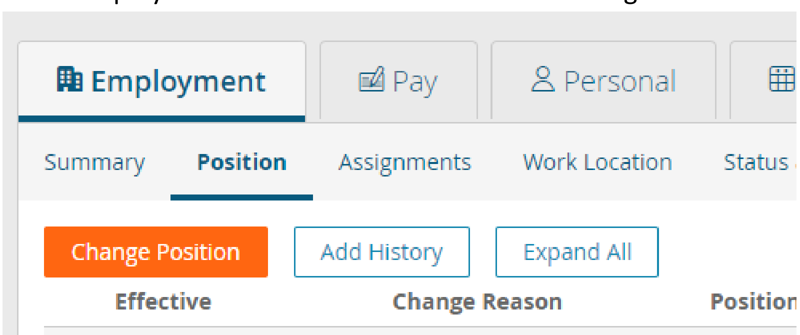
INPUTTING PERSONNEL CHANGES INTO PAYLOCITY – FOR MANAGERS

This process takes the place of changes requested through the previous Personnel Change Info Form. For terminations, refer to the separate document, Inputting Employee Terminations or Resignations into Paylocity. **If the change is not already budgeted, please ensure you have approval from your manager before inputting position and pay changes.**

Requests are input into Paylocity by the manager and HR is notified to review and approve the changes. If you are unsure about any of the selections, select the closest match and leave a note for HR in the Note box on the form to verify the selection.

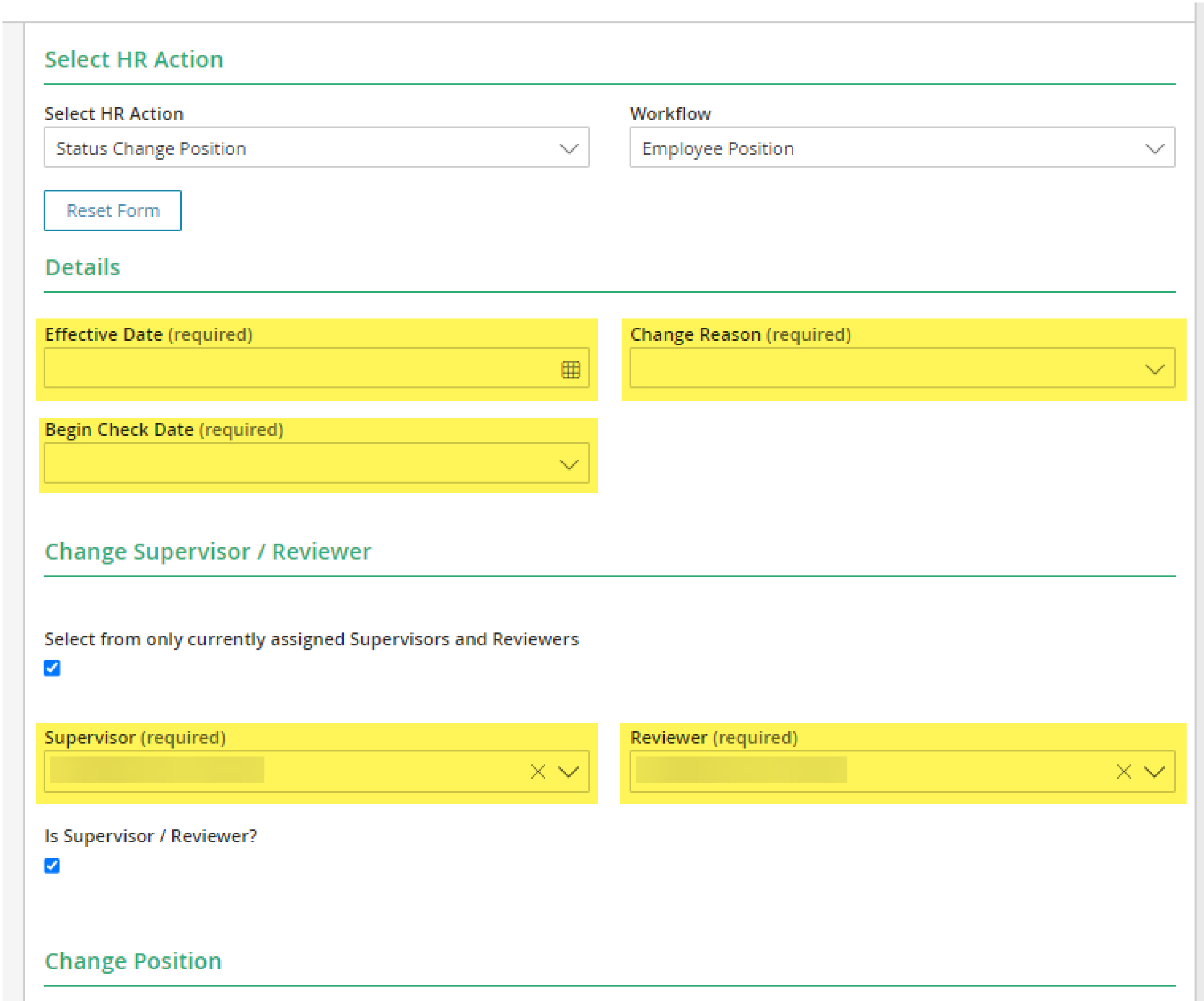
To change job title, supervisor, or department:

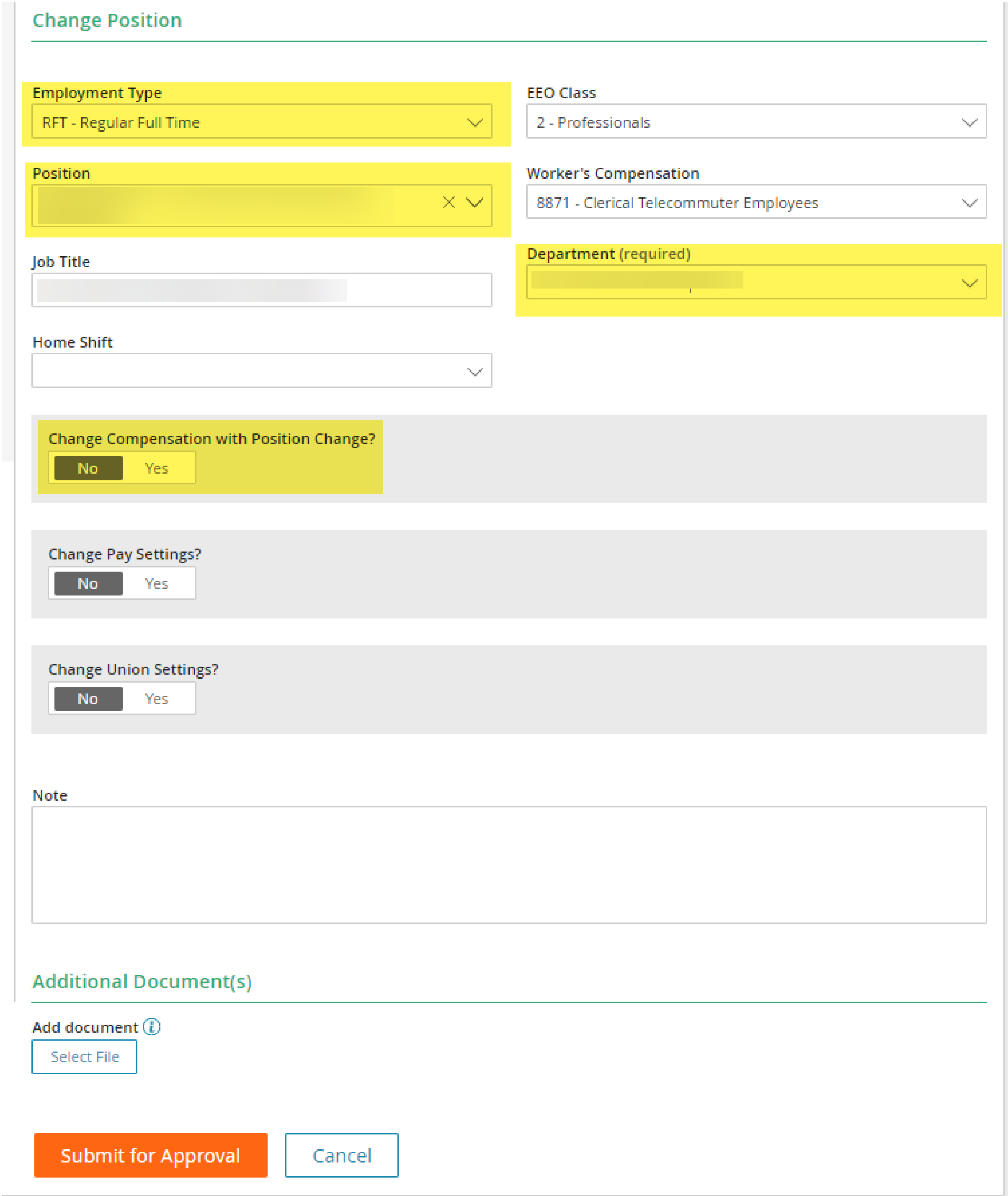
1. Go to HR & Payroll and click on the name of the employee you need to update.
2. Go to Employment > Positions and click on the Change Position button.



   ** If you do not see this option, please contact HR.

3. Complete any of the fields highlighted in the screenshots at the end of this section that apply to the change.
   a. For Begin Check Date, select the biweekly change that covers the effective date of the change.
   b. Select the Position in the dropdown list and the Job Title will update automatically. If the new title is not in the dropdown, manually enter the Job Title and HR will make the appropriate updates when the change is processed.
4. If you are also updating the employee's pay, click Yes under Change Compensation with Position Change and follow the next section of instructions, starting with Step 4.
5. Use the Note field to communicate to HR any details you want to share about the change or the selections made.
6. When all changes have been made, Click on Submit Approval to see a preview of the changes.
7. IMPORTANT: You must click Submit a second time on the preview screen to actually submit the change.
8. HR will receive notification of the change and contact you with any questions.


Select HR Action
Select HR Action
Status Change Position
Workflow
Employee Position
Reset Form
Details
Effective Date (required)
Change Reason (required)
Begin Check Date (required)
Change Supervisor / Reviewer
Select from only currently assigned Supervisors and Reviewers
Supervisor (required)
Reviewer (required)
Is Supervisor / Reviewer?
Change Position

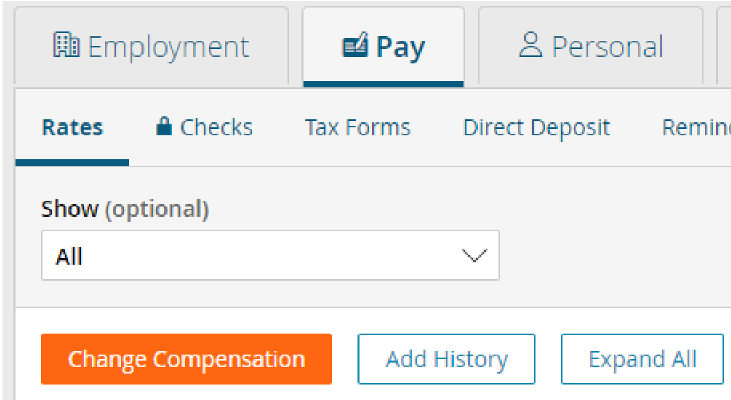


To change compensation (not used for bonuses):

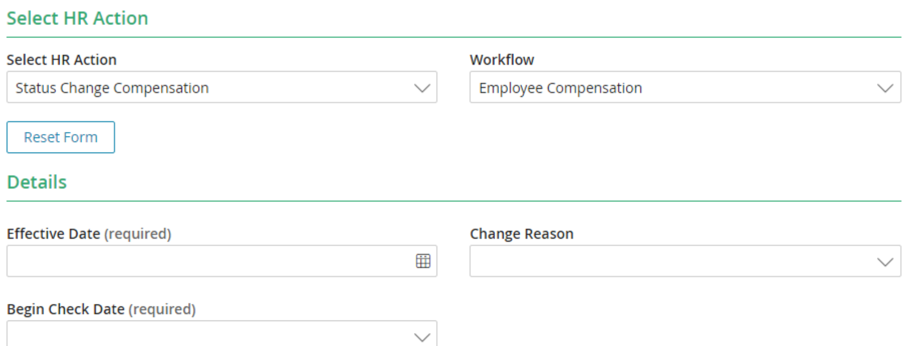
Note: If you are changing title AND pay, start with the first section to streamline the process.

1. Go to HR & Payroll and click on the name of the employee you need to update.

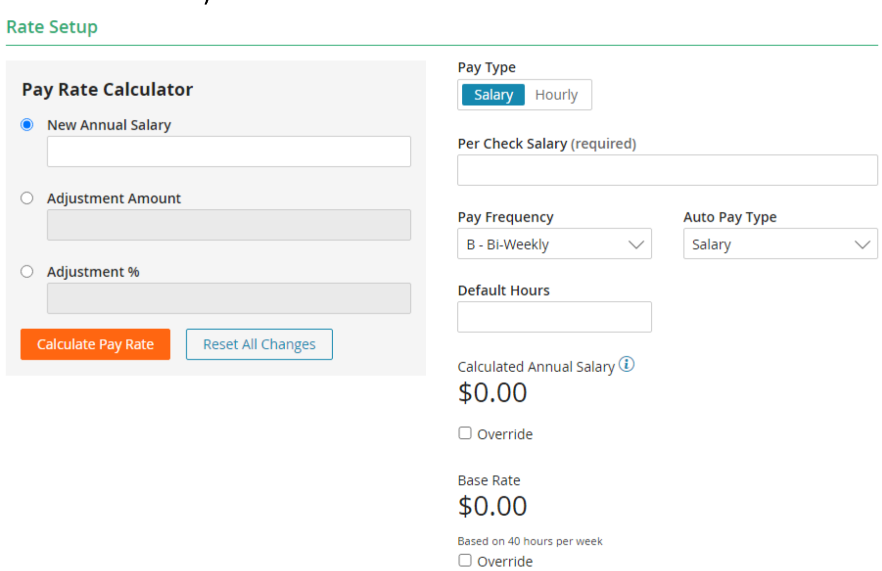
2. Go to Pay > Rates and click Change Compensation.



3. Complete the Effective Date, Change Reason, and Begin Check Date.
   a. For Begin Check Date, select the biweekly change that covers the effective date of the change.



4. Select Hourly or Salary for Pay Type.
   a. For Hourly Employees, type in the new Base Rate.
   b. For Salary Employees, input their New Annual Salary and click Calculate Pay Rate. The Base Rate will update with the correct rate based on the annual salary. (Annual Salary / 2080 = Base Rate).



5. **REQUIRED**: Please upload the approval received from Amanda Savage or Janet Skeens by clicking Select File under Additional Document(s). Select the approval document and open.

6. When all changes have been made, Click on Submit Approval to see a preview of the changes.
7. IMPORTANT: You must click Submit a second time on the preview screen to actually submit the change.
8. HR will receive notification of the change and contact you with any questions.