

# Paylocity News



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**Issue: 4th Quarter**

**December 2009**

**Message from our CEO**

**Steve Sarowitz**



Paylocity is still thriving, despite an economy that is still in the doldrums. For the last 6 months, we have seen year over year declines in employee counts amongst our clients of between 5% - 8% each month. Not surprisingly, our numbers correlate very closely to other national statistics that we have seen. Despite this trend, we are still growing. We are projecting a 25% growth in our clients this year, fueled by new sales growth and continued strong client retention. At the same time, our two largest competitors have both reported that they expect a decrease in the total number of clients served. Much of our sales growth is tied to our continued geographic expansion. Less than 5 years ago, 95% of our new business was in Illinois. Today over 70% of our new business comes from outside our home state and we expect that this trend will continue to grow over time. Denver is our newest market and we anticipate adding other markets as well.

Paylocity is projected to hit a milestone in 2010; we expect to cross over the 5,000 client threshold early in the year.

In November, 2009, we released our latest version of WebPay. The primary purpose of this release was to improve WebPay's

performance and scalability. The great majority of our customers (over 95% according to our latest survey), were already very satisfied with WebPay's performance and will now find it even faster. I have already received several positive comments about WebPay's speed. Moreover, we are starting to see a significant amount of increased usage of employee templates, which was released earlier this year. Employee templates can be customized by company to include all applicable fields that you need to do for repetitive tasks in a single screen. Default values can be added and fields can be configured to be required as needed. In addition, each template can be accompanied by its own checklist of related tasks. We look forward to continuing our ongoing efforts to enhance both WebPay and Web Time. We will continue the expansion of HR features within WebPay and have plans to significantly upgrade Web Time as well, based on the client feedback that we have received.

Our entire organization joins in sending holiday greetings to everyone with every good wish for the New Year!



How do I...?

### Q. Preview my W-2's with WebPay's newest feature?

Paylocity is always striving to make your payroll and HR processes easier. Check out our newest feature in WebPay! Users can now preview their W-2's and make any necessary changes prior to year end, ensuring all information is 100% accurate prior to printing! Simply follow the directions below:



1. Follow this path: Reports > Quarter/Year End > W-2.
2. These W-2 previews will display as "W-2" and will have a process date of 12/31/09.  
*Note: These previews will include all payroll information processed prior to 10/22/09.*
3. If you require a re-run of a W-2, the corrected previews will overlay this W-2 display and keep the same process date of 12/31/09.
4. Once year end W-2's are uploaded to WebPay, they will replace the current W-2 preview information.

Verification suggestions:

- a. Name and SSN are in the correct format
- b. Company FEIN
- c. Box 13 (indicator for retirement plan) of W-2 form is checked for applicable employees
- d. Deferred compensation plan type is correct and verify employee contribution amounts
- e. Individual employee taxes are correct (For example, FITW, SITW and local)

Please contact Client Services if you need assistance in making changes to any information that may need to be corrected. We can be reached at 1.888.873.8205 or locally at 847.956.4850.

## Employee Spotlight

### Annette Barnes

Asking the same question of every employee I interview for our "employee spotlight" feature can seem a bit repetitive, however when asking Annette Barnes, Account Manager the question (what is your favorite thing about working at Paylocity) I received a refreshing new reply; "Learning something new everyday." After interviewing Annette, I have come to appreciate her answer even more.



A married Mother of 4, Annette's calling to customer service must have come from being able to create calm from chaos. "It can sometimes feel like I am juggling a million balls at once but that's part of why I like it," says Annette. Handling 25-30 clients exclusively has got to have its challenges, but Annette remains as cool as a cucumber. "Everything is always changing...new laws, product upgrades, etc. but that is part of why I really enjoy what I do."

That must be true because Annette received 5 Orppie nominations (Paylocity's employee recognition program) last quarter alone! Consistently going above and beyond her normal job responsibilities has become the norm for Annette. Says Cary Willis, Client Services Manager, "Annette's commitment to our clients' needs is evident in every interaction she has throughout the day. She partners effectively internally and externally to identify and target solutions that achieve the results our clients are seeking. Her strong customer focus, availability and attention to detail demonstrate her commitment and are very much appreciated by her Account Management colleagues and clients alike."

Way to go Annette...thanks for all of your continued hard work and efforts!

## State Unemployment Rate Changes

### SUI Rates

Please forward all State Unemployment Rate Change notifications and State Frequency changes (if applicable) to Paylocity as soon as possible. Paylocity will not be responsible for the payment of additional tax, penalty or interest charges as a result of the failure to notify us of SUI rate changes. Send to [SUIRates@Paylocity.com](mailto:SUIRates@Paylocity.com).



## Unleash the Entrepreneur in your Employees

### Deming Cycle

You know where you would like to see your firm in the future but what's the best way to get there? Whether it's continuous improvement like lean product innovation or identifying new ways in helping you to grow, the biggest hurdle you may face is cultural. Successful company-wide initiatives start with the alignment between leadership and staff, based on a solid understanding of company goals. This year more than ever, employees want (and need) to understand where you are going and how they fit into helping you get there; communication is key.



To truly unlock superior performance from their staff, top companies turn their employees into entrepreneurs by communicating the profit drivers of the business and helping them to understand how each are accountable in their specified areas. Employees need to know where they are starting from, where they are going to and require feedback on exactly how to get there. Remember however, that financial understanding does not come easily to many. Helping them to better analyze becomes part of the goal.

There are a variety of communication formats, the most common of which are goal setting, town hall meetings, department communication and private conversation. We recommend team meetings because it is possible to establish a culture of teamwork this way. You can establish, with the help of the team, the key drivers for the organization. These

metrics should include key performance indicators as well as historical data. Each team can then move forward to set goals and review progress on a regular basis.

Routine meetings with management should occur to review financials and discuss opportunities through collaboration. Causes and issues of poor performances should be examined. Participants should consider all possibilities in a non-judgmental way, leaving no stone unturned. As long as action items are reported back to the group, the expectation should be one of finding areas for improvement.

If these steps are followed it will result in operational teams implementing the action plan. Follow-up is continued at subsequent meetings to ensure sustainable improvements. The process is disciplined and based on the famous and proven method of the Deming Cycle: Plan, Do, Check, Act.

In closing, it's about facilitating managers and employees to better understand the issues, become accountable and take action. The results will be increased ownership at all levels that will lead to better financial performance and sustained gains for your business over time.

HRadvantage is a key resource for Paylocity clients in the Human Resource arena. Feel free to reach out to Lori Kleiman, SPHR (lori.kleiman@hradv.com) and her team at 847.904.1290.

## Important Year End Information

### Timetables and Deadlines

Reporting year end information: All information to be recorded in 2009 **must be** reported before 4:00pm CST on January 4, 2010. Any late reporting will be subject to additional fees.

W-2's: Expect to receive notification of your uploaded year end tax package(s) by 01/18/2010 unless you reported information *after* the 01/04/2010 deadline. Copies of employee W-2's should also be received by this date for distribution.



## Human Resource Updates

### HR Alerts

Mandatory 2010 Labor Law Postings  
Don't forget to update the Federal and State labor law posters

to be in compliance with the 2010 requirements for your business.

**GINA Takes Effect**

Effective November 21, 2009, the Genetic Information Nondiscrimination Act of 2008 (GINA) prohibits discrimination based on genetic information and protects confidentiality of such information.

**Michelle's Law**

Effective November 8, 2009, for plan years starting on or after that date (or Jan. 1, 2010, for calendar year plans), Michelle's Law extends the eligibility for group health benefit plan coverage to certain dependent children who are over the age of 18 and enrolled in an institution of higher education.

There is no "Client Spotlight" featured this quarter due to the length of this newsletter relaying necessary year end information. 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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