



August 29, 2007

## **Paylocity — Paylocity WebPay**

Paylocity offers a web-based payroll and human resources system that is designed to be a nearly hands-off system for use by individual businesses while allowing supervision by the business' public accountant. This includes the ability for accounting firms to access multiple client business payroll information from a singular interface and import data into write-up applications. The system's payroll functions include support for any number of client departments and subsidiary units with unlimited employees, pay rates and deductions, and supports all federal and state payroll taxes and withholding requirements, including Puerto Rico.

Paylocity also offers complete tax reporting and liability payment services. The WebPay system also includes extensive human resources capabilities, such as accruals and benefits management; detailed personnel files; and a company Intranet that enables employee self-service functions, posting of employee manuals and orientation information, company directory listings, customized links and other features. Paylocity offers a pricing model that reflects the Software as a Service (SaaS) model, which means the cost associated to implement the Paylocity solution is not cost prohibitive. The Paylocity solution can be implemented for as little as \$40 per payroll for a given company. Direct deposit, tax filings and the accountant overview functions are included.

### **EASE-OF-USE/DATA ENTRY – 5 Stars**

WebPay first opens within the user's Internet browser and, for accountants managing multiple client companies, provides an initial company selection screen that also allows setting up company groups and client user accounts. Other options for Reports and Security functions are also provided. Multiple company search functions are provided, including a pull-down selection list. The system then opens into the Company management window, which provides a beautifully designed web-based interface that defaults to the company's internal employee website and displays company news, notices, holiday reminders and other items that can be easily customized by the user. Features of the accounting system are available in a left-side navigation menu, with primary functions divided into categories for Employees, Payroll, Company, Finance, Reports and Tools.

The system's employee selection list provides a sortable spreadsheet view that offers more than one dozen search and filter options, including name, SSN, supervisor, division, department, pay group, frequency and employment type. Within individual employee records, WebPay offers tabbed information data-entry screens for personal and work information, payroll and deduction setup, pay history, time off, and custom fields. All data-entry screens are very intuitive with fields that include selection lists and other intelligent features. Other data sections include information on dependents, emergency contacts, employee "biography" (which could be used for performance review data), and employee pictures. WebPay does not provide checklists or wizards for entry of new client data, but the process is straightforward, and most data is entered on a single screen.

Payroll processing functions provide simple batch setup for departments, employee groups or other pay frequencies, while the system's QuickPay/Detail function offers a simplified single-screen interface for entering time data for up to 50 employees within a pay run from a single screen. Time data can also be imported from spreadsheets or time clock systems.

### **FEATURES – 5 Stars**

WebPay automates most processing functions, with users primarily entering time data and editing settings, and having access to reporting and analysis functions. When payrolls are processed, Paylocity handles printing and delivery of checks and stubs, or the processing of direct deposits to any number of accounts per employee (or payroll debit cards). The vendor also provides compliance services, including reporting and payment of local, state, federal quarterly and year-end liabilities. Third-party payments can also be sent for garnishments, insurance and other voluntary deductions.

WebPay can track multiple departments and cost centers within a business and allows an unlimited number of employees, pay types, multi-states, deductions, benefits, time-off accruals and pay groups. Retirement accounts, HSAs, cafeteria plans, workers' compensation tracking and reporting, and other deductions can be managed through the program, including itemized tracking of employer contributions and employee vesting.

The system allows up to 40 user-defined fields for tracking training, skills or other information.

A variety of easy-to-use tools are included, such as gross-up and gross-to-net calculators, benefit gross-ups, pre-scheduling of upcoming pay changes, global changes, labor allocation, and user-defined security features.

WebPay's human resources functions provide compliance support for EEO, FMLA, OSHA, COBRA and HIPPA regulations, while enabling the management of benefits and time-based accruals. Reminders and alerts can be set up to remind administrative users of task due dates. WebPay includes an audit trail feature that tracks and verifies employee changes. An optional Unemployment Cost Management service is also available.

An optional Employee Portal module allows client employees to view pay stubs; request time off; make deduction changes; edit direct deposit preferences; or access company policies, handbooks and other documents. A Manager Self-Service function provides access to information on their subordinates based on security settings and the user's role. As an online system in general, authorized administrative users (accountant or business) have access to payroll and HR data at any time.

#### REPORTING CAPABILITIES – 4.5 Stars

Reporting functions offer search and filtering capabilities with the ability to save reports into groups or batching. Customizable report libraries are available for individual companies and for the multi-company accountant function, providing access to nearly 50 standard reports and forms, including pay period reporting, summaries, quarterly and year-end reports, benefits management, earnings, employee data, third-party sick pay and many others. Reports can be viewed on-screen prior to printing or can be saved to PDF, \*.CSV,

Excel, HTML, Image and XML formats. With the company's tax compliance service, all liabilities payments and forms submissions are handled by the vendor. Regular check runs are printed by the vendor, with the business or accountant having the ability to print individual checks as needed. An optional in-house check printing option is also available.

#### INTEGRATION/IMPORT & EXPORT – 5 Stars

WebPay can import employee time data from more than 200 clock and point-of-sale systems, and also includes two-way integration with iEmployee, Infotronics, Kronos, Qquest and TimePro. GL interfaces are provided for QuickBooks, Peachtree, MAS 90/200, Activant and Dynamics GP (formerly Great Plains).

Additional interfaces are available for retirement plans and financial services providers. The system can export time data into Excel format, and can output reports into PDF, \*.CSV, \*.XLS, HTML, Image and XML.

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#### RELATIVE VALUE – 4.5 Stars

WebPay offers comprehensive payroll and HR functions in a system best suited for use directly by businesses that outsource their payroll, but whose external public accountants wish to be able to access, edit, analyze and import payroll data into other accounting systems. The system provides excellent access and controls for professional accountants who are overseeing the outsourced payroll for multiple business clients, while providing intuitive user interfaces and data entry that can be performed either by the accountant or the business. Employee and manager self-service interfaces add further value, allowing workers to access personal pay information. Phone-based support and free web-based and classroom training sessions are included.

2007 Overall Rating: 5 Stars

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