

**Cheri Eccles**

**From:** Paylocity [ceccles@paylocity.com]  
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# Paylocity News



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**Issue: 2nd Quarter**

**06/09**

**Message from our CEO**

**Steve Sarowitz**



I am happy to report that Paylocity is still successfully weathering the fierce economic storm that we are in. Thus far this year, we have more than doubled our new sales. Although we are seeing more of our clients going out of business, our client retention numbers remain exceptionally high. In addition, we have had several clients return to Paylocity only months after being offered free payroll processing by a competitor who could not match either our service nor technology. In our latest sets of client surveys, we received responses from 500 clients and are excited to report that 92% are likely to recommend Paylocity to a friend. This translates to a Net Promoter score of 60 which is considered exceptional as it is common for companies to get a negative score. We will continue to build Paylocity based on our client references and thank you for taking the time to complete our survey and promote Paylocity to other businesses!

Our sales growth has continued despite the economic downturn. Paylocity now has salespeople covering 20 different markets coast to coast. Just a few short years ago, over 95%

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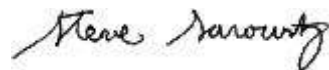
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of our clients were in the Chicago area. Today, just over 65% of our clients are based in Chicago, with the rest of our clients spread across the country. Our newest markets to open are Austin, Grand Rapids, Los Angeles, and Charlotte. I am confident that clients in those markets will embrace our company just as others have all across the country. In every market that we have gone to, I have heard from clients who were thrilled to get relief from the service and technology challenges they had experienced with our large publicly-held competitors.

In June, we will be releasing an updated version of Web Time, our web-based time and attendance product. The new release will have single sign-on capability and complete integration with WebPay, eliminating the need to enter data in multiple places. In August, we will have a major release of WebPay, featuring, among other things, enhancements in FMLA tracking, benefit management, mass change ability and customizable new hire templates. Over the next year, we will be heavily focused on increasing WebPay's HR capabilities, so look for continual improvement in that arena.



How do I...?

### **Q. How do I enter the Cobra Provisional Credit into Millennium?**

From the Main Menu, click the Payroll module.

If you are going to enter this information during a regular payroll, select the correct check date in Batch Control and click Start Batch.

Select the employee (for whom the Cobra payment was made on) from the employee drop down menu.

Click on the Pay Detail tab.

Click the Add New Check Button.

Select the ECPROV memo earning code from the Ded/Earn Code drop down.

Enter the amount eligible for federal reimbursement in the Amount field.

Arrow down to Save information.



Click the Properties button.

Block all direct deposits, automatic earnings, and automatic deductions. (This will ensure that no accidental payments are made to the terminated employee)

When done, click "Save Changes...This Paycheck Only".

Repeat these steps for any additional COBRA credits.

During the payroll process this COBRA memo earning will be converted to a tax credit. On your pre-process register, it will appear as a memo earning.

After your payroll is done processing, it will appear on your Payroll Summary Report. It will be listed as "Cobra Provisional credit" under the FITW and Related Taxes.

You will also receive a voucher (memo) with your payroll package that will reflect this credit for the terminated employee for your records.

## Employee Spotlight

### Lori Sesso

As second to youngest in line with her 5 siblings, Lori Sesso, Customer Service Team Lead, knows a thing or two about how to get recognized. Though our new employee recognition program began merely weeks ago, Lori has already received 4 "Orppie" awards, each nomination coming from other departments for her efforts in going "above and beyond."



Having started with Paylocity right out of college just 2.5 years ago, Lori was quickly identified as a hard-working, quick-thinking sort of employee. She rapidly moved up the ranks to Quality Assurance Coordinator/Peer Mentor, helping to train new hires along the way and now supervises a group of 15 service representatives.

Says Cary Willis, Lori's manager, "Lori is an integral part of the Client Services team! She has been instrumental in evolving the recently created Client Services Team Leader position into a role that functions both as an advocate for our clients and mentor for our WebPay team members. Lori continually partners with all departments within our organization, functioning as the Client Services WebPay Release Lead and constantly guides our staff towards providing customer satisfaction with each interaction.'

When asked about her favorite thing about working at Paylocity, Lori doesn't hesitate. "Everyone is upbeat and friendly here. When you spend the majority of your day at work, it needs to be a place you enjoy going to...and I very much enjoy it here."

We are glad she does and we enjoy recognizing Lori for her hard work and dedication.

## Client Spotlight

### Wine Sergi

Connecting with the insurance strategy that's most effective for your specific business is challenging and requires a depth of knowledge far beyond the norm. That's why companies rely on Wine Sergi's expertise to connect them with the right business insurance. Through detailed, insightful insurance strategies designed for the unique needs of your company, Wine Sergi gives you the confidence to focus on growing your business - instead of managing risk.



Founded in 1924 by Roscoe H. Wine, Wine Sergi's primary goal has always been to build client relations for the long term. The client trust and confidence they have built is exhibited in their long list of notable clients and the many third and fourth generation business owners who have entrusted them to protect their assets - both business and personal.

Having been voted as one of the "Best Places to Work in IL" three years running must surely be demanding on a human resources department, especially bearing in mind that it's a department of one, with over 100 ESOP employees. In Sue Oswald's role as Human Resources Manager, she wears many hats and says, "the Paylocity team is a tremendous support." Sue adds that payroll is one of her least favorite job activities but because WebPay is so intuitive and easy to use, Paylocity has definitely made it easy for her.

Making payroll easier for our users is great to hear. Sharing views on how to continue making our respective places a great place to work was another benefit to our meeting. Sue and I shared our thoughts and ideas as to what makes our workplaces special; in the hopes of drawing from one another's experience. What I learned in the process was how much our company's have in common. The entrepreneurial spirit runs rampant through both companies', providing employees with an approachable atmosphere. Additionally, client relations and integrity are at the top of both prioritization lists. Lastly, we both understand that if not for

the above listed advantages, neither business would succeed.

It was a pleasure learning more about Wine Sergi Insurance. If you would like to learn more, call 630.513.6600 or visit <http://www.winesergi.com>.

## Employee Recognition

### Orppie

Paylocity's new employee recognition program provides opportunities to recognize and reward individual staff members making significant contributions to the company. Such contributions include; providing outstanding service, implementing a new cost or time-saving idea, completing a noteworthy project or somehow contributing above-and-beyond that which is normally expected.



When a nominated employee accomplishes an "above-and-beyond" task, they are presented with an "Orppie" card by their manager. (Note: Managers physically bestow workers with an "Orppie" award card *in costume*, helping to bring awareness to the nominated staff member.) Once the employee accrues five "Orppie's", they cash them in to Human Resources and can choose from a variety of gift cards.

Recognizing and rewarding the outstanding results and contributions of our employees is yet another way Paylocity continues to strive for excellence.

## Documentation Best Practices

### HR Documents

As our society becomes more litigation oriented, employee documentation is critical to the protection of all businesses. It is better to err on the side of caution by keeping notes and documentation rather than having continuous verbal discussions that can never be proven.



A national survey conducted by HRhero.com indicates that one-out-of-three employers rate their organizations documentation as "Not Very Good." Employers tend to get themselves into trouble by not having the proper documentation to support their employment decisions. In this short space, we will share some of the minimums you should

have for your business.

### **Employment Documents**

*Application- Eliminates discrimination and provides for legal disclaimers*

*Job Description - Helps to demonstrate the essential functions of the position*

*Tax Forms - Must be completed for Federal and State taxes*

*Offer Letters and Employment Contracts - Should be reviewed by legal expert*

*I9 Form and Binder - Each employee should fill out an I9 form for Employment eligibility verification. These must be kept in one master binder to eliminate discrimination.*

### **Ongoing Employment Documents**

It is extremely important to maintain separate Personnel, Medical and Confidential files. This eliminates any claim of discrimination based on confidential information.

*Contents of Personnel Files -Documents above plus performance (performance appraisals, verbal & written reprimands, goals etc), payroll, compensation and benefits information*

*Medical Files -Any medical related information as well as insurance forms that contain medical questions*

*Confidential Files -Information related to workers compensation, harassment etc. should be kept in a separate file as the need presents itself*

*Separation Documents*

*Pre-termination Checklist - You should have a list of consideration items (and management approval prior to termination) such as; has the employee been given fair warning? Will severance be provided? Etc.*

*Separation Agreement - If severance is to be provided*

*Exit Checklist - Items to provide at the termination conference*

### **Consideration Before Termination**

- *Do any contracts or contractual obligations exist?*
- *Is the employee in protected class?*
- *Has the employee recently alleged discrimination/harassment/ filed for workers compensation or reported violations to any government agency?*
- *Do you have disciplinary documents and performance reviews in the employee file?*

- *How were other similarly situated employees treated?*

### **At the Time of Termination**

- *Exit interview form*
- *Final employee performance appraisal*
- *Record of documents given with final paycheck*

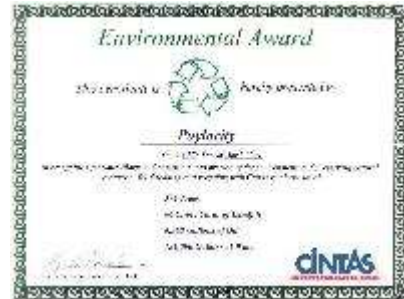
Documentation is a simple yet powerful tool for taking control of your employment relationships. As an employer, there is no such thing as too much documentation. Take the time to train skills documentation, and then enforce the practice.

Lori Kleiman, SPHR and Greg Stobbe, JD, SPHR are senior consultants within the Gallagher Human Resources division. They are available to work with your or your team on HR policy and procedure issues which include documentation, policies, training and overall HR practices. You may reach them at our Gallagher location in Northfield, IL by call 1.877.201.7105.

## **Paylocity Green Efforts Continue**

### **Environmental Award**

Paylocity received an Environmental Award from Cintas Document Management in recognition of our efforts and commitment to protect the environment and preserve natural resources. By shredding and recycling last year, Paylocity saved 374 trees, 66 cubic yards of landfill, 8,360 gallons of oil and 154,000 gallons of water.



## **10 Questions HR will be asked in a Crisis**

### **Be Prepared**

Many business owners are finding themselves in unfortunate circumstances as of late. In the event of a business interruption, your HR department will be asked questions concerning payroll, benefit and general workforce issues that you may not have considered, and you will need to have answers at the ready. Review these commonly asked questions and discuss them with your HR department before announcing any employment

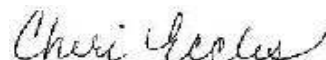


disruption to your employees.

1. How long will the facility be closed?
2. How long will I be out of work?
3. Will I be paid for the period during which our business operations are suspended?
4. Will benefits continue during the period in which our facilities are closed? If so, how long will they continue?
5. I receive a paper check in person each pay period. How will I receive my paychecks now? Can you mail them to another state?
6. How are you communicating with employees given the fact that the company's communication infrastructure has been devastated by the incident? I don't have access to the Internet. How can I monitor the "report to work" schedule?
7. Will you take disciplinary action against employees who do not report to work because they are managing the impact of this disaster at home?
8. Will my job be jeopardized because I have lost my ability to travel to work (due to car damage, destroyed roads, suspension of public transportation, etc.)?
9. I have a health condition (e.g., cardiac, pregnancy) and have been told that the stress of coming to work during this period may compromise my health? What should I do now?
10. Will you be redeploying long-serving employees from one company facility to another?

If you would like to feature your company in our "Client Spotlight" section or have any comments or questions about "Paylocity News" please feel free to reach me at [ceccles@paylocity.com](mailto:ceccles@paylocity.com).

**Sincerely,**



Cheri Eccles  
Marketing Manager  
Paylocity Corporation



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