

Paylocity Roles and Responsibilities

Stage	Role/Owner	Responsibilities
Sales	Employer Admin	Initiate the Sales & Contact conversation with Cocoon.
	Cocoon	Complete Cost, Capabilities, and Limitations conversation. Confirm if Client would like to move forward with the Service.
	Employer Admin/Paylocity	If moving forward with the service, Employer Admin will log in and use the Paylocity Marketplace to initiate the Integration Request with Paylocity.
Implementation	Paylocity	Receive the Marketplace or Service Inquiry, initiate an Implementation Project with Cocoon Integration. API access is generally provided within 2-5 business days.
	Employer Admin	Once API access has been granted by Paylocity, initiate connection in the Cocoon platform via Merge.
Production	Cocoon / Employer Admin	Cocoon will confirm integration is functioning with initial data sync. Any issues are addressed with Employer Admin and support from Merge if necessary.
Ongoing Support	Cocoon / Merge	Cocoon provides 1st level support and Merge provides 2nd level support.
	Paylocity	Paylocity will provide 3rd Level Support for the Cocoon Team directly. It is Paylocity’s expectation that Cocoon works with Paylocity directly for integration issues, as opposed to sending a client-user to their team. If a client needs to be engaged, the Paylocity Analyst will help make that determination upon scoping the issue with Cocoon’s Engineering and/or Support contacts.