

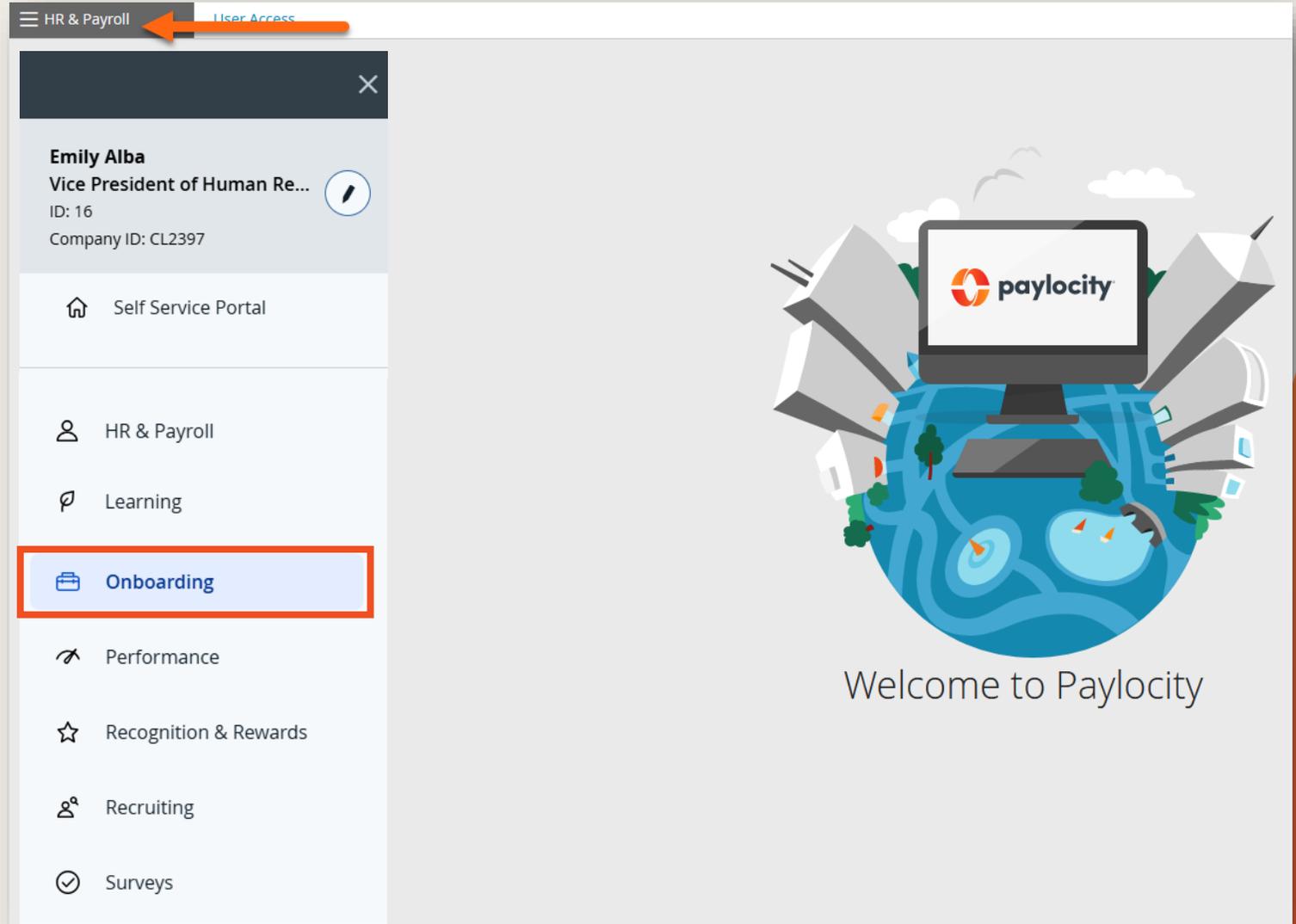


Onboarding Module User Guide

Navigating to Onboarding Module

Onboarding Module

- Click on App Switcher in the top left-hand corner of your screen to open the Apps Menu
- Click On Onboarding Link
- You will automatically be redirect you to the Onboarding Dashboard



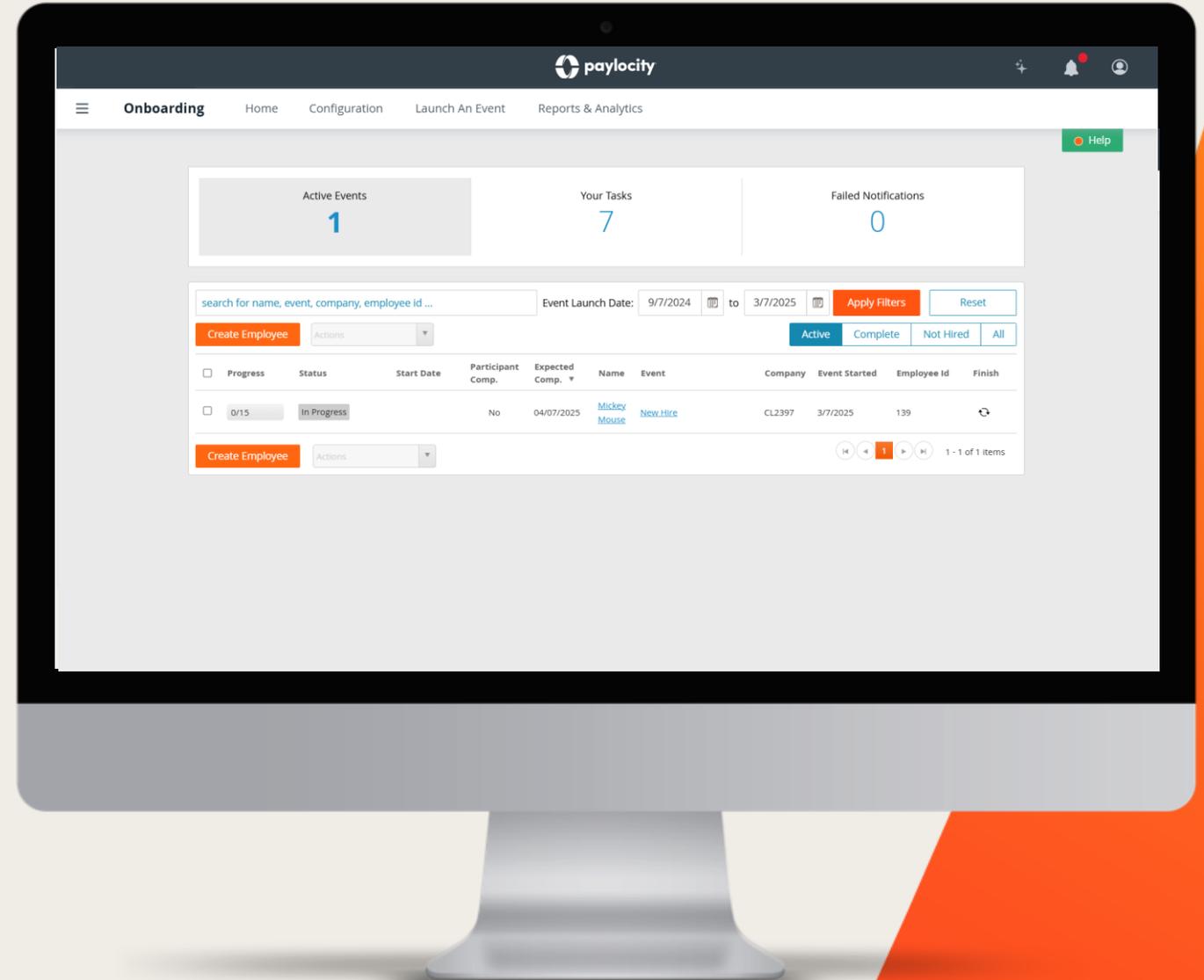
The screenshot displays the Paylocity HR & Payroll interface. At the top left, there is a hamburger menu icon labeled "HR & Payroll" and a "User Access" link. Below this is a user profile card for Emily Alba, Vice President of Human Resources, with ID: 16 and Company ID: CL2397. The main navigation menu on the left includes: Self Service Portal, HR & Payroll, Learning, Onboarding (highlighted with a red box), Performance, Recognition & Rewards, Recruiting, and Surveys. The main content area on the right features a graphic of a globe with a computer monitor displaying the Paylocity logo, and the text "Welcome to Paylocity".

Navigating the Onboarding Module

Onboarding Module

Navigating the Onboarding Dashboard

- The Onboarding Dashboard is your landing page as soon as you navigate into the Onboarding Module

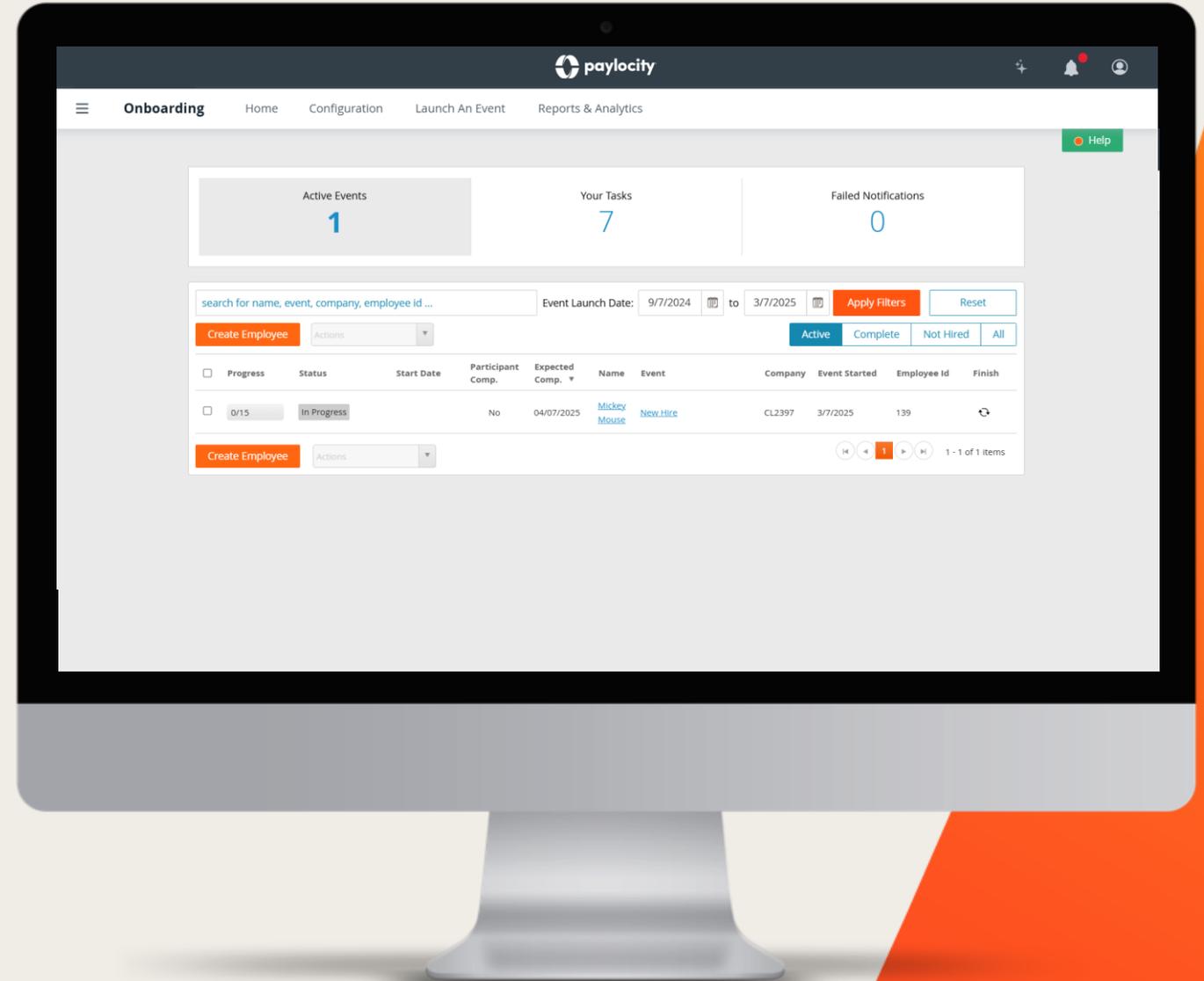


Navigating the Onboarding Module

Onboarding Module

Navigating the Onboarding Dashboard

- Click onto the Event Name hyperlink to drill into the details of the Onboarding Event.
- You will be able to:
 - View progress of the tasks
 - Review information entered by the new hire
 - Complete employer tasks



Navigating the Onboarding Module

Onboarding Dashboard Tiles

ACTIVE EVENTS = Main view of the dashboard and shows you all events in progress.

YOUR TASKS = Shows you tasks in each event packet that requires your specific attention to be completed.

FAILED NOTIFICATIONS = If any notification fails to send to an employee for any reason, select Resend to push the notification to the employee again.

SEARCH BAR = Use search bar to search by Name, Event, Company, or Employee ID.

ACTIVE = Shows you all active events in progress.

COMPLETE = Shows you all packets that have been marked as complete or finished.

NOT HIRED = Shows you all packets that have been marked as not hired. No HR & Payroll Record created for employee.

ALL = Shows you all packets and their statuses.

Launch Onboarding Packet

Onboarding Module

- Ensure your new employee shows on the Onboarding Dashboard without an Event Name
- Select **Launch An Event > Launch Event Packet**

The screenshot shows the 'Onboarding' dashboard with the 'Launch An Event' menu item highlighted. A callout box points to the 'Launch Event Packet' option. Below the dashboard summary, there is a search bar and filters for 'Event Launch Date' (9/7/2024 to 3/7/2025). A table lists onboarding events for two employees: Donald Duck and Mickey Mouse. The 'No Event' status for Donald Duck is highlighted with an orange box.

Progress	Status	Start Date	Participant Comp.	Expected Comp.	Name	Event	Company	Event Started	Employee Id	Finish
0/0	No Event		N/A		Donald Duck		CL2397			
0/15	In Progress		No	04/07/2025	Mickey Mouse	New Hire	CL2397	3/7/2025	139	

Launch Onboarding Packet

Onboarding Module

- Select the event to launch
 - You will use “Rehire” events for rehiring employees and “New Hire” events for new people joining your organization.
- Click **Next**

Launch Onboarding Packet

1. Choose Event

2. Choose Employees

3. Confirm and Launch

Search for name, or description...

Type:

All

Apply Filters

Reset

Name	Description	Active Events	Modified	Type
<input type="radio"/> New Hire	Default onboarding event with employee and admin participation	1	3/5/2025 7:15PM	Default-New Hire
<input type="radio"/> Rehire	Default rehire event with employee and admin participation	0	3/5/2025 7:15PM	Default-Rehire

1 - 2 of 2 items

Next

Launch Onboarding Packet

Onboarding Module

- Choose the employee. You can select multiple at once if needed
 - If you select a “rehire” event, only terminated employees will show here.
 - If you select a “new hire” event, only the employees from the Onboarding Dashboard without an event will show.
- Click **Next**

Launch Onboarding Packet

1. Choose Event 2. Choose Employees 3. Confirm and Launch

Search for name, or company ID... Apply Filters Reset

Cost Center 1: Cost Center 2: Cost Center 3:

Create Employee

<input checked="" type="checkbox"/>	First Name	Last Name ▲	User Name	Email	Company ID	CC1	CC2	CC3	Supervisor
<input checked="" type="checkbox"/>	Donald	Duck	DDuck	sdabney@pa...	CL2397				

⏪ ⏩ 1 ⏪ ⏩ 1 - 1 of 1 items

Next

Launch Onboarding Packet

Onboarding Module

- Review the employee and event information and make updates if needed
- Click Launch

Launch Onboarding Packet

1. Choose Event 2. Choose Employees 3. Confirm and Launch

Summary

Event Description:
Default onboarding event with employee and admin participation

Calculated Due Date:
4/6/2025

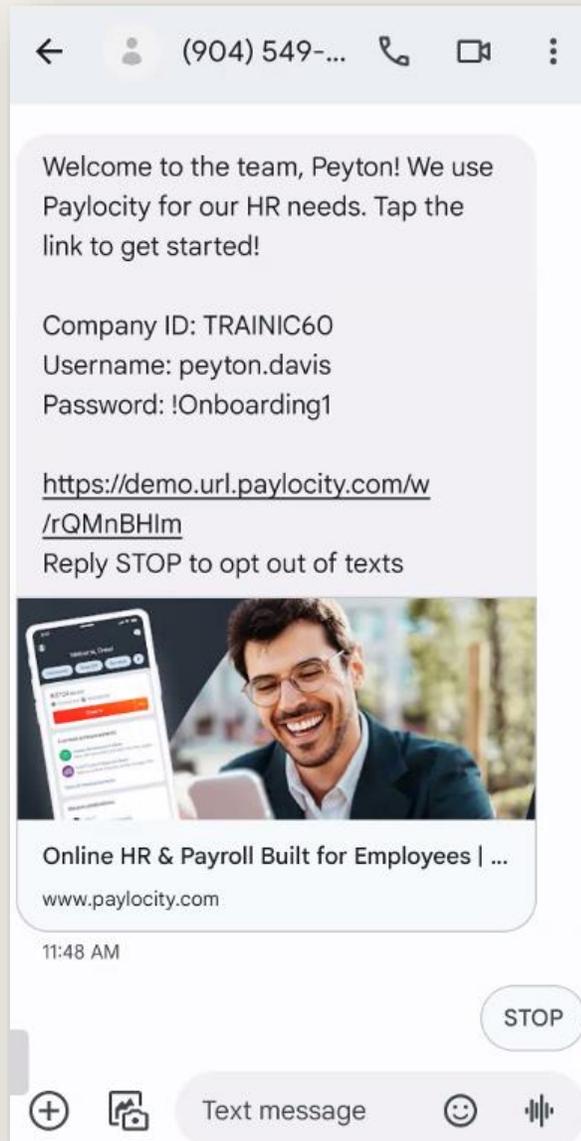
Send Notifications:

Selected Employees (1)

▼  Donald Duck



Welcome and Login Email



- The Employee will receive an email or Text Message to be able to access their Onboarding Packet.
- The Email or Text Message will contain their Company ID, Username, Temporary Password, and a hyperlink to access their electronic Onboarding Packet.
- *New* New Hires may now access their Onboarding Packet directly within the official Paylocity App.

Complete Onboarding Tasks

Onboarding Module

Employer Tasks to Complete

- Click into the **Event Name** link to open the packet
- You will land on the **Welcome** message and see a list of all event tasks on the left side of the screen.
- Some of these are to be completed by the new hire/rehire while others are completed by the employer.
- Employer tasks include:
 - Eligibility Verification
 - Employment Status
 - Work Location
 - Dept/Position
 - Pay Rate
 - Time & Labor
 - Tax Setup
 - Review Tax Setup

The screenshot displays the Paylocity onboarding interface. At the top left is the Paylocity logo. Below it is a 'Welcome Message' button. A progress bar shows '0% Complete' and '0 of 15 Tasks Complete'. On the left side, there is a vertical list of tasks, each with a checklist icon and a status: 'Employment Eligibility Incomplete', 'I-9 Document Attachments Incomplete', 'Eligibility Verification Incomplete', 'Employment Status Info Incomplete', 'Work Location Incomplete', and 'Department and Position Info Incomplete'. On the right side, there is a 'Welcome' header with a green checkmark icon, followed by a congratulatory message and a 'Get Started' button.

Complete Onboarding Tasks

Onboarding Module

Employer Tasks to Complete

- Select the task you wish to complete from the left-side of the screen
- Some tasks are dependent on the employee completing their portion such as:
 - Eligibility Verification depends on the employee completing their “Employment Eligibility” and “I-9 Document Attachments” tasks
- You will get the orange warning below if you open one of these tasks

The screenshot displays the Paylocity onboarding interface. At the top left is the Paylocity logo. Below it is a 'Welcome Message' button. A progress bar shows '0% Complete' and '0 of 15 Tasks Complete'. On the left side, there is a list of tasks: 'Employment Eligibility Incomplete', 'I-9 Document Attachments Incomplete', and 'Eligibility Verification Incomplete'. On the right side, there is a warning banner with a triangle icon: 'This task is dependent on the Employment Eligibility task. Please complete that task before beginning this one.' Below the banner is the title 'Eligibility Verification'. A table shows task details: 'Completed By: Module Administrators, Record Administrators' with a 'Reassign' button, 'Due: 4/7/2025', 'Approval By:', and 'Approved By: None'. Below the table is the instruction: 'Please open and physically examine the documents uploaded by this employee.' A green header reads 'Review, Complete and Sign Form I-9'. The final instruction says: 'Please click the link below to review Form I-9 section 1 submitted by your employee and complete section 2. If you find errors, return to this task to reject back to employee for correction.'

Complete Onboarding Tasks

Onboarding Module

Employer Tasks to Complete

- When you select one you can complete, you will see the right side of the screen populates with fields for you to complete
- Fill in all information, note that some fields are **Required** while others may be **Optional** because they don't apply for everyone

The screenshot displays the Paylocity onboarding interface. On the left, a vertical list of tasks is shown, all marked as 'Incomplete':

- Employment Eligibility (Incomplete)
- I-9 Document Attachments (Incomplete)
- Eligibility Verification (Incomplete)
- Employment Status Info (Incomplete)

The 'Employment Status Info' form on the right contains the following fields:

- Completed By:** Module Administrators, Record Administrators (with a 'Reassign' button)
- Due:** 4/7/2025
- Approval By:** (empty)
- Approved By:** None
- Status (required):** Active (dropdown menu)
- Hire Date (required):** (calendar icon)
- Adjusted Seniority Date:** (calendar icon)

A 'Next Task' button is located at the bottom right of the form area.

Complete Onboarding Tasks

Onboarding Module

Welcome Message

12% Complete
3 of 26 Tasks Complete

- Notice and Acknowledgement Form - Hourly Pay Rate and Payday
Incomplete
- Employment Status Info
Complete
- Work Location
Complete
- Department and Position Info
Complete
- Pay Rate
Incomplete
- Tip Credit Notification
Incomplete
- Benefits Class
Incomplete
- Taxability
Incomplete
- Employment Eligibility
Incomplete
- I-9 Document Attachments
Incomplete

Pay Rate

Completed By:
Module Administrators, Record Administrators
[Reassign](#)

Due:
4/17/2023

Approval By:
Approved By:
None

Pay Type (required)
 Hourly Salary

Per Check Salary
\$0.00

A PER CHECK SALARY IS NOT REQUIRED FOR HOURLY.

Base Rate (required)
\$0.0000

A BASE RATE IS NOT REQUIRED FOR SALARY.

Per (required)
Per Hour

Pay Frequency (required)
-- Select --

Auto Pay (required)
-- Select --

Notes

[Next Task](#)

- **Blue** tasks are incomplete
- **Green** tasks are complete
- Be sure to click the **Orange Next Task** button in the bottom right corner to mark as complete

Complete Onboarding Tasks

Onboarding Module

Employment Status Info

Completed By: Module Administrators, Record Administrators Reassign	Due: 4/20/2023
	Approval By: Approved By: None

Status (required)
Active ▾

Hire Date (required)
03/20/2023

Adjusted Seniority Date

Home Contact Info

Completed By: Employee Participant Reassign	Due: 4/20/2023
	Approval By: Approved By: None

- The “Completed By:” area will indicate which user is responsible for completing the task.
- Employee Participant is the Onboarding Candidate

Review Employee Tasks

Onboarding Module

Employee Tasks to Complete

- Click into the **Event Name** link to open the packet
- You will land on the **Welcome** message and see a list of all event tasks on the left side of the screen.
- Some of these are to be completed by the new hire/rehire while others are completed by the employer.
- Employee tasks include:
 - Employment Eligibility
 - I-9 Document Attachments
 - Personal Contact
 - Direct Deposit
 - Emergency Contacts
 - Withholding Forms
 - Policy Acknowledgements

The screenshot displays the Paylocity onboarding interface. At the top left is the Paylocity logo. Below it is a 'Welcome Message' button. A progress bar shows '0% Complete' and '0 of 15 Tasks Complete'. On the left side, there is a vertical list of tasks, each with a checklist icon and the status 'Incomplete':

- Employment Eligibility
- I-9 Document Attachments
- Eligibility Verification
- Employment Status Info
- Work Location
- Department and Position Info

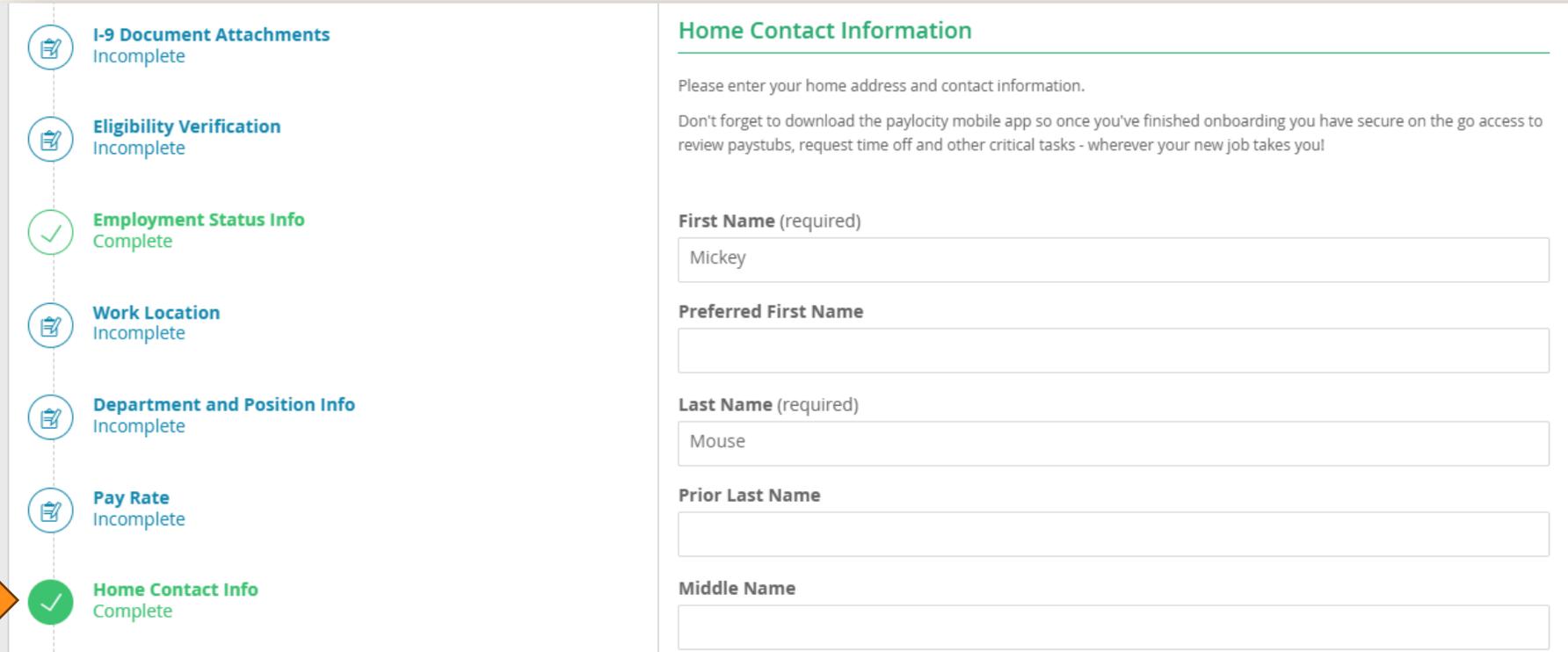
On the right side, there is a 'Welcome' header with a green checkmark icon. Below it is a message: 'Congratulations on your new position! This task list has been designed to help you complete your new hire paperwork. Let's get started!'. At the bottom of the right side is a large orange 'Get Started' button.

Review Employee Tasks

Onboarding Module

Employee Tasks to Complete

- Once the employee completes a task, you will see it in green showing **Complete** on the left side of the screen
- You can review the information for accuracy by selecting it on the left side. You may not edit these fields but can see most tasks



The screenshot displays the onboarding interface. On the left, a vertical list of tasks is shown, each with a status icon and label:

- I-9 Document Attachments (Incomplete)
- Eligibility Verification (Incomplete)
- Employment Status Info (Complete)
- Work Location (Incomplete)
- Department and Position Info (Incomplete)
- Pay Rate (Incomplete)
- Home Contact Info (Complete)

An orange arrow points to the 'Home Contact Info' task. The right side of the interface shows the 'Home Contact Information' form, which includes the following fields:

- Home Contact Information (Section Header)
- Please enter your home address and contact information.
- Don't forget to download the paylocity mobile app so once you've finished onboarding you have secure on the go access to review paystubs, request time off and other critical tasks - wherever your new job takes you!
- First Name (required) (Text input field containing 'Mickey')
- Preferred First Name (Text input field)
- Last Name (required) (Text input field containing 'Mouse')
- Prior Last Name (Text input field)
- Middle Name (Text input field)

Complete Onboarding

Onboarding Module

- Once all tasks are complete, return to the main dashboard in Onboarding.
- Navigate to the far right side of the screen and click the circling arrows to begin the Finish Onboarding process.

The screenshot displays the Paylocity Onboarding Module dashboard. At the top, there are three summary cards: 'Active Events' with a count of 44, 'Your Tasks' with a count of 321, and 'Failed Notifications' with a count of 0. Below these is a search bar and filter controls. The main area contains a table with columns for Progress, Status, Start Date, Participant Comp., Expected Comp., Name, Event, Company, Event Started, Employee Id, and Finish. A single row is visible for William Riker, with a 'Ready' status and a 'Finish' button circled in orange. The bottom of the table shows pagination controls for 1 of 1 items.

Progress	Status	Start Date	Participant Comp.	Expected Comp.	Name	Event	Company	Event Started	Employee Id	Finish
<input type="checkbox"/>	30/30 Ready	8/26/2024	Yes	09/15/2024	WILLIAM RIKER	_New Hire	305489	8/15/2024	WILRIK	

Complete an Onboarding Packet

Onboarding Module

- You will be brought to an Onboarding Summary page for the Employee
- Please review and ensure you see all blue checkmarks
- If you see anything other than the blue checkmarks, please return to the task and make the necessary corrections/update.
- Once ready, click the orange Finish Onboarding button to send their record to HR & Payroll.

Onboarding Summary

[View Employees](#) > Finish Onboarding

Finish Onboarding Employee

WILLIAM RIKER

Employee Id

Auto Generate Employee Id?
Selecting will overwrite the Employee Id provided.

[Finish Onboarding](#) ✓ Complete ⚠ Incomplete ⚠ Incomplete, Not Approved ⚠ Incomplete Preventing Finish

Employment Eligibility

✓

[View I-9 Form](#)

I-9 Document Attachments

✓

[View Driver's License issued by state/territory](#)

[View Social Security Card \(Unrestricted\)](#)

Eligibility Verification

✓

[View I-9 Form](#)

Employment Status Info

✓

Complete an Onboarding Packet

Onboarding Module

Once the employee's event packet has been completed and their profile has been sent to HR & Payroll you can access the completed packet in the **Complete** folder.

Active Events

1

Your Tasks

0

Failed Notifications

0

Event Launch Date: 9/20/2022 to 3/20/2023 Apply Filters Reset

Create Employee Actions Active **Complete** Not Hired All

<input type="checkbox"/>	Progress	Status	Start Date	Participant Comp.	Expected Comp.	Name	Event	Company	Event Started	Employee Id	Finish
<input type="checkbox"/>	14/14	Complete	3/20/2023	Yes	04/20/2023	Testing Candidate	New Hire-General Packet	163055	3/20/2023	881017	

Create Employee Actions 1 1 - 1 of 1 items

Navigating the Onboarding Module

Onboarding Module

The different types of Completed packets:

search for name, event, company, employee id ...											
		Event Launch Date:		10/7/2022	to	4/7/2023	Apply Filters		Reset		
Create Employee		Actions				Active		Complete		Not Hired All	
<input type="checkbox"/>	Progress	Status	Start Date	Participant Comp.	Expected Comp.	Name	Event	Company	Event Started	Employee Id	Finish
<input type="checkbox"/>	7/7	Complete	4/3/2023	N/A	05/08/2023	Test Candidate1	New Hire Admin Only	TRAINIC60	4/7/2023	4710	
<input type="checkbox"/>	7/7	Complete	4/4/2023	N/A	05/08/2023	Test Candidate2	New Hire Admin Only	TRAINIC60	4/7/2023	4711	

1 - 2 of 2 items



Signifies that this Packet has been completed and that an HR & Payroll Record has been created for the employee.



Signifies that this Packet has been completed, but no HR & Payroll Record has been created from the employee.

Complete an Onboarding Packet

Onboarding Status Types



COMPLETE = Marks the entire packet as complete but does not create an HR & Payroll record.



DELETE = Completely removes the packet and its content from the Onboarding Module. Action cannot be undone.



FINISH ONBOARDING = Marks the entire packet as complete and does create an HR & Payroll record.



NOT HIRED = Marks the entire packet as Not Hired and does not create an HR & Payroll record.



SEND REMINDER = Sends a reminder to the Employee that they have incomplete tasks

Complete an Onboarding Packet

Onboarding Module

Navigate back to HR & Payroll > Employee Search screen and confirm that you see the new hire in your Active Employees list. Note this may take a few minutes to update.

The screenshot shows the Paylocity HR & Payroll interface. The left sidebar has 'Onboarding' and 'HR & Payroll' highlighted. The main content area shows the 'Employee Search' screen with a search bar containing 'Last Name, First Name, SSN, Employee Id' and a filter set to 'Active'. Below the search bar, there are options to 'Display SSN', 'Export Employees', and 'Add New Employee'. A table of active employees is displayed below.

<input type="checkbox"/>	Last Name ▲	Preferred / First Name	Emp Id	Status	Supervisor [Id]	Department	ChargeDept
<input type="checkbox"/>	Aalderink	Sarah	3446	A		South Central	Operations
<input type="checkbox"/>	Abbate	Brian	3470	A		Mid-Atlantic	Organization Management
<input type="checkbox"/>	Adams	Karen	1630	A		South Central	Legal
<input type="checkbox"/>	Adams	Marie	3	A		Central	Human Resources
<input type="checkbox"/>	Adkins	Helena	3128	A		South Central	Finance
<input type="checkbox"/>	Adkins	Nancy	3316	A		South Central	Human Resources
<input type="checkbox"/>	Akin	Jason	3784	A		999- RSC	7959-D.O. (Knott)
<input type="checkbox"/>	Alba	Emily	16	A		Corporate	Human Resources
<input type="checkbox"/>	Alcon	Lauren	268	A		South Central	Shared Services
<input type="checkbox"/>	Alcon	Peg	272	A		Northeast	Shared Services
<input type="checkbox"/>	Aldrich	Joseph	2975	A		Mid-Atlantic	Finance
<input type="checkbox"/>	Alewine	Jody	303	A		South Central	Operations
<input type="checkbox"/>	Allen	Ann	1792	A		South Central	Legal
<input type="checkbox"/>	Allen	Michael	1960	A		Northeast	Sales & Marketing
<input type="checkbox"/>	Allerdyce	Sheppard	89	A	Philyor, Carlton [3789]	DO6- Philyor	7610-Kissimmee
<input type="checkbox"/>	Alex	Eric	3278	A		Central	Finance

Complete an Onboarding Packet

Onboarding Module

- In case of errors...

- You will be shown a red **Error** Flag and blue **View** hyperlink that you can click to review the errors that generated.

- When you click on the link, you will be brought back to the Onboarding Summary page that will detail out the errors which are preventing you from successfully completing the Onboarding Packet.

Uncommon Situations

Onboarding Module

Manually Adding an Employee

- If you need to create (or re-create due to deleting) an employee directly within the Onboarding Module, you will select **Create Employee** on your Onboarding Dashboard
- Then fill in all information available
 - Those in **Green** are required along with a form of contact
 - All others are optional and can be completed later
- Once filled in, click **Save**

search for name, event, company, employee id ... Event Launch Date

Create Employee Actions

Add Employee

Add employee to the event module.

Profile

First Name

Preferred First Name

Last Name

Middle Name

HR & Payroll Company Id

Tax Form

Employee Id (optional)

If no Employee Id is assigned Onboarding will automatically create one at event launch

Username

Login Url **Copy URL**

Personal Email

Mobile Phone

Expected Start Date

Work Location

Save **Cancel**



Uncommon Situations

Onboarding Module

Modifying Tasks in an Employee's Packet

- If you need to remove, replace, or add tasks to an Onboarding Packet, you will select the event from your Onboarding Dashboard
- Scroll to the bottom and select **Edit**
- Select the "X" next to tasks to remove them
- Select **Add Task** to choose a task from the dropdown
- Once tasks have been added, removed, and replaced as needed, select **Done**

