Getting Ready for First Payroll

Course Guide

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Step 1: Review Your Course Guide

This guide is designed to help you get the most out of your Getting Ready for First Payroll course and includes guidance on completing key tasks, participant materials, and additional resources to take your learning even further. All in an easy step-by-step guide.

So what is this course all about? The aim of this course is to prepare you for the big day. Your first payroll with Paylocity! Completing all components of this course will prepare you to:

- Start a payroll batch
- Confirm payroll setup
- Enter/edit payroll information via QuickPay and Details screens
- Verify batch totals
- Submit a payroll batch
- Pickup Standard reports for payrun
- Use Community to communicate with employees about payroll

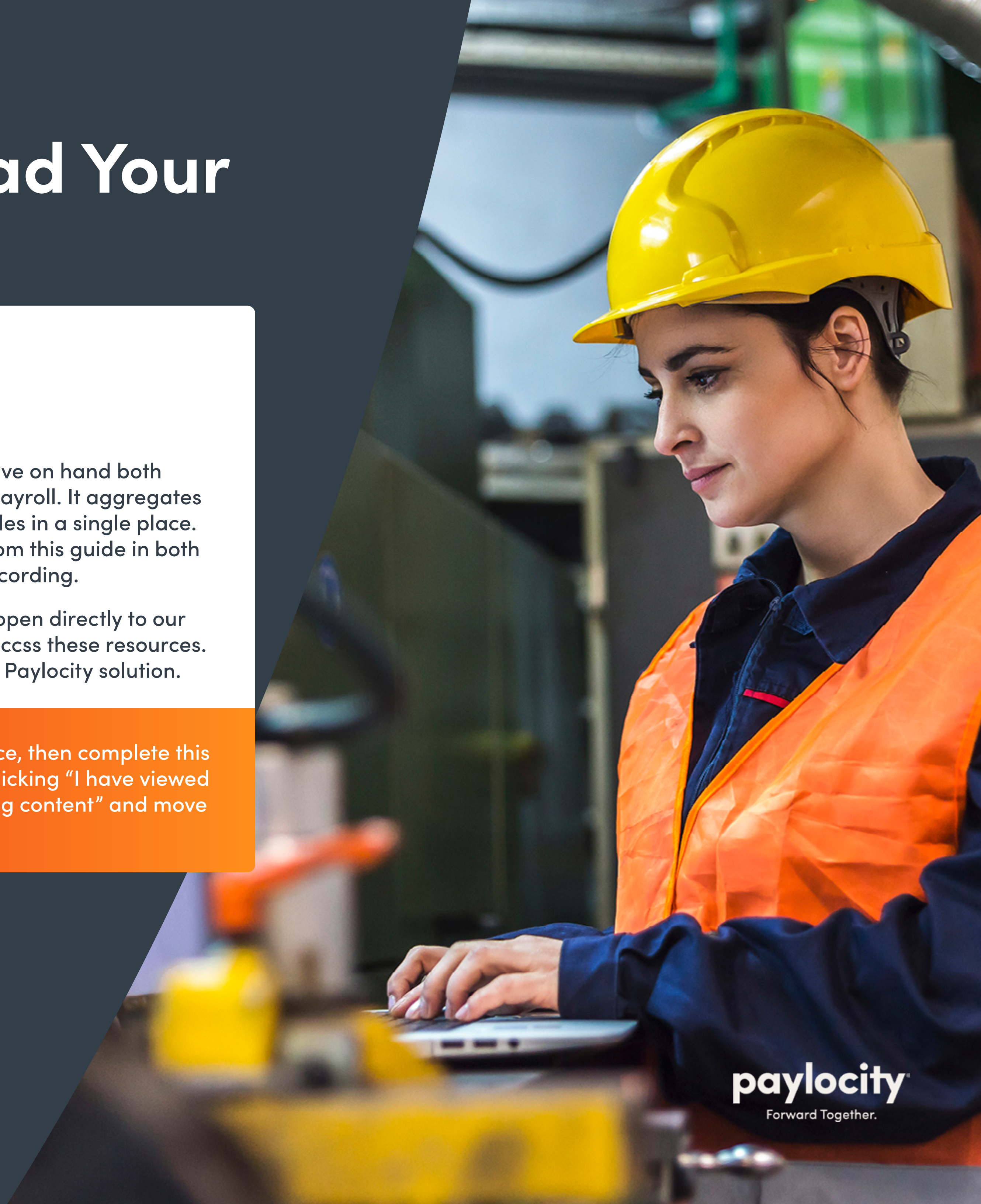
Bookmark or download this resource, then complete this learning task in your workflow by clicking "I have viewed this site and understand this training content" and you're ready for Step 2!

Step 2: Download Your Resources

The Payroll User Guide is a great resource to have on hand both during our course and while running your first payroll. It aggregates many of the most utilized Knowledge Base Articles in a single place. We'll be demonstrating steps and processess from this guide in both the instructor led courseand the On Demand recording.

Plese Note: This resource links within this guide open directly to our Knowledge Base, you may be asked to login to accss these resources. Use the same credentials you use to access your Paylocity solution.

Bookmark or download this resource, then complete this learning task in your workflow by clicking "I have viewed this site and understand this training content" and move onto the next step.



Step 3: Decide How You Want to Learn

Now that you know what you will be learning, next choose the best way to learn! You can register for an Instructor Led Training (ILT) course or review the On Demand Video.

Register for an Instructor-Led Course

Use the registration link in your training course to choose a day and time that best fits your schedule. We recomment doing this as early as possible to help ensure your learning stays on track.

Or Review the Course On Demand

Simply complete the course registration item by checking "I have viewed and understand this training document" to access the On Demand recording. Review the content when it's most convenient for you.

If you've registered for the instrucor-led course or would prefer to review the On Demand recording, click "I have viewed this site and understand this training content" to complete the registration training item.

Review the course recording or scrub the playhead to end of the video to complete the On Demand training item.

Hands-On Practice

During the Instructor-led course, you will complete the hands-on activities in our demonstration environment. You'll receive your unique login credentials at the start of the session.

1. Record your login credentials here:

   CompayID ____________________

   Username ____________________

   Password ____________________

2. Access the demo environment at the following address: [https://demo.paylocity.com.](https://demo.paylocity.com)

3. Enter your assigned login credentials and then click Login.

4. If you are asked to create Security Questions, click Skip for Now.

Your credentials are valid until 7 p.m. Cental Time the day the credentials are assigned.

Step 4: Check Your Understanding

We've covered several important topics to prepare you for getting started with Paylocity. Take a moment to gauge your learning by completing our short knowledge check. It's a great opportunity to review what you've learned.

Please note: This training item will open in another window. If prompted, be sure to enable pop-ups to view this content.

There's no minimum score required to complete this knowledge check. Review each question, select the best answer, and click the submit check in the lower right. Click Finish on the results slide to complete this item. The completion status will update automatically.

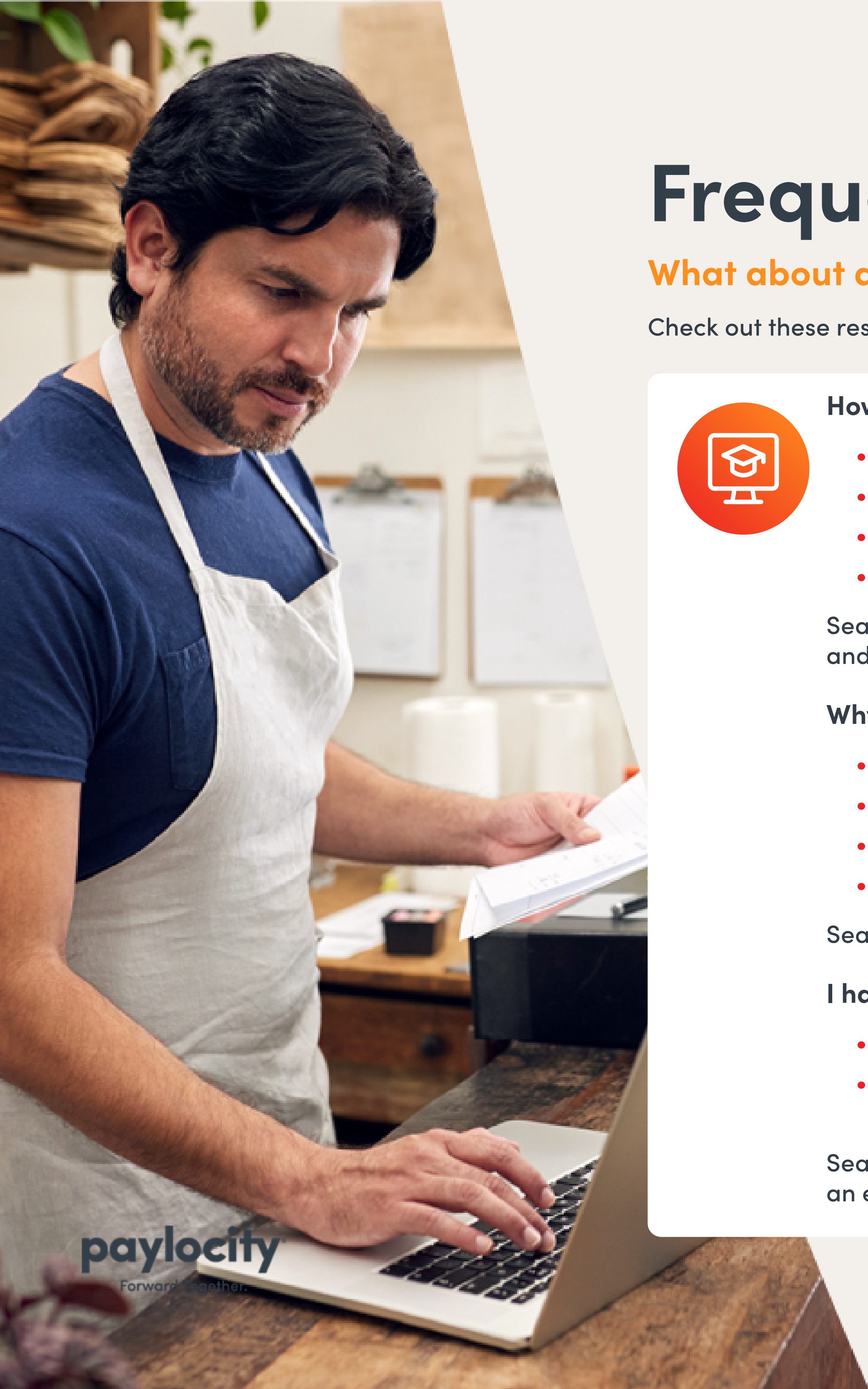
Explore Our Most Popular Content

We've covered everything you need to be ready for your first payroll. Take your learning to the next level by exploring our most popular content that will take you beyond your first payroll. The following course links will open directly within our Learning solution so you may be asked to enter your Paylocity login credentials.

On Demand Videos

- Beyond Your First Payroll: Increasing Efficiencies
- Getting the Most from Your Company Set
- Payroll: Pay Terminated Employees
- Payroll: Pay Employees on a New Check Date
- Payroll: Pay Taxes on a Fringe Benefit
- Payroll: Create an Additional Check for Bonuses, Commissions, or Reimbursements
- Payroll: Pay an Employee a Specific Bonus Amount
- Payroll: Pay Employees Outside of a Payroll Batch

To view our full catalog of Payroll courses, select Learning from the main menu, then from General Categories select Product Training > HR & Payroll > Payroll > Admin.



Frequently Asked Questions

What about after first payroll?

Check out these resources on other questions you might have down the road.

How do I fix…

- Paid the wrong employee?
- Paid the wrong amount?
- Wrong direct deposit entered?
- Forgot to skip the pre-note when switching to direct deposit?

Search the Knowledge Base for: How do I void a check in current quarter and we'll walk you through how to correct these scenarios step by step.

Why am I unable to submit payroll?

- Check that no backdated checks are still open
- Accept/Reject pending changes audits
- Verify no employees are missing tax codes
- Release audit holds

Search the Knowledge Base to find steps for each of the above.

I have a batch started, and I forgot a pay raise.

- Go into the Employee's Record
- Update the Pay Rate. This will be reflected in the current batch and apply when you process payroll.

Search the Knowledge Base to find steps for new pay rate information for an employee.

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401k wasn't supposed to come out of this check, but it is.

- Create a manual check
- Use the deduction code you're reversing
- Enter the amount to refund as a negative number
- Save/Print the manual check as usual

Search the Knowledge Base to find steps for using the check calculator.

A deduction isn't showing.

This can be for a variety of reasons, including:

- Earnings not sufficient to cover a deduction
- An override blocks the deduction
- If there is a second check, the deduction may be split across both
- If multiple batches are merged, the source batch may have blocked deductions

Search the Knowledge Base to find steps for resolving a missing deduction.

We forgot to pay an employee (or reimburse or pay extra hours). How do I pay them now?

- If it can't wait until the next check, issue a manual check to the employee for the missing amount

Search the Knowledge Base for how to use the check calculator.

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We have terminated someone. How do I get them a check?

- From the Detail View screen, change batch filter to 'All Emps', then change the status filter to 'Terminated' and select the employee
- Use Actions to Calculate an Additional Check and enter the employee's pay details

Search the Knowledge Base hot to add an employee to a batch to review how to add terminated employees to a batch.

I pulled the batch over before the time off request was approved. What do I do?

- Delete the batch, approve the time off, and start over, if possible; or
- Use the Detail View screen for that employee to manually enter the time off pay type

Search the Knowledge Base to find steps for deleting a batch or entering employee payroll information in Pay Detail.

I need to pay a bonus.

- On the Grid View screen, click the name of your employee
- To create an additional bonus check, click Actions and Add Check
- Choose your earning code and enter the amount details

Search the Knowledge Base for how to create an additional check.

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I put in a first batch, but it hasn't processed yet. What do I do to submit a second?

- A second batch cannot be submitted until after the first batch is finished processing.
- Review the status of your first batch in Pay Entry History

Search the Knowledge Base for Pay Entry History to learn more about reviewing statuses and history.

I haven't received my payroll reports yet.

- Use Pay Entry History to verify that your payroll has finished processing

Search the Knowledge Base for Pay Entry History to learn more about reviewing statuses and history.

Payroll Submission Guidelines

Things to keep in mind.

When do I need to submit payroll?

- The daily deadline is 6:30 PM CT
- Ideally, 2 days before the check date and no later than 6:30 PM CT the day before the check date

When are employees paid?

- Checks will deliver the next business day (unless there are delays with the courier
- Bank files (direct deposit) are transmitted the day you submit payroll

What happens if payroll is submitted after 6:30 PM CT?

- Payroll Processing reports and Year to Date updates may not be available in the system right away
- ACH and deliveries may not process the following business day

What about holidays?

- When Paylocity is closed, no ACH payments are transmitted, and no incoming wire transfers are accepted
- Payroll can still be submitted, but any holds/errors cannot be released or corrected until the following business day
- Paylocity recommends allowing more time from the Processing Date to the Check Date

Search the Knowledge Base for more details on payroll deadlines.

Next Up

The next course in your learning journey is:

04 Getting Ready for First Punch

In the next cousre, we'll review the tasks you need to get you up and running, including managing timecards, time off requests, and more. In this course, you will learn to:

- Navigate the T&L Supervisor Dashboard
- Edit timecards
- Approve/deny rime
- Send T&L data to payroll
- Use and share employee resources for first punch

Be sure to complete any remaining learning items to access the content in your next course.

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