-specific policies like time off, compensation, or benefits.

Position Management

Get complete visibility into your workforce at the position and seat level so you can quickly configure new positions, more accurately predict vacancy, manage budget changes, assign required skills and certifications, and more.

Document Library

Store all employee documents in one location — from offer letters and tax forms to exit documents. A holistic view of the employee across the entire lifecycle provides a single, searchable source of truth that keeps you organized and compliant.

Compliance

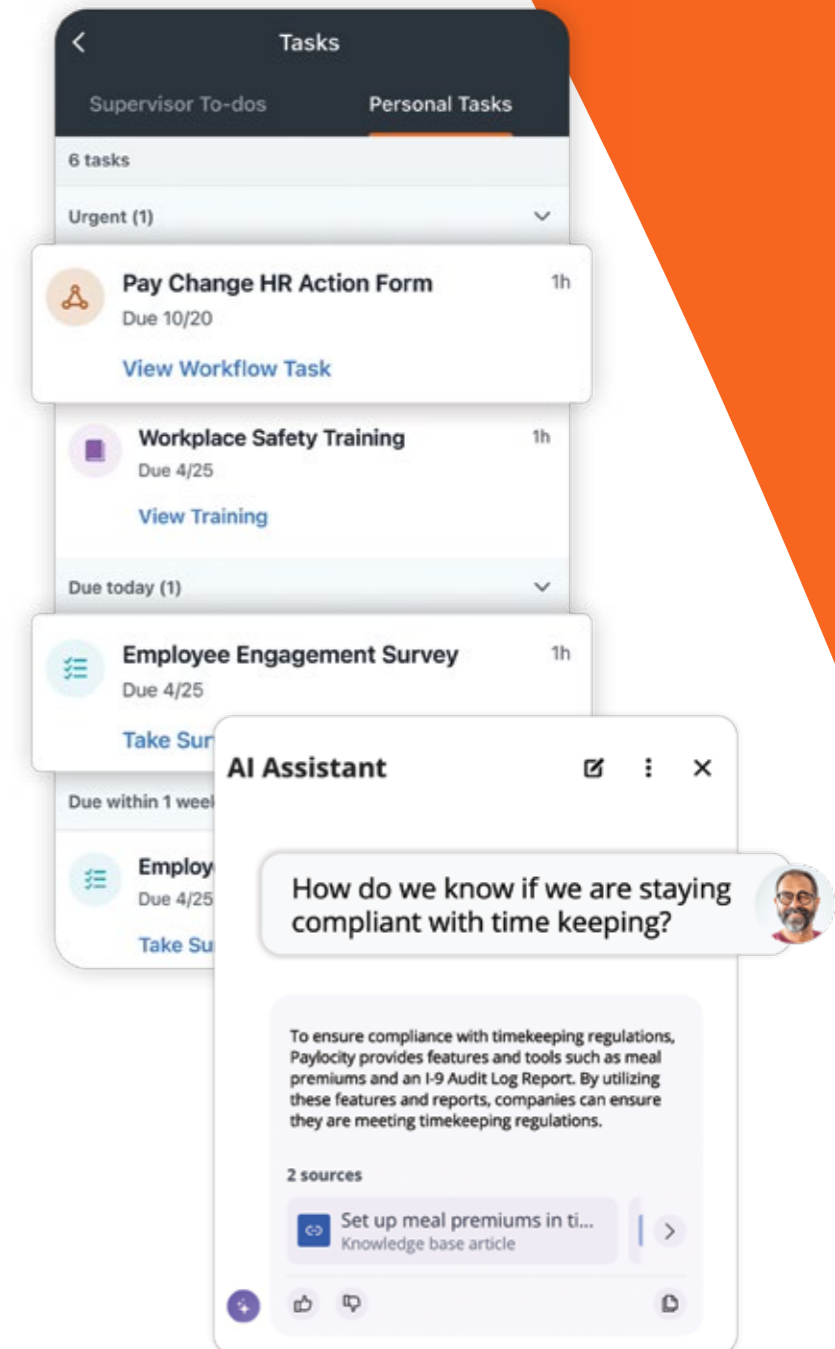
Take a proactive approach to compliance with an intuitive dashboard and interactive HR compliance courses. Get quick access to work authorizations, EEO and FLSA compliance data, industry news, certifications, and more — plus built-in AI guidance for common questions about labor rules and regulations.

HR Edge

In today's complex world of compliance requirements, social issues, and policies, the risk is too high to take chances. We partner with your company to minimize risk and maximize best practices.

International Employee Management

Reduce administrative burden and risk while supporting global growth. Easily onboard and manage payroll for international employees and maintain compliance with country-specific laws.



“Paylocity empowered my team to be much more effective, which allows me to work on the business, not in the business. We’re no longer stuck in the weeds of everyday tasks — we have the information at our fingertips to focus on strategy as we grow.”

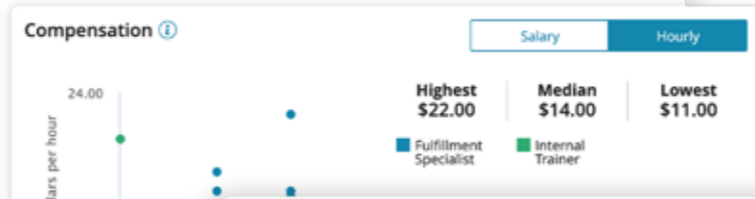
– Senior Director of Human Resources, POLYWOOD

Search by first name, last name, or position

Merit Cycle

Total Budget
\$21,476.00 (64.02% used)

Used Budget \$13,748.80 **Remaining Budget** \$7,727.20



Employee	Rating	Guidelines	Current Pay
Alex Volkoff Fulfillment Specialist	2.00/5.0	Ok (0.00-2.00%)	\$15.0000
Annabelle Wu Fulfillment Specialist	2.00/5.0	Ok (0.00-2.00%)	\$26,000.00
Calvin Rankin Fulfillment Specialist	3.50/5.0	Good (1.00-5.00%)	\$45,000.00

Training Catalog + Create New Training

UX01 Categories: Data Collection, Employee Transfers, First 90 Days, Onboarding

Search Training Title, Description

Safety Training Bundle

27 Trainings

Ergonomics

Back Safety

Bloodborne Pathogens

Driver Safety

Driver Safety - [Spanish/Español]

Electrical Safety: General Awareness

Welcome, Charlotte!

Your tasks are due soon.
Due in 5 days

Welcome messages 1

Tasks to complete 4/8

- Emergency Contacts In progress
- Direct Deposit
- Go Paperless
- Employee Profile

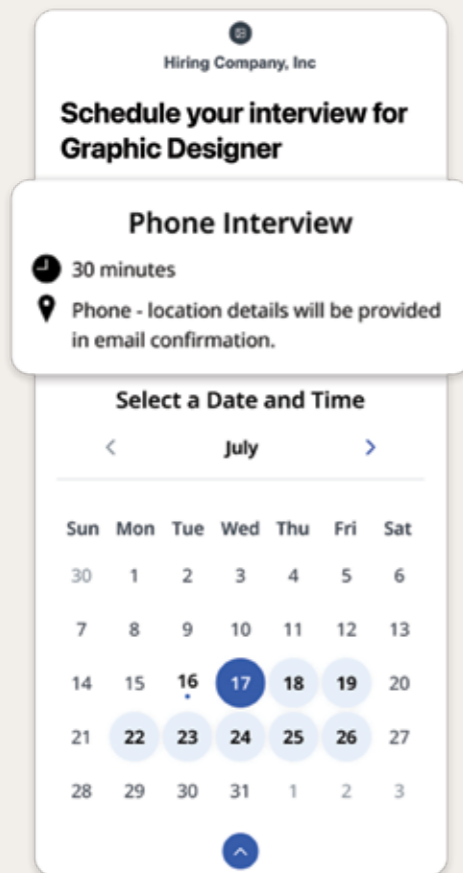


Talent

Support early engagement, enable faster productivity, and reinforce fair pay and learning to build a workforce that stays, performs, and delivers results.

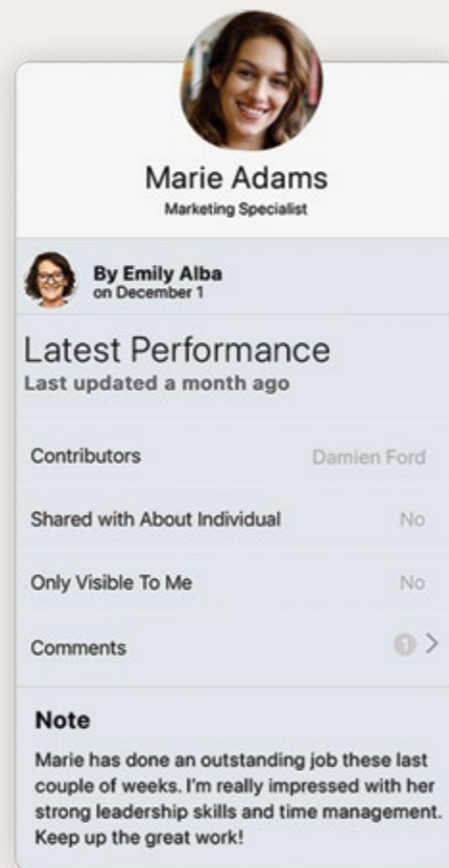


Hire Quickly. Retain Longer. Develop Continuously.



Recruiting

Browse Market Pay data to help define compensation and use AI to write job descriptions. Extend your reach with text and QR code promotions and streamline communications with mass texting. Attract candidates with customized career pages. Speed up the screening process by empowering candidates to schedule their own interviews and do one-way video interviews, and offering integrated assessments. Create personalized offer packages and manage them directly within your recruiting platform.



Onboarding

Automate tasks and simplify compliance using built-in tools to securely collect and track I-9s, tax forms, expiring documents, and background checks. Empower new hires to promptly and easily complete pre-boarding tasks anywhere, on any device. Accelerate ramp-up with video welcomes, auto-assigned training, and team introductions via social profiles and community groups.

Performance

Collaborative goal setting and text or video journals help drive ongoing conversations. Use customizable forms to gather feedback from anyone at any time. With built-in 360° reviews, sentiment analysis, and compensation benchmarks, streamline the performance review process while reducing bias and saving time. Access 9-box succession planning to identify employees who are ready for their next step.

Learning

Tap into out-of-the-box training including bundles specific to certain needs — like workplace safety or healthcare training. You can even add 95,000+ courses from Go1.* Empower subject matter experts to create training — which you can mix and match with the provided content. Automatically assign training by role and schedule it based on key milestones or set recurrence intervals. Automatically add skills or certifications to employee records after course completion, and require a supervisor sign-off on training completion. Send employee reminders and prevent fast forwarding to reinforce compliance.

Compensation

Make data-driven compensation decisions that align with your organization's guidelines for annual increase or one-time bonuses. Use dashboards to see compensation and performance history, and regularly refreshed market pay data to ensure employees are compensated competitively. Optimize talent acquisition and retention by sharing individual employee statements that outline the investment in that employee, from vacation time to benefits.

“One of the best things about Paylocity is that it’s a one-stop shop for HR. Whether it’s performance reviews, recruiting, or onboarding, it’s all in there in one platform. And it’s really user-friendly, too.”

– Director of Human Resources, Inter Miami FC

*Go1 subscription required

Overview	Admin Alerts 12 Pending	Enrollments 29 Pending	EOI 8 Pending	Earnings & Deductions 54 Pending
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Open Enrollments

Enrollment Window: 12/1 - 12/31 (282 days remaining)

Enrollment Status

Not Started	6
In Progress	33
Submitted	11
Pending	23
Approved	49
Total:	122

Coverage Details

Medical

Benefit Plan	Number of Employees
Aetna	20
Blue Cross	25
Blue Cross	16
Waive	22

Total HSA Contributions

Benefit Plan	Employee	Employer	Contribution Gap
Aetna	\$16K	\$8K	\$3K
Blue Cross	\$16K	\$8K	\$3K
Blue Cross	\$16K	\$8K	\$3K
Waive	\$16K	\$8K	\$3K

Benefits Decision Support

start over

We've run our recommendation based on your expected needs and ranked the plans available to you!

Select the plan you want to continue with and we will walk through our analysis step by step. [Or change your answers and start over](#)

Continue with this plan

Switch

Switch

#1 Saves you overall

ACME Healthcare

ACME HDHP HSA Through DemoGroup

Lowest estimated total cost under typical circumstances

#2 Pay less at point of care

ACME Healthcare

ACME Gold PPO

#3 Pay less at point of care

ACME Healthcare

ACME Gold PPO

Benefits

Coverage

Cards

Health Insurance

subscriber name: Kayla Valentino

identification number: 2468010

group number: PT1770

PPO

Dental Insurance

subscriber name: Kayla Valentino

identification number: 2458910

group number: DA8587

PPO

+\$777

[Plan details](#)

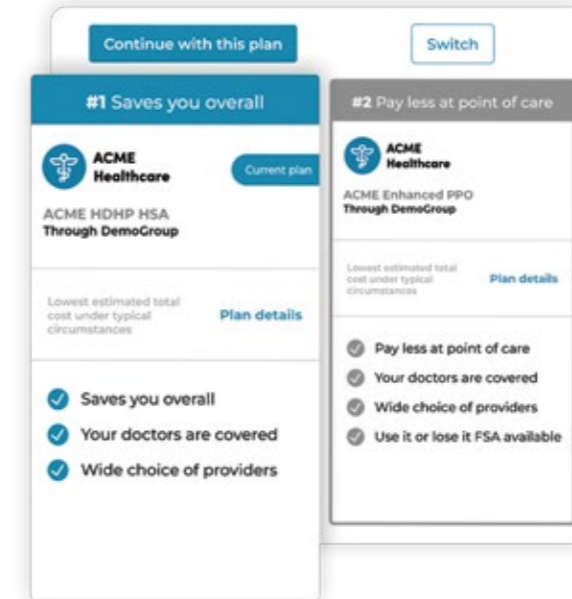
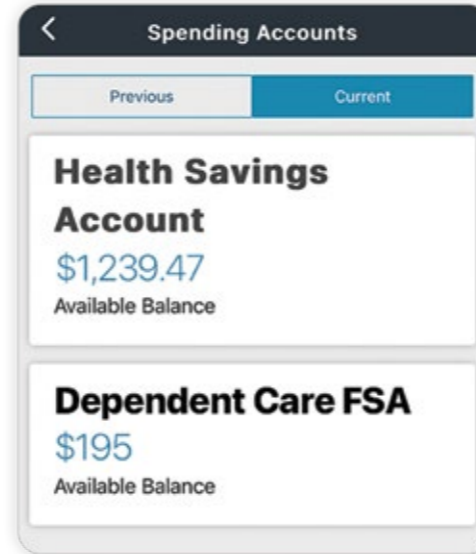
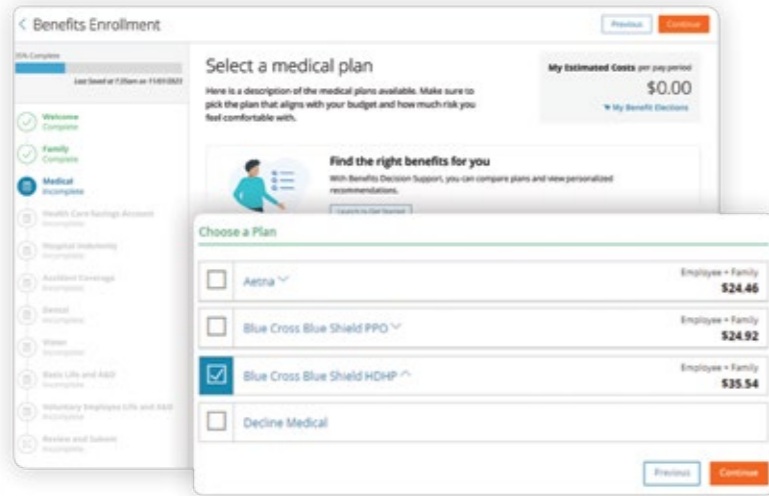


Benefits

Simplify benefits administration for HR and employees. Give your workforce the flexibility to set up and manage benefits on desktop or the Paylocity Mobile App. Built-in guidance reduces questions and helps employees feel confident in their choices.



Modernize Benefits



Benefits Administration

Our dedicated team of experts works with you to configure your benefit offerings – or take the lead with self-service Benefits Guided Setup. With reporting tools and a data-rich dashboard, you gain actionable insights and can securely extend access to your broker. Save time by automating workflows, syncing data with Payroll, and enabling electronic file delivery to carriers.

Flexible Benefit Programs

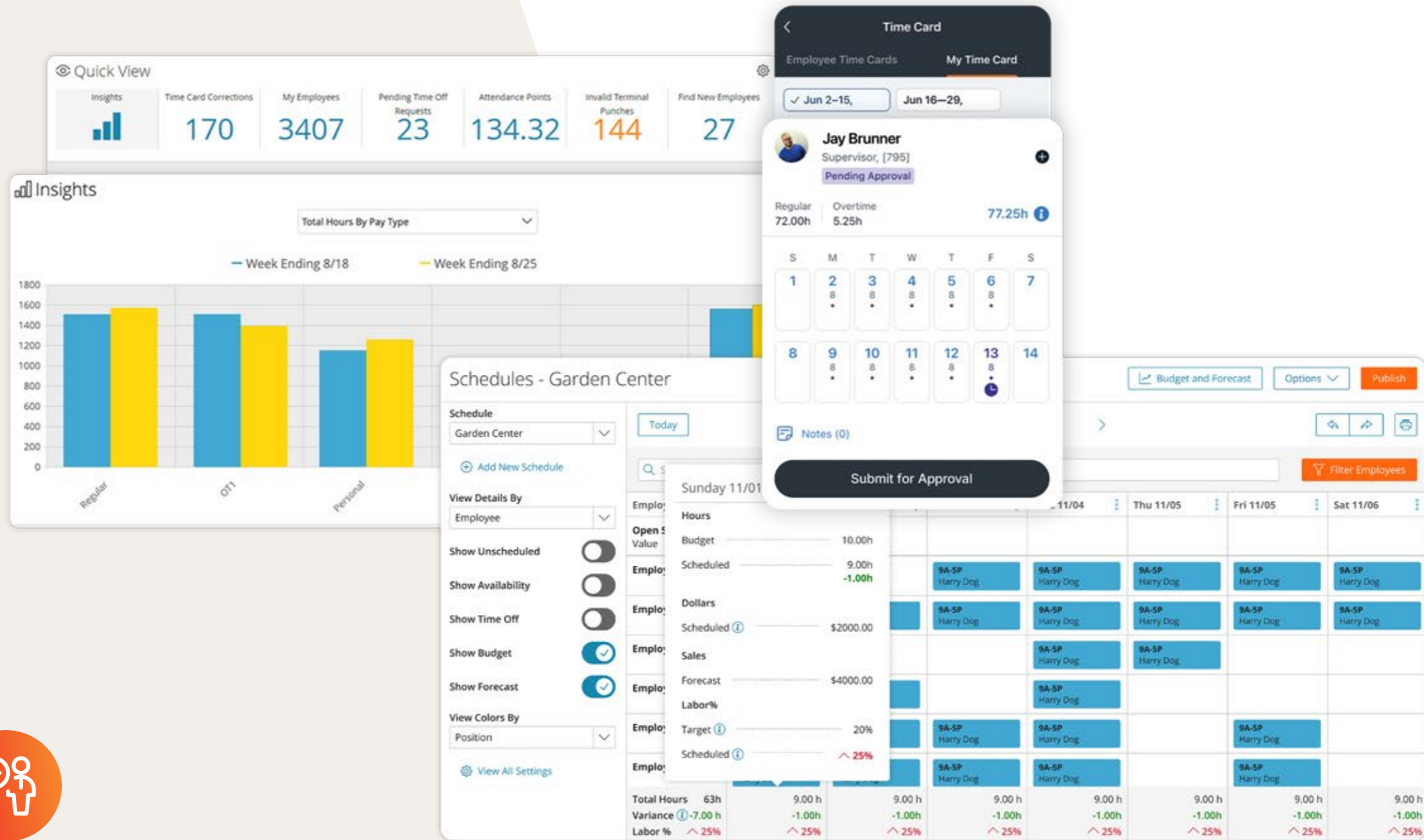
Paylocity makes it easy to offer and manage flexible contribution plans like FSAs and HSAs, manage COBRA administration, and more. Employees can check balances, access cards, and submit claims in the same system they use to punch in and check pay stubs.

Making the Most of Benefits

Employees can manage benefits, check balances, and submit claims from any device. Real-time notifications, Ask-an-Expert groups, and LMS training keep employees in the know. A simple enrollment experience coupled with Benefits Decision Support helps employees choose the best plans for their unique needs.

“Open enrollment was paperless and straightforward for everyone since we announced it on Community and everybody enrolled on the self-service portal.”

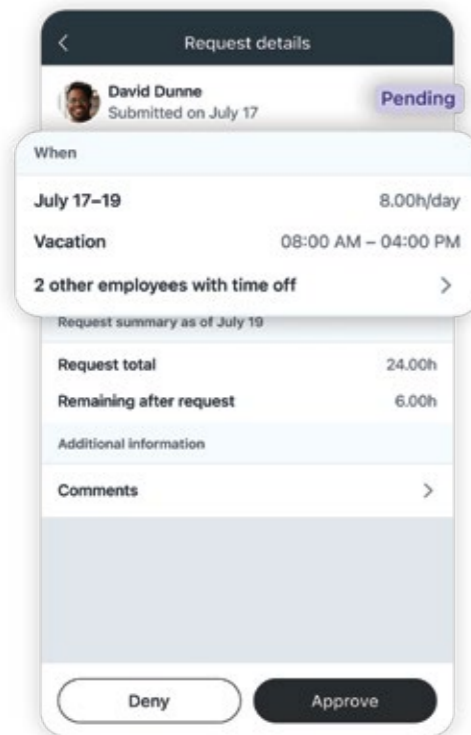
– CFO, Beemac Trucking



Time & Labor

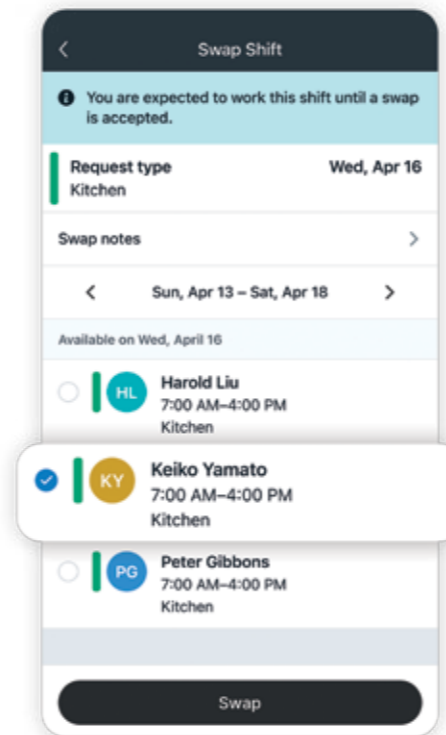
The costs of manually scheduling, tracking, and managing time add up quickly. Paylocity's Time & Labor offering combines automation with strategic tools to help reduce unplanned labor costs, minimize compliance risks, and keep your workforce connected.

Simplify Scheduling, Time Tracking, and Communication



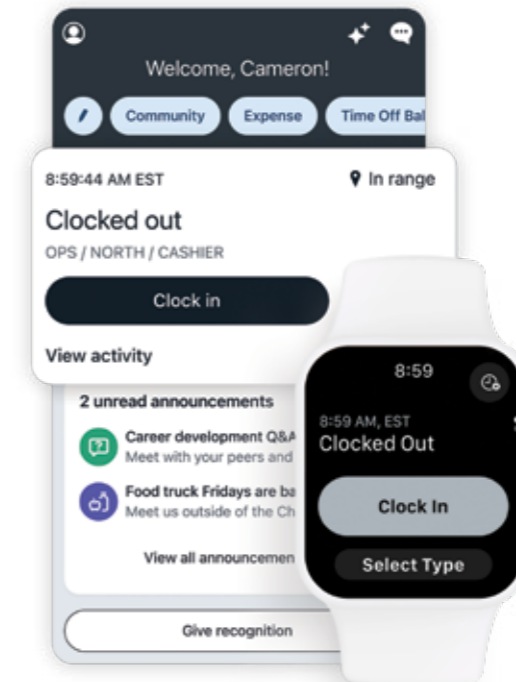
Time & Attendance

Simplify time and attendance with automated policy enforcement, real-time communication, and powerful analytics that help reduce errors and improve accuracy. Self-service tools give employees visibility and control to manage their time more efficiently.



Scheduling

Build smarter schedules with AI forecasting and tools that align the right people to the right shifts. Features like shift swapping and open shift claiming give employees flexibility while maintaining coverage, controlling labor costs, and fostering a connected workforce.

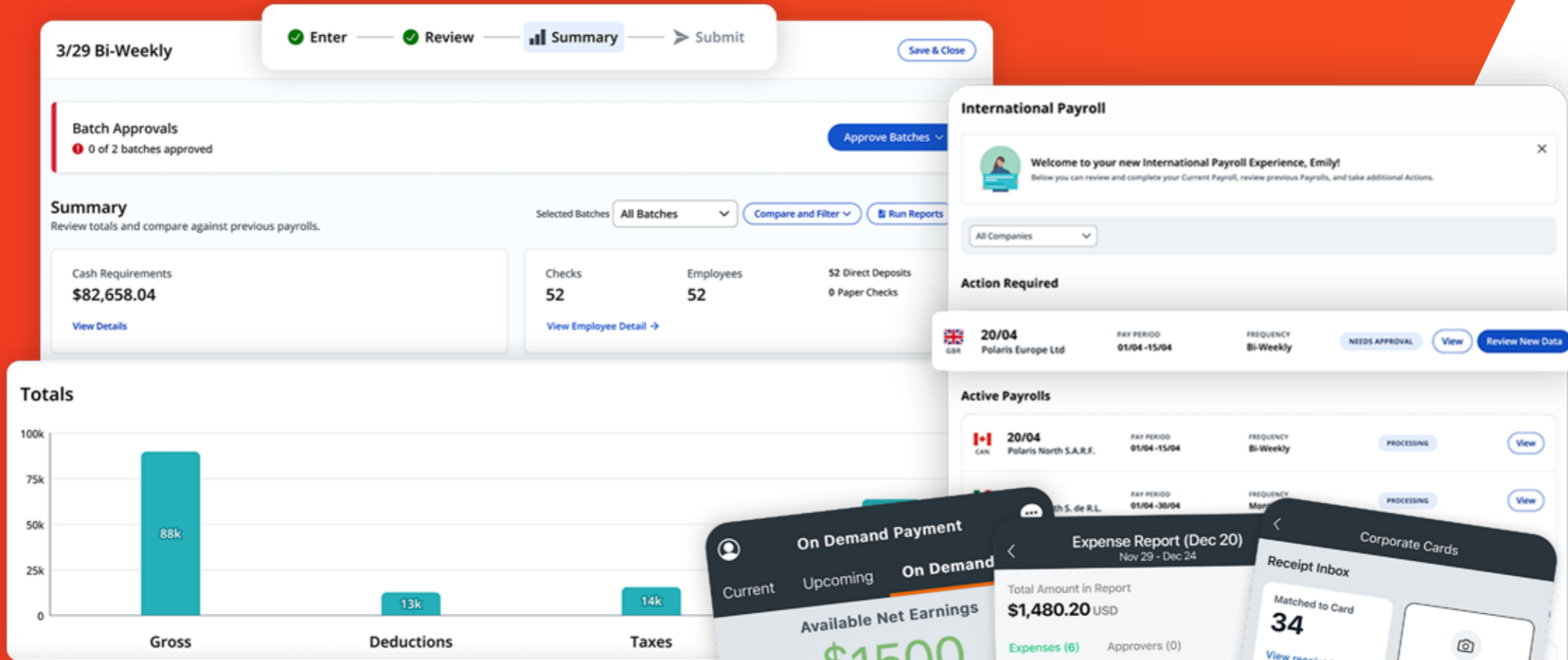


Time Collection

Capture time your way with flexible options—from traditional clocks and tablet kiosks to web or mobile app with Apple Watch punch. Reduce time theft with geolocation, facial recognition, and fingerprint validation. Advanced attestation verifies breaks and waivers for more accurate, compliant timecards.

“Our employees really enjoy being able to submit and approve hours, view pay stubs, check vacation time, and request and approve time off right from their desktop or mobile device. Before Paylocity, questions on all of this typically came into our HR team.”

– VP of HR, Catholic Charities New Hampshire



Payroll

Eliminate the manual entry, errors, and headaches that come from conventional payroll technology. Save time and improve accuracy with a payroll solution that automates the busy work. You can even offer employees a more flexible pay schedule, allowing them to access their earned wages anytime — at no extra cost or effort.



Eliminate Manual Data Entry and Errors

General Ledger Solutions

Choose between specialized implementation and customized reporting or a low-maintenance, self-service option that empowers you to configure, maintain, and create journal entries on your own. And whenever you need support, it's provided by a dedicated team of subject matter experts that are specifically trained on our General Ledger solution.

Payroll Audits

Ensure payroll is completely accurate with our Payroll Readiness Dashboard, a powerful tool that provides you with a comprehensive overview of your critical payroll tasks well ahead of your processing day. Choose the audits important to you, and the system will automatically alert you of potential issues.

On Demand Payment

Reduce financial stress and improve satisfaction by offering employees access to earned wages before their normal payday – without any changes to your payroll process or additional cost to you.



Check Preview

Help employees manage their finances proactively by providing a snapshot of their upcoming check, available at any point in time. When employees can flag issues before you run payroll, it eliminates rework and saves you time.

Expense Management

Eliminate the need for spreadsheets, calculators, and signatures by digitizing the process of submitting, approving, and reimbursing employee expenses.

Garnishment Managed Services

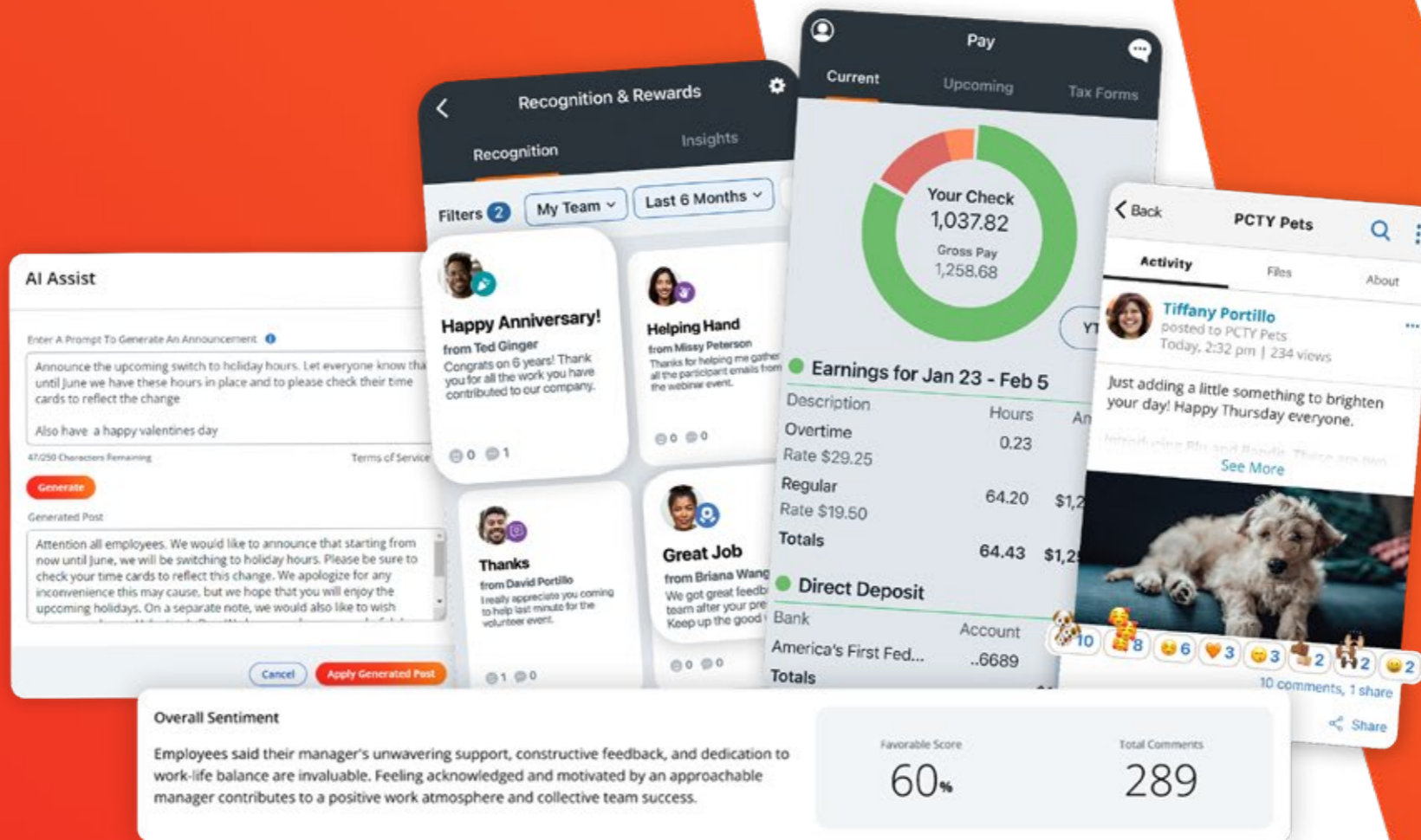
With our expert guidance, you can take the stress out of complying with complex legal requirements and put the focus back where it belongs – on your business.

Global Payroll

Manage secure, cloud-based payroll for employees in over 100 countries – right within Paylocity. Our in-country experts and project managers provide the local expertise you need for seamless global operations.

“We had an in-house payroll system that just wasn’t keeping up with the times. We wanted a more modern, fully featured HR platform that would help us communicate and give our employees a one-stop shop for all the information they need. That’s where Paylocity came in.”

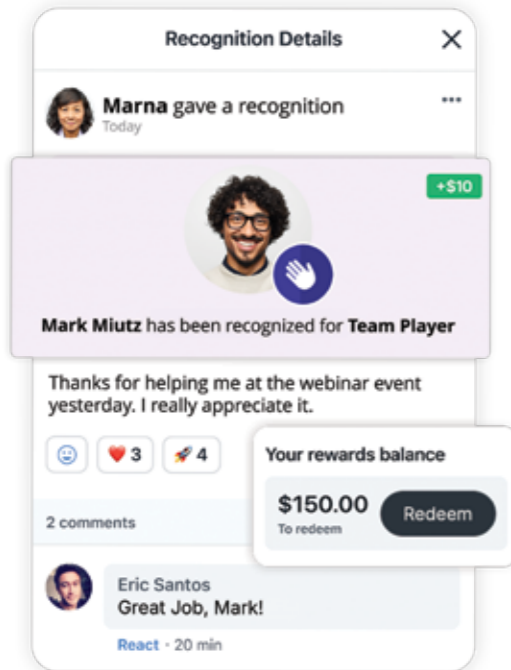
– Operational Controller, New England Authentic Eats



Employee Productivity and Engagement

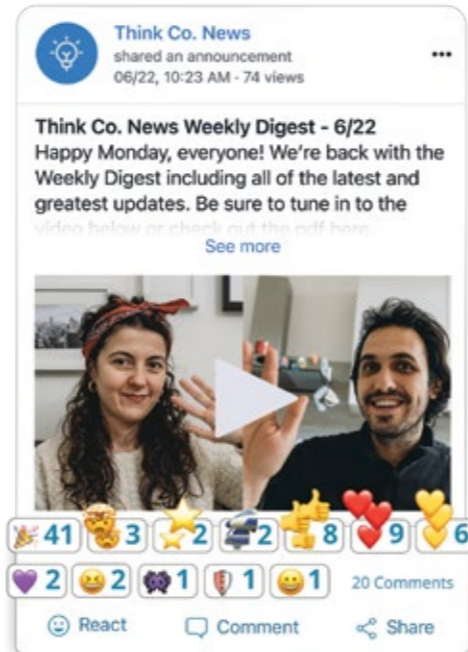
Today's workforce expects intuitive, seamless experiences in every part of their lives — including the tools they use at work. It's essential to create an environment where employees are supported to do their work effectively and help the organization succeed. From providing transparent communication to recognition for top performance and a feedback loop to improve, Paylocity helps every employee — whether remote, deskless, or on-the-go — feel connected to their work and the organization. When employees are engaged, they're more productive, more likely to stay, and better aligned to drive business success.

Drive Results with a Connected, Collaborative Workforce



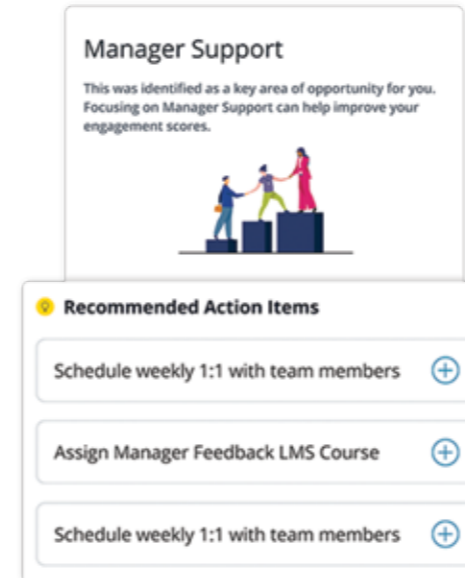
Recognition & Rewards

Drive stronger retention and motivate employees with meaningful recognition of milestones and achievements. Amplify the impact with a built-in rewards program, offering both cash and digital gift card redemption.



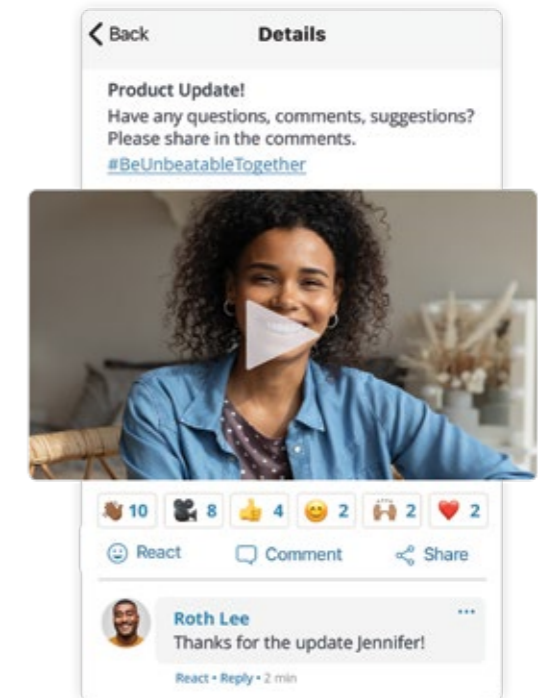
Community

Community provides a central hub to reach employees with important communication, provide visibility to leaders, and allow employees to connect and collaborate across the organization with announcements, discussion groups, and chat.



Employee Voice

Gain valuable insights into your team's engagement via automated surveys and AI-generated sentiment summaries. Proactive action plans boost employee satisfaction and retention.



Video

Easily create, share, track, and view all videos in the Video Hub and help teams stay informed by integrating them at touchpoints across the employee lifecycle: in job postings, announcements, performance journals, and more.

“The data shows our culture and engagement efforts are working, which is right where we want to be to meet our aggressive goals.”

– VP of HR, Revere Plastics

Easily Connect Paylocity to Your Other Business Systems

Integrations to Connect Your Data



Pre-Built Integrations

Seamless connections to 450+ retirement, benefits, and other business systems.



Open APIs

Flexibility to connect to any system, unlocking custom integrations & processes.



Embedded Experiences

Access third party functionality directly in Paylocity for higher adoption and ease of use.

“We’re able to reallocate time and effort we would have spent mindlessly, repetitively entering data back to supporting our employees in more meaningful ways.”

– Director of Finance/Accounting, ISG

Forward Together

We're more than just a provider. We're a partner.

Simplifying Work

One platform that automates your business around your people so you can move faster and get things done.

Relentless Innovation

Every release and every feature is built for what you need with an eye toward the future.

In It Together

Hands-on partnership and service from day one to support you, build with you, and evolve together.



7M
employees
on platform

42K+
clients



"Paylocity is more than a software company. It's the software and services partnership that differentiates them. The support they provide with compliance along with the software solution are unmatched."

– Director of People Services, KCI Wireless

One platform for HR, Finance, and IT.

Headquartered in Schaumburg, Ill., Paylocity (NASDAQ: PCTY) is an award-winning provider of cloud-based HR, payroll, and spend management software solutions. Founded in 1997 and publicly traded since 2014, Paylocity offers an intuitive, easy-to-use product suite that helps businesses automate and streamline HR and payroll processes, attract and retain talent, and build culture and connection with their employees. Known for its unique culture and consistently recognized as one of the best places to work, Paylocity accompanies its clients on the journey to create great workplaces and help all employees achieve their best.

Find out more about how Paylocity unifies HR,
Finance, and IT teams with one integrated solution.

paylocity.com

