

Onboarding for Employees

Welcome! This resource will walk you through the quick and easy steps for completing your new hire paperwork and any other important related tasks.

[Login](#) | [Get Started](#) | [Complete Tasks](#) | [Finish Up](#)

Login

To access the onboarding application, click the link provided in the email correspondence from your new employer.

Then enter your secure login credentials as communicated via email. This will include the following:


- Company ID
- Username
- Temporary Password

You will then be required to enter a new password for security purposes. Simply follow the prompts to complete this process.

Upon successful login, you will arrive at the company branded onboarding page to begin the process of completing your personalized event plan.

Smart Tip


Employees will receive 2 emails from the employer prior to accessing the application: one with a link to access the event and the other with confidential login credentials.



Company Id

Username

Password



Personalize your Paylocity Security Image in User Preferences

☐ Remember My Credentials

[Forgot Password](#)
[Register User](#)

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Get Started

Once logged into the application, everything you need to get going is simply a click away. At a glance you will be able to view all of the event tasks that require your attention and company welcome information. Then you can choose the order in which you wish to complete the events or walk through them consecutively.



Smart Tip

Section headers help to keep you on track.



Smart Tip

Click **Get Started** to walk through each task, step by step.



Smart Tip

Track your progress and select a specific task conveniently from the **Event Summary**.



Smart Tip

Your **Welcome** page may contain specific company information to help you get acquainted with the orientation process.



Smart Tip

Some companies may allow users to add employee profile information such as prior education, hobbies, favorite sports teams, and links to preferred social media sites to encourage communication and networking within the company.

The screenshot displays the Paylocity onboarding interface for a new employee, Devon Cooper. The interface is divided into three main sections: 'Welcome', 'Your Tasks', and 'Summary'. The 'Welcome' section features a large orange 'Get Started' button and a message from the CEO. The 'Your Tasks' section shows a progress bar indicating '0 of 6 Tasks Complete' and a list of tasks that are 'Incomplete': Home Contact Info, Emergency Contact Info, Withholding Forms Wizard, Eligibility Verification, Self Service Profile, and Summary. A 'Smart Tip' box is overlaid on the 'Get Started' button, providing guidance on how to proceed.

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Complete Tasks

As you proceed through each option, you may be required to select or enter specific information.

Emergency Contact Info

Please add one or more people that we may contact in an emergency.

Required Field

Priority
☒ Primary ☐ Secondary

First Name

Last Name

Relationship

Primary Phone

Home Phone


Work Phone

Work Phone Ext

Mobile Phone

Save

Cancel

 **Smart Tip**
Required fields will be indicated with green text.


Welcome Your Tasks

1 Emergency Contacts on file


Robin Cooper - Spouse - details - remove

Emergency Contact Info

Please add one or more people that we may contact in an emergency.

 Add Emergency Contact

Next Task

 **Smart Tip**
The task header will display the number of records on file and an easy method to add, edit, or remove information.

 **Smart Tip**
Some tasks may require you to complete other actions first before proceeding.

For example, employers may require the addition of personal home contact information before users can add emergency contact details.

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Complete Tasks (cont.)

The withholding tax wizard will ask you a few simple questions to determine the best course of action for your individual needs. From here you can complete, sign, and print your forms (if required) in just a few easy steps.

The screenshot shows the 'Withholding Forms Wizard' interface. At the top, there are three tabs: 'Welcome', 'Your Tasks' (which is active), and 'Summary'. Below the tabs, the title 'Withholding Forms Wizard' is displayed. A message box with a megaphone icon says: 'Please use the forms assistant to create and sign your withholding forms. You must complete all forms before continuing to the next task.' Below this, there is a button with a person icon and a plus sign, labeled 'Start Withholding Forms'. At the bottom, there is a large orange button labeled 'Next Task'.

Some events may require a signature of acceptance. Depending on company configuration, users will sign using a touchscreen or mouse or by typing their electronic signature

The screenshot shows the 'Please Sign Below' interface. It has two tabs: 'Type' and 'Draw' (which is active). Below the tabs is a large white area where a handwritten signature 'Devon Cooper' is visible. A red 'Clear' button is located in the top right corner of the signature area.

The screenshot shows the 'Please Sign Below' interface with the 'Type' tab active. It features a text input field containing 'Devon Cooper'. Below the input field is a grid of six boxes, each containing a different version of the signature 'Devon Cooper'. The bottom-left box is highlighted in blue.

Smart Tip

You can save and quit the application as sections are completed and easily return at a later time to pick up where you left off.

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Finish Up

Once all of the tasks in your event have been completed, it's time to take one last look at the information provided.

paylocity onboarding

Welcome | Your Tasks | Summary

Please review your selections below ensuring accuracy or view full event summary PDF before finishing this event.

I'm Done

Your tasks are 83% complete

Event Summary
5 of 6
Tasks Complete

- Home Contact Info Complete
- Emergency Contact Info Complete
- Withholding Forms Wizard Complete
- Eligibility Verification Complete
- Self Service Profile Complete
- Summary Incomplete

Devon Cooper
Event Summary: Welcome to Garner Group!
[Preview Event Summary](#)

[Home Contact Info](#)

First Name: Devon
Last Name: Cooper
Address 1: 1234 Main St.
City: Roselle
State: Illinois
Zip: 60172
Email Address: arhodes@paylocity.com
SSN: XXX-XX-3505

[Emergency Contact Info](#)

Tom Smith - Father
[view more for this emergency contact info](#)

[Withholding Forms Wizard](#)

Smart Tip

Your level of completions is clearly displayed.

Smart Tip

A thumbs up icon indicates that a section has been completed.

Smart Tip

Once all of your event information has been reviewed, click **I'm Done** to submit your entries.

Smart Tip

Preview or print a copy of your event details to review entries for accuracy prior to submitting.

Smart Tip

Click the corresponding link to revisit a specific task.

Smart Tip

After your completed event has been submitted, additional edits will not be permitted. Depending company configuration, individual tasks may be available to view only.