

Employee Support - Paylocity Walkthrough Guide

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Employee Support - Paylocity Walkthrough Guide

AI Assistant

The AI Assistant quickly answers questions and provides personalized support. It's available on your desktop or the Paylocity mobile app.

W-2 Tax Form

Where is my W-2?

You'll be able to access your W-2 electronically starting **January 16, 2026**. Printed forms will begin mailing on January 14, 2026 unless you opted for paperless. If you don't receive your W-2 by **January 31, 2026**, please access your W-2 electronically or contact your HR department for assistance.

How do I access my W-2?

On desktop:

- **If you use Paylocity Home:** Navigate to **Paylocity > Home > Employees > Person Record**. Select the **Pay** tab, and then select **Tax Forms**.
- **If you use the Employee Self-Service portal in Paylocity:** Navigate to **Paylocity > Employee Self-Service > Pay Tile > More > Tax Forms > Select Tax Form**.

On mobile:

- In the **Paylocity app**, select **Pay > Tax Forms > 2025**.

If you can't access your W-2, please contact your HR team—even if you're no longer employed there.

How do I update my federal tax withholding (Form W-4)?

- **Desktop:** Log in to Paylocity using a web browser and select **Employee Self-Service**. Once in the Employee Self-Service portal, select **Pay**, then select **More**, and choose **Tax Forms** or **View/Edit Tax Setup**. Select the **Federal Tax Code**, enable the appropriate **W-4 form version**, and enter your filing status, dependents, and any additional withholding elections. Be sure to select **Save** before exiting.
- **Mobile:** Federal tax withholding updates cannot be completed in the Paylocity mobile app. Please log in using a web browser to make changes.

- If you cannot make these changes, please contact your employer's HR department for assistance.

How do I update my state or local tax withholding?

- **Desktop:** Log in to Paylocity using a web browser and select **Employee Self-Service**. Select **Pay**, then **More**, and choose **View/Edit Tax Setup**. Select the applicable **State or Local Tax Code**, update your filing status, exemptions, or additional withholding amount as needed, and select **Save**.
- **Mobile:** State and local tax withholding updates cannot be completed in the Paylocity mobile app. Please log in using a web browser to make changes.
- If you are unable to make updates, please contact your employer's HR department for assistance.

Log-In & Account Support

How do I reset my password?

You can reset your password on either desktop or mobile.

Desktop: Choose "Forgot Password" and follow the prompts.

Mobile: Select "Forgot Your Password or Company ID" and follow the prompts.

If you don't receive your one-time code within 5 minutes, check your Spam folder. If you still have trouble logging in, hr@icookafterschoo.com.

How do I find my username?

Desktop: Choose "Forgot Password," then select "Need Help" under Username. Follow the prompts.

Mobile: Select **Forgot Your Password** or **Company ID**. Select **Need Help** under the **Username** and **Password** fields and follow the prompts.

If you don't receive your one-time code, check your Spam folder. If you still have trouble logging in, please contact hr@icookafterschoo.com.

Pay & Direct Deposit

How do I find and print a pay stub?

Get your paystub on desktop:

To print a single past paycheck or multiple paychecks,

1. Log into Paylocity and navigate to **Employee Self-Service**
2. Select the **Pay** tab and click **Checks**.
3. Select the paycheck date and click **Download Paystub**. If you need to print multiple paystubs, select the appropriate pay weeks you need, then choose **View Summary**.
4. Right-click on the summary and select **Print**.

Get your paystub on the mobile app

1. In the menu, choose **Pay** and select the **envelope icon** in the top-right corner.
2. You'll be prompted to create a password. Once you have a new password, you can email a PDF of your most recent pay stub. You can also email past paychecks by selecting **History** at the bottom of your screen. Select a check date, then click the **envelope icon** at the top-right corner of the screen.

How do I see my PTO balance?

Desktop: Log into Paylocity, navigate to Employee Self-Service, and select Time Off to see your PTO balance. Selecting Request Time Off lets you see your accrual balance and the number of hours or days available on the request date.

Mobile: Select Time Off from the main menu. Select the Balance tab. Select Time Off Type to view your balance details.

How do I update my direct deposit information?

Desktop: Log into Paylocity and select Employee Self-Service. Once in the Employee Self-Service portal, select Pay and then select More. Next, select the Direct Deposit Accounts tab, then select an existing bank account or Add New Direct Deposit Account from the Add or Edit Account dropdown menu. Select an option from the Account Type dropdown menu.

Mobile: From the main menu, select your name, swipe to the bottom, and tap Edit. Make sure to save your edits.

If you cannot make these changes, please contact your employer's HR department for more information.

Personal information

How do I update my address, phone number, or personal information?

Update your personal information from desktop

Log in to Paylocity and select Employee Self-Service from the main menu. Select View Employee Record, then Personal, and Edit Contact on the welcome card. Be sure to click Save before exiting.

Update your personal information on the mobile app

At the top of the menu, select your name and company. Click the pencil icon to update personal information. Select Save.

Depending on the level of employee access your employer grants, you may be unable to adjust your profile. In that case, please contact your employer for assistance.
