

Benefits through Paylocity

In Feb. 2021, the Archdiocese of San Antonio transitioned to using Paylocity when it comes to enrolling in benefits.

Please email Human Resources at hr@archsa.org with any questions

This step-by-step guide is for

- New Hires wanting to enroll in benefits
- New Hires wanting to waive benefits
- Employees going through a life event to either add or remove coverage through the Archdiocese
- Choosing a beneficiary for life insurance (if applicable)

Enrolling in Benefits or making changes to your current Benefits

- 1) Log into your employee Paylocity account: www.paylocity.com
 - a. Ask your bookkeeper what your Paylocity login is if you do not know it
- 2) From your Self-Service Portal or Time and Labor, click HR & Payroll Tab
 - a. Be sure to view your Benefit Guide that provides breakdown of all the benefit information

Archdiocese of San Antonio [59200] paylocity 1

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Pension Plan
Onboarding Orientation

Pay

Date	Check #	Net Amount	Dir Dep
01/29/2021	12536	hidden	✓

Go Paperless More...

Time Off

Type	Available	Last Bal
LYS75 - LAY SICK 7.5 HOURS	0.00 Hours	0.00
LYV75 - LAY VACATION 7.5 HOURS	0.00 Hours	0.00

Time Off History More...

Time Entry
Launch Time & Labor
Launch Time & Labor

Benefits
YTD Compensation
Retirement Plans
Deduction Amounts

Career
Apply for Open Position

3) Click the "Enterprise Benefits" Tab

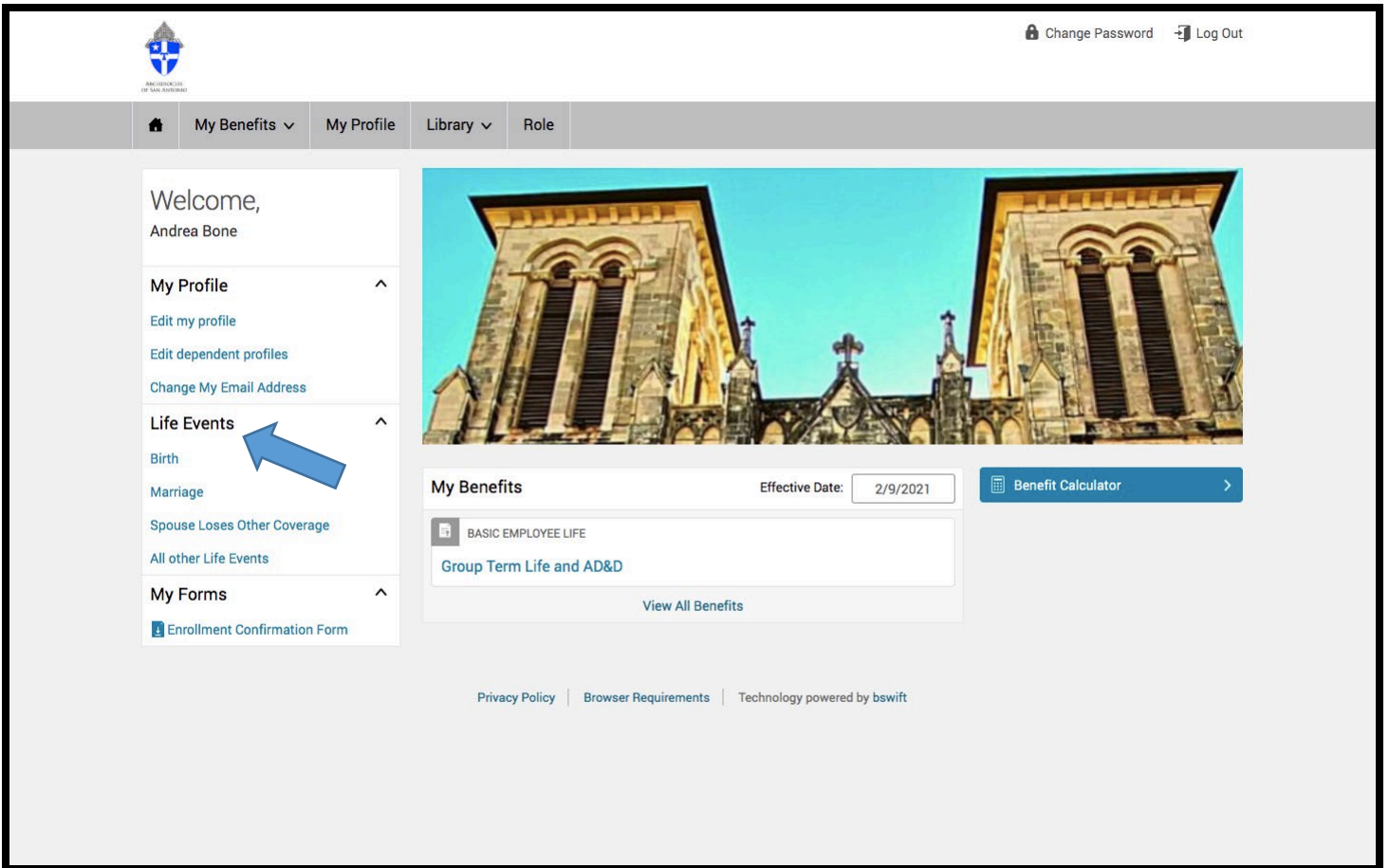
The screenshot shows the Paylocity self-service portal interface. On the left, a navigation menu is open, listing various options: Community, Self Service Portal, HR & Payroll, Learning, Performance, Time & Labor, and Enterprise Benefits. A blue arrow points to the 'Enterprise Benefits' option, which is highlighted with a red heart icon. The main content area is dimmed, showing sections for Pay, Time Entry, Time Off, and Employment. The 'Pay' section includes a table with the following data:

Date	Check #	Net Amount	Dir Dep
01/29/2021	12536	hidden	✓

The 'Time Off' section includes a table with the following data:

Type	Available	Last Bal
LYS75 - LAY SICK 7.5 HOURS	0.00 Hours	0.00
LYV75 - LAY VACATION 7.5 HOURS	0.00 Hours	0.00

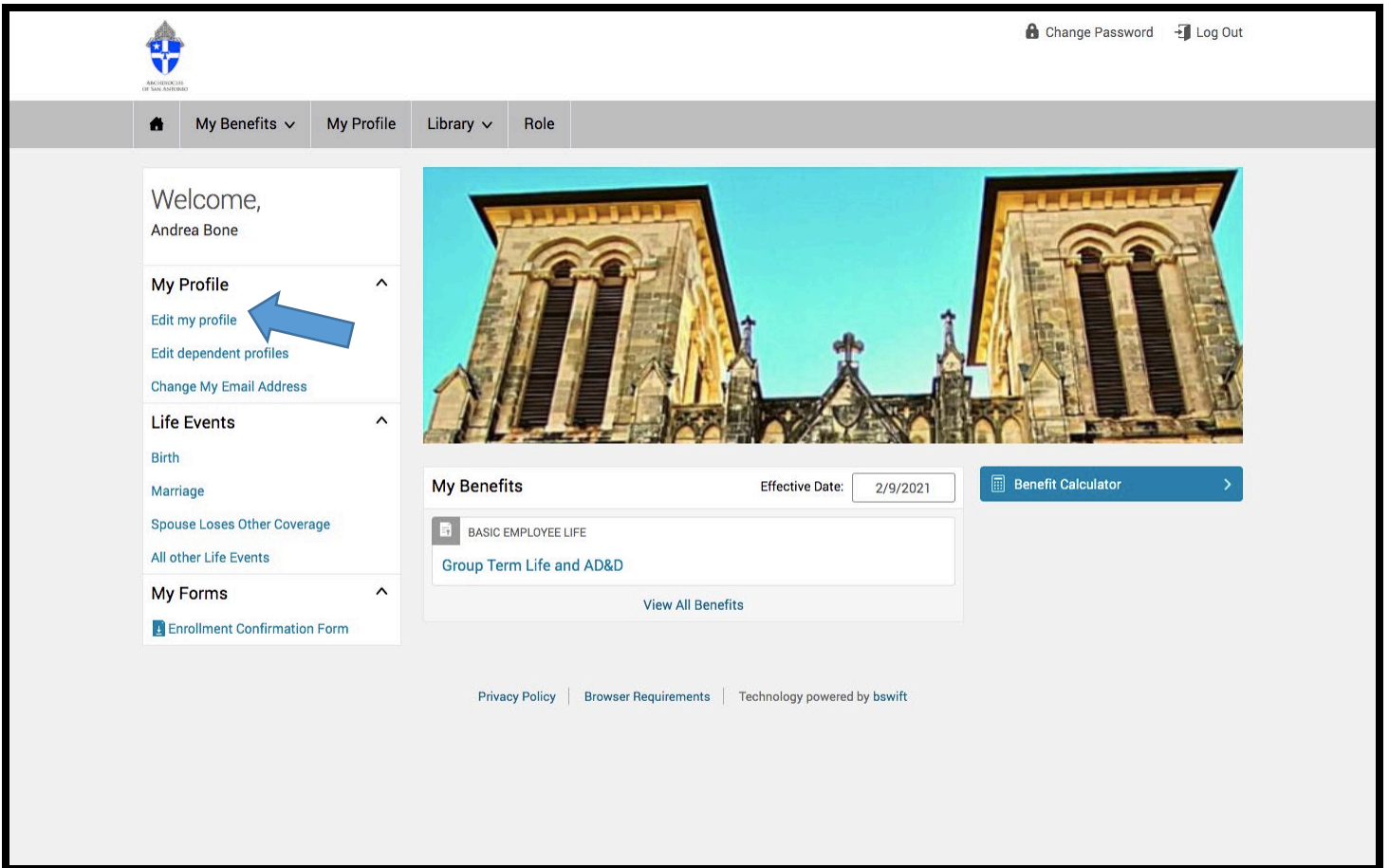
Other visible elements include a 'Launch Time & Labor' button in the Time Entry section, a 'YTD Compensation' chart in the Benefits section, and an 'Apply for Open Position' link in the Career section.



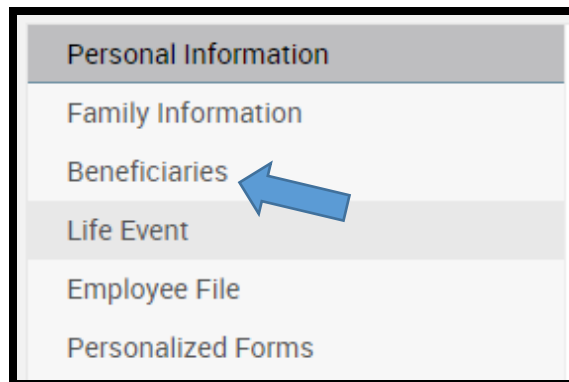
- 4) Under life events, you will either enroll in coverages, make changes, or unenroll in benefits
 - a. Choose what benefits you or do not want
 - b. Upload the documentation
- 5) Send to HR for approval

Designating a Beneficiary

- 6) On your home page, click “edit my profile”



7) Then click, Beneficiaries



8) Add your Beneficiary Information and Press "Save"

Relationship	Name
(Employee)	My Estate

[+ Add Beneficiary](#)



Beneficiary Designation

Basic Employee Life

Beneficiaries

Name	Percentage
My Estate (Employee)	<input type="text"/> %

Total: 0.0000% (must equal 100%)

[v Add Secondary Beneficiaries](#) (optional)

Name	Percentage
My Estate (Employee)	<input type="text"/> %

Total: 0.0000% (must equal 100%)

