Paylocity Time and Attendance

USER GUIDE

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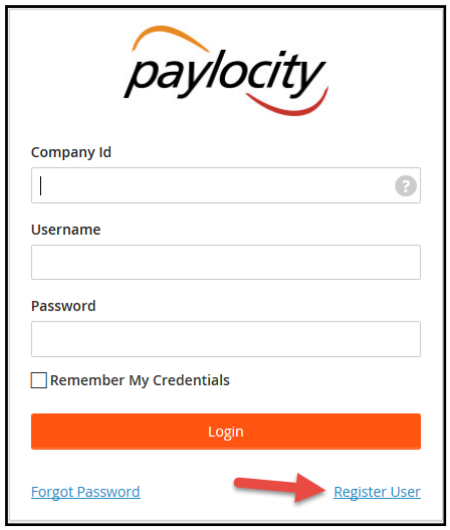
1. Access Web Time by clicking on the Paylocity Icon shown below on the PC desktop.

2. Click **Register User on the bottom right of screen** to create a new User Name and Password.



3. Enter 37565 Lori's Gifts Company Id (not case-sensitive)

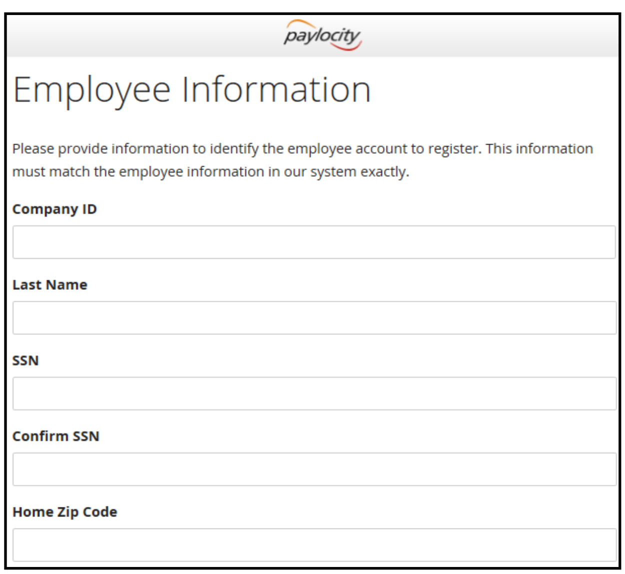
4. Enter your **Last Name**.

5. Enter your nine digit Social Security number (**SSN**)

6. Enter your SSN a second time in the **Confirm SSN** field.

7. Enter your Home Zip Code. If you have moved and not reported an address change to payroll, there may be an issue when you sign on. If you experience that issue, send an email to payroll@lorisgifts.com with your new address.

8. Click **Next**.



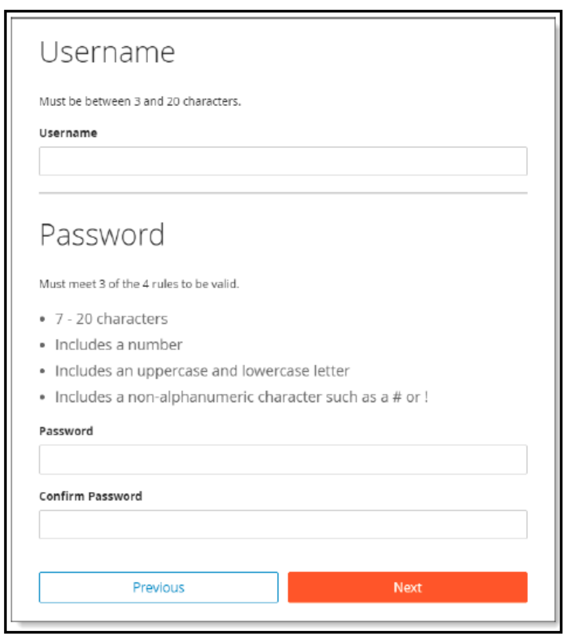
9. Enter the **Image Text**.   This is a security process. If you can't read the distorted letters, click on Dispay New Image to re-ceive another set of letters.

10. Click **Next**.

11. Enter the **User name** (not case-sensitive) and **Password** (this is case-sensitive) you would like to use when accessing this account; specific requirements are:

- User name must be between 3 and 20 characters long
- Password must be between 7 and 20 characters long, includes an upper and lower case letter, must include a number and a special character such as # or !

12. Enter your **Password** a second time in the **Confirm Password** field and click **Next**.



13. Select login challenge questions from the **Question 1**, **2**, and **3** drop downs and enter answers. Click **Next**.

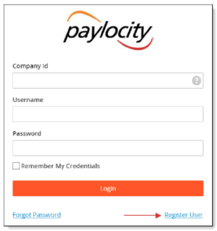
14. Select an image from the **Select Security Image** drop down.

15. Enter a personal **Security Phrase** (*128 character limit*) and click **Next**.

16. Verify all registration information is correct.

17. Click **Finish** to create the new user account and enter Web Pay.

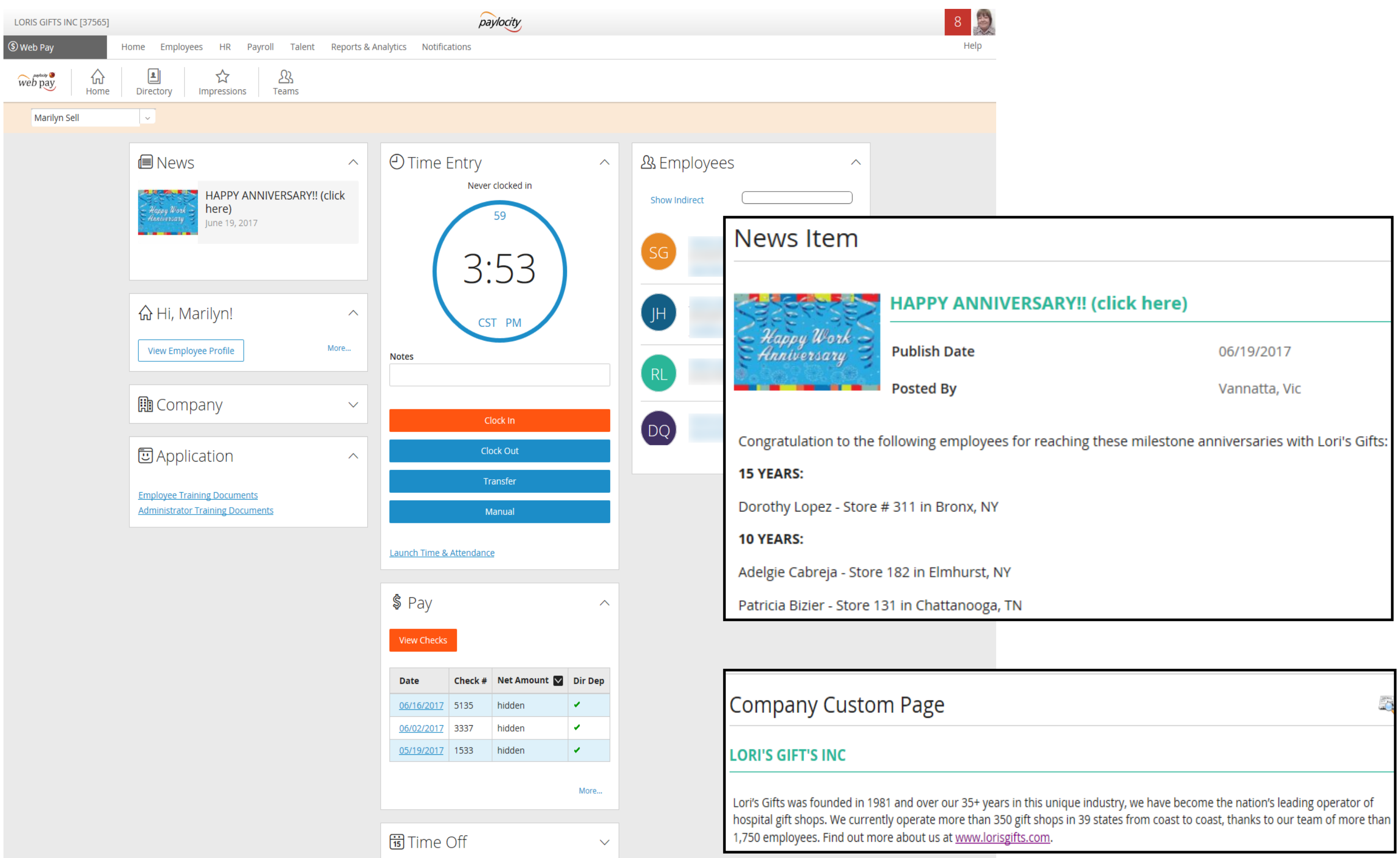
Using Paylocity: After you've registered as a new user, sign onto the application. Remember the company ID is 37565. This will take you to the Self Service Portal which is the beginning landing page. The self service portal provides you with all the information you need. Let's review some of the sections of the portal:



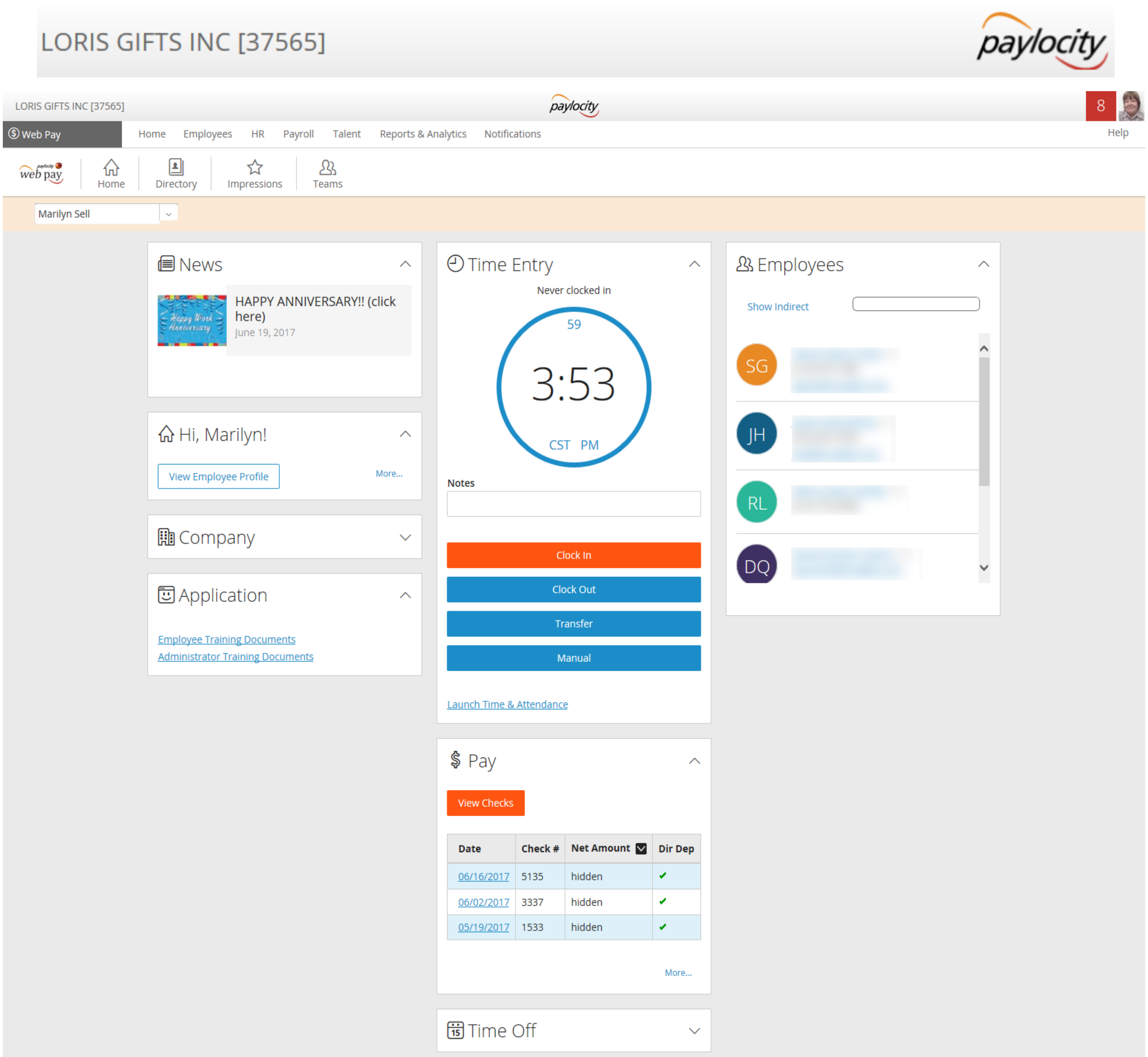
The Self Service Portal shows several blocks where various information is posted. Those blocks are News, Hi, Employee!, Company, Application, Time Entry, Pay, Time Off and Employees if you are a manager.

1. The News section is where an assortment of information will be posted. For now it shows company anniversaries. If you click on it, you'll see information about that month's anniversary.

2. The Company section is where news about our company is posted.



3. Hi, Employee's Name (your name will be inserted here) is a section that contains useful personal information about yourself. When you click on View Employee Profile, you will find 3 tabs, Details, Contacts and Social, where you will enter your information. Completing this section is mandatory so please start as soon as you can. Make sure you tap *Save* after each section. Details are demographics about yourself like a preferred first name, prior last name, birthday, marital status, etc. Contact includes space to enter phone and email addresses, street address and emergency contacts. Social is a place where you can write a short description of yourself. Do not post a picture or social medial information. That will be reviewed at a future time.



4. Application is where you can find additional on-line training information about Paylocity.

5. Time Entry is where you clock in and out for a fast punch. More detailed information in later pages.

6. $ Pay shows details of your past several paychecks. Click on the orange VIEW CHECKS and details are presented. Click on Download Paystub if you want to see more detailed information. Remember to keep this info confidential.

7. Time Off shows an overview of your PTO balance, used PTO, Available, and Approved. Requests are not made here.

8. Employees is a section seen only by managers where information about direct reports is listed. All of the same info displayed in red is here.

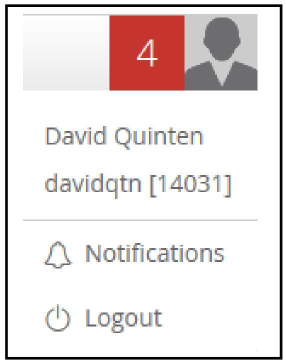
9. Logoff is available by clicking on the picture in the upper right corner and then sliding down to logout. Click on the man to see the info in the drop-down.

LORIS GIFTS INC [37565]

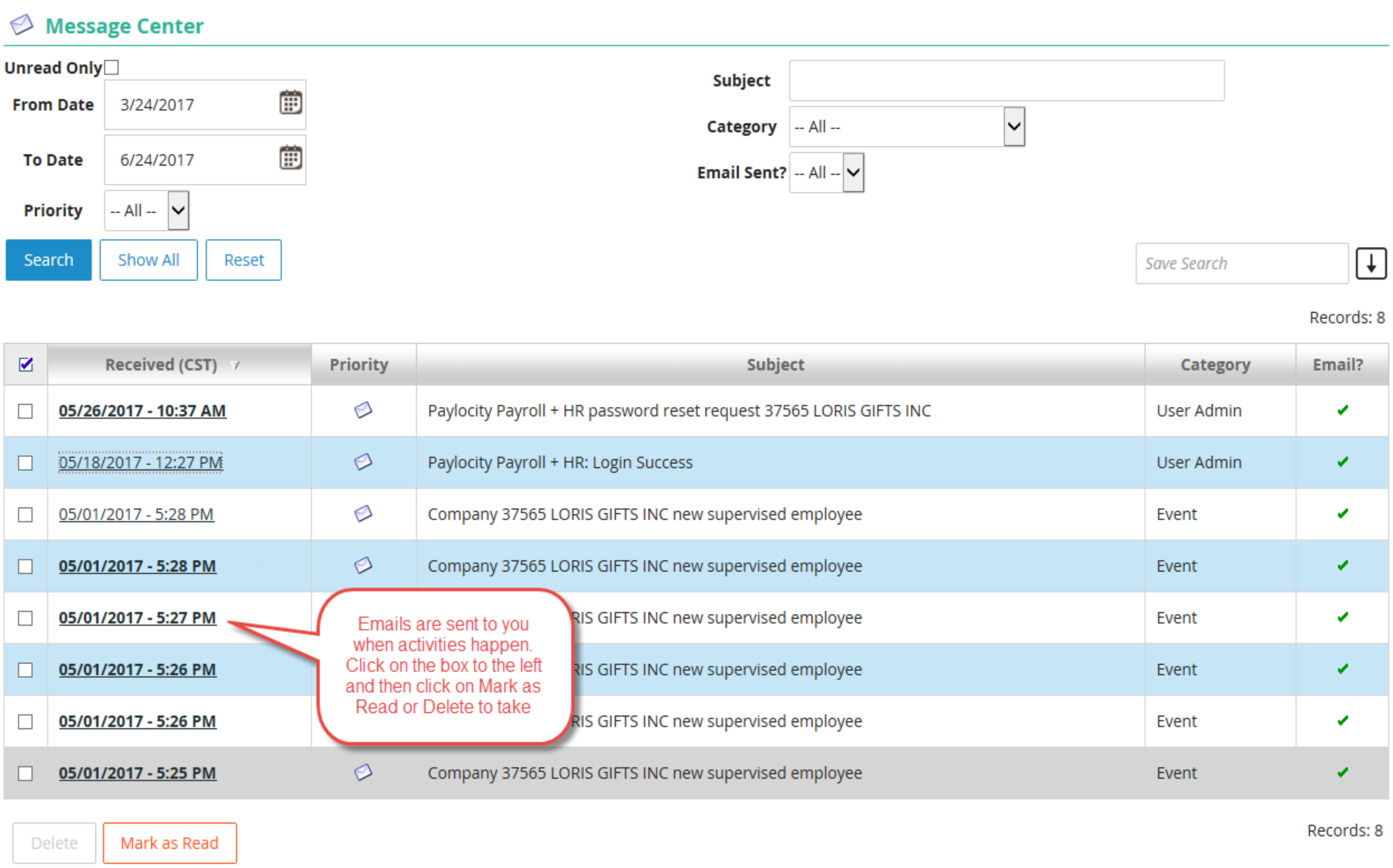
Logging out of Paylocity and checking mail:

In the upper right corner of your screen is a picture of a man and a red box that shows the number of emails you have.

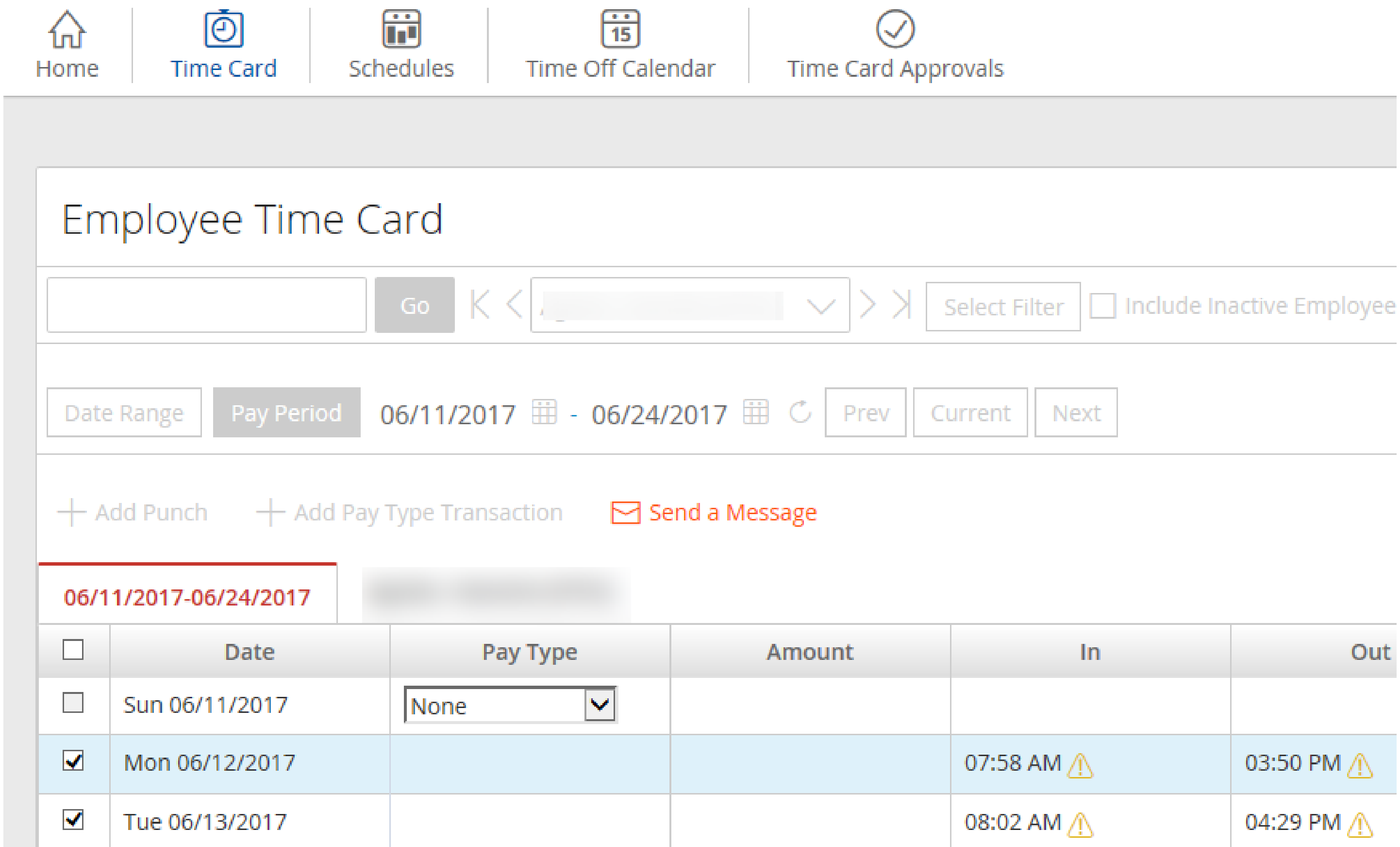
To logout of Paylocity: Click on the man until the drop down shows information. Slide the mouse down to Logout and click. You will be logged out of the application. Remember, if you don't complete this step, any employees in your store will see your confidential information.



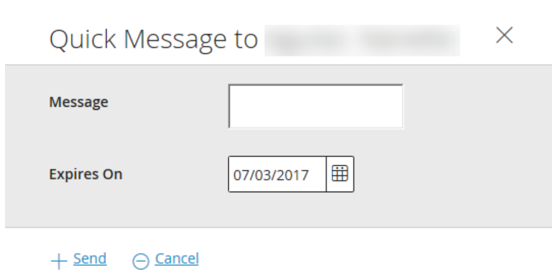
To review your email: The red box shows 4 which is the number of emails waiting for you to review. Click on the red box and the Message Center below is show. Click on the Received date/time to see the detail of each message. Click in the square and the Delete or Mark as Read to remove or reduce your message number.



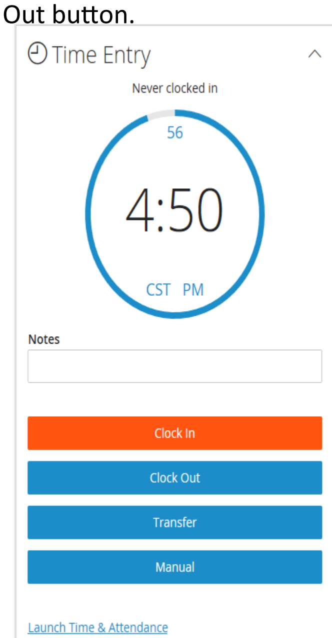
Sending a message to an employee from the employee's time card: when in the time card, ask questions or caution an employee of clocking in/out at the wrong times by clicking on the orange Send a Message.



This will open up the Quick Message dialog box below where a message can be written to an employee and an expiration date for the message to be viewed is assigned. When complete, click on the blue Send.

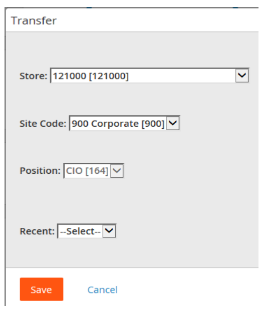


CLOCKING IN AND OUT: Step 1: Wait until your scheduled clock in time is close. Allow for the time it takes to sign in. Single click the orange Clock In button and you are done. When you are ready to clock out, do the same thing with the blue Clock Out button.



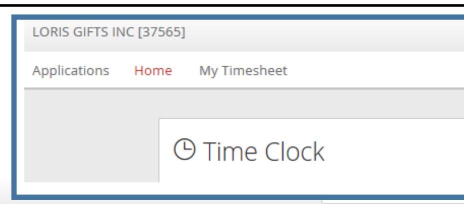
Step 2: If you are assigned to work outside your home store, click on the blue Transfer button. The box below will pop up and enable you to select the new store where you will Clock In. Next, click on the orange clock in button, as normal. When you clock out, click on the blue clock out button and it will complete that punch. Note: if you live in a state with 2 time zones, Paylocity defaults to one or the other. Tennessee is an example of this. The hours are still correct.

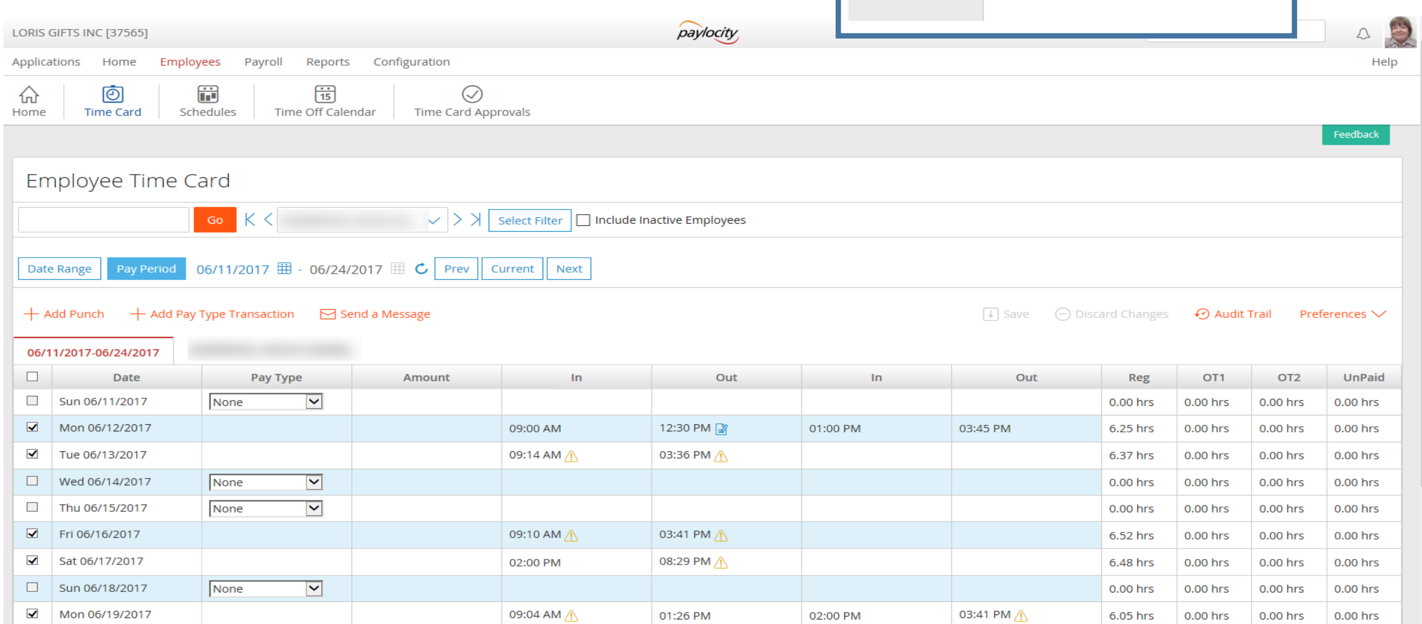
Reminder: Please pay attention to the times you clock in and out compared to your scheduled time. This is very important to make sure that your store is not penalized for going over your allocated hours. If a store exceeds hours, sales for bonus pay is forfeited for all employees during that pay period.



Manual Time Entry would not be normally used. It provides a space where you can select a cost center.

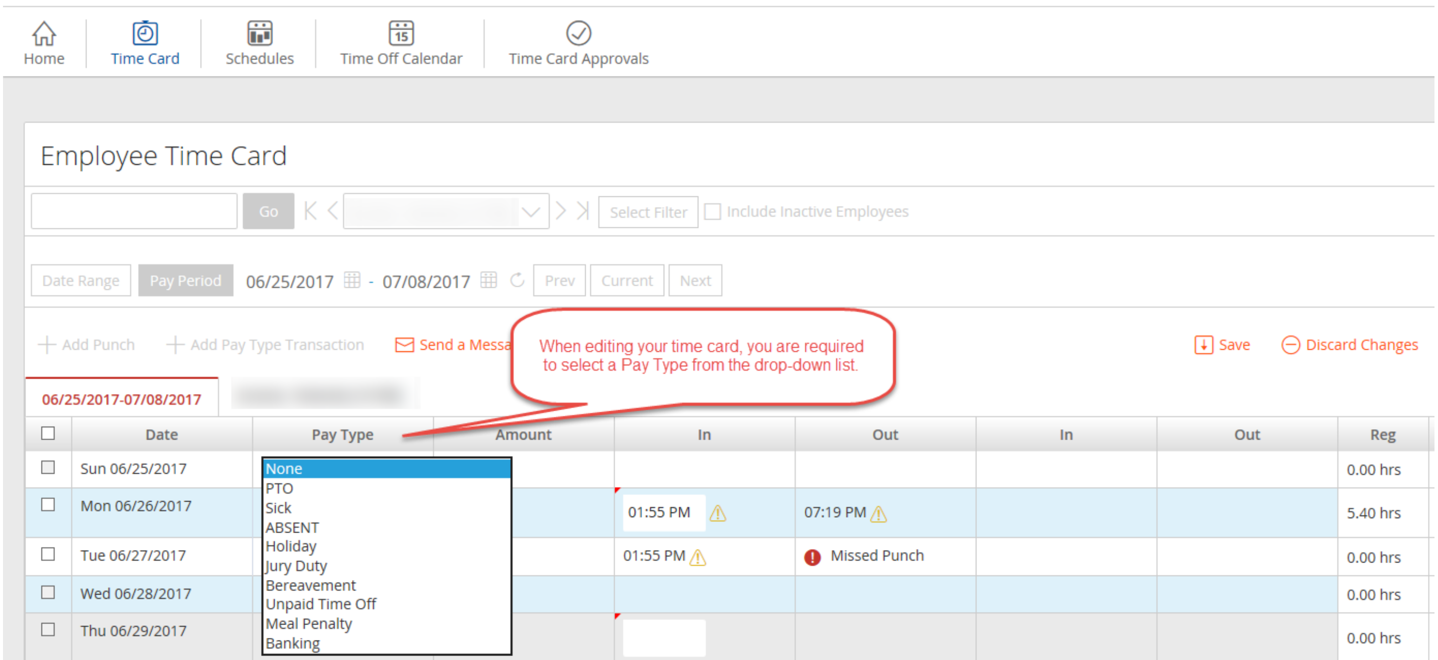
APPROVING YOUR TIME SHEET: When your final shift during the 2 week pay period is completed, you are required to approve your timesheet before leaving. If this is not done, your manager will edit and approve what's showing which may have errors. From your personal home page, go to My Timesheet. Once in the timesheet, you will be able to review all entries. Either use the Approve All button or click on each day in the left-hand column. If you see a yellow triangle with the ! Symbol, that is an indication that the punch time does not reflect hours entered for you on the schedule. If you're seeing these symbols on your timecard, you should be waiting in the lobby until 5 minutes prior to your shift begins before clocking in.



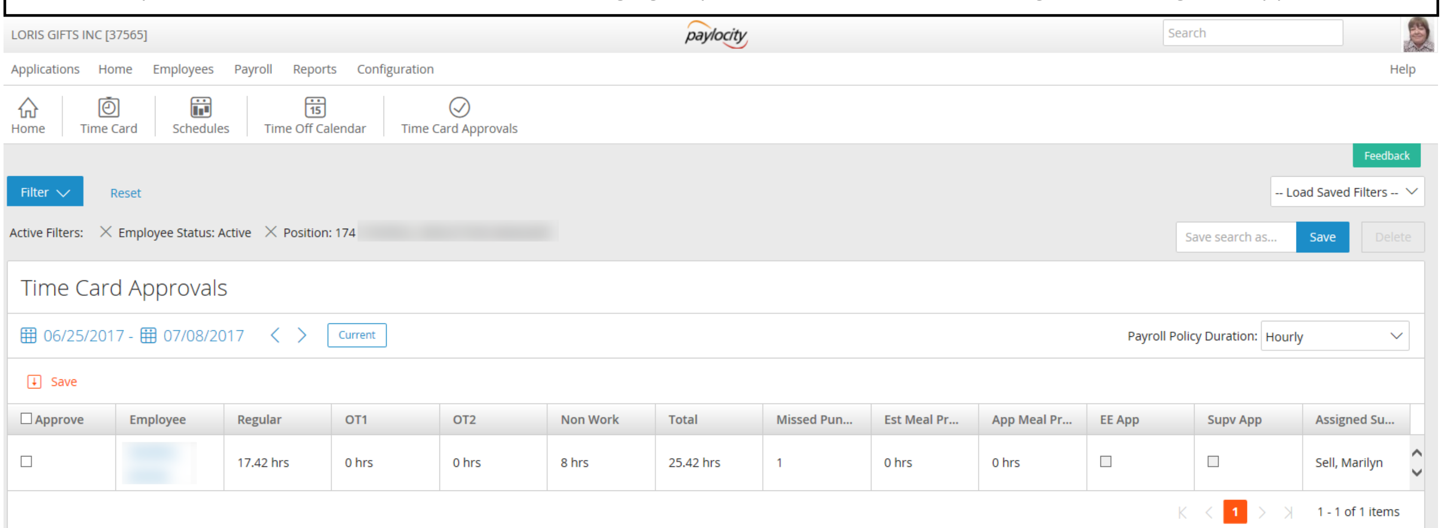


IF A TIME CARD NEEDS TO BE EDITED: To add information to a time card, select one to the types from the Pay Type drop-down. Many of these activities will be done by Payroll once an email request and supporting documentation is submitted. Examples of these are Jury Duty and Bereavement.

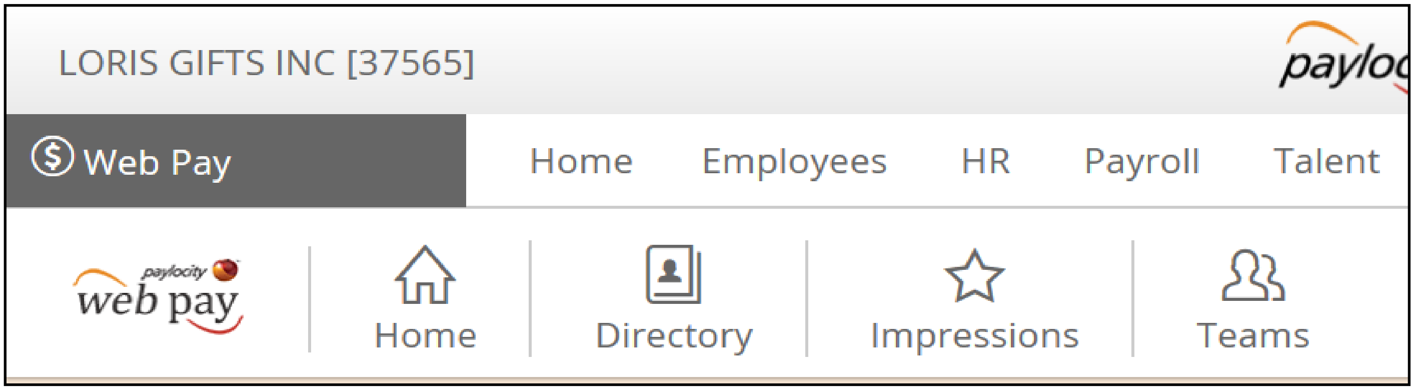
Banking Time: Most banking time is requested to be done after hours. When the manager/asst. manager goes to the bank to drop off the deposit, an additional entry is made the next day with Banking pay type selected to record the time it took to travel from the store to the bank. No time from the bank to your home should be recorded. If a manager leaves during the day to get change at the bank, a clock out punch should be made. When the manager returns, another in/out punch should be made/edited for the bank time. Lunch time should also be recorded separately.



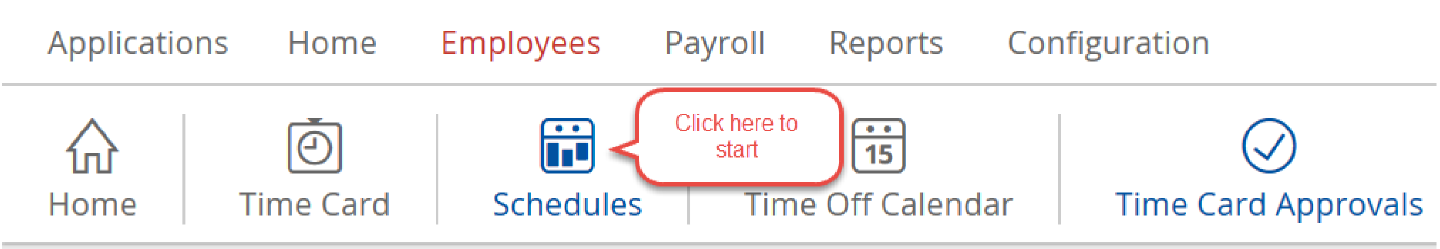
Supervisor's Approval: Time Cards are approved at the end of a pay cycle. An email is also sent from Payroll as a reminder. The employees time card must be approved first. That will be indicated on the right of the screen in the EE App field when it is checked. The supervisor will just click on the Approve box to the left. Then click on the red Save above the approve box. When that task is completed, an indication will show in the Supv App box on the right. Using the blue Filter function near the top of the screen can assist if there are a large group of stores for a District or Regional Manager to approve.

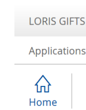


SCHEDULING: Step 1: Hover your mouse over the $ Web Pay Symbol in Grey. You will see 3 icons: Company, Self-Service Portal and Web Time. (Unable to provide a screen shot of this.) Select Web Time. The next panel you'll see has 5 icons.

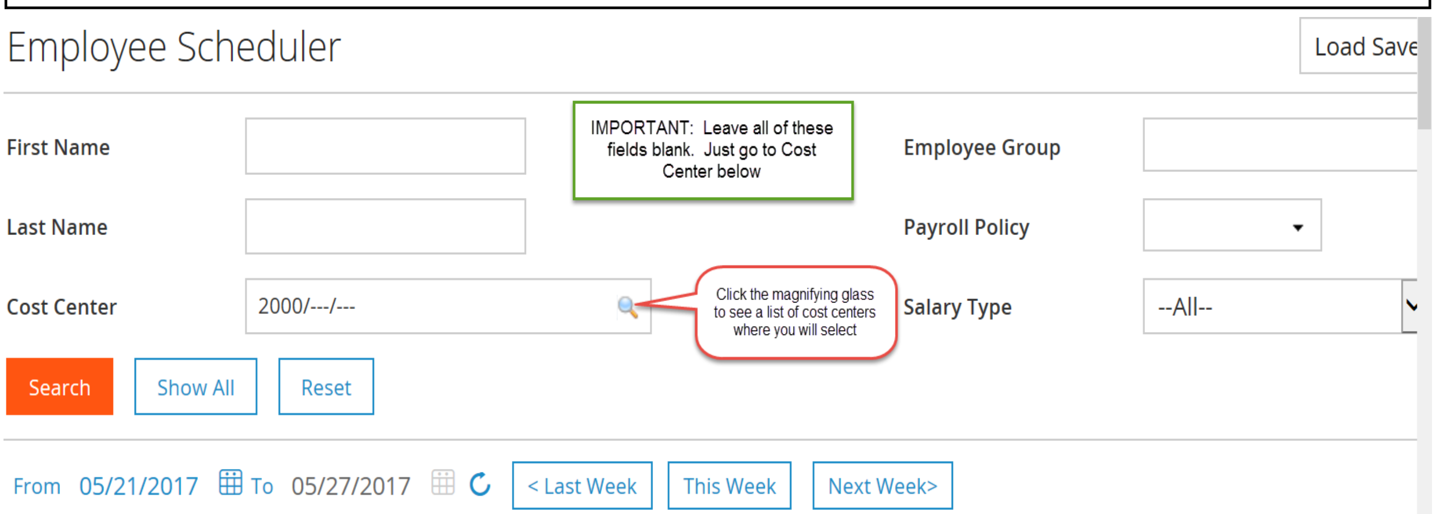


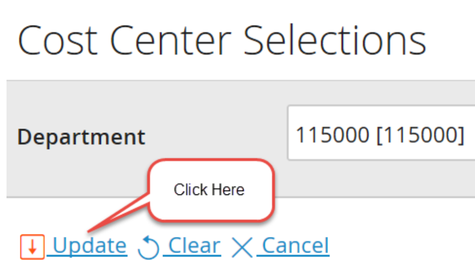
Step 2: Click on the Schedules icon.





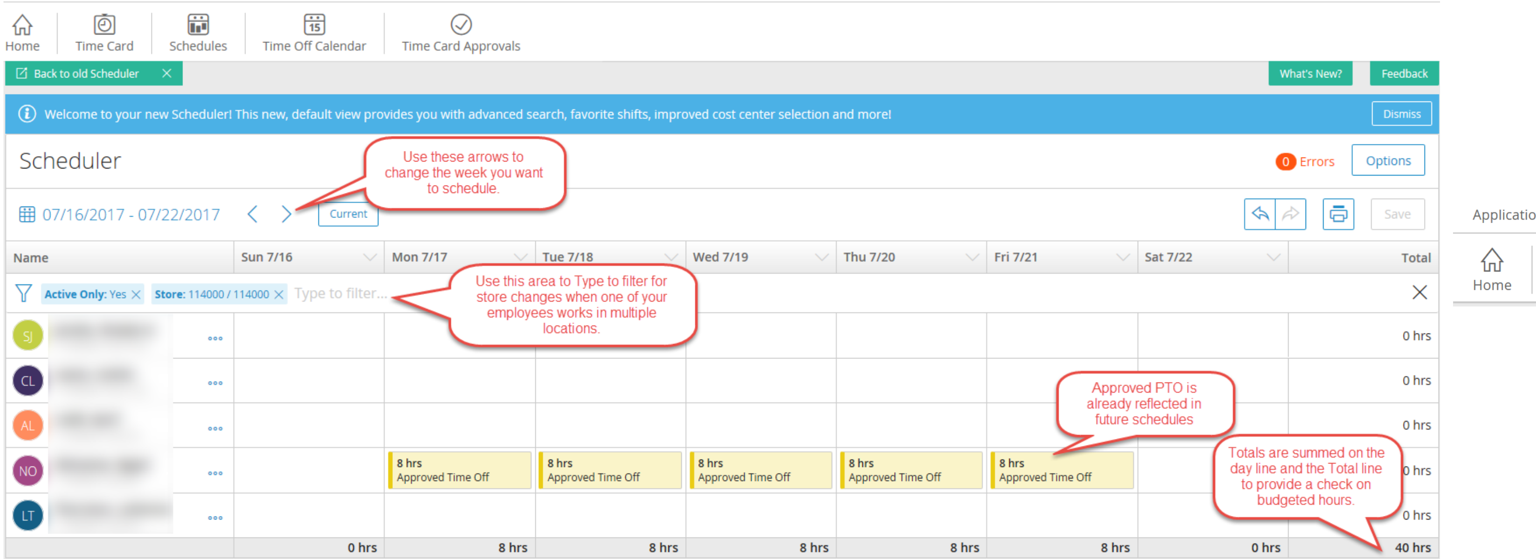
Step 3: COST CENTER EQUALS STORE NUMBER. In the cost center field, select the store number that matches your store. The number MUST be a 6 digit number so store 2 will be listed as 002000 while store 114 will be listed as 114000. Once the number is selected, click on up Update first, then Search.



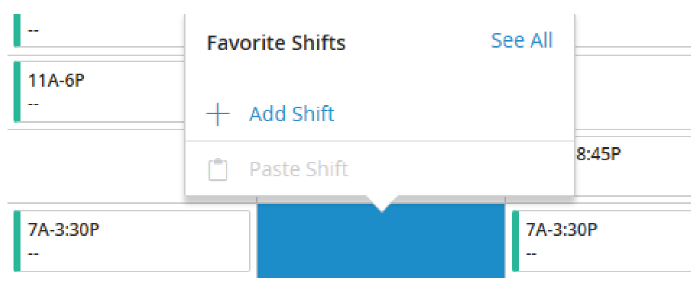


Step 4: Click on the Update text to record the correct gift shop.

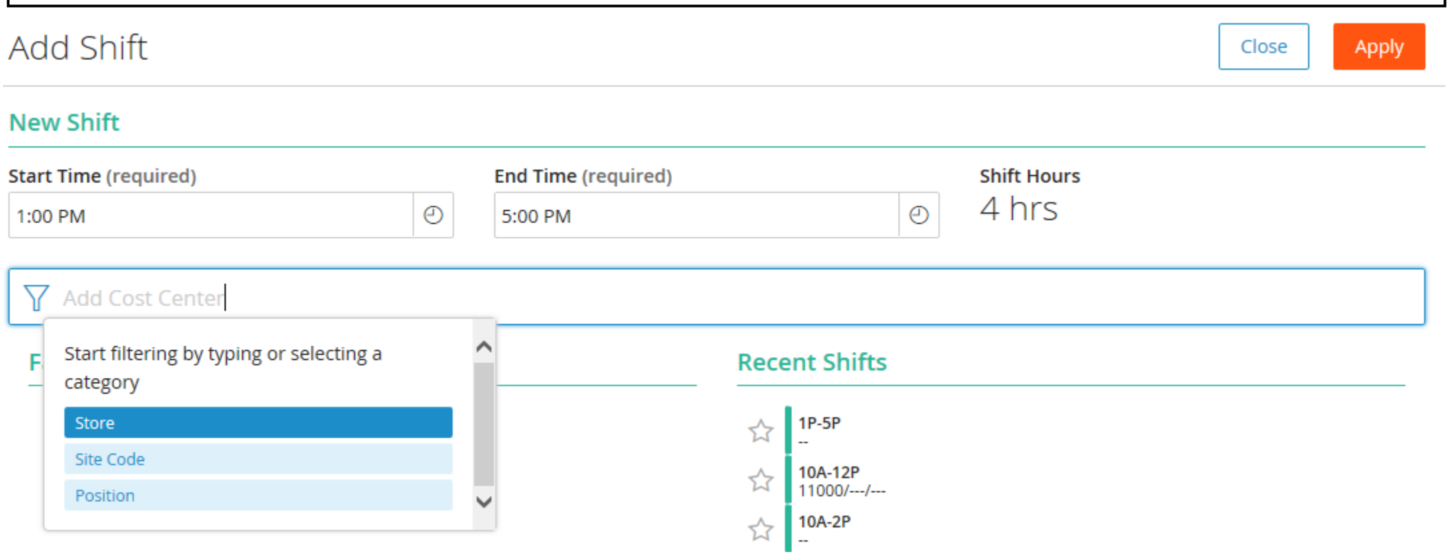
Step 5: If Update and Search were selected, you should see a list of employees like below. If you have no employees, repeat step 3 as you selected the wrong store/cost center. If correct, you should see an example like this:



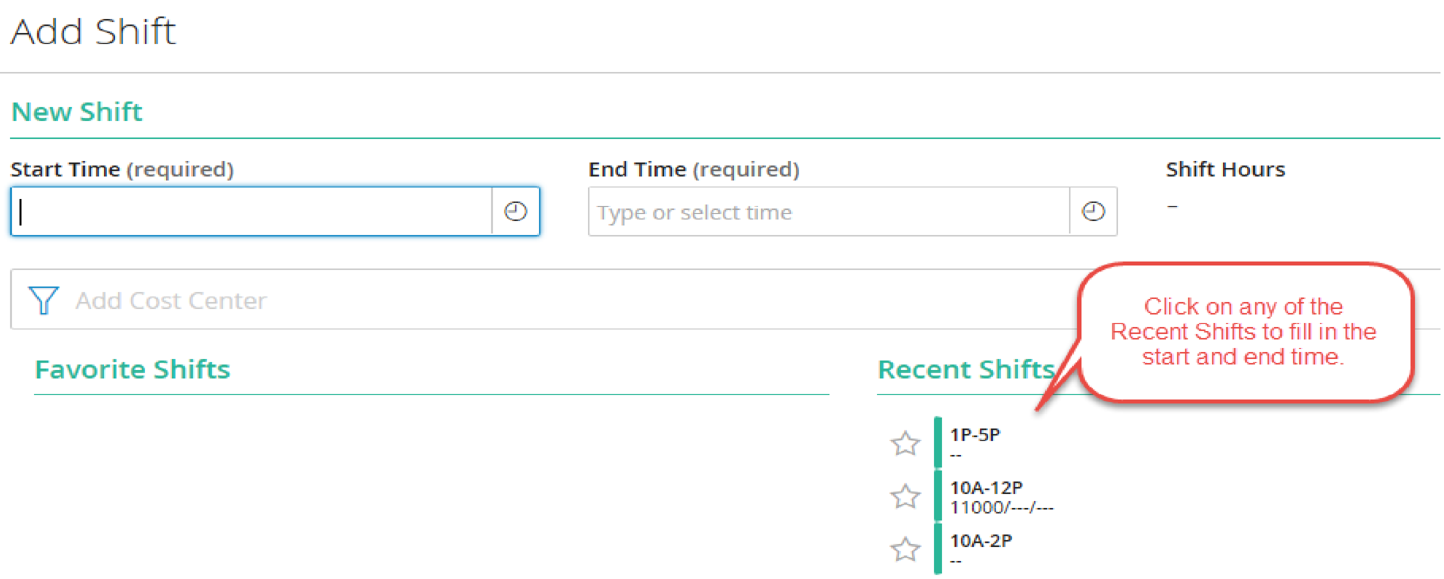
Step 6: Make sure the correct week is selected before you start. Click on the employees name and then click on the day of the week you are entering the schedule. The block will turn blue. Click on the Add Shift message.



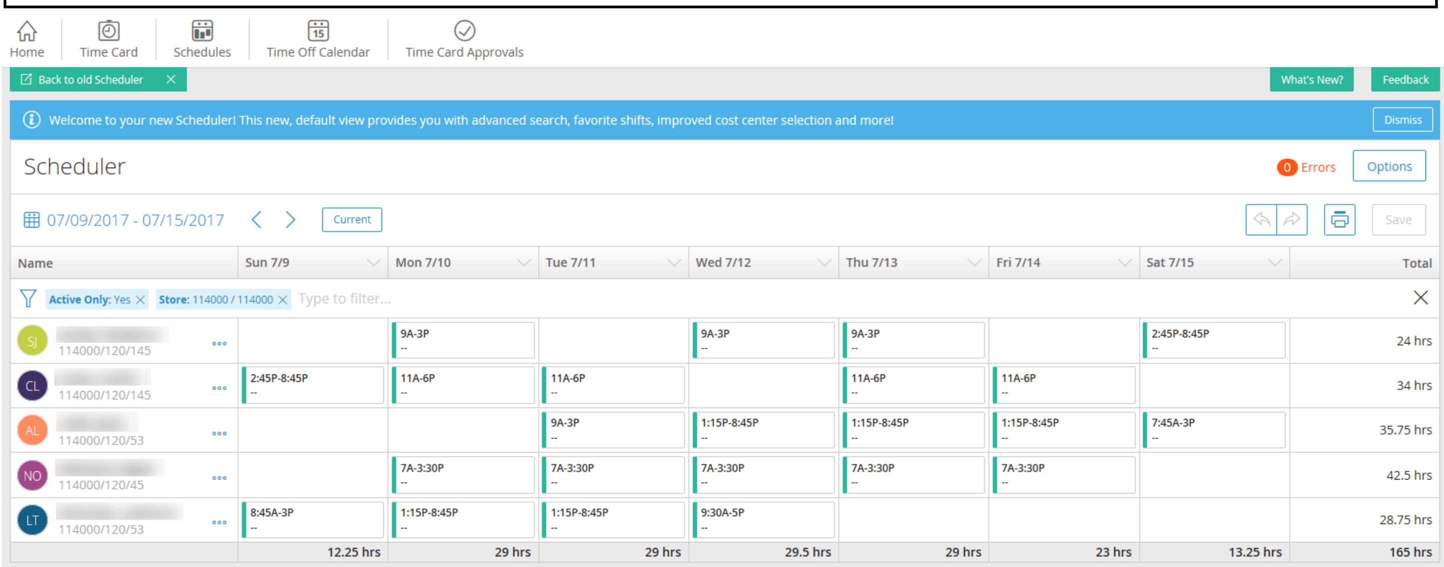
Important Tip about employees that work in their home store and another store: when the new shift is being added, click on the filter (funnel) and select store. This will provide the 6 digit numbers used to select a store. Click on the second store and the schedule will reflect the other store location.



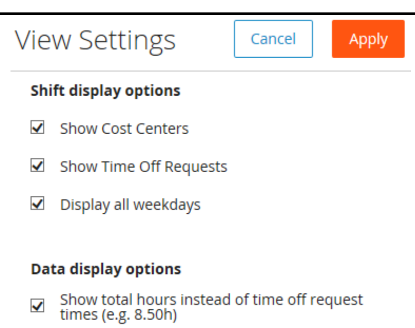
Step 7: Once the information is entered, select APPLY to save your work. At the bottom of the Add Shift screen, a Favorite or recent shift can be selected from any shown for easy entry.



Step 8: The final schedule should look similar to the one below.

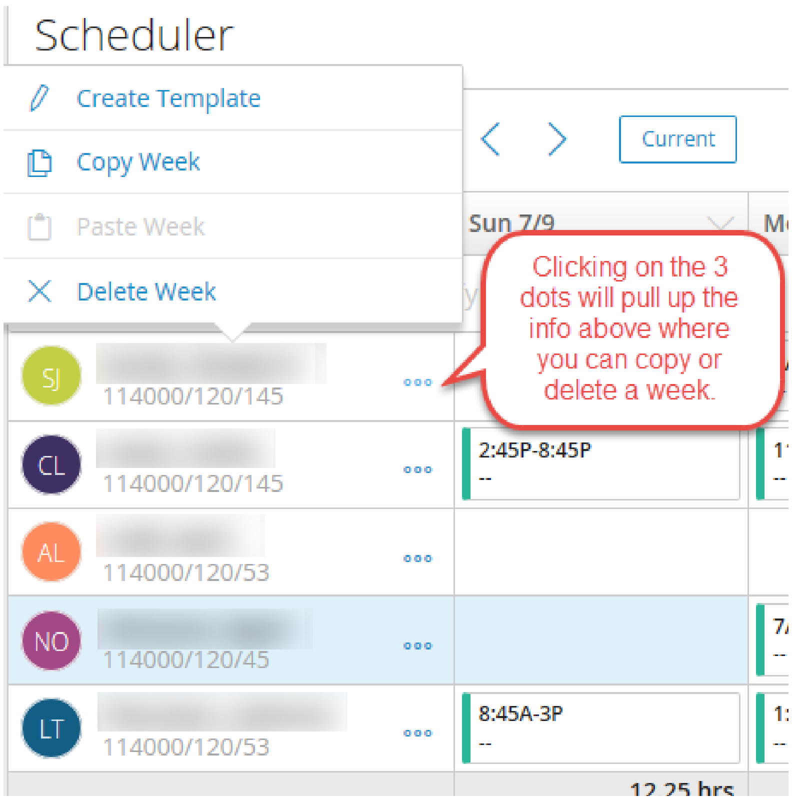


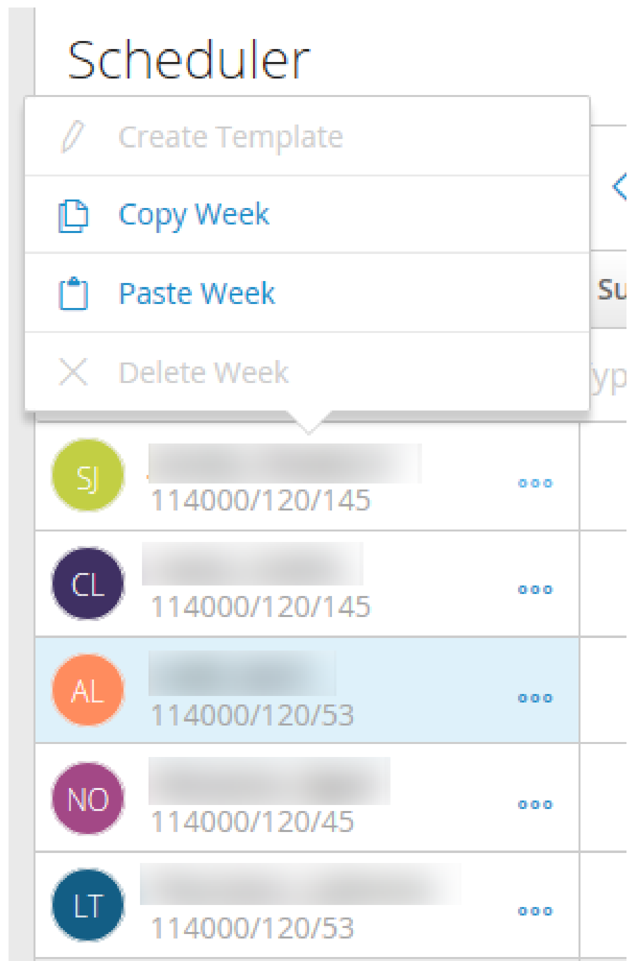
Step 9: On the top right of the screen is an Options button. This will allow you to change the settings shown in the View Settings box below.



Caution: schedules should not be printed on store printers as they are not large enough to handle the formatting.

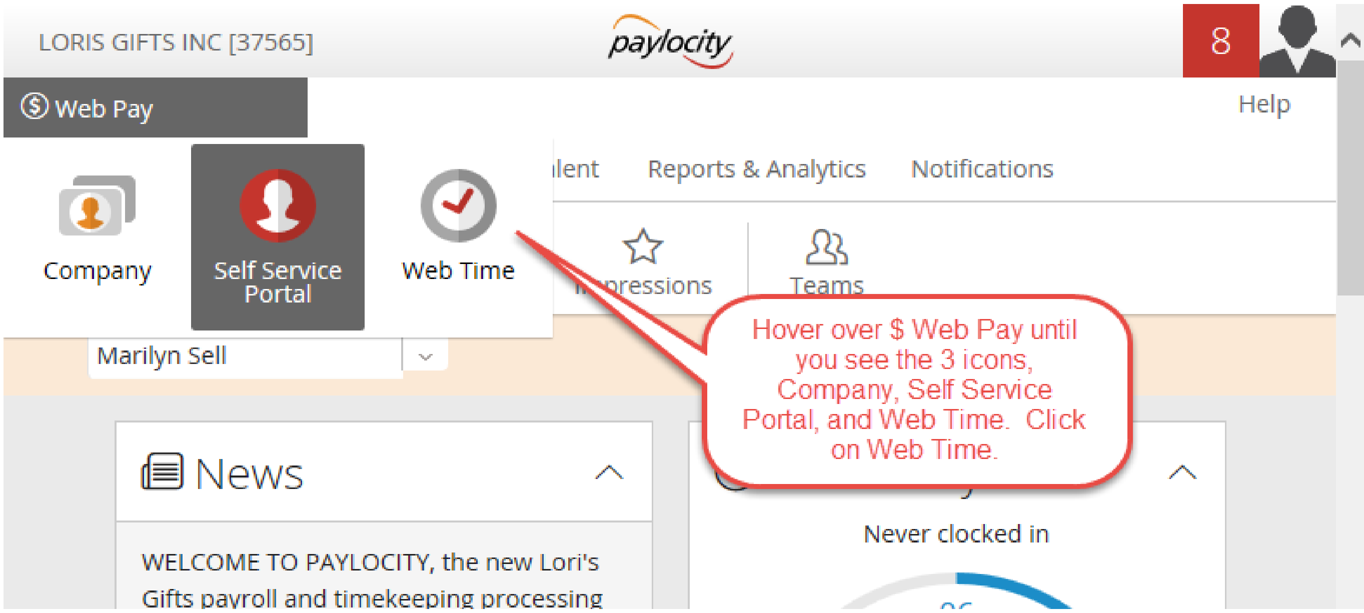
Step 10: Schedules can be copied from week to week if employees work the same schedule. This is a very easy function and will allow for editing if the schedule is close. Look for the More … button next to the employee's name. When you click, you'll see the Copy Week or Delete Week box display. Then select the future week where you want to Paste that schedule. Click on the employee and then select Paste Week. The same hours will become available for you to save or edit.



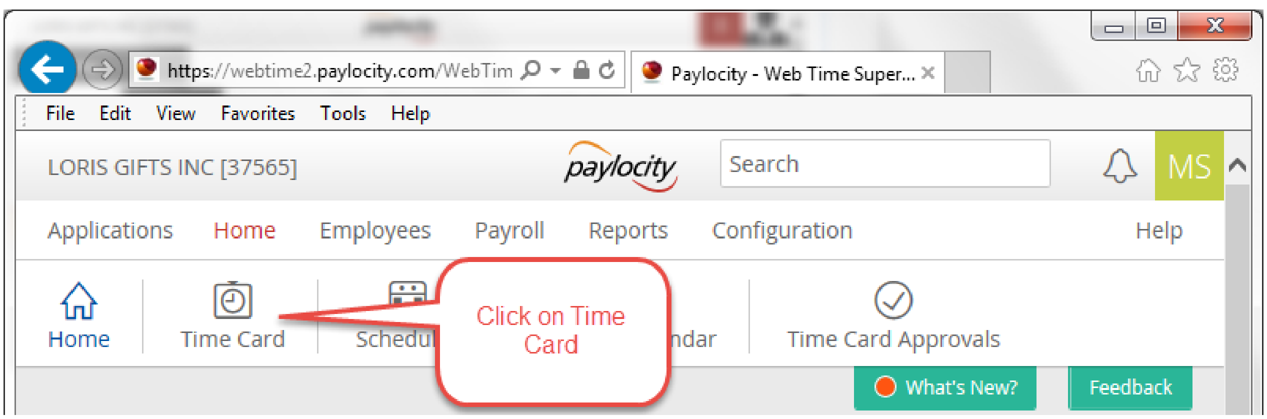


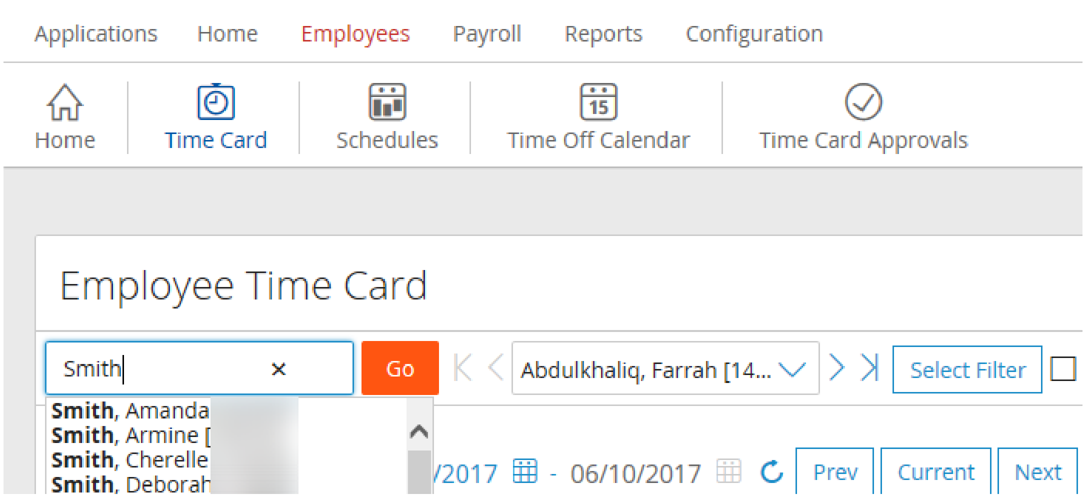
Above, you will see listed under the employees name their home store number (114000), site code (120) and their position code (145 for part time sales associate, 53 for part time assistant manager and 45 for store manager.)

EDITING OR ADDING A MISSING PUNCH: Hover over the $ Web Pay box in the upper left of the screen until the 3 Icons become visible. Click on Web Time to begin the process.

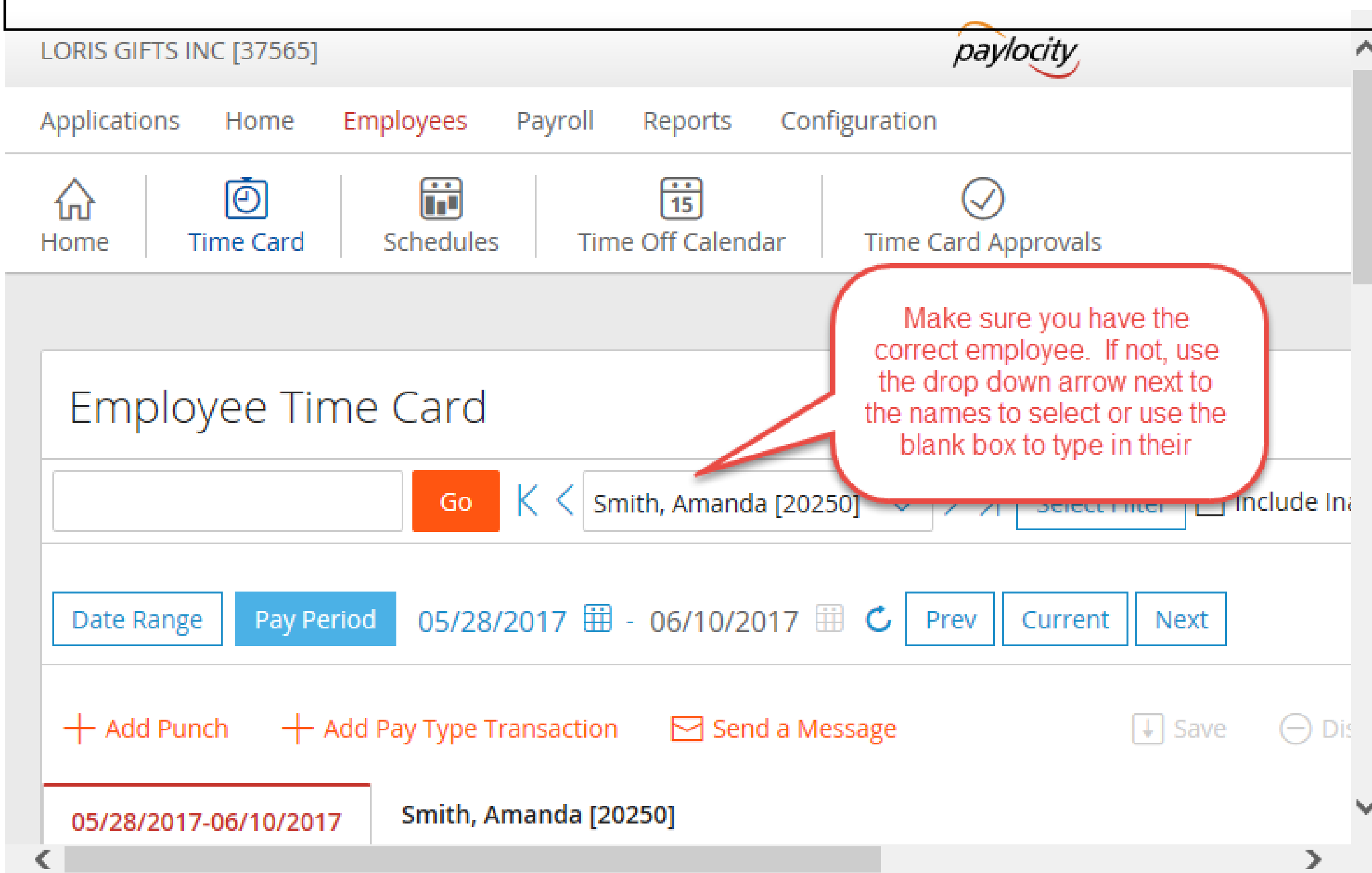


EDITING OR ADDING A MISSING PUNCH: Click on the Time Card Icon as seen below. Enter a Last Name, click on the correct one and Click on Go. Or select a name from the drop down list illustrated on the next page.

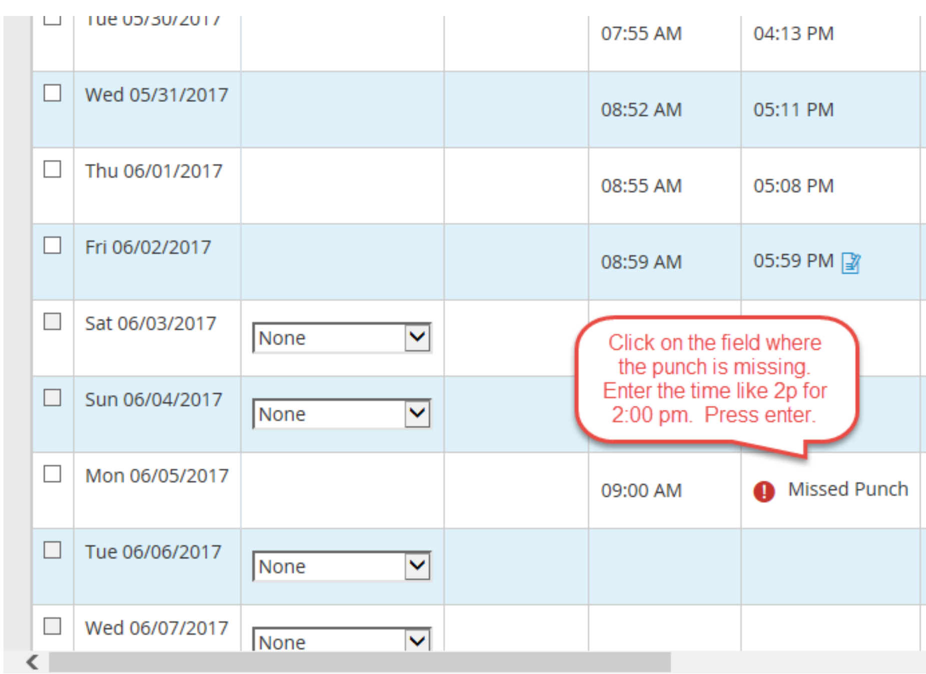




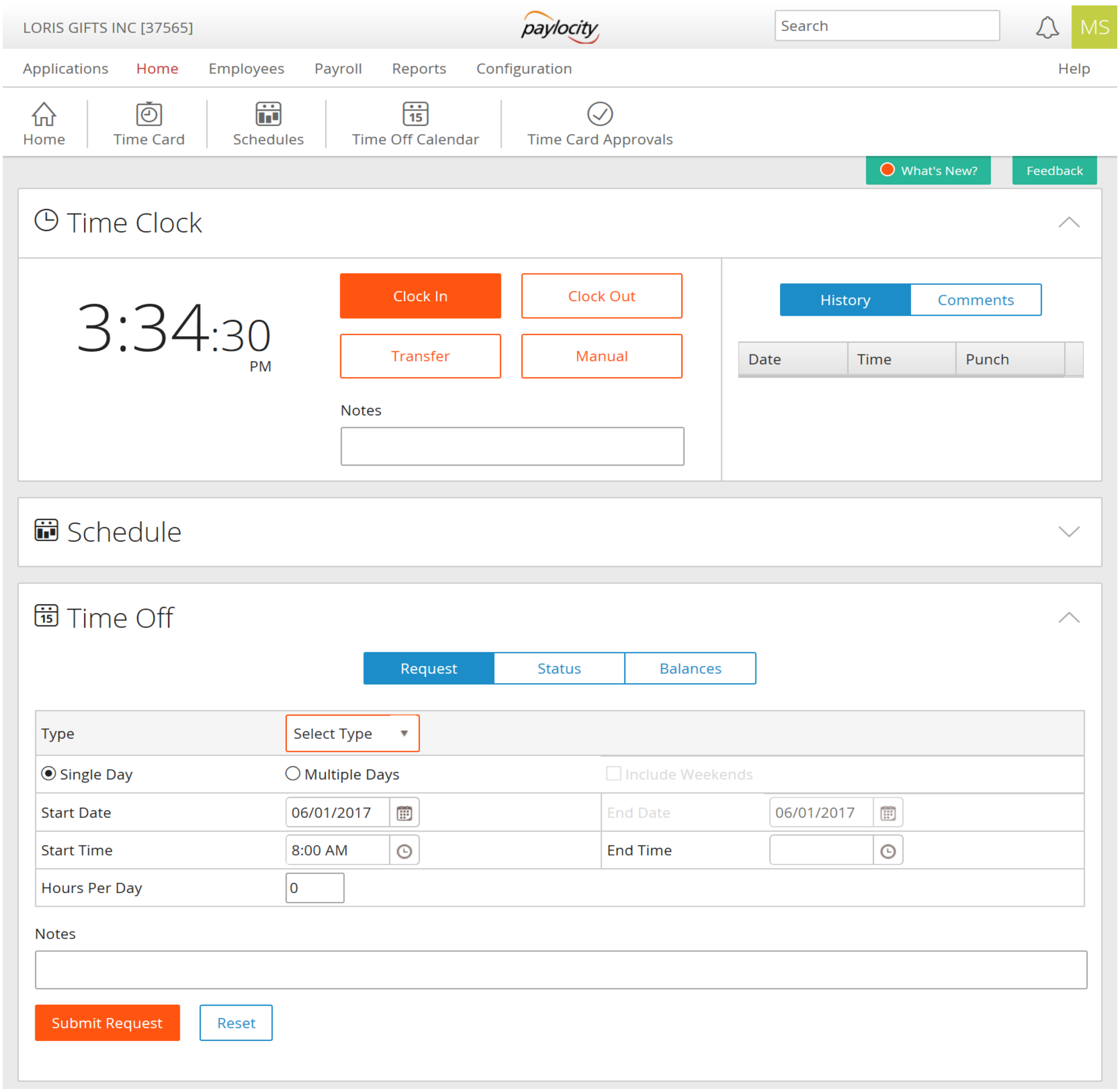
EDITING OR ADDING A MISSING PUNCH: Make sure you have the correct employee and pay period date range selected. The system defaults to the current pay period. If you need to change the period, click on the previous or next box.



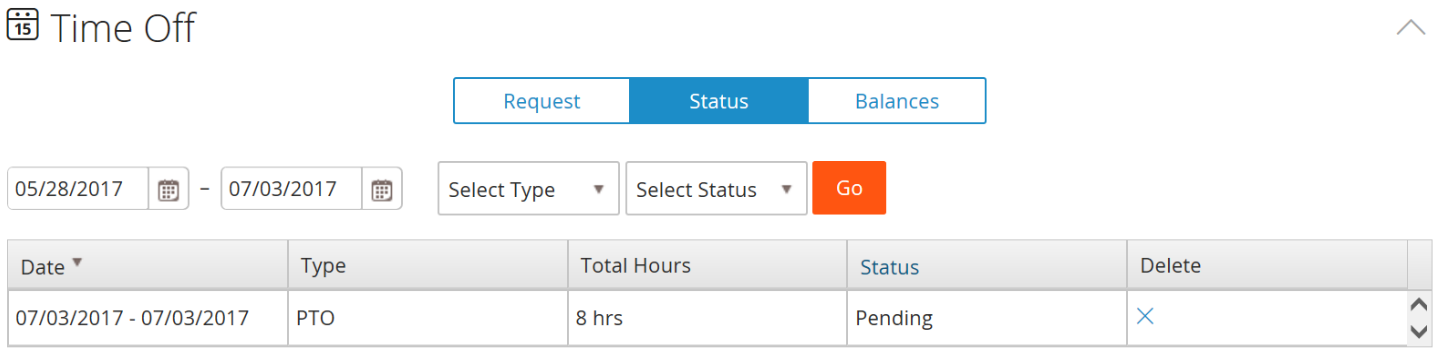
EDITING OR ADDING A MISSING PUNCH: Find the day that requires a correction. Looked for informational symbols like Missed Punch as notated below. Click on the box to edit and make the entry. Remember to enter A for AM or P for PM.

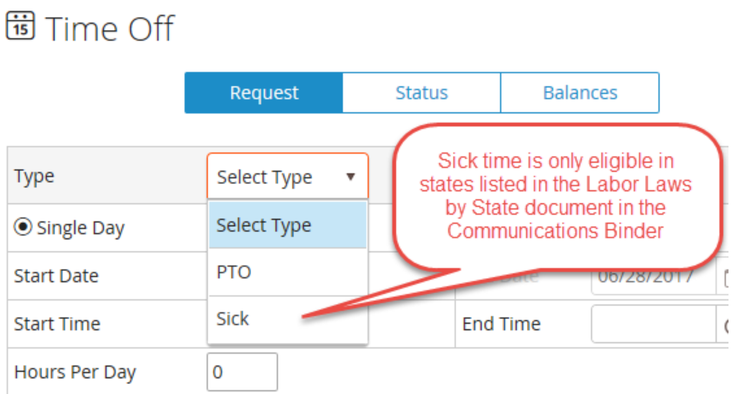


REQUESTING PTO: Click on the Time Off Calendar Icon. You will see the Time Off work area. It has 3 Blue Icons for Requests, Status, and Balances. Click on the one appropriate to your activity. Select the Type which will be PTO in most cases. Fill in the rest of the information such as Single or Multiple Days, the start date and end date, time and the number of hours requested. Add any notes intended for the supervisor. Click on the orange Submit Request Box. An email notification will be sent to your supervisor. You will receive an email when it is approved. You can also check on the status by clicking on the blue Status box in the middle. If you want to check your PTO balance, do that by clicking on the Balances box. Salaried personnel must enter only 4 or 8 **Hours Per Day** per company policy.

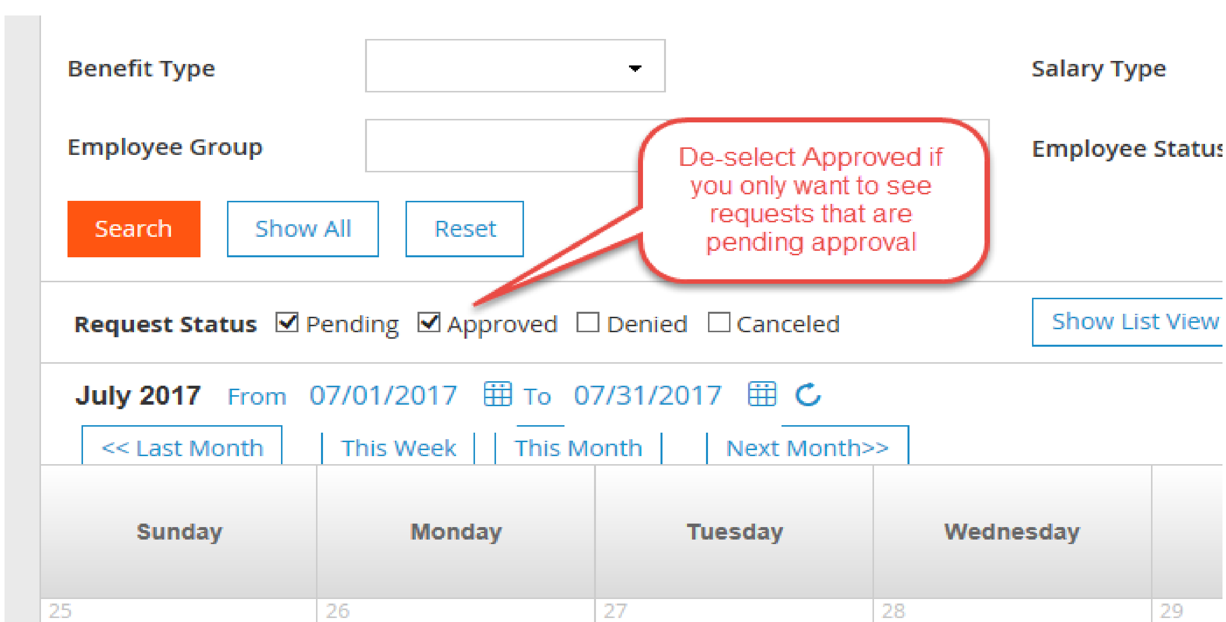


REQUESTING PTO: You can also check on the status of your PTO request by clicking on the blue Status box in the middle box shown in the example below. The status will say Pending until it is Approved or Denied. If you want to check your PTO balance, do that by clicking on the Balances box.

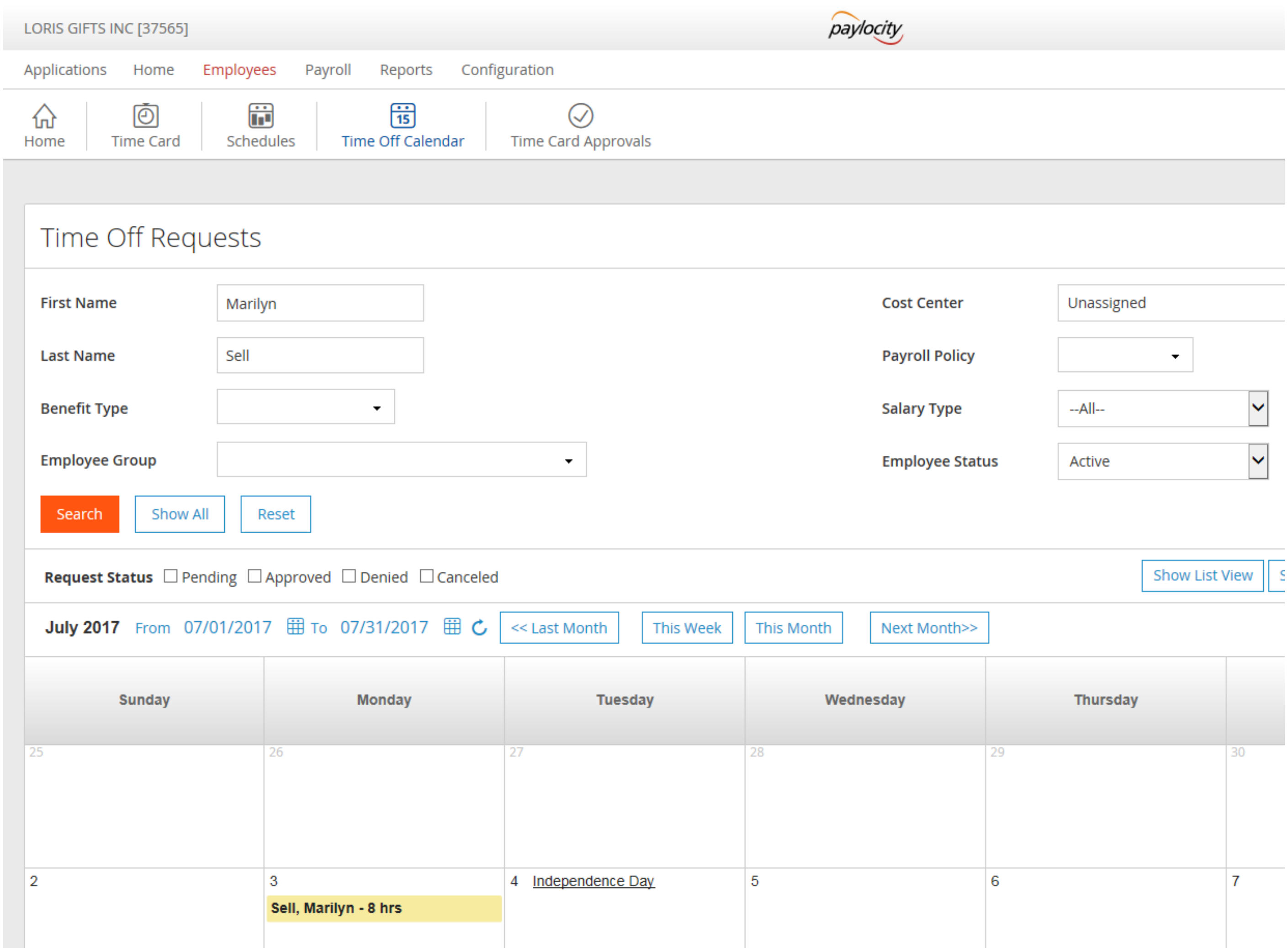


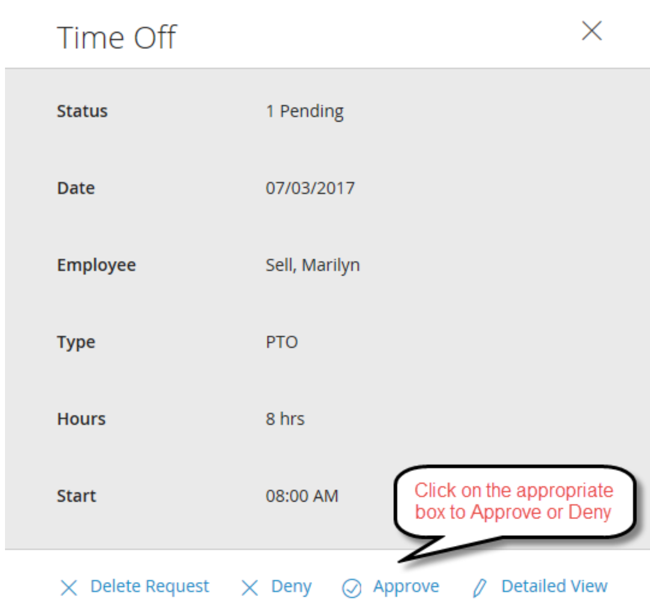


APPROVING PTO REQUESTS: The following screens outline how to approve PTO requests. Just enter the last and first name of the individual you're reviewing and click on the orange Search button. It will bring up the individual with their request in yellow for Pending. If you don't see any names, click on the next month or time period as your selection may not be correct.

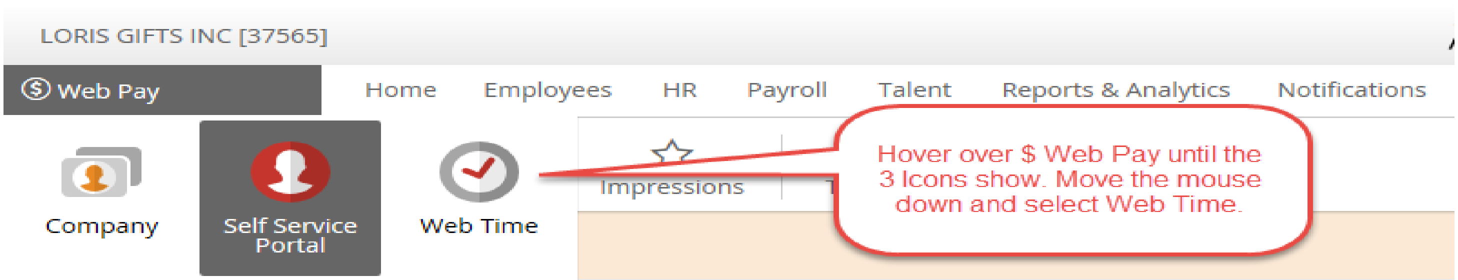


APPROVING PTO REQUESTS: Click on the Yellow box with the employee name; the Time Off box will open. Review the time frame requested and Approve or Deny the request. Always click on Save

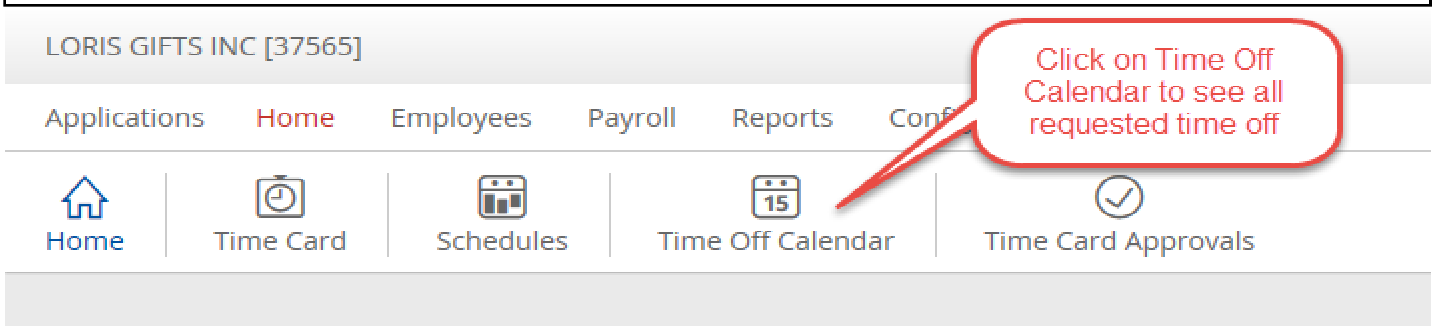


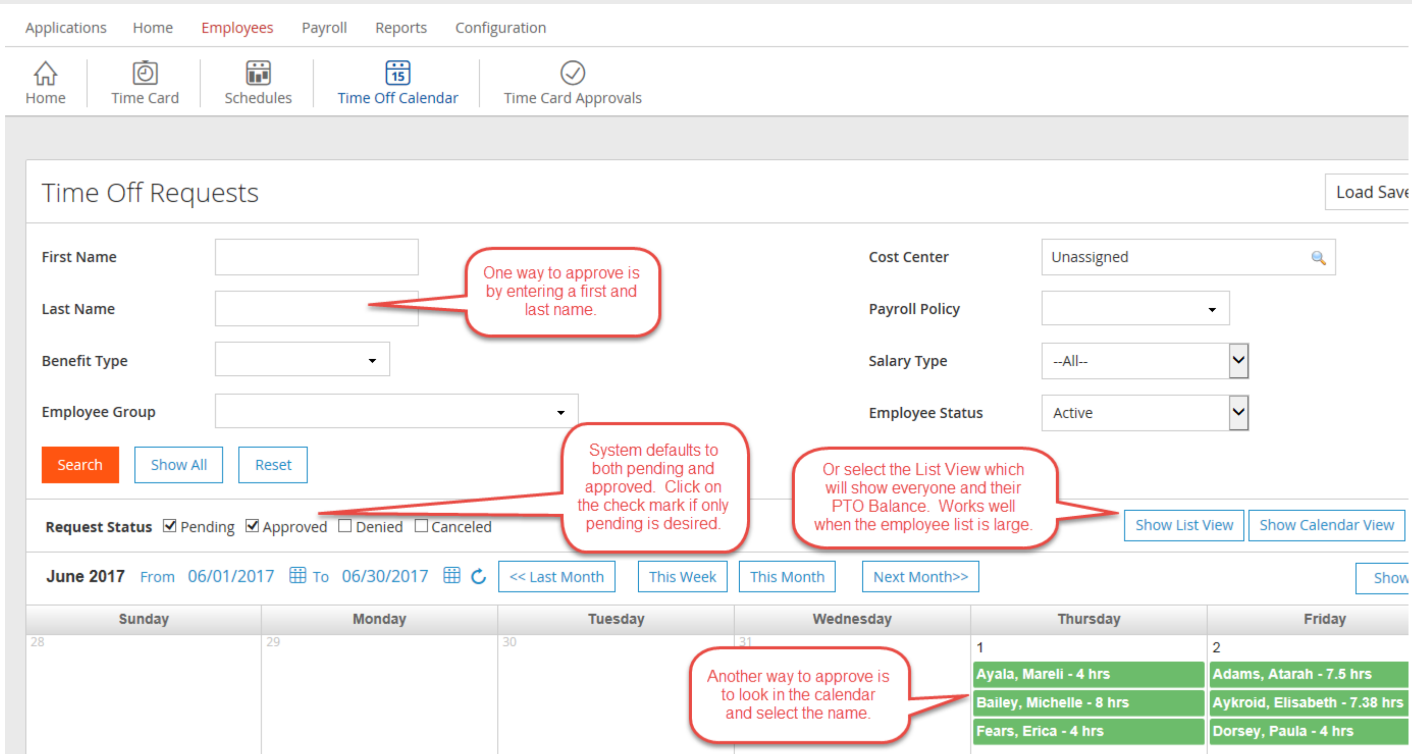


<u>APPROVING PTO REQUESTS:</u> Hover over $ Web Pay until the 3 Icons show. Click on the Web Time Icon. Click on the Yellow box with the employee name; the Time Off box will open. Review the time frame requested and Approve or Deny the request. Click on the Time Off Calendar Icon. You will see the Time Off work area. It has 3 Blue Icons for Requests, Status, and Balances. Click on the one appropriate to your activity. Select the Type which will be PTO in most cases. Fill in the rest of the information such as Single or Multiple Days, the start date and end date, time and the number of hours requested. Add any notes intended for the supervisor. Click on the orange Submit Request Box. An email notification will be sent to your supervisor. You will receive an email when it is approved. You can also check on the status by clicking on the blue Status box in the middle. If you want to check your PTO balance, do that by clicking on the Balances box.

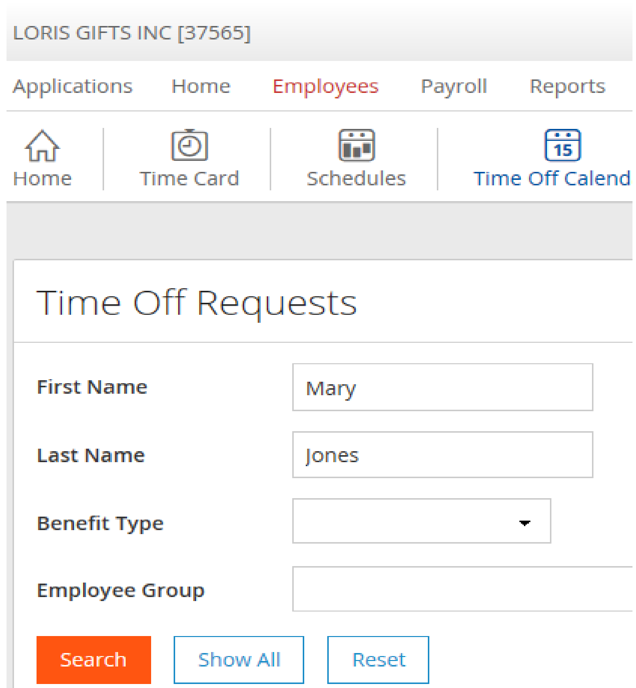


<u>APPROVING PTO REQUESTS</u>: Next click on the time off calendar to see requests submitted.

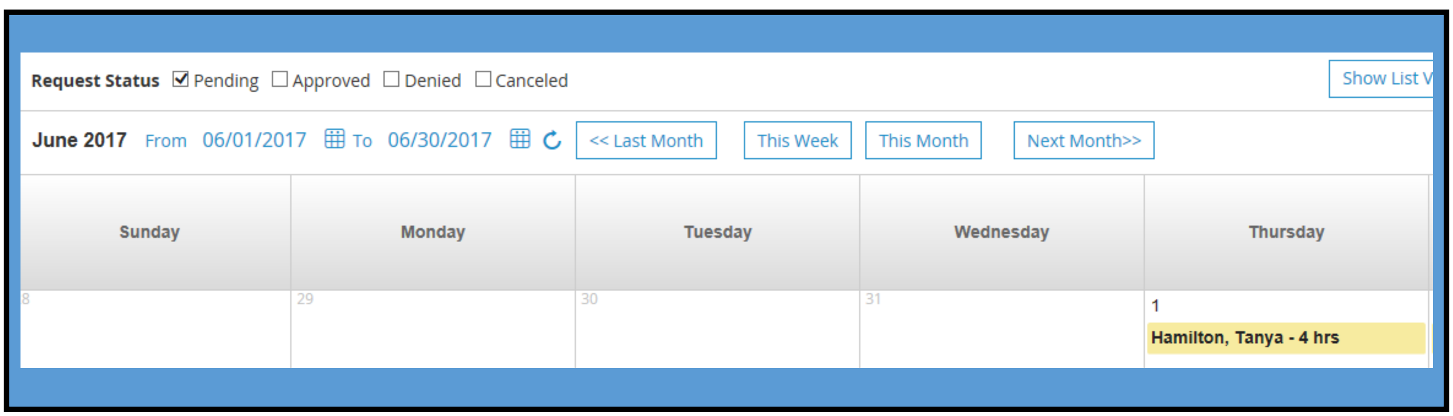


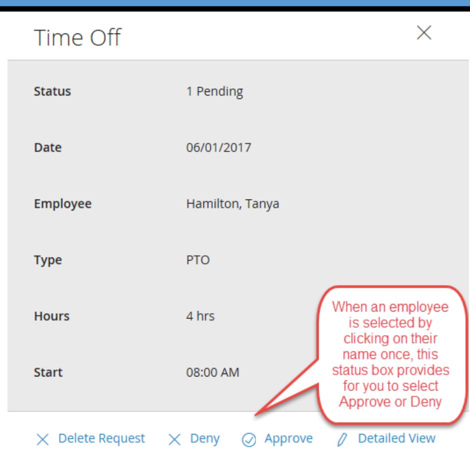


APPROVING PTO REQUESTS: If requesting by name, enter the first and last name and then click on the orange Search



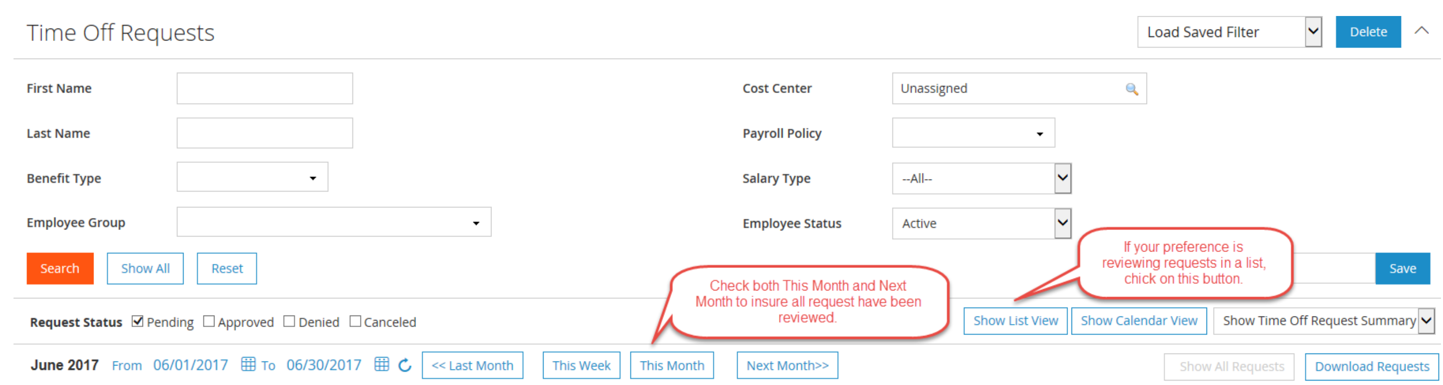
APPROVING PTO REQUESTS: If requesting from the calendar, click on the person in the box. Yellow means pending, green means approved.

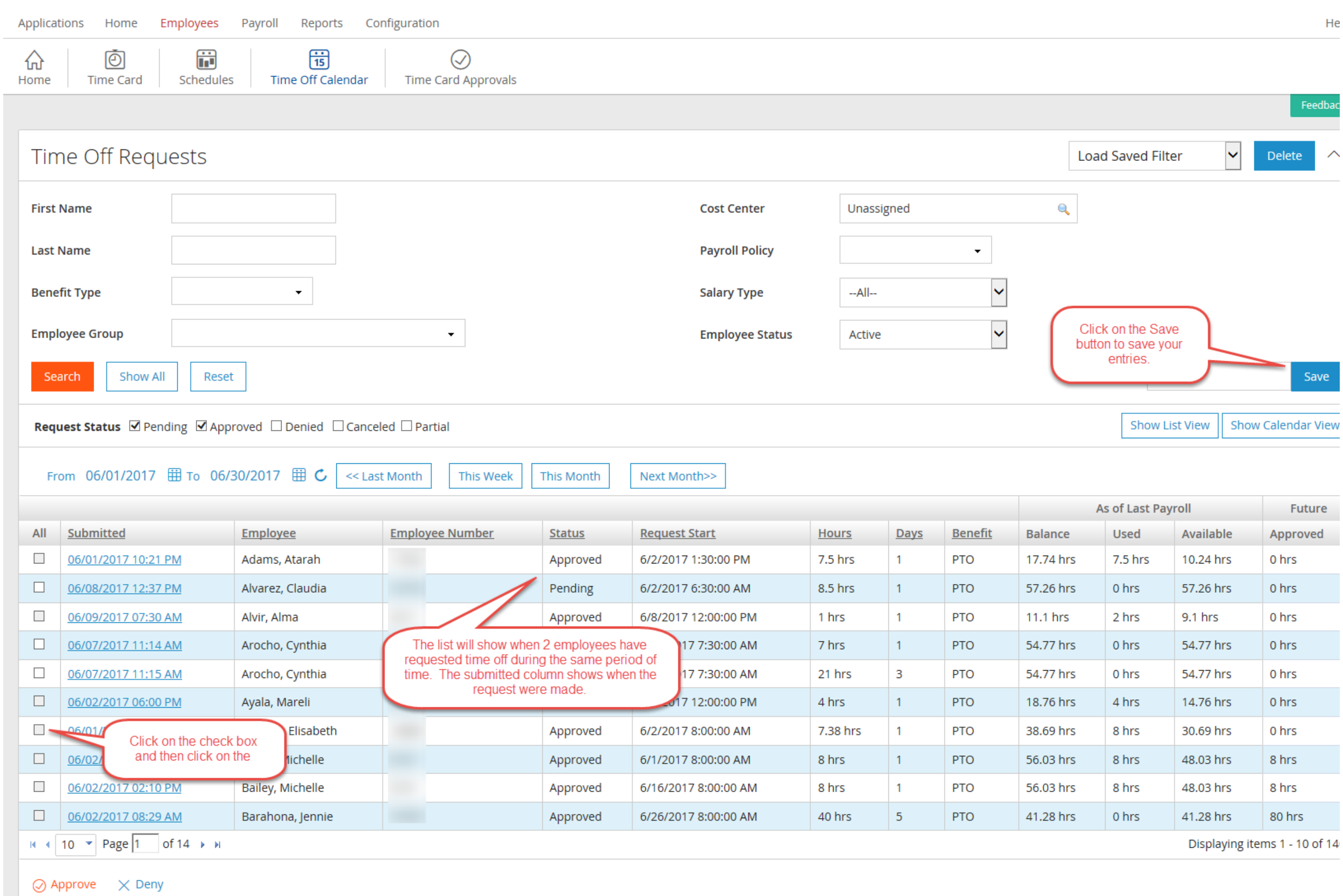




Once the approval or denial is selected in the time off box to the left, an email will be sent to the employee communicating the status of their request. Always click on the Save button.

APPROVING PTO REQUESTS: If requesting from a list, click on the person in the box. Click on the Show List View in the blue box.

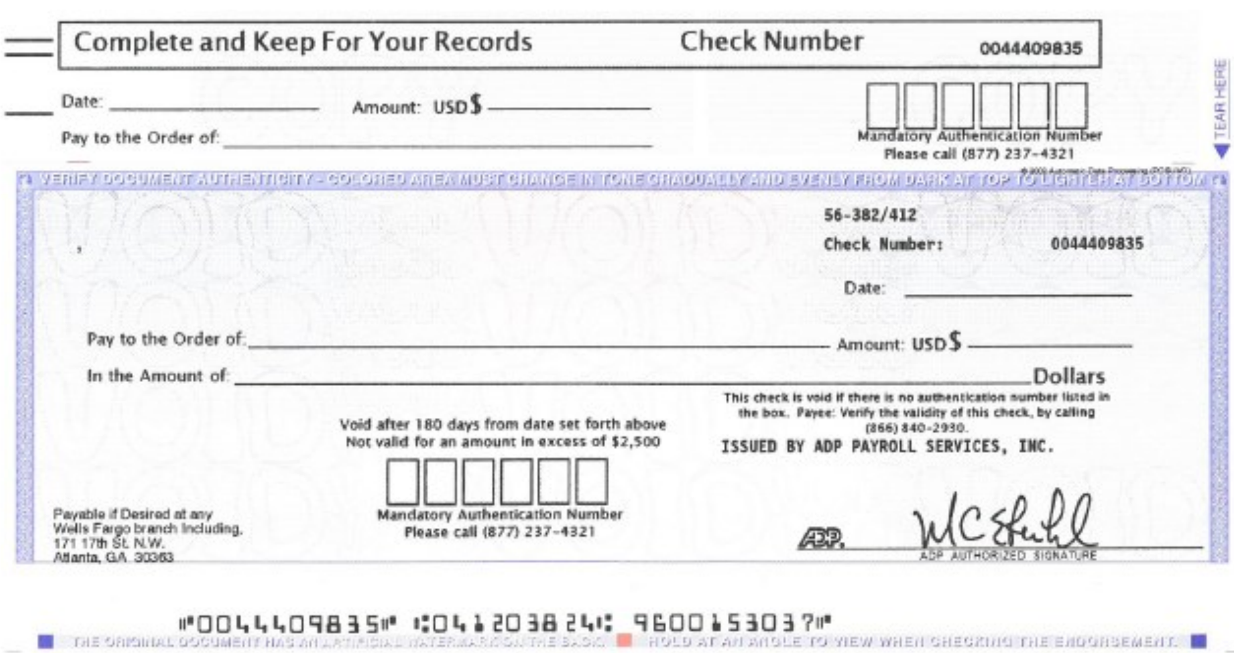




RECEIVING YOUR PAYCHECK ON AN aline card: An aline card is used for employees who don't have a bank checking or savings account for direct deposit. This is the only alternative to receiving your pay check as no paper checks are distributed. This service is offered through ADP. Follow these instructions for setting up this option:

1. When a new employee completes their On-boarding documents on-line, they select how they would like to be paid. If their selection is an aline card, Payroll receives a notification. The store manager gives an envelope containing the card to the employee and records the Proxy ID number on the top in an email to Payroll@lorisgifts.com. Payroll will activate that number for the employee in 24 hours. Once the activation occurs, a pin and balance alert is set up by the employee by either on-line activation with their home computer at mycard.adp.com or by phone at 877 ADP-4321 (877.237.4321) which is open 24/7. Please be sure to sign the back of your card. Read the Cardholder Agreement.
2. Also included in the aline envelop are 2 aline checks. You can use the check as a standalone self issued payroll check to receive your full net pay if you wich to receive you pay via paper check. You are not required to activate your aline card to use the aline check. On pay day, the check must be made payable to yourself for your full net pay and dated. Call 877.237.4321 to authenticate the check and write the authentication number provided on the check in the blocks. Once authenticated, the check can be deposited in an account or cashed for free at any branch of the bank listed on the check.
3. Review the paperwork in the aline envelop to understand fees that may be associated with each type of transaction.
4. You can chose to discontinue the use of an aline card deposit by changing your payroll option in Paylocity. This will be discussed in the next section.

Follow the instructions on the green sticker to activate the card.



Complete and Keep For Your Records Check Number 0044409835

Date: ______ Amount: USD$ ______

Pay to the Order of: ______

Mandatory Authentication Number
Please call (877) 237-4321

TEAR HERE

VERIFY DOCUMENT AUTHENTICITY - COLORED AREA MUST CHANGE IN TONE GRADUALLY AND EVENLY FROM DARK AT TOP TO LIGHTER AT BOTTOM

56-382/412
Check Number: 0044409835

Date: ______

Pay to the Order of: ______ Amount: USD$ ______

In the Amount of: ______ Dollars

This check is void if there is no authentication number listed in the box. Payee: Verify the validity of this check, by calling (866) 840-2930.

Void after 180 days from date set forth above
Not valid for an amount in excess of $2,500

ISSUED BY ADP PAYROLL SERVICES, INC.

Mandatory Authentication Number
Please call (877) 237-4321

Payable if Desired at any Wells Fargo branch Including,
171 17th St. N.W.
Atlanta, GA 30363

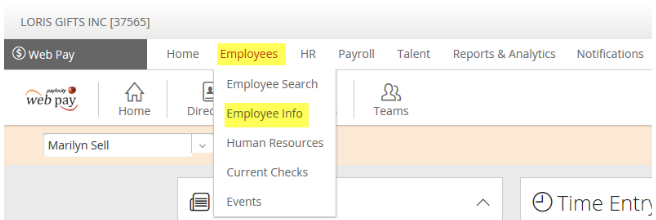
ADP AUTHORIZED SIGNATURE

0044409835 041203824 9600153037

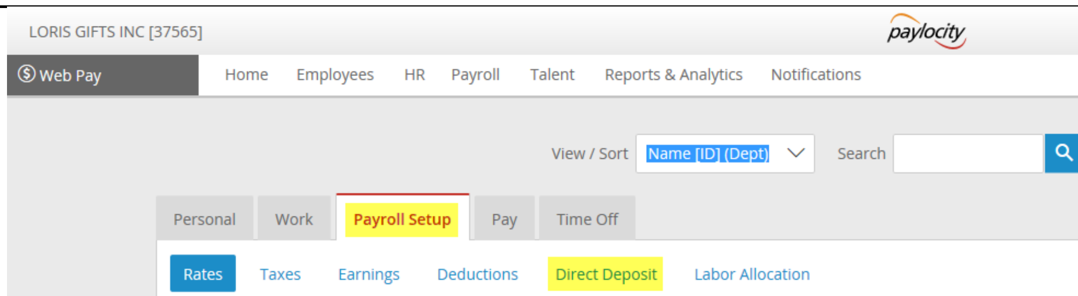
THE ORIGINAL DOCUMENT HAS AN ARTIFICIAL WATERMARK ON THE BACK. HOLD AT AN ANGLE TO VIEW WHEN CHECKING THE ENDORSEMENT.

Changing bank accounts or changing from an aline card to a bank account: If you want to change from the current bank account to a new one, want to have money sent to a secondary bank account or switch from an aline card, complete the following steps:

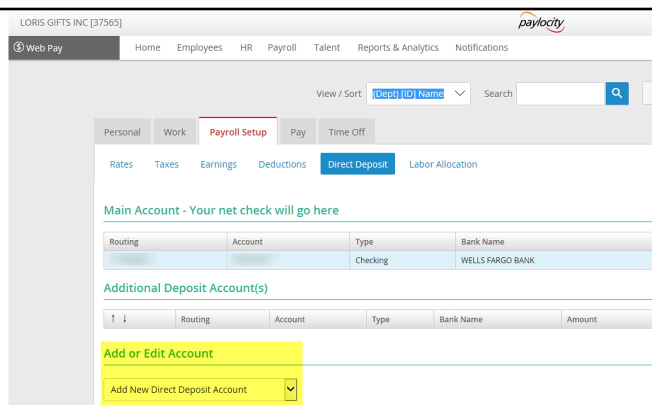
1. Log into the Self-Service Portal and get to your HomePage; click on 'Employees' at the top of the page highlighted below.
2. Select Employee Info from the drop down options



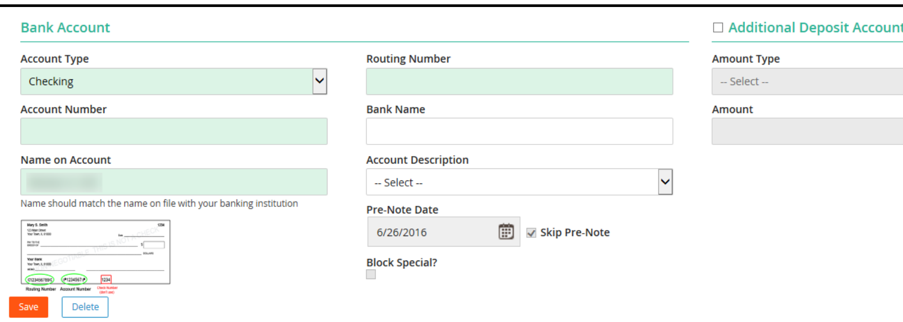
3. Click onto the Payroll Setup tab where you will click on the Direct Deposit option.



4. The screen below will show the existing Direct Deposit information and allow you to add or edit any account. Click on the yellow highlighted section.

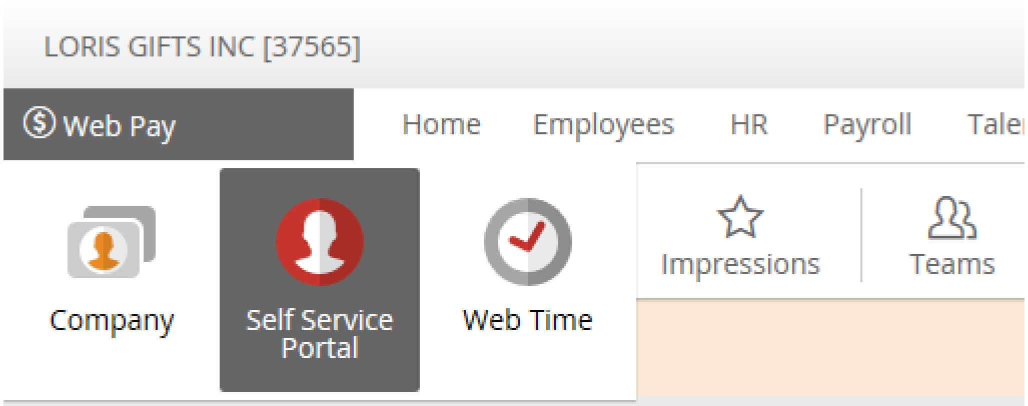


5. Main Account is where your main check will go. Below you will see the lower part of the screen where detail is added. Make sure the routing and account numbers are entered correctly. There is an example at the bottom of the screen. Save

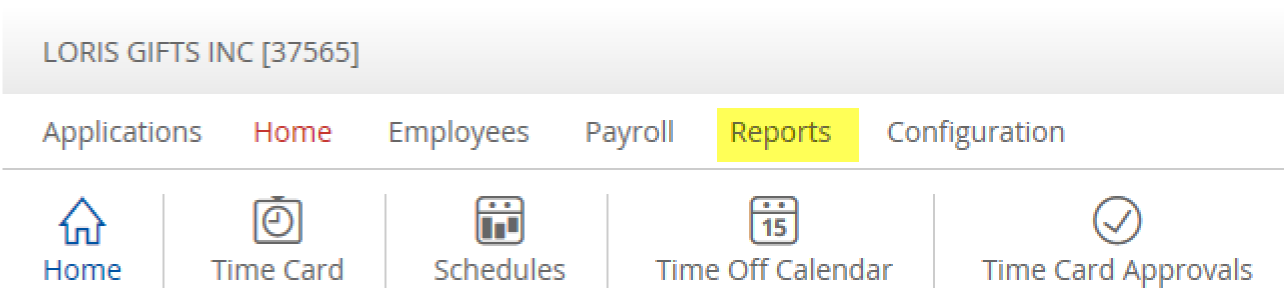


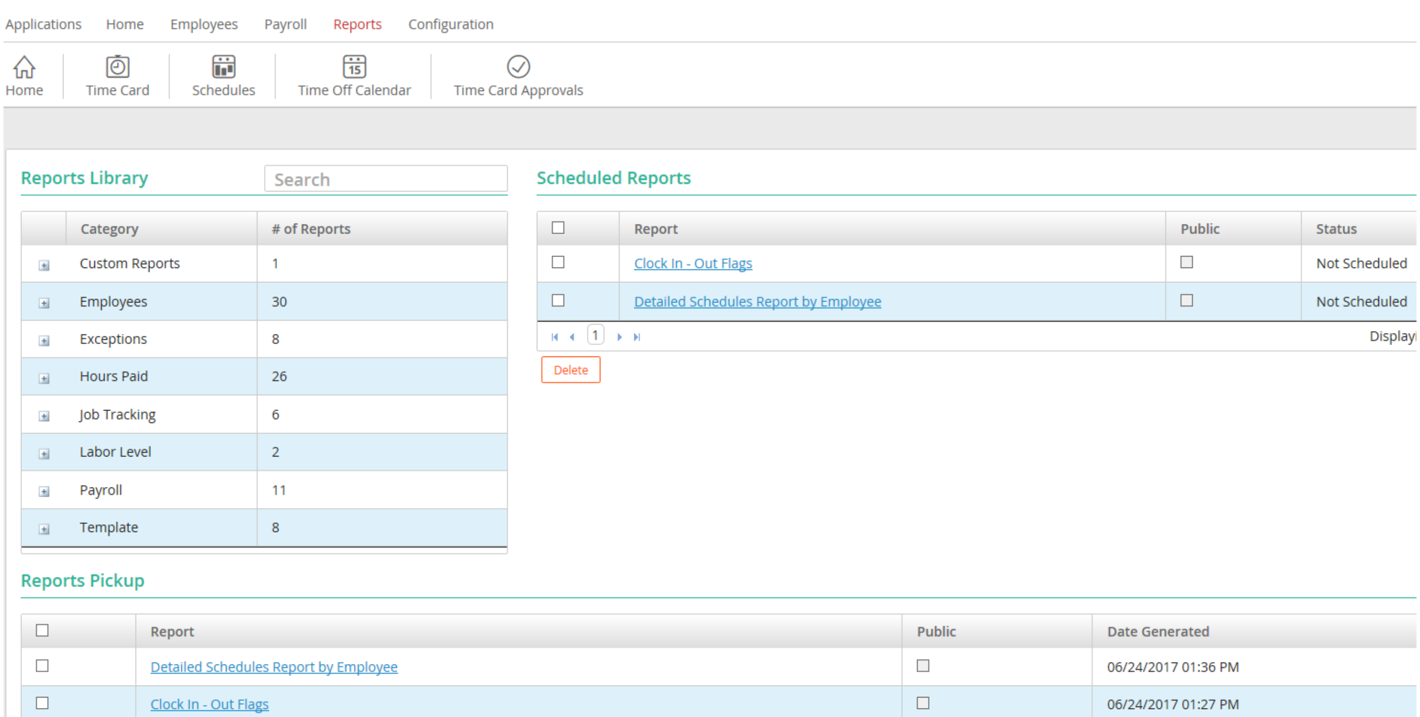
USING THE REPORTING FEATURE: Reporting is extensive in Paylocity. There are many reports available. The review below is for the Employee Time Card Report with the principles being similar for other reports. More detailed information will come at a later date.

1. Hover over $ Web Pay until the 3 Icons Show. Click on Web Time.



2. Click on the Reports section highlighted below in yellow. The report screen will display with options to select.





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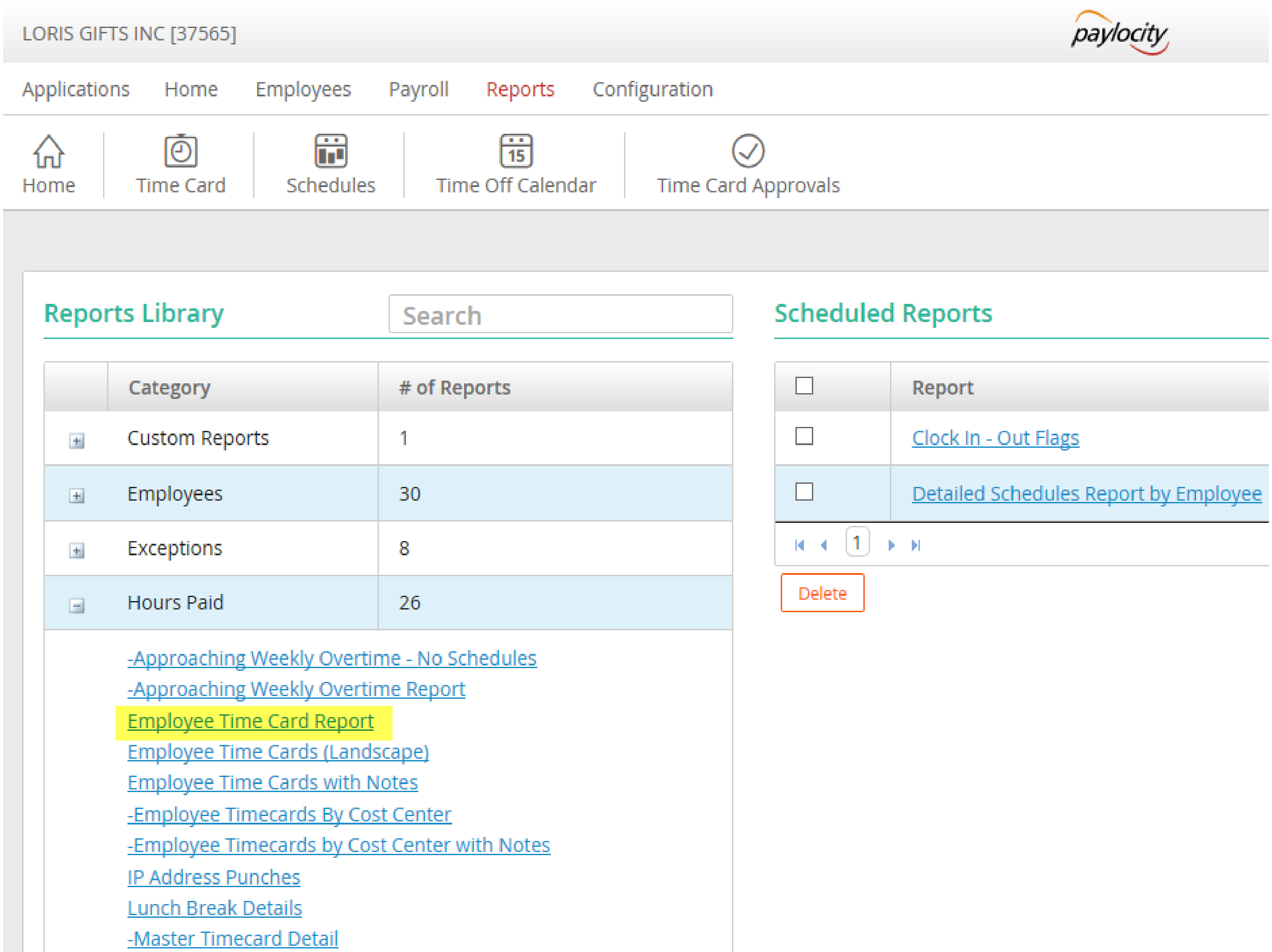
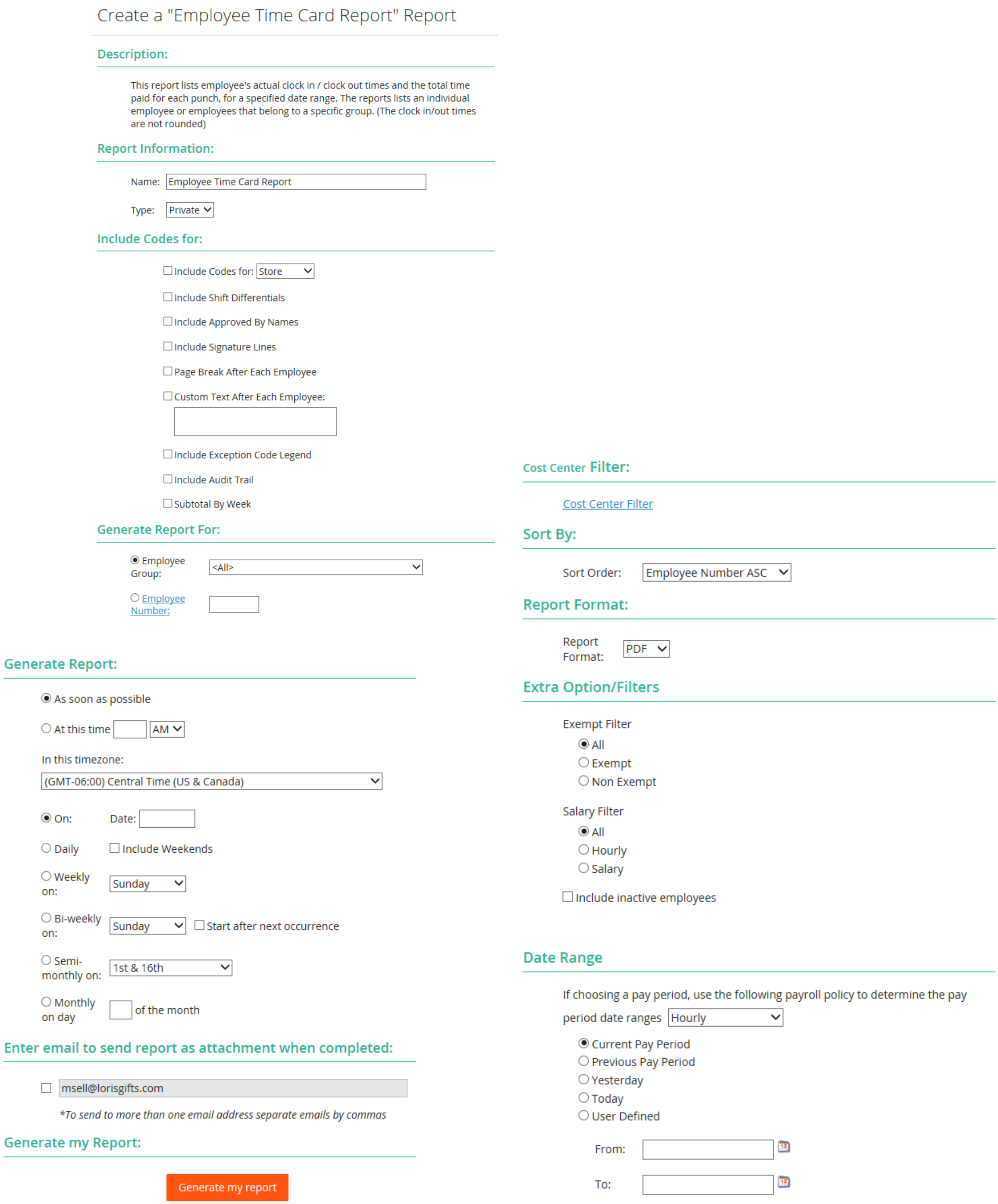
A report library is listed on the left. The most commonly used report will be in the Hours Paid group. Click on the box with the + sign and a group of reports will show. Select the Employee Time Card Report.



You will be shown the Create a Report Wizard that allows for maximum flexibility. Name your report, include Codes, generate the report for, Cost Center filters, Sorting, Format (PDF or Excel), extra Filters, date range selections, a scheduler with dates/times to run, and who to email it to. Be sure to select the Generate My Report button. At the bottom of the screen will be the Reports Pickup where you will find the report. Don't let reports accumulate. Delete them by clicking in



The following are a list of frequently asked questions for your reference:

When do I get paid?

The annual Payroll Calendar is provided by Payroll in the each January.

- This will assist on monitoring monthly budgeted hours, signing off time cards on sign off Mondays and understanding when the actual pay dates are for each pay period.
- This calendar will be kept in the Communication's Binder, behind the Corporate Schedule.
- A Payroll Calendar with pay dates is provided to each new employee. By reviewing their start date on the calendar and corresponding pay date with the new hire, they will be able to plan their finances.

What are the Labor Laws and Compliances required in our store's state?

- Labor Laws by State / Mandatory Compliance and Important Labor and Payroll Laws as of 7/1/17 is located in the Communications Binder under the Schedules TAB

Do I have to report my banking hours each pay period to Lingling?

- Paylocity now provides for you to clock in/out and use the Banking type. If this is done consistently, no email is needed.

What if I can't find an answer to my question?

- Help is available at payroll@lorisgifts.com. If you can't reach someone, send an email to Helpdesk@lorisgifts.com and the email will be forwarded to Payroll. After the first run through, this gets easier. Thanks for your patience. We know you'll find this application user friendly and pretty too!

How much training time does an employee get?

- If the employee is new to Lori's, 20 hours for Sales Associates, 40 hours for Assistant Managers and 80 hours for Managers. However, if the employee is promoted for Sales Associate or Assistan Manager to the next level, 20 more hours are given to the promoted Assistant Manager and 40 more hours are given to the promoted Manager. If additional hours are required, approval must be obtained from Lingling Chou at lchou@lorisgifts.com before they are used.

How is Holiday pay handled?

- Hourly associates that work the holiday will be paid at a rate of time and a half for the hours worked. Any full time manager that work the holiday will be credited with 8 hours in their PTO account to be used any time they would like with managerial approval.

My scheduling application is not working correctly?

- If the PC's version of Internet Explorer is not up to date, this creates this problem. Contact helpdesk@lorisgifts.com

Where are the aline cards kept in the store, how many should I have and how do I get more?

- A store should keep 5 aline cards on hand in the Office Anywhere crate in the Direct Deposit & Aline Pay Card folder. More can be obtained by emailing Payroll@lorisgifts.com

How long does it take to get a new employee into Paylocity?

- New employees are expected to complete their new hire paperwork during the on-boarding screens in Equifax. If this is done prior to their first day, an employee will be there when they start. However, if they use the store's computer to complete their on-boarding, it will take another day for the employee to show in Paylocity. So do on-boarding early.

What if I need additional hours over my Corporate Schedule to run a special event?

- Hours over the Corporate Schedule must be approved in advance by sending an email to Lingling at lchou@lorisgifts.com. Requests are approved when stores agree to generate $50 per hour to cover the hours.