

Technology

#1
requested functionality
among HR software buyers
is core personnel tracking¹



80%

of HR departments' time is spent on administration and paperwork alone



The American Payroll Association estimates that errors from manual methods cost companies



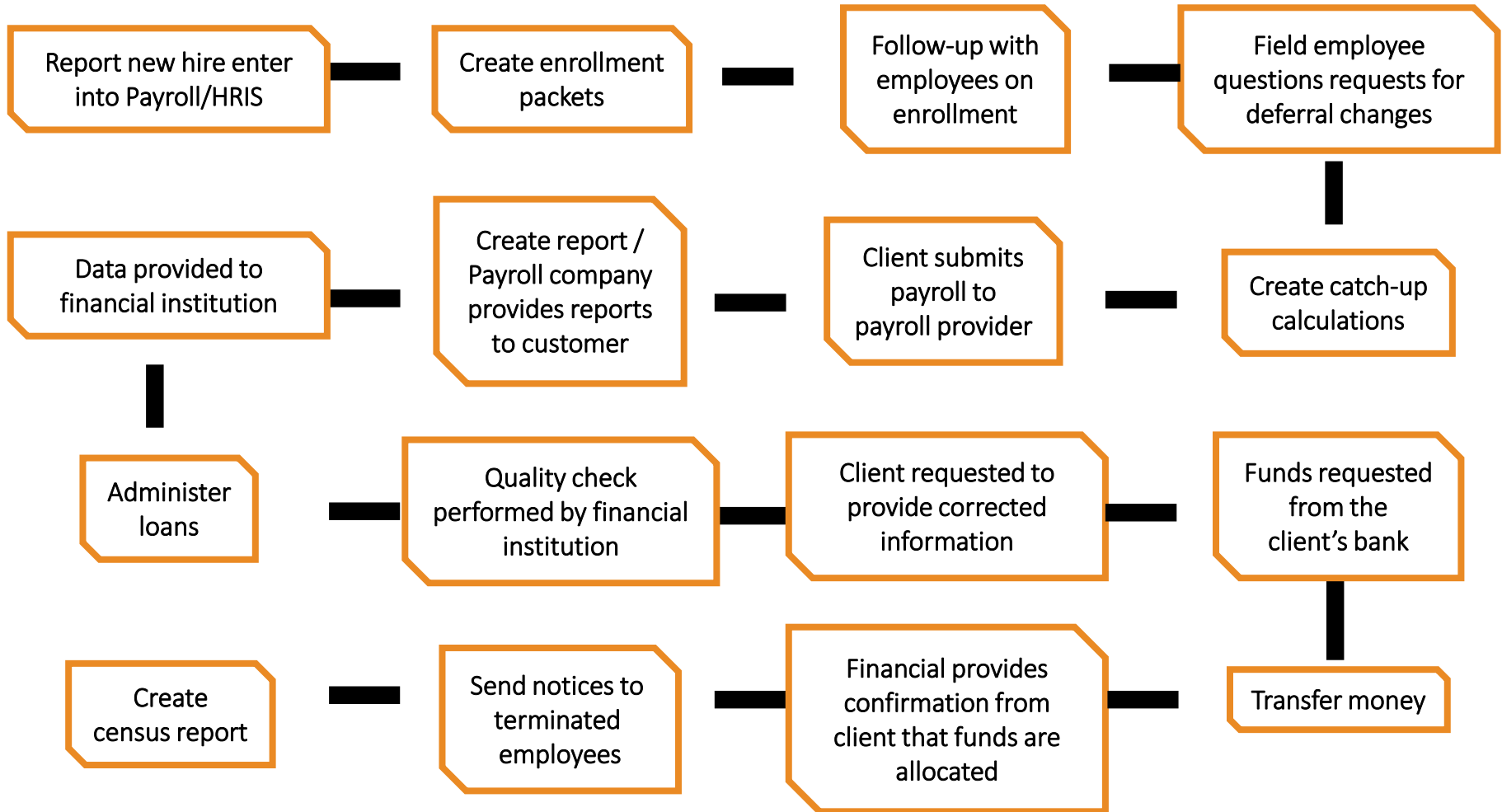
1-8%
of total payroll¹

Companies with new, recently updated HCM platforms spend

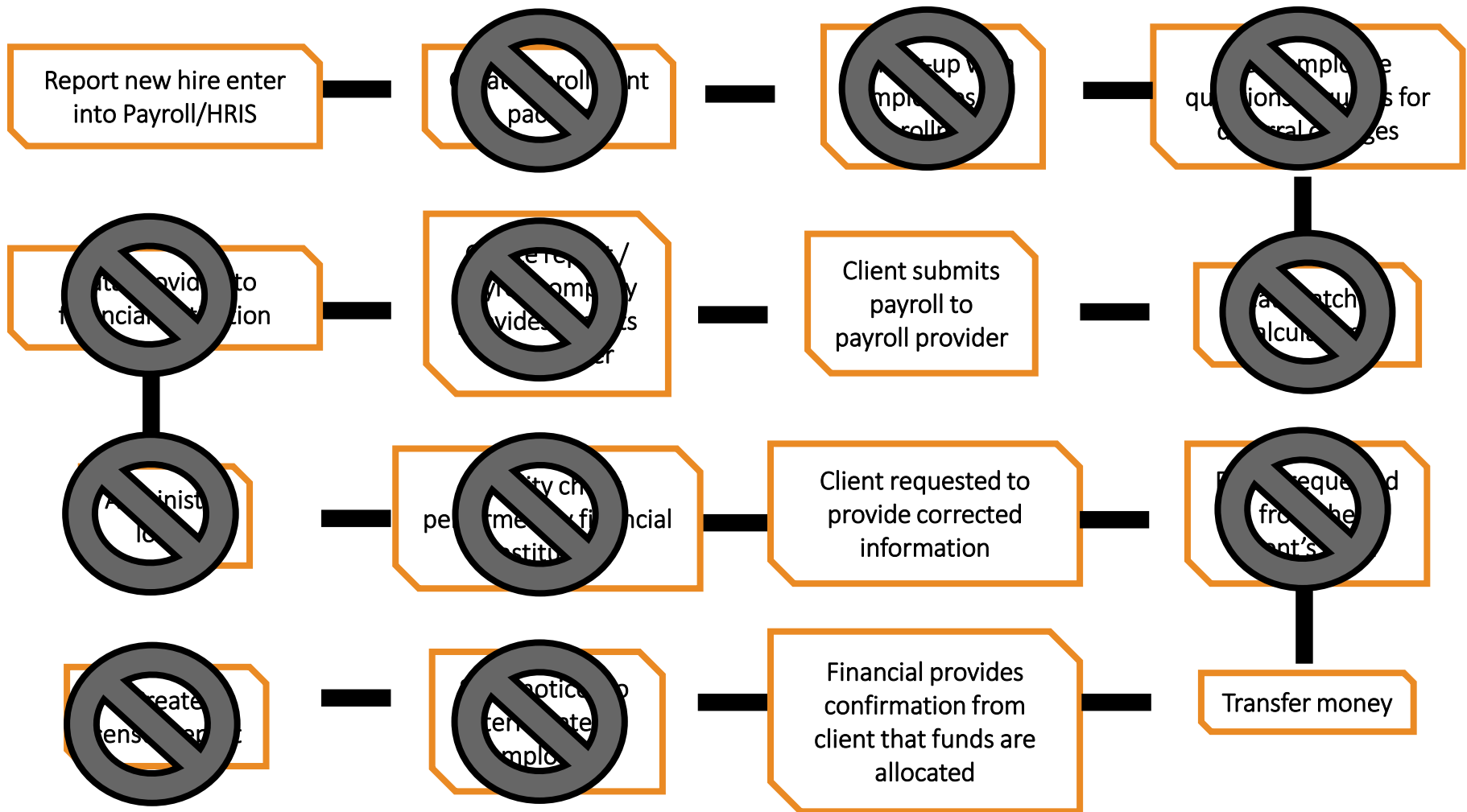
22%
less per employee on HR¹



Retirement Plan Administration – Manual Process

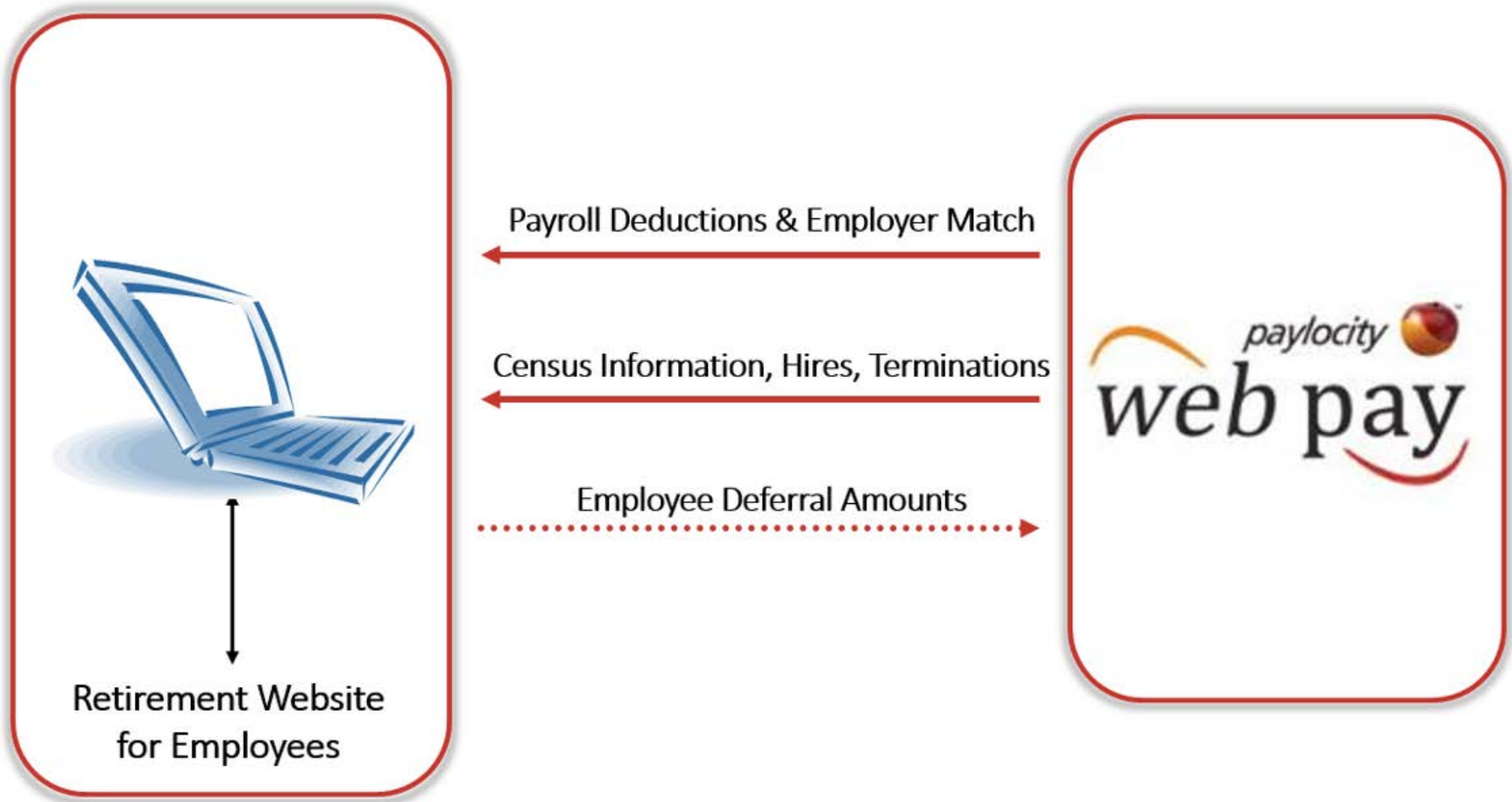


Retirement Plan Administration – Automated Process



Retirement Plan Record Keeper Integration

Automatic Flow of Data with 180 or 360 Integration



Paylocity Partner Portal

Access to Data for Financial Advisors, TPA's and Insurance Brokers

Partner Set Overview

Select Company or Set All Companies and Sets

Recent Hires
(within last 45 days)

8

Recent Terminations
(within last 45 days)

4

401k Participation
(within last 45 days)

18.8%

Campaigns
(within last 90 days)

17

Recent Hires

[Export to Excel](#)

Co ID	Last Name	First Name	Emp ID	Pay Type	Emp Type	Position	Hire Date	Benf Class	Benf Elg Da...	High Comp	401k Elg Da...
1PP11...	Abbadabba	Dolly	99	Salary	Regular Full Time (30+ Hours)		06/17/2017	Not Defined	06/17/2017	No	06/17/2017
1PP22...	Davis	Blake	50	Hourly	Regular Full Time (30+ Hours)	Payroll Clerk	06/17/2017	Not Defined	06/17/2017	No	06/17/2017
1PP22...	Allerdyce	Devon	94	Hourly	Regular Full Time (30+ Hours)	Fulfillment Specialist	06/17/2017	Not Defined	06/17/2017	No	06/17/2017
1PP33...	Watson	Leila	31	Hourly	Regular Full Time (30+ Hours)	Implementa...	06/17/2017	Not Defined	06/17/2017	No	06/17/2017

[+ Send Memo](#)

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Paylocity Partner Portal

401k Participation & Total Contributions in FA & TPA Portal

Partner Set Overview

Select Company or Set All Companies and Sets

Recent Hires
(within last 45 days)

8

Recent Terminations
(within last 45 days)

4

401k Participation
(within last 45 days)

18.8%

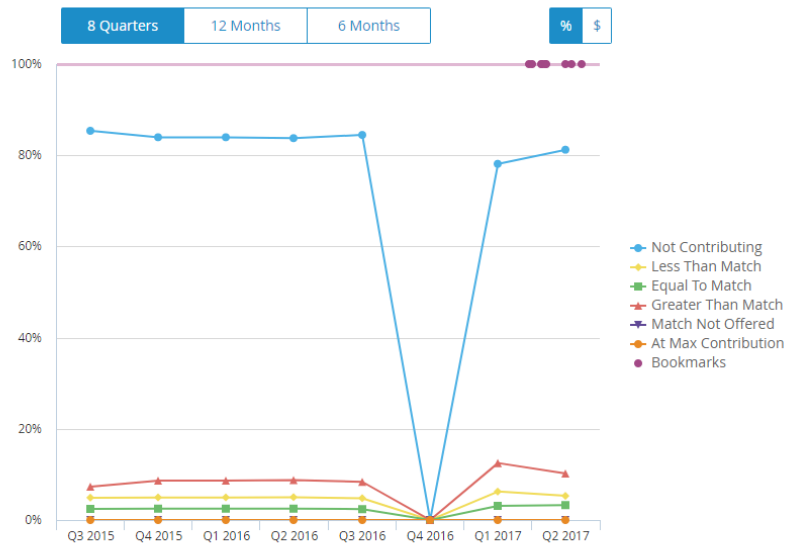
Campaigns
(within last 90 days)

17

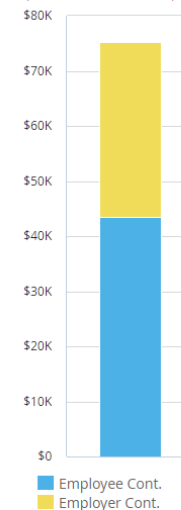
401k Participation Among Active Employees

[Export Dashboard](#)

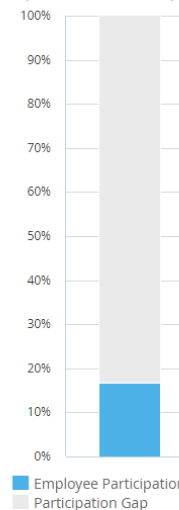
Company Match Breakdown



Total Contributions (within last 12 months)



Total Participation (within last 12 months)



Paylocity Partner Portal

HSA Participation in Insurance Broker Portal

Recent Hires
(within last 45 days)

8

Recent Terminations
(within last 45 days)

4

HSA Participation
(2017)

6.4%

Campaigns
(within last 90 days)

4

Recent Hires

[Export to Excel](#)

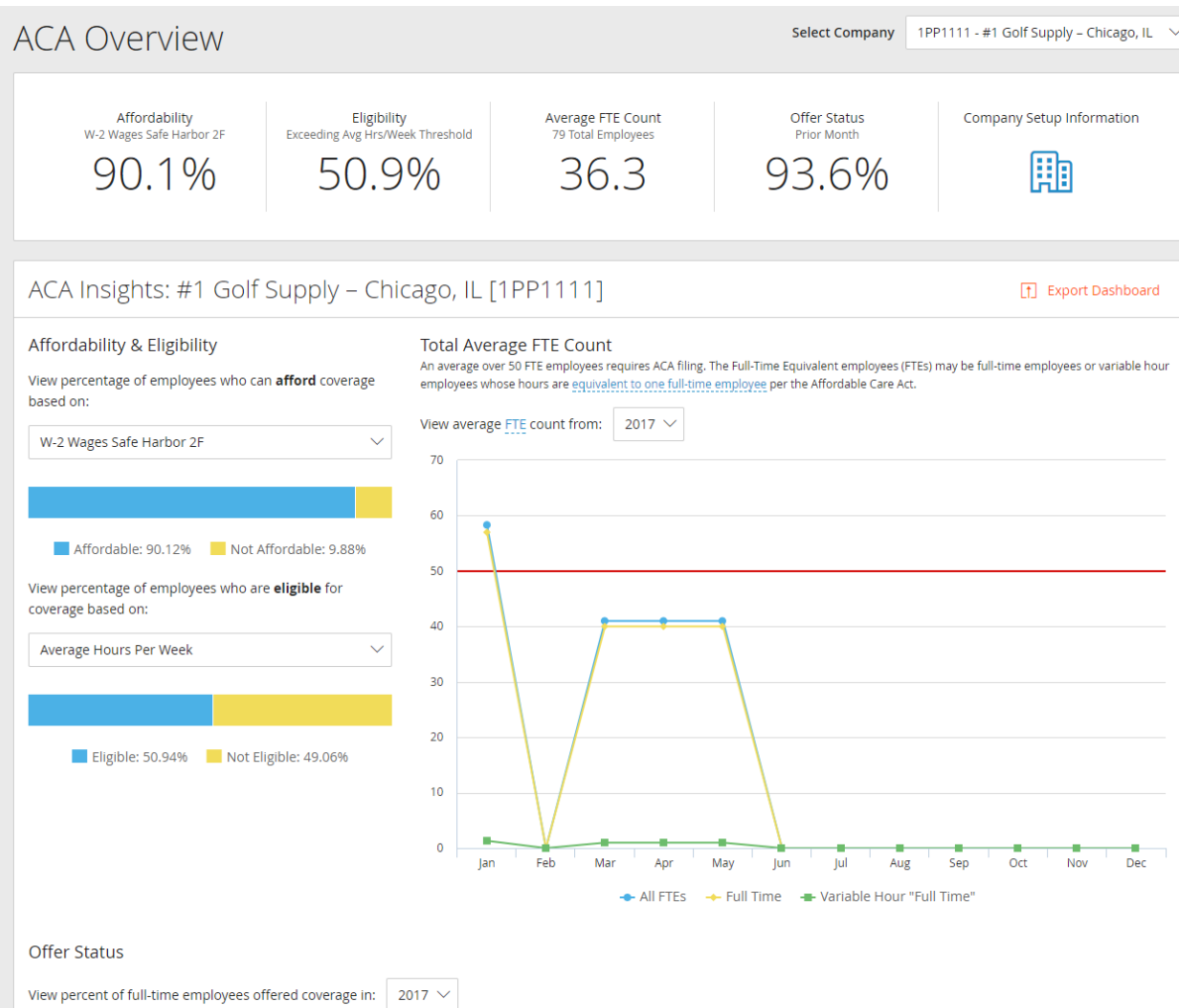
Co ID	Last Name	First Name	Emp ID	Pay Type	Emp Type	Position	Hire Date	Rehire Date	Benf Class	Benf Elg
1PP11...	Abbadabba	Dolly	99	Salary	Regular Full Time (30+ Hours)		08/12/2017	Not Applicable	Not Defined	08/12/2017
1PP22...	Davis	Blake	50	Hourly	Regular Full Time (30+ Hours)	Payroll Clerk	08/12/2017	Not Applicable	Not Defined	08/12/2017
1PP22...	Allerdyce	Devon	94	Hourly	Regular Full Time (30+ Hours)	Fulfillment Specialist	08/12/2017	Not Applicable	Not Defined	08/12/2017
1PP33...	Watson	Leila	31	Hourly	Regular Full Time (30+ Hours)	Implementation	08/12/2017	Not Applicable	Not Defined	08/12/2017
1PP33...	Richard	Walter	38	Salary	Regular Full Time (30+ Hours)	Design Engineer	08/12/2017	Not Applicable	Not Defined	08/12/2017

[+ Send Memo](#)

[1](#) 1 - 8 of 8 items

Paylocity Partner Portal

ACA Overview in Insurance Broker Portal



Paylocity Partner Portal

Set-up Campaigns to Email Employees Directly

Recent Hires
(within last 45 days)

8

Recent Terminations
(within last 45 days)

4

401k Participation
(within last 45 days)

18.8%

Campaigns
(within last 90 days)

17

Campaigns

+ Send Memo

Find Memo, Person, or ID

3/28/2017 - 6/6/2017

Not Participating Email About Link and Match

Export to Excel

Date Sent: 6/6/2017 Sent by: John Smith Company: 1PP1111 Chart Bookmark: 401k Company Match Breakdown

Status

Last Name ^	First Name	Emp ID
Banner	David	100
Barclay	Reginald	39
Bison	Dave	69
Cooper	Santana	43
Cruz	Fabian	46
Davis	Dustin	66
Green	Darius	54
Grey-Summers	Jean	79
Harrison	Tobias	77
Ibrahim	Sarah	76

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Message

Company match

If you're not aware, the company matches 100% up to the first 6%. To update, click the link below at www.money.com. Your plan number is 57645

Not Participating Email About Link and Match

32

6/6/2017

John Smith

Non Participating Employee Campaign

64

5/23/2017

John Smith

Grow Investment contributions

3

5/15/2017

John Smith

Rollover

3

4/20/2017

John Smith

Let's Meet

2

4/18/2017

John Smith

Empower

4

4/14/2017

John Smith

Up Contribution

2

4/14/2017

John Smith

Not Contributing

67

4/13/2017

John Smith

Welcome

2

4/13/2017

John Smith

New Hires 4/1

2

3/31/2017

John Smith

Paylocity Partner Portal

Access Reports like a Full Census & 401k Loan Deduction Totals

Reports

Name

Report Type

-- All --



Class

Partner Set: Third Party Admin

Report Group

-- All --



Category

-- All --

Search

Show All

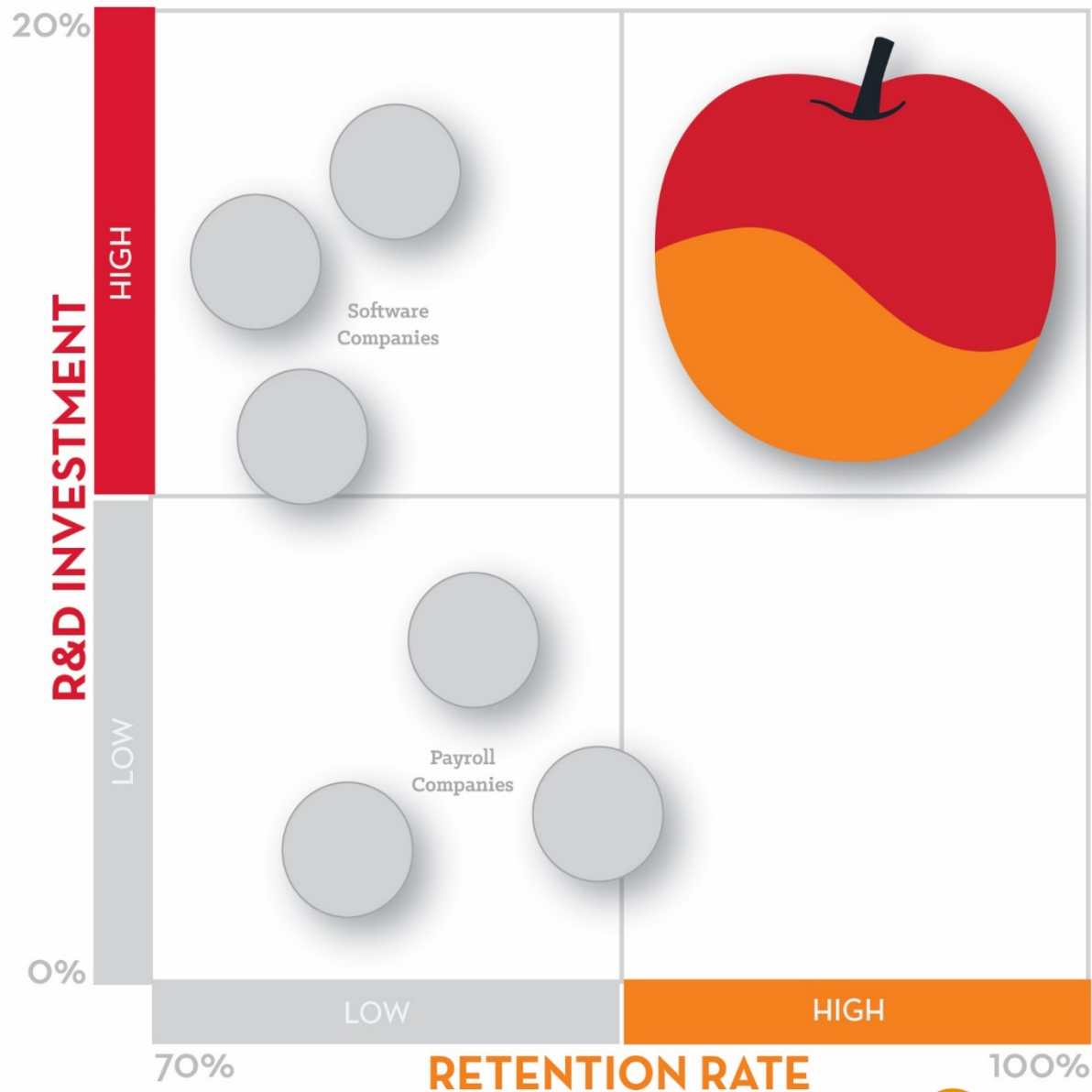
Reset

Save Search

<input type="checkbox"/>	Name	Sample	Description	Class	Type	My Reports
<input type="checkbox"/>	401 K Report		Summary or detail of 401(k) payroll activity	PS_TPA	Standard	★
<input type="checkbox"/>	401K Census Export		Standard census info for retirement plan providers	PS_TPA	Standard	★
<input type="checkbox"/>	401K Loan Listing		401(k) loan deduction totals by employee for the selected check date range	PS_TPA	Standard	☆
<input type="checkbox"/>	Address List		Address Listing	PS_TPA	Standard	☆
<input type="checkbox"/>	Company Code Group Setup		Company Code Group Setup	PS_TPA	Standard	☆
<input type="checkbox"/>	Comprehensive Demographic Rept		Comprehensive Report on Employee Demographic Information	PS_TPA	Standard	☆
<input type="checkbox"/>	Payroll Register ER Taxes Export		Payroll Register with ER Taxes Data Export	PS_TPA	Standard	☆
<input type="checkbox"/>	Payroll Register Export		Payroll Register Export by Check	PS_TPA	Standard	☆
<input type="checkbox"/>	Termination List		Lists terminated employees	PS_TPA	Standard	☆
<input type="checkbox"/>	TPA 401K Census		TPA 401k Census Report	PS_TPA	Standard	★

15% of our Revenue Invested into 30 Development Teams

Elevating Payroll
and HR Across
the **Backroom**
and into the
Boardroom



97% Client Retention for over 20 Years

