HOW TO CHANGE PERSONAL INFORMATION IN PAYLOCITY

Updated February 2021

Functions in the Paylocity App vs. Self Service Portal:

Paylocity APP

- APPROVE YOUR TIME <u>EACH WEEK</u> <u>(MANDATORY)</u>
- REVIEW YOUR PAYCHECK <u>EACH WEEK</u>
- VIEW SCHEDULES
- UPDATE PERSONAL INFORMATION
- VIEW PAYSTUBS, W2's, etc.
- CHECK COMMUNITY FOR UPDATES
- AND MORE….

Self Service Portal

www.PAYLOCITY.com

- UPDATE YOUR TAX EXEMPTIONS
- DIRECT DEPOSIT INFORMATION
- COMPLETE OPEN ENROLLMENT FOR INSURANCE
- COMPLETE 401K ENROLLMENT
- AND MORE…….

(These items can only be seen/completed at Paylocity.com not in the App)

FYI…You can simply access your Self Service Portal (www.paylocity.com) by logging into your app > click the three lines in the top left corner > scroll down to bottom of the list and select More > than click on Pylocity.com

How to Add/Edit Direct Deposit Info and Update Demographic Info

**Add or Edit
Direct Deposit**

◯ paylocity

**Mobile:
Updating Demographic
Information**

◯ paylocity

This does not apply to Rapid Cards
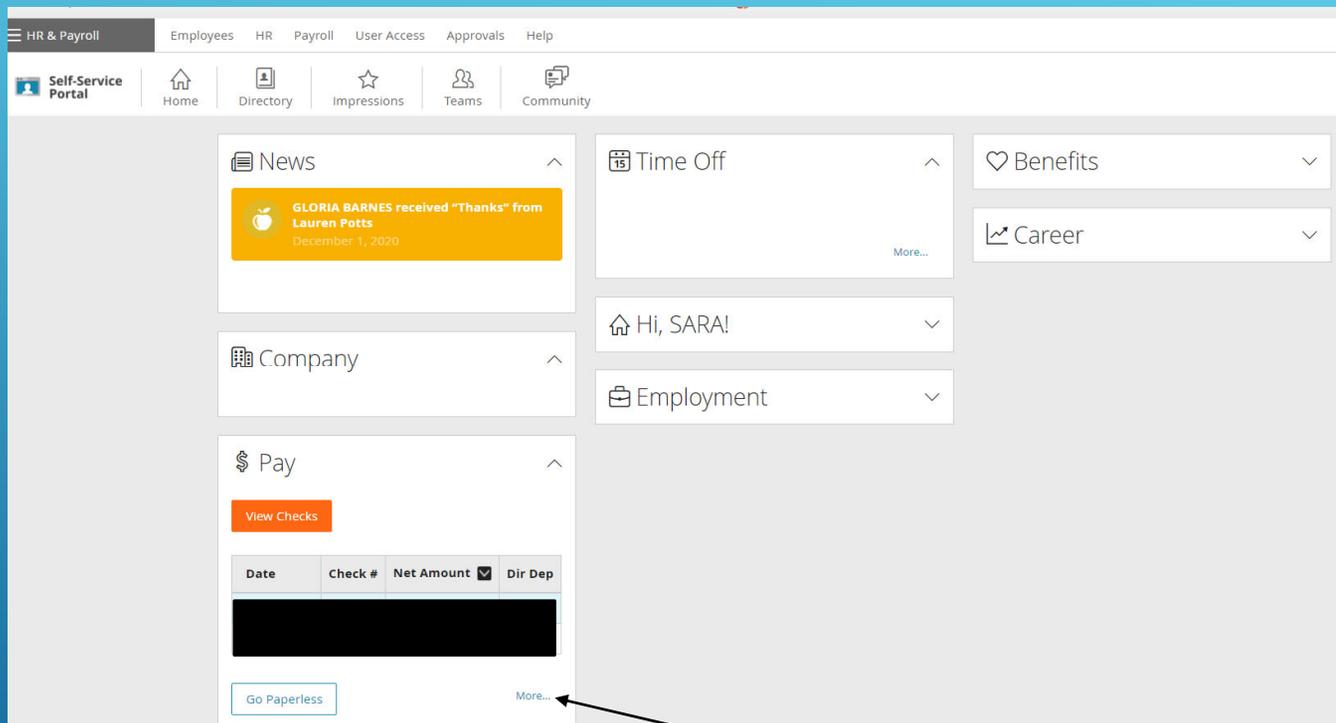
https://use.vg/vvl0s6

https://use.vg/VgKfUv

Right Click on each link and select open
hyperlink to view a video on how to make
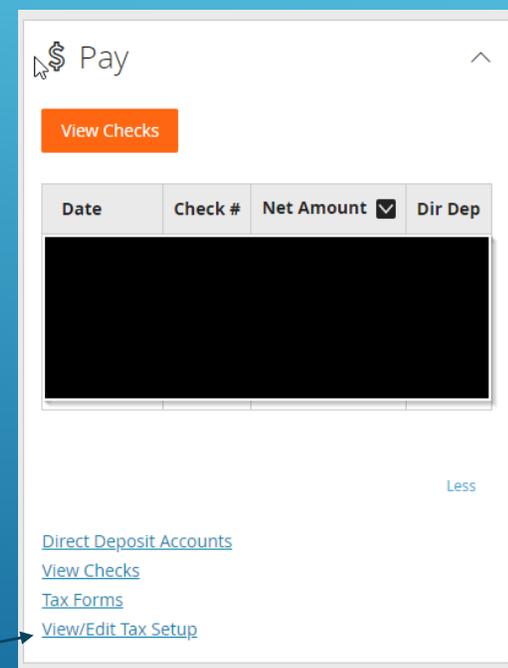these changes in Paylocity.

How to update your Tax Exemptions

Step 1: Log into you Self Service Portal at Paylocity.com, not the app.

Step 2: Look for the Pay tile and click More....

Step 3: Select View/Edit Tax Setup

Step 4: Depending on if you want to update your
Federal Income Tax or your State and Local tax. You
will select the hyperlinked blue writing for your update.

Tax	Filing Status	Dependents	Other Income	Deductions	Type	Amount	Percentage	Pre-Filled W-4
FITW - Federal Income Tax	Single	$0.00	$0.00	$0.00	Default	Default	Default	View

State and Local Taxes

☑	Tax Code	Filing Status	Exemptions 1	Exemptions 2	Type	Amount	Percentage
☐	GA - Georgia SITW	Single	0	0	Default	Default	Default

W-4 Tax Form   **Blank Federal W-4 Form**

- Filing Status   -- Select --
- Multiple Jobs or Spouse Works (Line 2c) ⓘ   ☐
- Dependents (Line 3) ⓘ $ 0.00
- Other Income (Line 4a) ⓘ $ 0.00
- Deductions (Line 4b) ⓘ $ 0.00
- Extra Withholding (Line 4c) ⓘ   Default Amount

Amount $ 0

Percentage   % 0

This is what your
Federal form will look
like.

This is what your State
and Local form will
look like.

- Filing Status   -- Select --
- Exemption 1   0
- Exemption 2   0
- Amount Type   Default Amount

Amount $ 0

Percentage   % 0

Step 6: Fill out your Filling Status and dependent amounts.

*If you wish to file Exempt you will select Blocked under Extra withholdings on your W4 and the same for your State and local under Amount Type.

W-4 Tax Form — Blank Federal W-4 Form

- Filing Status — -- Select --
- Multiple Jobs or Spouse Works (Line 2c) ⓘ ☐
- Dependents (Line 3) ⓘ — $ 0.00
- Other Income (Line 4a) ⓘ — $ 0.00
- Deductions (Line 4b) ⓘ — $ 0.00
- Extra Withholding (Line 4c) ⓘ — Default Amount
- Amount — $ 0
- Percentage — % 0

- Filing Status — -- Select --
- Exemption 1 — 0
- Exemption 2 — 0
- Amount Type — Default Amount
- Amount — $ 0
- Percentage — % 0

- Extra Withholding (Line 4c) ⓘ — Blocked

- Amount Type — Blocked

Step 7: Once you have made your updates you will click Save and your selections will be saved.

Save | Save & Return | Cancel

*** IF you would like to change your taxes for supplementary checks. Ex: Bonus*** Please see next page.

If you have any questions on how to make your selections:
- Review the Notes section for each form
- Download the Blank Form and read through it
- Consult with your preferred tax agent.
- These do not reset annually

*** IF you would like to change your taxes for supplementary checks. Ex: Bonus***

Federal Tax Details

Launch Guided Tour

| Tax Code | Federal Income Tax | W-4 Tax Form | Blank Federal W-4 Form |

how much to withhold from your pay for Federal Income Taxes.

With "2019 or Prior" selected at the top of the page, the fields listed match up with the 2019 and prior Form W-4. With "2020 or later" selected, the fields listed will match up with the current Form W-4.

Once you switch to the current Form W-4, you will not be able to go back to the 2019 and prior form, per IRS regulations.

Notes

- **Filing Status** Married
- **Multiple Jobs or Spouse Works (Line 2c)** ⓘ ☑
- **Dependents (Line 3)** ⓘ $ 2000.00
- **Other Income (Line 4a)** ⓘ $ 0.00
- **Deductions (Line 4b)** ⓘ $ 0.00
- **Extra Withholding (Line 4c)** ⓘ Default Amount Learn More

Supplemental Check -- Select --

-- Select --
Taxes Blocked on Supplemental Checks
Supplemental Flag has no effect on this tax
Use Employee Add'l Taxes only for Supplemental Checks
Use Supplemental Tax Rate - Code
Use Supplemental Tax Rate plus Employee Additional Taxes

Amount $ 0

Reciprocity Code

Percentage % 0

Save   Save & Return

Please select the scenario of your chose and select save once you are in the portal to update your tax information. This can be applied to both your Federal and State Tax exemptions.