

# Paylocity FAQ Guide

---

Below are questions and answers to some of the most common questions regarding Paylocity.

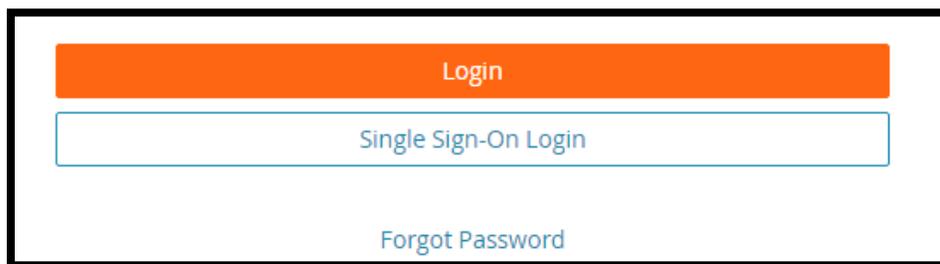
## **Q: What systems did Paylocity replace?**

**A:** The introduction to Paylocity allowed Lifeworks to combine 8 different systems or websites into one. Paylocity has replaced the following:

- DATABASICS (not including service billing)
- Microsoft Dynamics SL (Payroll)
- Silver Brook (Human Resources)
- Cornerstone PIIQ (Performance Management)
- Recruitee (Recruiting applicant training system)
- DocuSign (New hire onboarding)
- Arcoro/Infinity HR (Benefit Enrollment)
- JAT Paystub Portal

## **Q: How do I sign into Paylocity using Single Sign-On (SSO)?**

**A:** You are able to log into Paylocity by using your username and password or with Single Sign-On (SSO) using your Lifeworks Microsoft account credentials. To use Single Sign-On on your computer click the “Single Sign-On” button below login. To use Single Sign-On on the mobile app on your Lifeworks iPhone, tap the “Sign in with Single Sign-On (SSO)”. You may be prompted to log into your Lifeworks Microsoft account the first time. If you are asked to add in a company ID type 197483. SSO will allow you to log into Paylocity without needing your username and password.

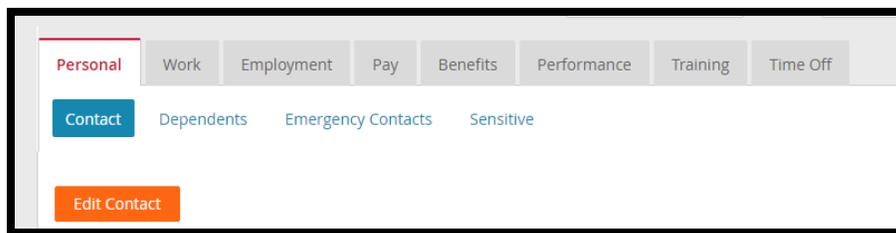


**Q: How do I reset my Paylocity password?**

**A:** On the login page of Paylocity there is a forgot password button. Enter your company ID, Username, and Phone or Email followed by continue. A onetime password will be sent to your Lifeworks email. Once logged into Paylocity you can create a new password. If you have any other issues with your Paylocity password, send an email to [D365-IT@Lifeworks.org](mailto:D365-IT@Lifeworks.org).

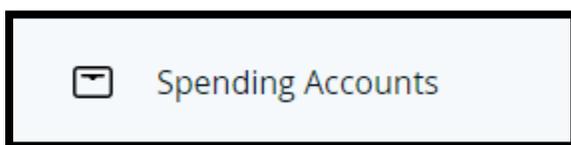
**Q: How do I update my personal information in Paylocity such as a change of address?**

**A:** In the HR and Payroll section of Paylocity you will find an edit contact button. This is where you can update your personal information such as address, phone number, emergency contacts and more. For security purposes, you will be sent a pin code prior to being able to update certain information.



**Q: Where can I see how much money I have in my HSA or FSA accounts?**

**A:** You will be able to access your HSA or FSA money via the Spending Accounts tab in Paylocity.



**Q: How can I see how much PTO I will have on a future date?**

**A:** Click Request Time Off located in the Time and Labor section of Paylocity. Under Request Type select PTO followed by selecting a future date in the Request Dates field. You will then see how much PTO you will have on that future date.

**Q: What expenses should I add to my Paylocity expense report?**

**A:** The only expense reimbursement taking place in Paylocity is for mileage. All other expense items should use the [Fillable Expense Reimbursement Check Request Form](#).

**Q: How does my mileage expense get reimbursed and when does it need to be submitted by?**

**A:** Mileage is now reimbursed on your bi-weekly paycheck. All mileage expenses must be approved by your manager no less than 7 days prior to payday for it to appear on that check.

**Q: What should I select as the payment method on my expense report?**

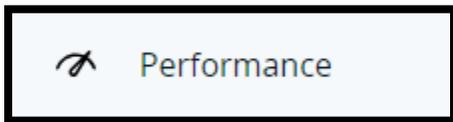
**A:** Always select cash (reimbursable). Lifeworks does not use the Credit Card (non-reimbursable) option.

**Q: Will Paylocity allow my PTO balance to go in the negative?**

**A:** No. Paylocity is set up to not allow a negative PTO balance. This setting can impact future PTO request where you don't have the PTO now but will on a future date. If you are getting an error message entering future PTO you should request the PTO by talking to your supervisor followed by putting the PTO request into Paylocity at a time closer to the date you want off.

**Q: Will my performance goals be kept in Paylocity?**

**A:** Yes! All Lifeworks staff will keep their performance goals in the Performance tab of Paylocity. Additional information on how to enter a goal into Paylocity can be found on the HR page of Lifeworks Today. Peer feedback and year end reviews will also take place in the Performance tab of Paylocity.

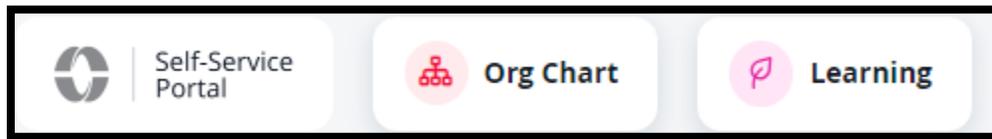


**Q: I see additional tabs in Paylocity such as Learning and Survey, will those ever be used?**

**A:** Paylocity has many different features available to Lifeworks. In 2024 we are implementing all components that we know we want to use. As we continue to growing using Paylocity, don't be surprised if additional tabs such as Survey or Learning are used in the future.

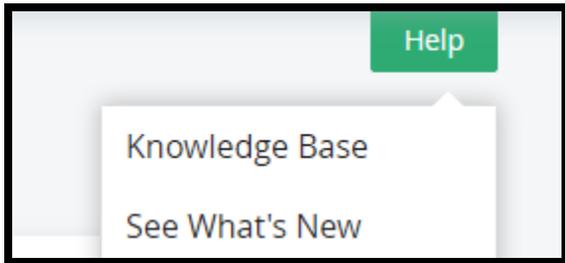
**Q: Where can I find an up-to-date Organizational Chart?**

**A:** Once you log into your Paylocity account you will see a button that says Org Chart toward the top of the page. Here you will see an up-to-date org chart with your supervisor and all of your Lifeworks co-workers.



**Q: Where can I learn more about Paylocity?**

**A:** Using the Help button and selecting Knowledge Base will give you a search engine to learn additional information about Paylocity.



**Q: Who can I reach out to if I have questions about Paylocity?**

**A:** Please send Paylocity questions to the following D-365 systems:

- [D365-Payroll@lifeworks.org](mailto:D365-Payroll@lifeworks.org) -Questions on paycheck, timecard adjustments, contracted proxy access
- [D3365-HR@lifeworks.org](mailto:D3365-HR@lifeworks.org) -benefits, surveys, core staff proxy access, new hire orientation, FMLA, performance
- [D365-IT@lifeworks.org](mailto:D365-IT@lifeworks.org) -password reset, permissions, job coach account setup