



# **Employee Guide to Paylocity: Frequently Asked Questions**

## **Registering and Logging In**

### ***How do I get the Paylocity app for my phone?***

The app is available for download on both iOS and Android devices. To download the applicable version of the App please do the following:

1. Check your phone operating system and follow the correct step according to your phone:
  - [Google Android version](#) is available for download and install on all Android OS 7 or higher devices.
  - [Apple iOS version](#) is available for download and install on Apple iOS 11 or higher devices (iPhone, iPad, and iPod Touch).
  - Requirements are subject to change.
2. Register a new user account on the Paylocity Mobile App.
3. Log In to access the app.

### ***In order to register for self-service, it asks for my work email. If don't have a CASS work email, what do I use?***

If you don't have a CASS email your work email is your personal email CASS has on file for you. If you don't remember your personal email on file, please contact CASS HQ.

### ***I'm trying to register my account but I'm receiving error messages.***

If you are having trouble registering, it could be one of the following issues:

1. The Agency ID, last name, Social Security Number, and/or ZIP code you entered do not match what is in the system.
2. The agency administrator (even if you're not employed there anymore) needs to enable access for you. Please contact CASS HQ for administrator support.

### ***I've registered for Paylocity, but I forgot my password. How do I reset it?***

Choose "Forgot Password," and follow the prompts.

If you are still unable to access your account, contact CASS HQ for administrator support.

### ***I'm trying to register for self-service but why haven't I received my one-time passcode?***

If you haven't received your one-time passcode, start by checking your Spam folder. If you don't find it there, resend the code and choose the option to have it texted to you. If that still does not work, get in touch with your agency administrator to verify the phone number or email address is entered correctly in your employee profile.



***When will the Paylocity self-service portal be active so I can access and familiarize myself with it?***

The self-service portal is active now. Please register now if you have not done so already, as the self-service portal is where you will be able to review your personal information and make any updates if it is incorrect. The self-service portal is also how employees will clock in and out for work each day, check annual leave balances, submit requests for time off and more. Please refer to your self-registration email sent by HR with instructions on how to register and gain access or contact HR for additional information.

## **Updating or Accessing Personal Information**

### ***How do I change my address, email, phone number or emergency contact?***

You can change this information within your Paylocity app. Update information by clicking on the person icon on top left. Select Edit Profile and Emergency Contacts to make the necessary updates.

### ***I changed banks and need to change my direct deposit account that my paycheck gets deposited into, how do I do that?***

You can conveniently change this information within your Paylocity self-service portal (not on the Paylocity app). Once you log in, under the “Pay” heading tile click on more in the bottom right of the tile to bring up more options. Click on “Direct Deposit Accounts”. Pick the account from the drop-down menu you want to edit. To delete the bank account press, delete and save. To edit if with the same bank, click on edit and update to the correct information and then hit save. To add a new bank account, scroll to Bank Account and add your bank account information in the three required fields.

### ***What if I haven’t received my paycheck or direct deposit. What do I do?***

If you have not received your physical paycheck or direct deposit receipt, contact CASS HQ and verify your delivery address and/or direct deposit account information.

### ***I want to change my federal or state tax withholding, how do I do this?***

You can view and change your tax withholding by logging into the Paylocity self-service portal (not on Paylocity app) and under the “Pay” heading tile click on more in the bottom right of the tile to bring up more options. Click on “View/Edit Tax Setup” to make the requested change.

### ***How do I access my W-2s and other tax forms?***

Desktop: Log into the Paylocity self-service portal and under the “Pay” heading title click on more in the bottom right of the tile to bring up more options. Click on “Tax Forms” and choose the year. You will have the option to password protect the document or waive the protection, and then you can view the PDF file.

Mobile: Tap "Pay" at the bottom of the screen. Tap "Tax Forms" at the top of the screen. Tap on the year to preview. You may view it as pdf on your device or tap envelope icon at the top right to send to an email address. You will be prompted to create a password for the PDF by default. If you are unable to access your employee account, contact your current or former employer’s HR department for additional support.

## **Entering Time and General Payroll Information**

### ***How do I clock in and out on the mobile app?***

Log into the Paylocity Mobile App you can clock in/out from the home tab or select “punch” from the main menu. Then select the appropriate Punch Type from the dropdown menu. If you want to add a note to your punch, select “Add Note” to add a message to the Punch Type. Notes will display a preview of the message within the row title. Select Back to return to the Punch screen then select “Submit” to record the punch. When punching from the self- service portal, employee dashboard, mobile app, or kiosk, the time listed may not match a user's device. To prevent manual manipulation of recorded hours, Time & Labor does not draw the time from a user's phone or computer, but rather from the Network Time Protocol server. The time displayed is the national time based off the employee's listed time zone.

### ***How do I clock in and out on a desktop or laptop?***

Log in to your self-service portal and navigate to Time Entry tile on home page. To Log In click on the Orange Clock In bar. To Log Out click on the orange clock out bar. When punching from the self-service portal, employee dashboard, mobile app, or kiosk, the time listed may not match a user's device. To prevent manual manipulation of recorded hours, Time & Labor does not draw the time from a user's phone or computer, but rather from the Network Time Protocol server. The time displayed is the national time based off the employee's listed time zone.

### ***What if I clock in a few minutes later than the time I'm supposed to start my shift, will the system still record my hours?***

There is a 5-minute grace period when clocking in. If you clock in later than 5 minutes from the start of your designated shift, your clock in will label it a late punch. You will be able to put notes on your “in” punch if you were late for any reason, but the punch will still show late. The system will still record your time and calculate your hours based upon your clock in and clock out punches.

### ***Will I have to clock in and out for lunch?***

No. The Paylocity system will automatically deduct 30 minutes for lunch each day. If you work less than 6 hours and don't take a meal break or if you take a meal break for longer than 30 minutes, contact your supervisor to edit your timesheet. You must state the reason in the notes section for the edit. Every employee working 6 hours or more in a day must take a meal break of at least 30 minutes.



***Will I get a stipend for using my phone to clock in and out?***

No. Access to time and labor and cell phone usage for clocking in and out will be minimal.

***Will my paystubs still be mailed out?***

If you receive your pay via direct deposit your paystubs will be paperless, and you will be able to access your paystubs at any time through the Paylocity self-service portal. Once you log in under “Pay” on the main login page you will see the most recent paystubs issued to you. Click on the date portion of the paystub to view the details and print. To hide net pay information for added security click on the arrow next to “net amount” to hide this information moving forward while on the self-service log in page.

***Does Paylocity have GPS tracking for clocking in and out?***

Yes, it does. This feature will help CASS in billing for our clients and to help us track efficiencies.

***I’m trying to submit my time off request but it’s giving me an error and not letting me send it. What’s wrong?***

First, the system has limits in place that require time off requests to be submitted more than 24 hours in advance. If you are putting in a request with less than 24 hours’ notice, you will receive an error message and will not be able to complete the request. If this happens, please talk to your supervisor. Either your supervisor or CASS Payroll/HR will need to enter the request.

If your request is made with more than 24 hours’ notice and you are still receiving an error message, check to make sure you have enough time accrued to accommodate the request. The system will not allow you to submit a time off request that causes you to go into a negative balance. If this happens contact CASS HQ.