

# Troubleshooting Employee Self-Service (ESS)

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A helpful guide for when employees come to you with questions regarding the Paylocity Employee Self Service Portal



## Table of Contents:

*Hold down CTRL and left click the link below that applies to your need.*

- [01 Is the Employee Having Access and/or Registration Trouble?](#)
- [02 Are You Working with a Rehire or Reactivated Employee?](#)
- [03 Accessing User Access |User Accounts](#)
- [04 Employee Access to Time and Labor](#)
- [05 Has the employee forgotten their password?](#)
- [06 Want to Give Your Employee a Temporary Password?](#)
- [07 Is the Employee Locked Out?](#)
- [08 Does the employee need to update any of their registration information?](#)

## 01 - Is the Employee Having Access and/or Registration Trouble?

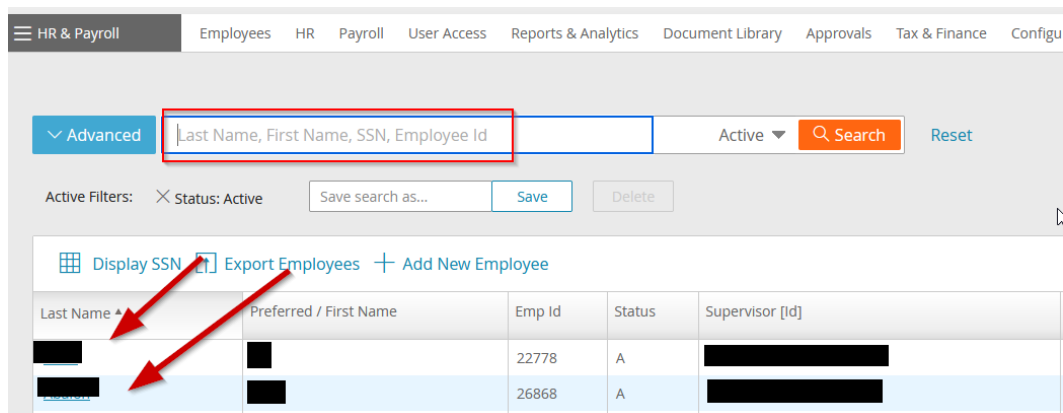
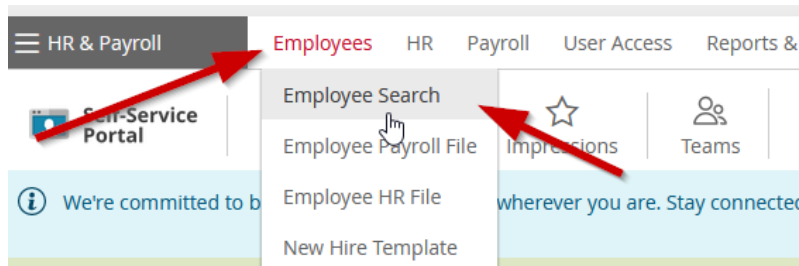
This includes key items to keep in mind that can prevent an employee from registering/accessing the Employee Self Service Portal:

- Only employees who are **ACTIVE** in Paylocity can register
- Email notifications are sent to their personal and/or work email address
- Non-Employees do not have access to the portal
- Employees must have the following information populated in the system
  - Date of Birth
  - Social Security Number

To verify the employee's last name and SSN are entered in correctly and matches what the employee is attempting to use to register, follow the steps below.

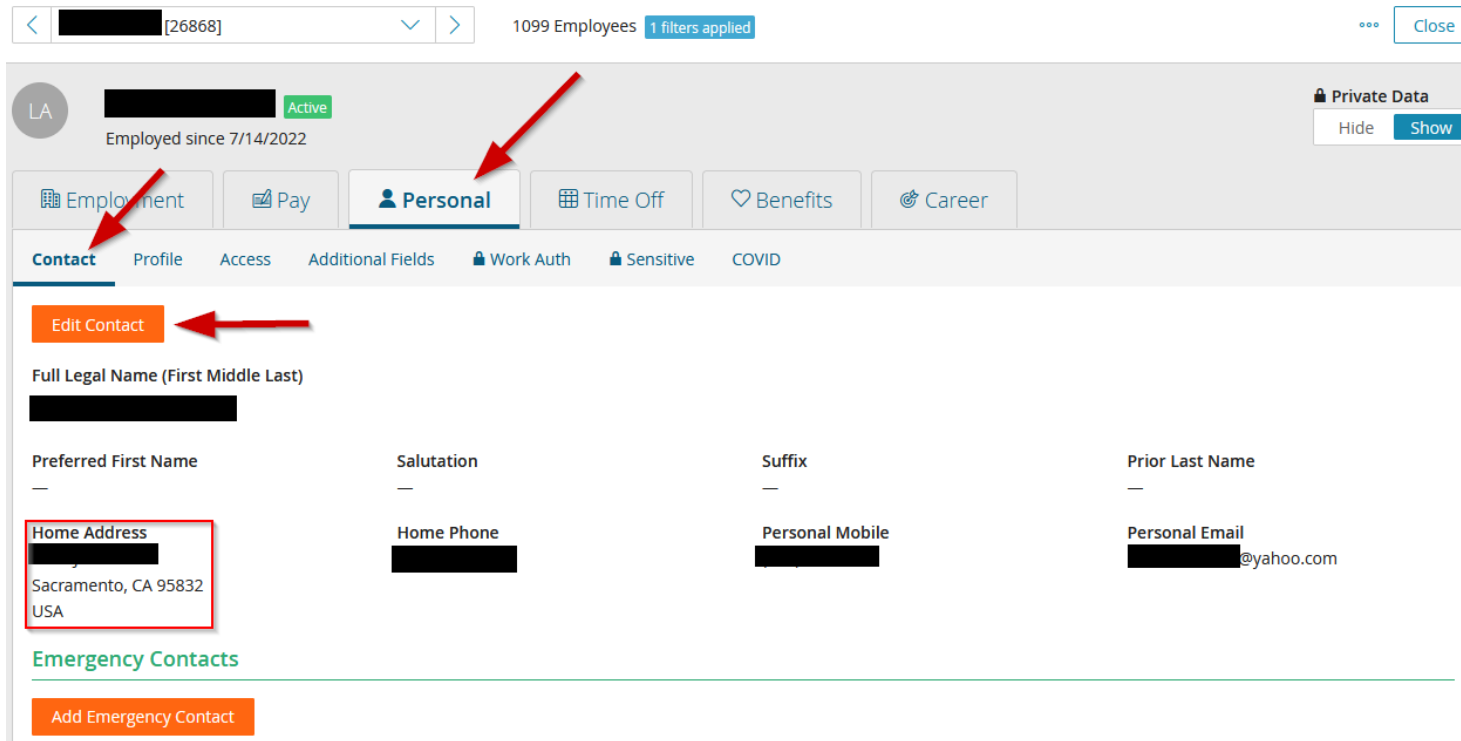
First you need to find the employee in question

Employee Search | enter in the employee ID or name | click on their name



Then to view an employee's address and last name

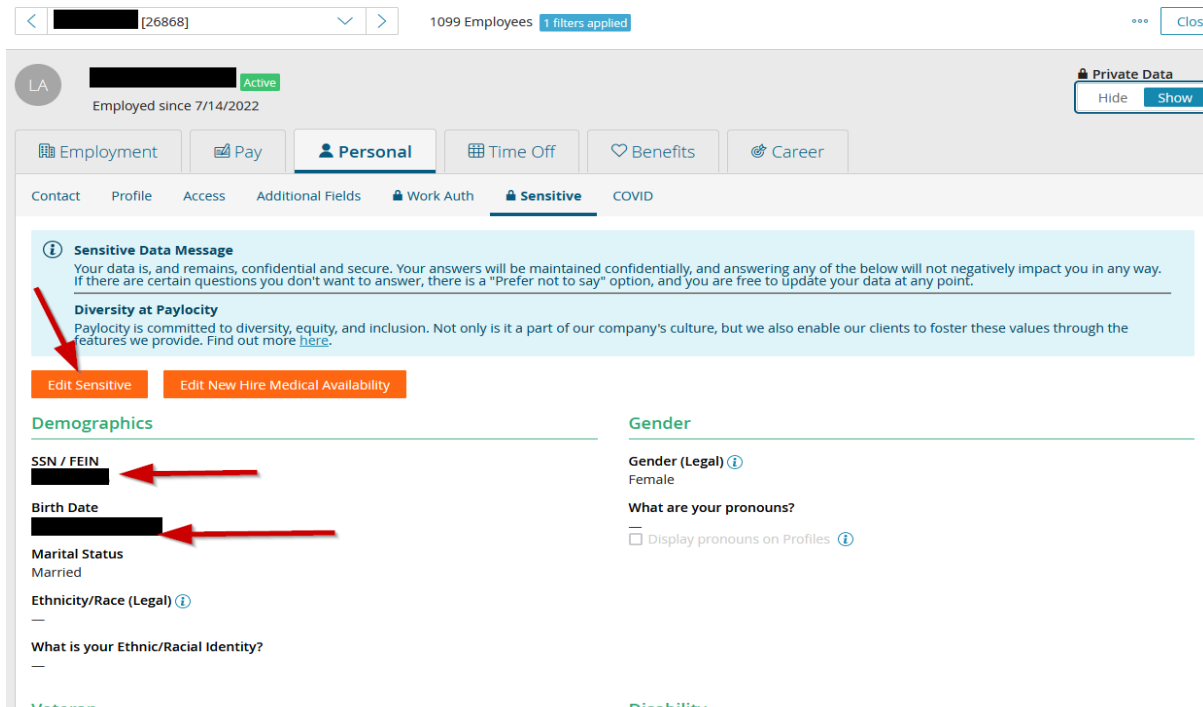
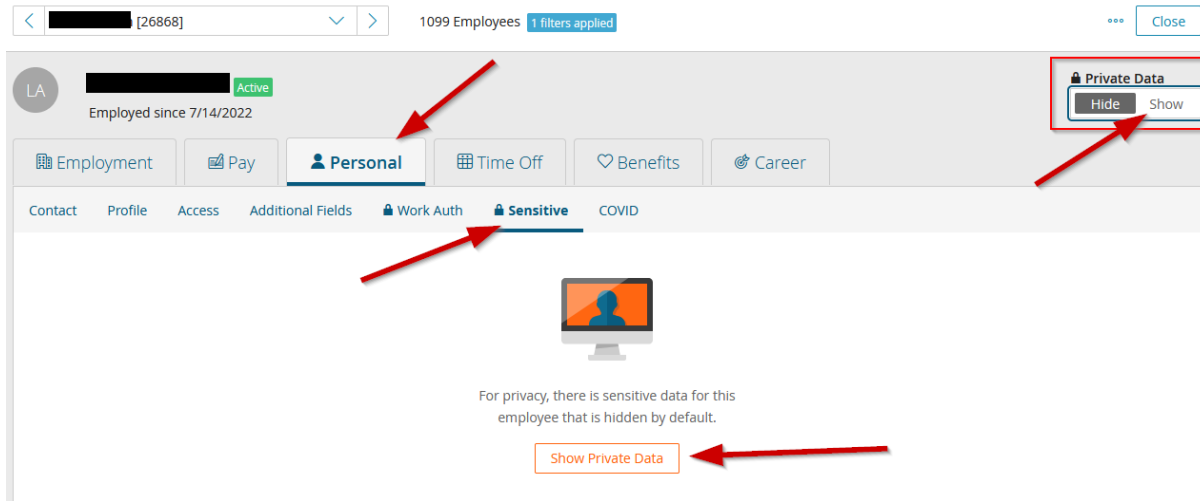
Personal | Contact – if you need to update their address click Edit Contact



The screenshot shows the Paylocity employee profile interface. At the top, there is a search bar with a dropdown menu showing "[26868]" and a "Close" button. Below the search bar, it indicates "1099 Employees" and "1 filters applied". The profile header includes a circular icon with "LA", a name field, an "Active" status, and "Employed since 7/14/2022". A "Private Data" toggle is set to "Show". The main navigation bar contains tabs for "Employment", "Pay", "Personal", "Time Off", "Benefits", and "Career". The "Personal" tab is selected, and its sub-menu includes "Contact", "Profile", "Access", "Additional Fields", "Work Auth", "Sensitive", and "COVID". The "Contact" sub-tab is active, displaying an "Edit Contact" button. Below this, the "Full Legal Name (First Middle Last)" field is redacted. The "Home Address" field is highlighted with a red box and contains the text "Sacramento, CA 95832 USA". Other fields include "Preferred First Name", "Salutation", "Suffix", "Prior Last Name", "Home Phone", "Personal Mobile", and "Personal Email" (ending in "@yahoo.com"). At the bottom, there is a section for "Emergency Contacts" with an "Add Emergency Contact" button.

Finally, to verify the employees SSN and Date of Birth

Personal | Sensitive – make sure to set Private Data to Show | if you need to update their SSN or Date of Birth click Edit Sensitive

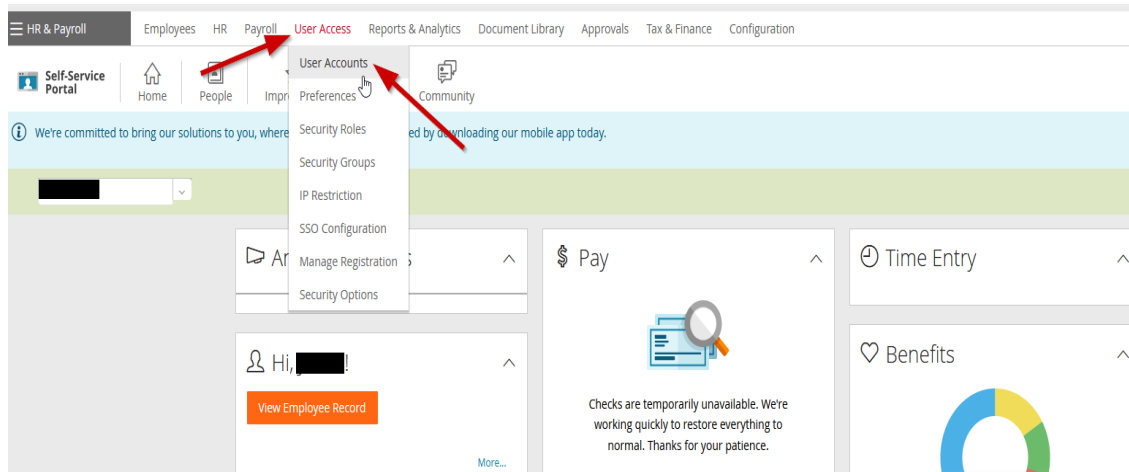


## 02 - Rehire or Reactivated Employee Assistance Troubleshooting

If an employee comes to you saying they cannot register themselves on the new ESS portal, first you will want to check their user information at the company level as the company administrator.

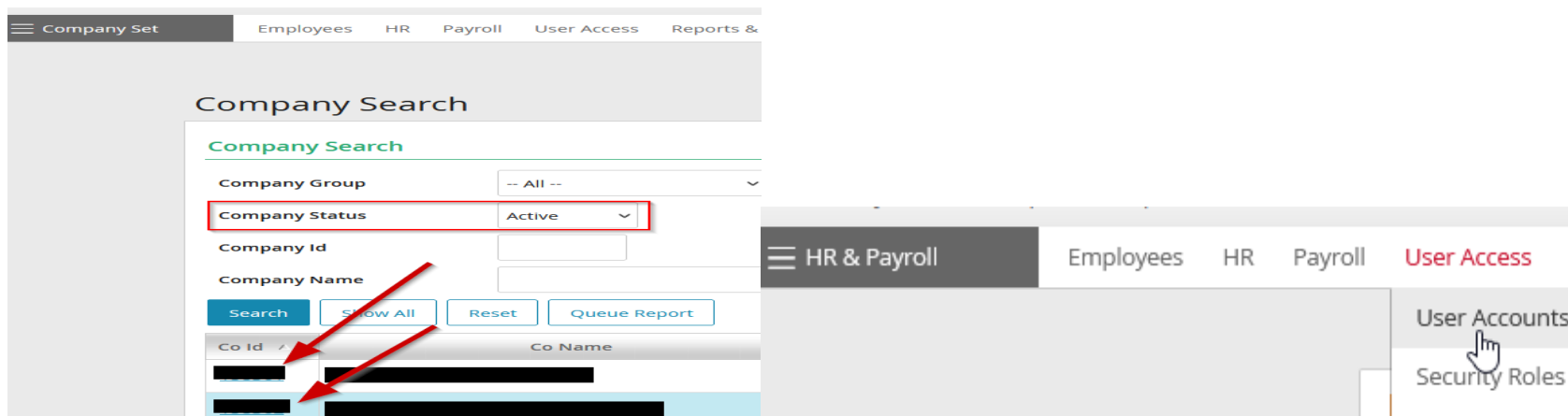
To do this you will need to log into your company as the administrator

User Access | User Accounts

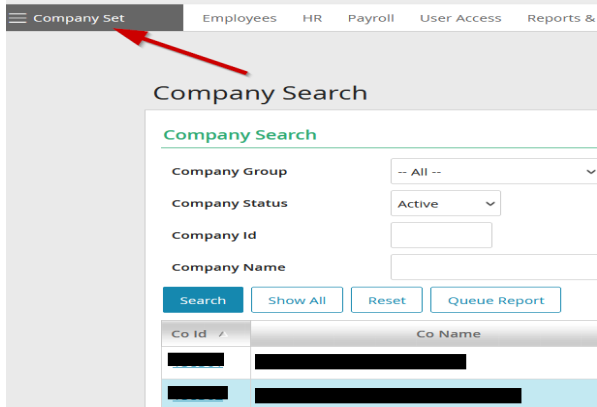


**Please note:** If you have more than one client ID with Paylocity, you will need to go to the individual company ID to view their user account. On the Company Search screen, make sure the Company Status is set to **ACTIVE** in order to view your IDs | click the Co ID you need to access

## 03 - Accessing User Access | User Accounts



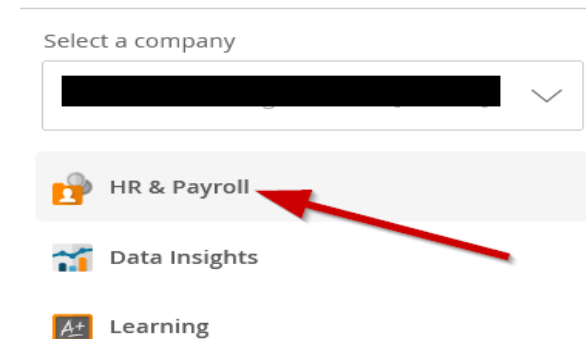
Another way to select the Company ID from the Company Search screen  
Click on the Company Set app switcher



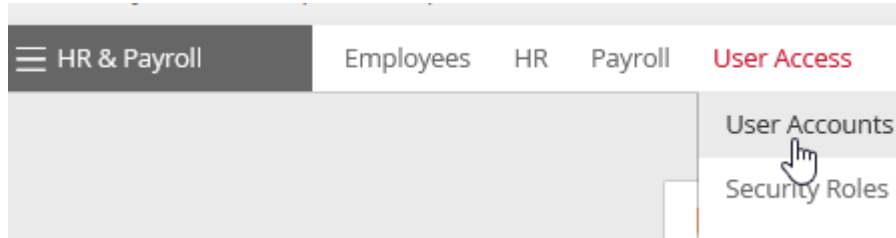
Once the drop down opens, select the company you want to view.



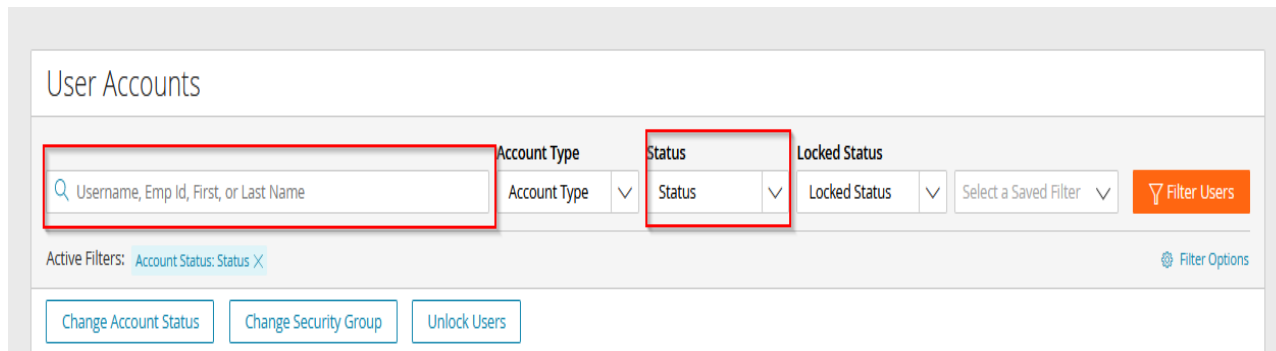
Select HR & Payroll and you'll be taken to the company code that you've selected.



Once you land in the company database, click on the User Access dropdown and select User Accounts.



Once the User Accounts screen opens, you'll be able to search for the employee by their Employee ID, Last Name or First Name. Be sure to have the Status set to **STATUS**.



Once you have located the employee, if their Account Status is marked **Disabled**, you will need update and enable their access.

Account Status	Locked Status	Password
Disabled		Reset
Enabled		Reset
Enabled		Reset



Check the box to the left of their Employee ID Number and click on the **Change Account Status** button.

	Change Account Status	Change Security Group	Unlock Users		
<input type="checkbox"/>	Emp Id	User Accounts	Username	Security Group	Account Status
<input type="checkbox"/>	<a href="#">22033</a>	[REDACTED]	[REDACTED]	Employee	<a href="#">Enabled</a>
<input type="checkbox"/>	<a href="#">22555</a>	[REDACTED]	[REDACTED]	Employee	<a href="#">Disabled</a>

Select Enabled and Apply Changes

### Change Account Status

You will immediately change the Account Status of 1 account(s) to:

Enabled  
 Disabled

[Apply Changes](#) [Cancel](#)

Once the employees account is enabled, status click on their Emp ID. You'll navigate into the setup of the employee's user account.

### User Accounts




test Account Type Status Locked Status Select a Saved Filter Filter Users

Active Filters: Account Status: Status Filter Options

	Change Account Status	Change Security Group	Unlock Users				
<input type="checkbox"/>	Emp Id	User Accounts	Username	Security Group	Account Status	Locked Status	Password
<input type="checkbox"/>	<a href="#">26712</a>	[REDACTED]	[REDACTED]	Employee	<a href="#">Enabled</a>		<a href="#">Reset</a>
<input type="checkbox"/>	<a href="#">WB1</a>	Pcty Test User1	PUser1	Web Benefits Test EE	<a href="#">Enabled</a>		<a href="#">Reset</a>

While there, review the **Account Deactivation Date** Field. This should be blank for active employees. If a date is in place, delete the date and click Save & Return

### Employee User Account Details

Account Status	Enabled <input checked="" type="checkbox"/> Locked Out <input type="checkbox"/>
<b>Account Deactivation Date</b>	<input type="text"/>  
• Security Group	Web Benefits Test EE 
Partner Billing	<input type="checkbox"/>
Exclude from Company Directory?	<input type="checkbox"/>
User Type	Regular User

### Employment Information

Employee Id	WB1
Last Name	User1
First Name	Pcty Test
Preferred Name	
Work Phone	Ext.
Home Phone	
Home Zip Code	14586
Employment Status	WBT
Entity	101CAS - Cassadaga JCC
Project	CAS05 - Cassadaga JCC
Department	CDS01 - Self Sufficiency
Title	

### Notifications - Email Preferences

- Never Email Message Center Only
- Work Email
- Personal Email 

## 04 – Employee Access to Time and Labor

*If you are using Time & Labor and this employee will use Time & Labor, you will need to ensure their user access is set to allow access to Time & Labor.*

Search for the employee | click on their employee ID | Time & Labor Access select the drop down and change to Allow | Save & Return

User Accounts

test Account Type Status Locked Status Select a Saved Filter Filter Users

Active Filters: Account Status: Status X Filter Options

Change Account Status Change Security Group Unlock Users

Emp Id	User Accounts	Username	Security Group	Account Status	Locked Status	Password
26712			Employee	Enabled		Reset
WB1	Pcty Test User1	PUser1	Web Benefits Test EE	Enabled		Reset

Employee User Account Details

Account Status: Enabled  Locked Out

Account Deactivation Date:

Security Group: Web Benefits Test EE

Partner Billing:

Exclude from Company Directory?:

User Type: Regular User

Username and Password

Username: PUser1

Force User Password Change?:

Change Password?:

Password:

Confirm Password:

Multi-Factor Authentication

Enable Multi-Factor Authentication:

Login Challenge Questions

Challenge Lockout Minutes Remaining: None

Challenge Questions:  [Reset Challenge Questions and Answers](#)

Time & Labor Access

Time & Labor Only Access:

Time & Labor Access: Don't Allow

Default Home Page


Default Home Page: Self Service Portal

## 05 - Has the Employee Forgotten their Password?

Another situation that may be hindering their registration process is that they have already registered themselves but forgot. If that is the case, when you search for them on the Company-User Accounts page, they will come up with a Username already filled in. You will be able to give them the Username they have created, however you will not be able to see what their password is.

<input type="checkbox"/>	Emp Id	User Accounts <span>▼</span>	Username	Security Group	Account Status
<input type="checkbox"/>	<a href="#">WB8</a>	Pcty Test Max Salary User8	PUser8	Web Benefits Test EE	Enabled
<input type="checkbox"/>	<a href="#">WB7</a>	Pcty Test User7	PUser7	Web Benefits Test EE	Enabled
<input type="checkbox"/>	<a href="#">WB6</a>	Pcty Test Age Reductions 75 User6	PUser6	Web Benefits Test EE	Enabled

If they do not remember their password, when the employee is on the login page  
 Help | Forgot Password | fill in the information listed



[Help](#)

Welcome

Company ID

Username



Password  
 [Show](#)

Remember My Username

[Login](#)

[Single Sign-On Login](#)

[Forgot Password](#)  
[Register New User](#)  
[Privacy Policy](#)

## Login Help

Close



What do you need help with?

Forgot Company ID

Forgot Username

Forgot Password

[Supported Browsers](#)

[How to Login](#)



[Help](#)

## Forgot your password

To access your account, please enter your information.

Company ID

[Need Help?](#)

Username

[Need Help?](#)

Phone or Email

Text  Voice

I'm not a robot



[Privacy](#) - [Terms](#)

Continue

[Return to Login](#)

Another option would be for you to send an email with a link to the employee that will allow them to reset their password.

Search for the employee | click Reset on the employee you would like to reset their password | click Reset Password

### User Accounts

test X Account Type Account Type Status Status Locked Status Locked Status Select a Saved Filter Filter Users

Active Filters: Account Status: Status X Filter Options

Change Account Status Change Security Group Unlock Users

Emp Id	User Accounts ^	Username	Security Group	Account Status	Locked Status	Password
<input type="checkbox"/> 26712	[REDACTED]	[REDACTED]	Employee	Enabled		Reset
<input type="checkbox"/> WB1	Pcty Test User1	PUser1	Web Benefits Test EE	Enabled		Reset
<input type="checkbox"/> WB2	Pcty Test User2	PUser2	Web Benefits Test EE	Enabled		Reset
<input type="checkbox"/> WB3	Pcty Test User3	PUser3	Web Benefits Test EE	Enabled		Reset

### Password Reset

This will immediately clear the user's current password. An email will be sent to the user that contains a link to reset their Paylocity password. The email link is valid for 30 minutes. This cannot be undone.

Reset Password Cancel

## 06 - Want to Give Your Employee a Temporary Password?

If so, search for the employee and click on their Employee ID number | Upper right corner click the box to Force User Password Change and Change Password | Enter a temporary password to give to them so they can log in.

Once they have logged in, the system will then force them to change their password to something else.

### User Accounts

Search: test X

Account Type: Account Type Status: Status Locked Status: Locked Status Select a Saved Filter Filter Users

Active Filters: Account Status: Status X Filter Options

Change Account Status Change Security Group Unlock Users

Emp Id	User Accounts ^	Username	Security Group	Account Status	Locked Status	Password
<input type="checkbox"/> 26712	[Redacted]	[Redacted]	Employee	Enabled		Reset
<input type="checkbox"/> WB1	Pcty Test User1	PUser1	Web Benefits Test EE	Enabled		Reset

### Employee User Account Details

Account Status: Enabled  Locked Out

Account Deactivation Date: [Calendar Icon]

Security Group: Web Benefits Test EE

Partner Billing:

Exclude from Company Directory?:

User Type: Regular User

### Username and Password

Username: PUser1

Force User Password Change?

Change Password?

Password: [Input Field]

Confirm Password: [Input Field]

Passwords expire after 24 hours.  
Don't re-use passwords across users.

## 07 - Is the Employee Locked Out?

1. If an employee locked themselves out after 5 unsuccessful log-in attempts, the system automatically unlocks after 5 minutes, and the employee can log in again.
2. If you would like to bypass the 5-minute waiting period, you are able to manually remove the locked status. Select the Locked Status dropdown and filter to the Locked status | check the box on the employee(s) you would like to unlock | click Unlock Users | Unlock

User Accounts

Search: Username, Emp Id, First, or Last Name

Account Type: Account Type | Status: Enabled | **Locked Status: Locked Status**

Active Filters: Account Status: Enabled X

Buttons: Change Account Status | Change Security Group | **Unlock Users**

Emp Id	User Accounts ^	Username	Security Group	Account Status	<b>Locked Status</b>	Password
<input type="checkbox"/> 22778			Employee	Enabled		Reset
<input type="checkbox"/> 26868			Employee	Enabled		Reset

User Accounts

Search: Username, Emp Id, First, or Last Name

Account Type: Account Type | Status: Enabled | **Locked Status: Locked**

Active Filters: Account Status: Enabled X | **Locked Status: Locked X**

Buttons: Change Account Status | Change Security Group | **Unlock Users**

Emp Id	User Accounts ^	Username	Security Group	Account Status	<b>Locked Status</b>	Password
<input type="checkbox"/> 22778			Employee	Enabled	<b>Locked</b> Unlock	Reset

+ Add Non-Employee | Update Access Rights | 1 - 1 of 1 items

Unlock accounts

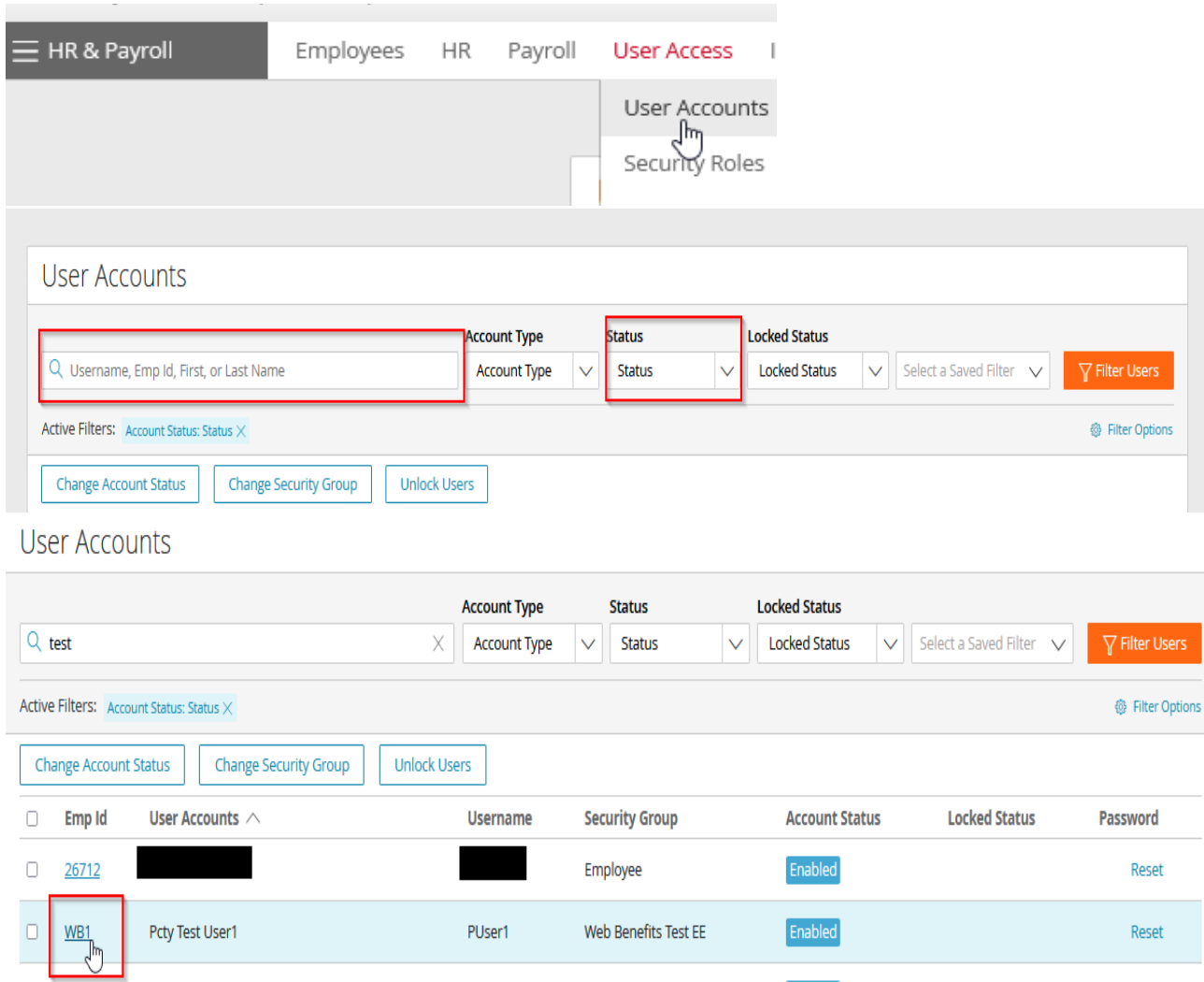
You will immediately unlock 1 account(s).

Buttons: **Unlock** | Cancel



## 08 - Does the Employee Need to Update Any of Their Registration Information?

1. If an employee registers but then comes to you wanting to change their User ID, Password and/or their challenge questions because they did them wrong or is having trouble remembering the answers, you can also accomplish this on the User Accounts pages.
2. First you will need to log into the company as an administrator and go to User Access | User Accounts | search out the employee | click on their Emp ID | upper left corner verify the Account Status is checked Enabled. If not, check this box. The Account Deactivation Date should be blank. If not, delete the date listed | right side of the page update the Username to what they would like to use | check the boxes Force User Password Change? And Change Password | Create a new temporary password – must contain at least 1 uppercase and 1 lower case letter and at least 1 number | If they also need their challenge questions reset, click Reset Challenge Questions and Answers



The screenshot shows the 'User Access' section of the Paylocity system. The navigation bar includes 'HR & Payroll', 'Employees', 'HR', 'Payroll', and 'User Access'. A dropdown menu is open under 'User Access', showing 'User Accounts' and 'Security Roles'. The 'User Accounts' page features a search bar with the placeholder 'Username, Emp Id, First, or Last Name' and a 'Status' dropdown menu. Below the search bar are buttons for 'Change Account Status', 'Change Security Group', and 'Unlock Users'. The main content area shows a table of user accounts with columns for 'Emp Id', 'User Accounts', 'Username', 'Security Group', 'Account Status', 'Locked Status', and 'Password'. The table contains two rows: one for '26712' and another for 'WB1' (Pcty Test User1). The 'WB1' row is highlighted, and a red box is drawn around the 'WB1' text in the 'Emp Id' column.

### Employee User Account Details

Account Status  Enabled  Locked Out

Account Deactivation Date

Security Group

Partner Billing

Exclude from Company Directory?

User Type Regular User

### Employment Information

[Edit Employee Information](#)

Employee Id WB1  
Last Name User1  
First Name Pcty Test  
Preferred Name

### Username and Password

Username

Force User Password Change?

Change Password?

Password

Confirm Password

### Multi-Factor Authentication

Enable Multi-Factor Authentication

### Login Challenge Questions

Challenge Lockout Minutes Remaining None

Challenge Questions  [Reset Challenge Questions and Answers](#)

### Employee User Account Details

Account Status  Enabled  Locked Out

Account Deactivation Date

Security Group

Partner Billing

Exclude from Company Directory?

User Type Regular User

### Employment Information

[Edit Employee Information](#)

Employee Id WB1  
Last Name User1  
First Name Pcty Test  
Preferred Name

### Username and Password

Username

Force User Password Change?

Change Password?

Password

Confirm Password

### Multi-Factor Authentication

Enable Multi-Factor Authentication

### Login Challenge Questions

Challenge Lockout Minutes Remaining None

Challenge Questions  [Reset Challenge Questions and Answers](#)