May 28, 2020

Greetings,

Due to the pandemic, we had to put our training for Paylocity and Attendance on hold, but we are now ready to continue our roll out.

We have had to make a few changes.

One of the changes is that we will not be able to continue the group training we started in the past. Our training platform is now self-directed.

As a reminder:

- **Paylocity Self-Portal Service Portal**: Allows you to view your current and past Paycheck information, company news, benefit information, contact information for other employees, change tax information, change demographic information, change direct deposit information, interactive features to recognize co-workers, and keep connected through community groups.
- **Paylocity App**: Allows you to view current Paycheck information, company news, benefit information, contact information for other employees, change demographic information, change direct deposit information, interactive features to recognize co-workers, keep connected through community groups, and receive real-time notifications.
- **Attendance Self-Service Portal**: Allows you to view your work schedule, punches, request PTO, and view your PTO balance. *Coming In July*
- **Attendance App**: Allows you to view your work schedule, punches, request PTO, view PTO balance, and it allows you to trade or pick up shifts. *Coming In July*

**Upcoming Key Dates:**

<table>
<thead>
<tr>
<th>Date</th>
<th>Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>May 29, 2020</td>
<td>Supervisor train on new iPad timeclocks, Paylocity Self-Service Portal and App</td>
</tr>
<tr>
<td>June 1, 2020</td>
<td>Employees start self-directed training on Paylocity Self-Service Portal and App</td>
</tr>
<tr>
<td>June 7, 2020</td>
<td>Staff begins to use new iPad timeclocks</td>
</tr>
<tr>
<td>June 15, 2020</td>
<td>Staff must be registered and using Paylocity Self-Service Portal and App</td>
</tr>
<tr>
<td>July 3, 2020</td>
<td>Your first paycheck is issued from Paylocity</td>
</tr>
</tbody>
</table>

What does this mean for you?

You will need to register to gain access to the Paylocity Self-Service Portal and App. Attached are documents that walk you through 5 easy steps to help you navigate the Paylocity Self-Service Portal and App.

*Lifestyle. Value. Trust.*

410 North Main Street | Dousman, WI 53118 | 800.848.5306 | www.threepillars.org
You need our company numbers to complete your Paylocity registration.

NOTE: you only use the numbers when entering a company ID:

- CP/RSL (WMH) 99741
- MCHR 99742
- VOS 99743

We have also included a sample pay stub to prepare you for the first payroll.

We will continue to implement the Paylocity and Attendance system over the next few months. We will continue to share more details about each phase as we implement it.

The specific roll out will happen in the phases below.

<table>
<thead>
<tr>
<th>Phase One</th>
<th>June</th>
<th>Employees Register in Paylocity/Attendance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase Two</td>
<td>July</td>
<td>Staff Begin Requesting PTO Through Attendance</td>
</tr>
<tr>
<td>Phase Three</td>
<td>Mid July</td>
<td>Staff Begin Pick Up/Trade Shifts Through Attendance Recruitment/Onboarding Online Systems Start</td>
</tr>
<tr>
<td>Phase Four</td>
<td>August</td>
<td>Employee Community &amp; Impressions System Roll Out</td>
</tr>
<tr>
<td>Phase Five</td>
<td>September</td>
<td>Performance Management – Performance Evaluations On line Benefit Enrollment All areas fully operational for you to use</td>
</tr>
</tbody>
</table>

For your convenience we have additional Paylocity training resources available for you on our website, under Employee Resources.

If you have questions or concerns, or need additional training assistance please contact your supervisor, myself, or Deanna Brownell HR Generalist/Payroll.

Thank you for your patience and understanding as we move forward with this new system.

Kathy Bernaden
Chief Human Resources & Compliance Officer

Step 1

Paylocity Self-Service Portal Registration

1. Access the login page, https://access.paylocity.com
2. Click Register User.

**Smart Tip**
To be able to register, an employee record must have your company ID (use numbers only):
- CP/IRSL (WMH) 99741
- MCHR 99742
- VOS 99743

If you are having difficulty entering the correct information in the registration process contact Kathy or Deanna in HR.

**Smart Tip**
From a mobile device, tap on the Apple or Google Play icon to navigate to the respective app store to download the Paylocity Mobile Application (App).
See Paylocity App instructions.

3. Enter the Paylocity assigned Company ID (listed in box above), then your Last Name.
4. Enter your nine-digit Social Security Number (SSN) in the SSN and Confirm SSN fields.
5. Enter your Home Zip Code.
6. Click into the box next to I'm not a robot and click Continue.
   - If prompted to further confirm you as a user after checking the box, complete the verification steps and click Verify.

Before we can get you logged in, we just need some information to properly identify the employee account to register. This information must match the employee information in our system exactly.

**Company (if present)**
- EDDID

**LastName (required)**
- Role:
- Title:
- Company ID (required)

**Home Zip Code (required)**
- 03005

I'm not a robot

Continue
7. Enter the **Username** (not case-sensitive), then the **Password** (case-sensitive) into the **Password** and **Confirm Password** fields. Click **Continue**.

![User Interface](image)

**Smart Tip**
The **Username** is required to be between 3 and 20 characters.

**Smart Tip**
The **Password** is required to be between 7 and 20 characters, in addition to including 2 of the following 3 items: 1 or more numbers, 1 or more uppercase letters and 1 or more lowercase letters, 1 or more non-alphanumeric characters.

8. Select challenge questions from the **Question (1,2,3)** drop downs, provide the answers, and click **Continue**.

![User Interface](image)

**Smart Tip**
Choose questions and answers that are not difficult to recall. Challenge questions can be asked when performing tasks such as resetting a password.

9. Review all the populated information and click **Finish** to create your user account.
Step 2

Edit Personal Information in Self-Service Portal

Once you have logged into your Paylocity account click on HR & Payroll > Self Service Portal. In the upper left-hand corner of your screen.

1. Click on View Employee Profile (box in middle of page) to add or edit personal information from the three available tabs.
2. First up is the Details tab. You don’t have to enter all of these, but you are able to enter them as you wish.
   - First you can enter the First Name, Last Name, and Middle Name.
   - You can also enter your Title.
   - Select and apply a Suffix.
   - Enter a Preferred First Name.
   - Enter Social Security Number.
   - Enter Marital Status from the dropdown.
   - Enter Birth Date.
   - Enter possible Disability.
   - Select Ethnicity from the dropdown.
   - Select Sex.
3. Next, we are going to look at the **Contact** tab. This is where you can enter all of the below information:
   - Enter applicable **Work**, **Home**, or **Mobile Phone**.
   - Enter **Work** and **Personal Email**.
   - Select the pencil icon to edit an address.
   - Select **Add Contact** to add an **Emergency Contact**. Select an emergency contact's name to edit information.
   - Select **Save**.

4. The final tab is the **Social** tab. This tab is meant to let your co-workers know about you. You can add a profile picture, about me section, and even connect your social media accounts. This area is **optional** and will become part of an **optional** company directory for only Three Pillars employees. We will roll out the company directory at a later date.
   - Click the pencil icon to **upload a profile image**.
   - Enter information in the **About Me** section.
   - Click **Save**.
Step 3

Navigate HR & Payroll sections

1. Once logged into Paylocity employee Self-Service Portal – it will open up to the Self-Service Portal.

2. Next click on the HR & Payroll drop down menu

3. Click HR & Payroll from the drop-down menu.
4. Once in the HR & Payroll tab you will find the following tabs listed:

>Personal

>Work

>Employment

>Pay

>Benefits
Performance

>Training

Time Off (We do not use this tab)

5. If you select Employees then select Employee Payroll File from the drop-down menu and you will find the following:

Personal

Work
6. Select Employees and then select Employee HR File from the drop-down menu and you will find the same as #5 above.

7. If you select Employees then select current check from the drop-down menu and you will see your most recent check. First payroll check in Paylocity system will be July 3, 2020.

8. Select HR and then select Org Charts from the drop-down menu and you will find organization charts. *(Coming Soon).*

9. When you select HR and then events, it will show events – *(Coming Soon).*

10. Select Payroll and Select Check Calculator – allows you to estimate your check

11. Select User Access and then Preferences to review log in and challenge questions.
Step 4

Helpful on line guides & tips

1. Select Help and Knowledge Base for Employees for help guides for the Self-Service Portal

![Paylocity Education and Knowledge](image)

2. **Helpful Tips:**
   - Click on the Paylocity logo and it will take you to the home screen which is the Self-Service Portal.

User Portrait Menu

In HR & Payroll, the User Portrait Menu is available in the top-right corner of the page. When a user hovers a cursor over this menu, additional options appear for that user (including Notifications and Logout). The user's Employee ID also appears in this menu.

**Important Information:** The User Portrait Menu can display the user's custom Profile Image.
Step 5

Logging into the Paylocity Mobile App

1. Download the Mobile Application from the App Store of Google Play

2. Open the Mobile application

3. Enter your assigned Paylocity Company ID. This will be the same as your self-service log in.
   CP/RSR (WMH) 99741
   MCHR 99742
   VOS 99743

4. Enter your Username. Same as your self-service log in.
5. Enter your Password. Same as your self-service log in.
6. After you finish you can click login
7. You will first land on the page below. This home page has the same links as on the Paylocity Self-Service portal.

8. You can click on the circle with your initials and it will take you to the screen where you can edit your personal information.
Understanding Your Paycheck

The numbers below all indicate one part of your paycheck. On the next page, find the number that corresponds to the part you want to learn more about.

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Checks may vary slightly from company to company. In order to maintain confidentiality, employees must contact their Company Administrator with questions. Paylocity is not authorized to speak directly with employees.
**PAYCHECK INFORMATION**

1. **Employee Information**  
   Employer name and address information

2. **Check Date**  
   The date your check can be cashed or when you should expect direct deposit

3. **Demographic Information**  
   Employee name and address information

4. **Net Pay**  
   Also known as take-home pay, income after necessary taxes and deductions have been withheld; may include direct deposit bank account information

**EARNINGS STATEMENT INFORMATION**

5. **Allowances and Exemptions**  
   Personal exemptions reduce the employee’s taxable income on Form 1040. When entered into the payroll system, they reduce the same amount of wages from income tax withholding and approximate the employee’s tax liability and the end of the year

6. **Earnings**  
   Gross pay before taxes and deductions; contains hour, wage, and salary information for current pay period

7. **Deductions**  
   Amount that is or may be subtracted from an employee’s paycheck; can be taken pre-tax or post-tax depending on the type of deduction. Also includes voluntary and involuntary deductions (e.g. child support)

8. **Taxes**  
   Withholding amounts for each applicable tax authority. Federal taxes are paid to the IRS; FICA funds both Medicare and Social Security; state and local taxes paid to the city/state where you live, if applicable

9. **Direct Deposit and Account Type**  
   Bank account information and amounts deposited, if applicable

**QUICK TIPS ON CALCULATING THE NET PAY**

Using the paycheck in this document as an example, follow these steps:

<table>
<thead>
<tr>
<th>Step</th>
<th>Calculation</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Calculate total earnings</td>
<td>$720.00</td>
</tr>
<tr>
<td>2</td>
<td>Calculate social security</td>
<td>-$27.30</td>
</tr>
<tr>
<td>3</td>
<td>Calculate Medicare</td>
<td>-$9.42</td>
</tr>
<tr>
<td>4</td>
<td>Calculate federal withholding</td>
<td>-$47.68</td>
</tr>
<tr>
<td>5</td>
<td>Calculate applicable state, local, disability, and unemployment insurance</td>
<td>-$30.57</td>
</tr>
<tr>
<td>6</td>
<td>Calculate adjustments (pre-tax and post-tax amounts)</td>
<td>-$70.10</td>
</tr>
<tr>
<td>7</td>
<td>From total earnings, subtract all employee withholding taxes, then add or subtract all adjustments based on how they impact net pay. End result is net (take-home) pay.</td>
<td>$534.93</td>
</tr>
</tbody>
</table>

**VIEWING YOUR CHECK ONLINE**

Do you have a login to view your check online? If so, remember you can access your current and historical check information at any time by logging into Web Pay. Based on your company's configuration, you may land directly in the Self Service Portal. From there, click your most recent paycheck date link under Compensation.

If you do not have access to the Self Service Portal, click Employees from the top navigation menu and select Current Checks to access the same information.