Onboarding for Employees

paylocity onboarding

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
- User Name
- 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.

Helpful Hint

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.

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Company Id

clnt04   ?

Username

rmartinez

Password

••••••

Personalize your Paylocity Security Image in User Preferences

☐ Remember My Credentials

Login

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.

Section headers help to keep you on track.
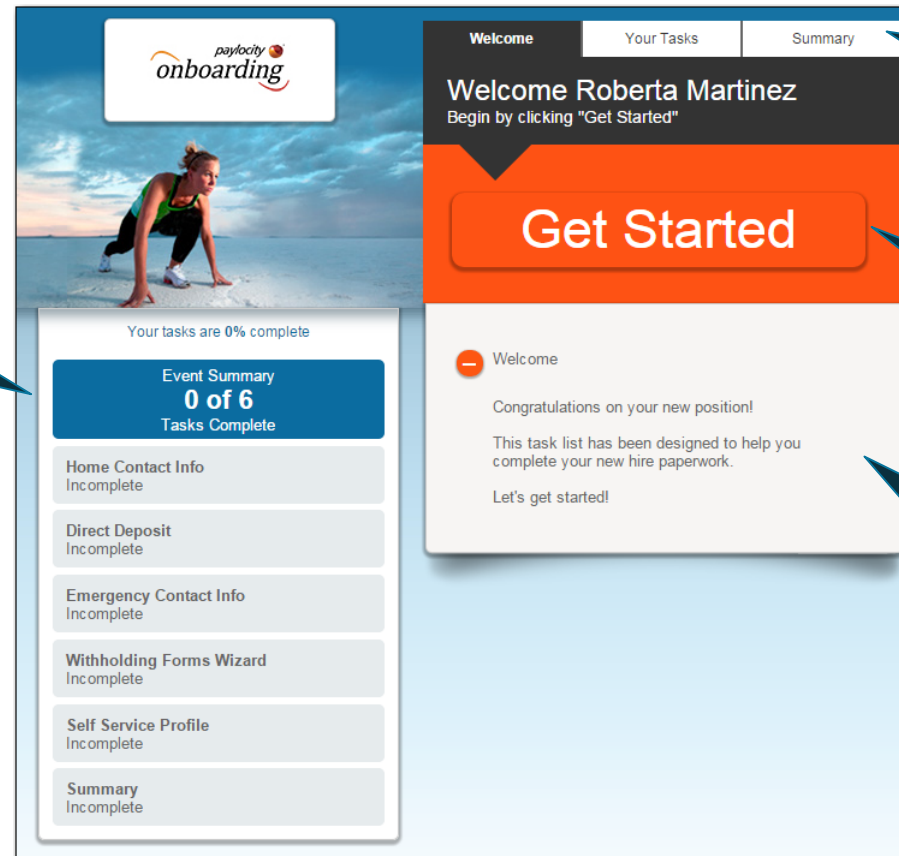
Track your progress and select a specific task conveniently from the Event Summary.

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

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

Helpful Hint

*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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Welcome	Your Tasks	Summary

Welcome Roberta Martinez
Begin by clicking "Get Started"

Get Started

Your tasks are **0% complete**

Event Summary
0 of 6
Tasks Complete

Home Contact Info
Incomplete

Direct Deposit
Incomplete

Emergency Contact Info
Incomplete

Withholding Forms Wizard
Incomplete

Self Service Profile
Incomplete

Summary
Incomplete

— Welcome

Congratulations on your new position!

This task list has been designed to help you complete your new hire paperwork.

Let's get started!

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Complete Tasks.

As tasks are completed, a thumbs up will appear to let you know the section is finished.

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.
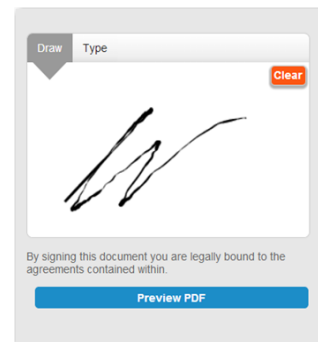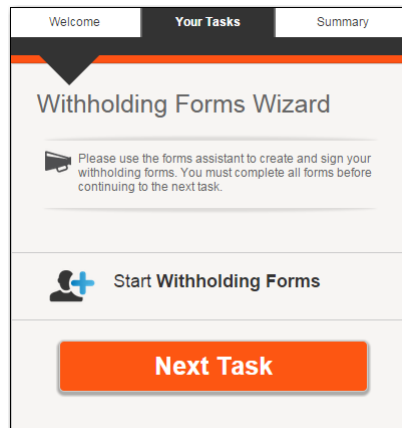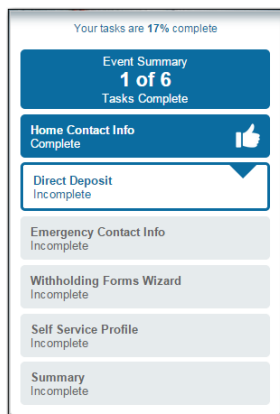
The task header will display the number of records on file and an easy method to add, edit, or remove information.
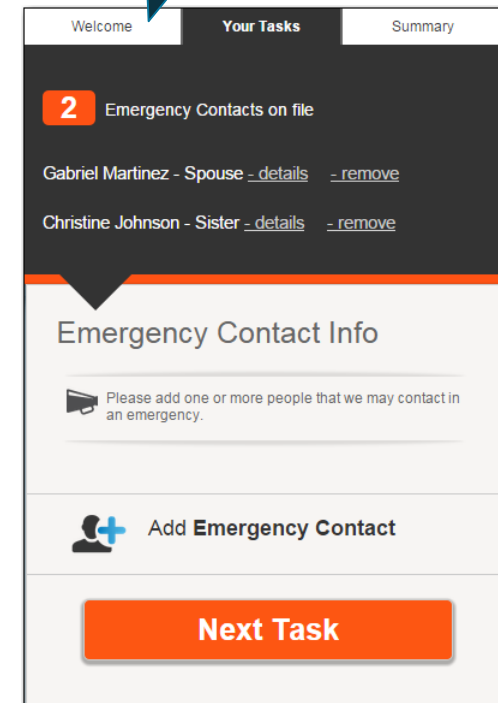
Some events may require a signature of acceptance. Depending on company configuration, users will sign using a touchscreen or mouse or by typing their electronic signature.

Easily view/print a PDF version of your signature by clicking the corresponding button.

Did you know?

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.

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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.

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

Your level of completion is clearly displayed.

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

View/Print a copy of your event details to review your entries for accuracy prior to submitting.

Click the corresponding link to revisit a specific task.

Helpful Hint

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