PROCEDURE FOR HIRING AND RE-HIRING EMPLOYEES

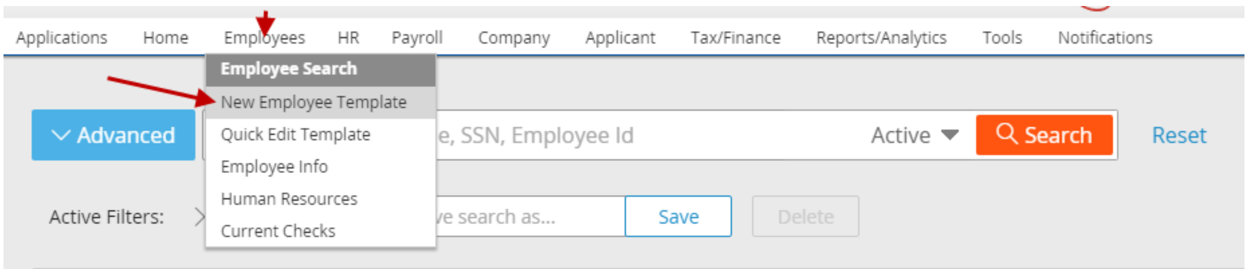
- ☐ Ask Employee if they have worked in the Archdiocese in the past or if they are a current Archdiocese employee to determine if they are a shared employee
- ☐ If the employee is shared
  - Obtain Employee ID from Central Payroll or HR
  - Overwrite the Employee ID in the New Hire Template with the ID provided
  - Please remember: For the next new hire entered through the new hire template – the EE ID needs to be overwritten, so it goes back to using your location's company ID number as the leading digits for the EE ID number.
- ☐ If employee is transferring from another location
  - Work with the previous location to coordinate term and hire dates
  - Inquire about benefits that might need to be transferred; notify HR about the transfer and the need to ensure benefits do not stop
- ☐ If the employee is a religious employee, please contact Central Payroll. Central Payroll will assist with entering in the religious employee appropriately in the payroll system.
- ☐ If employee is a rehire
  - Makes sure to see the notes in the guide about updating the record appropriately
- ☐ PLEASE NOTE: Please ensure new employee or rehire has completed has completed Safe & Sacred and has a current and correct level of background check completed BEFORE hiring them

  Please note: background checks take approximately 7-10 business days to process

After all of the items above are completed you can begin entering in the employee's information in the Paylocity New Hire Template.

Adding a New Employee in Paylocity

From the main menu, select > Employees, New Employee Template



*The "GREEN" buttons indicate required fields in the standard template; however, there is a checklist of all the critical data fields that you should ensure are completed when you enter a new hire in the payroll system on page 13 at the end of this guide.

Enter Employee Information:

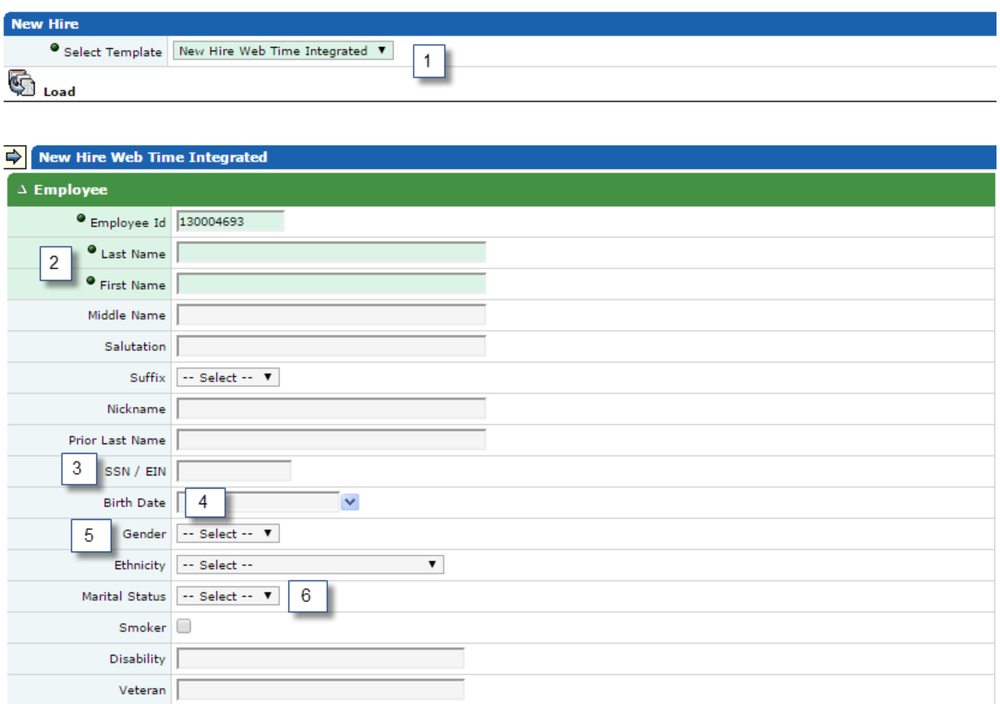
1. Choose New Hire template with WebBen Integrated (OR WebTime/WebBen Template if you have WebTime)
2. Employee ID will auto-populate.

- IMPORTANT: If you are hiring a "shared employee" who also works at another location within the archdiocese, you must contact HR or Central Payroll for the "shared employee" ID number and you must enter this number in the Employee ID field.

3. Last and first name (please use legal name; use nickname field if needed)

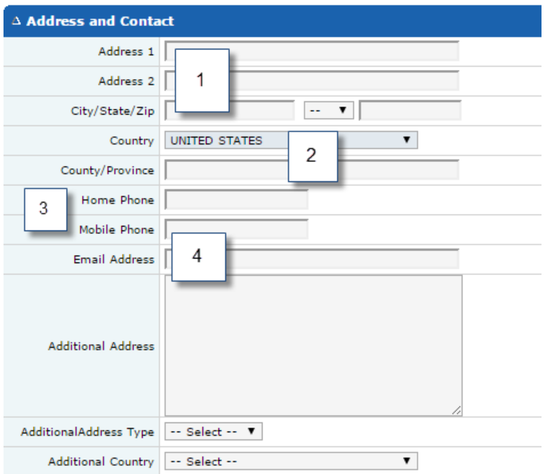
- IMPORTANT: If you are hiring a "shared employee" you must enter the employee's name exactly as it appears in the system at the other location(s) where the employee is currently active. Please check for correct name/spelling with Central Payroll or HR.

4. Social Security Number
5. Birth Date
6. Gender
7. Marital Status



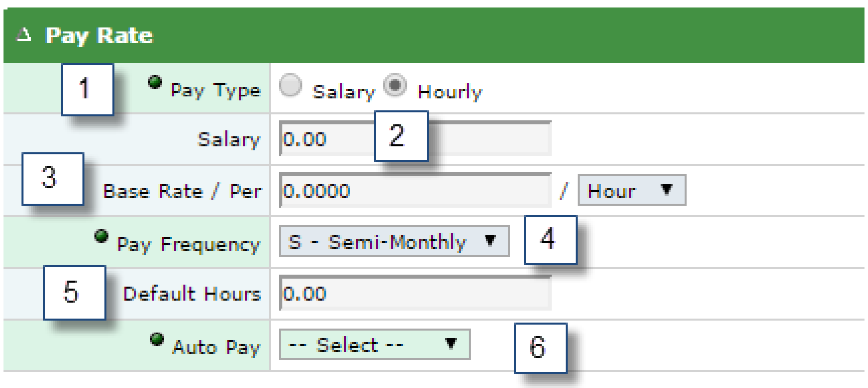
Enter Address and Contact Information:

1. Address, City, State, and Zip Code
2. Country and County
3. Home or Mobile Phone Number
4. Email Address



Enter Pay Rate Information:

1. Enter Pay Type = Hourly or Salary
2. Enter Salary amount (the amount per pay period – not annual salary) to be paid if salary employee
3. Enter Base Rate Per Hour if hourly employee (if salary employee, $0 should be entered)
4. Pay Frequency = Bi-weekly
5. Default Hours – this is a required field if the employee is salary (enter the standard number of hours per pay period)
6. Auto Pay – select None



Enter Employee Status:

1. Employee Status = Active
2. Effective Date = Hire Date
3. Location = Select the appropriate location if applicable
4. Pay Group = Select the appropriate pay group
5. Department = Select the appropriate department
6. Employment Type – Select from one of the following options:
   Regular Full or Part Time

   Religious Full or Part Time

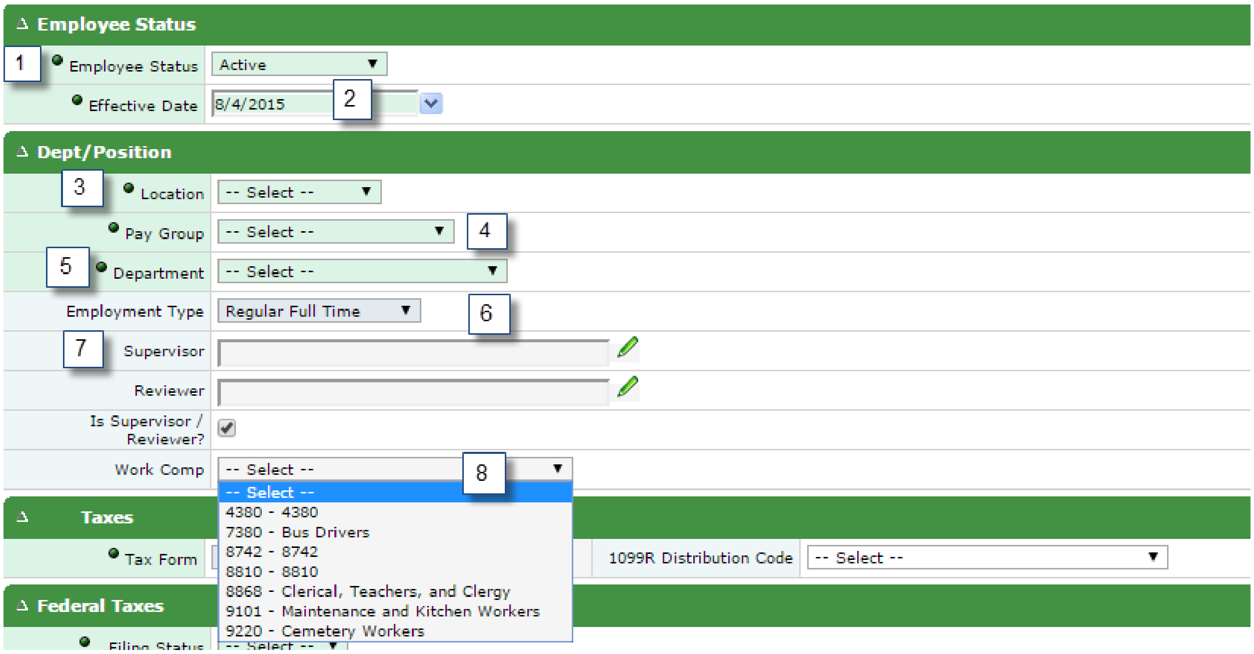
   Temporary Full or Part Time

   Seasonal (only to be used for employees employed for 6 months or less and typically at the same time of year such as summer camp counselor or football coach)
7. Supervisor
8. Workers Compensation Code – Select from one of the following options:
   8868 – Administrative, Clerical, Teachers, or Clergy

   9101 – Maintenance or Kitchen

   7380 – Transportation or Bus Drivers

   9220 – Cemetery

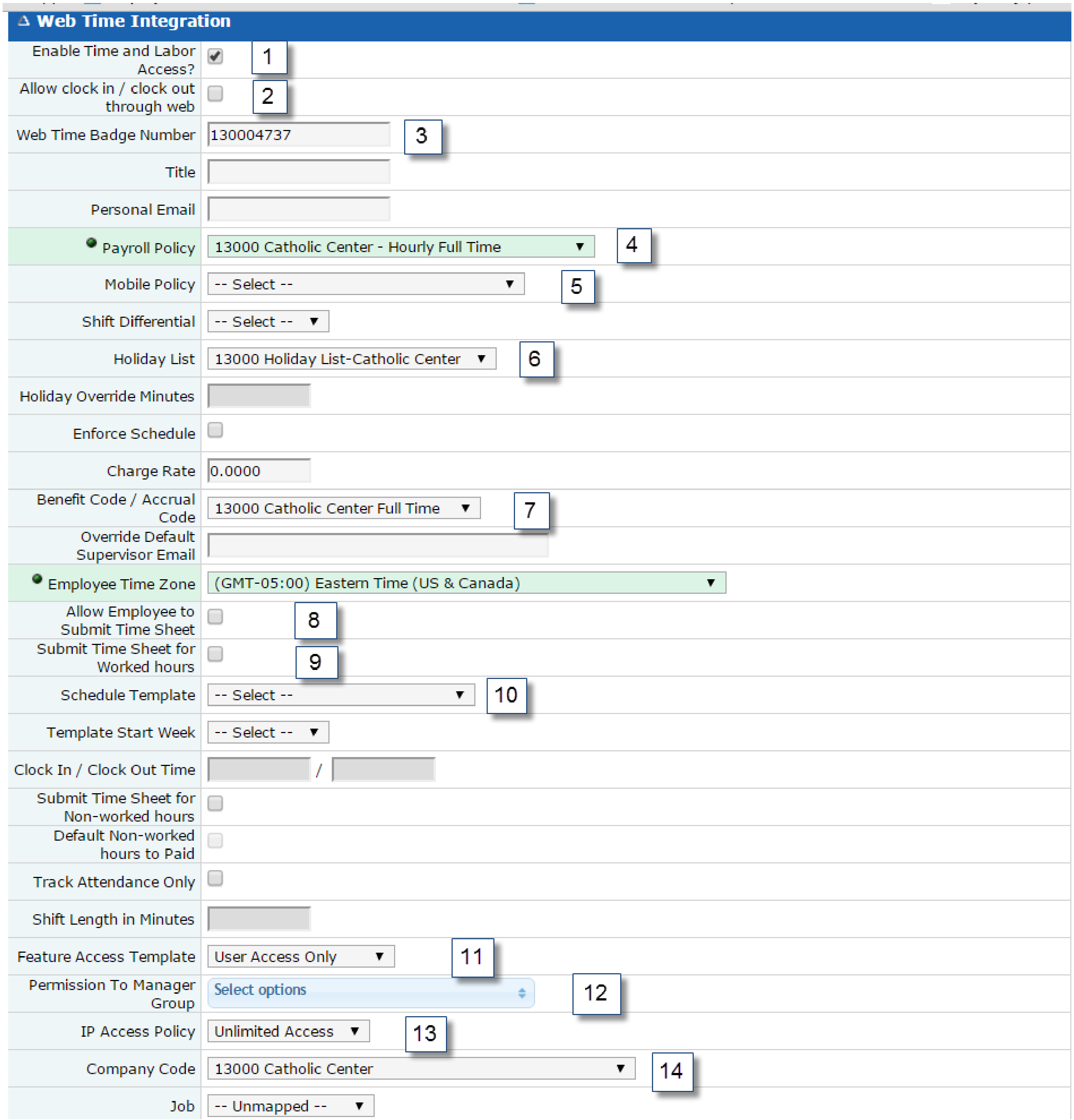

Employee Status
1
Employee Status
Active
Effective Date
8/4/2015
2
Dept/Position
3
Location
-- Select --
Pay Group
-- Select --
4
5
Department
-- Select --
Employment Type
Regular Full Time
6
7
Supervisor
Reviewer
Is Supervisor / Reviewer?
Work Comp
-- Select --
8
-- Select --
4380 - 4380
7380 - Bus Drivers
8742 - 8742
8810 - 8810
8868 - Clerical, Teachers, and Clergy
9101 - Maintenance and Kitchen Workers
9220 - Cemetery Workers
Taxes
Tax Form
1099R Distribution Code
-- Select --
Federal Taxes
Filing Status

Web Time Integration

Each of the following numbers corresponds with the screen print on the next page:

1. This is checked for all automatically.
   Uncheck this box if the employee is shared with another location. Active employees at their primary location already have a timecard in Web Time. One timecard will be used for each employee.
2. Check this for hourly employees.
3. Badge number is for Kiosk Users and defaults to Employee ID. Make sure the ID is correct when hiring a shared employee.
4. Payroll Policy: Choose your Company code and employment type (Hourly Full Time, Hourly Part Time, or Salary).
5. Mobile Policy: Choose your Company Code, if enabled.
6. Holiday List: Choose your Company Code and employment type if applicable.
7. Benefit Code: Choose your Company Code with the appropriate employee type (Part Time or Full Time).
8. Allow Employee to Submit Time sheet box: This is used for salaried employees that want to track their hours. You should mark this box for all **part-time salaried employees**.
9. Check this box to allow employee to enter total amount of hours worked per day. (Mostly used by part-time salaried employees that track hours).
10. Schedule Template: Choose the appropriate schedule template for your salaried employee work schedule.
11. The default is “User Access Only”. If new employee is a supervisor, change access to Location Supervisor.
12. For Supervisors: select group that employee will supervise.
13. IP Access Policy: You can choose IP Policy if one is set up at your location.
14. Company Code: Choose your company code.

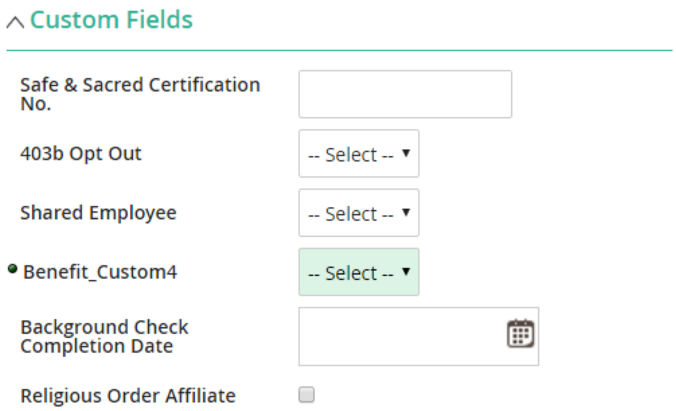
Job mapping can be used if the employee has two different rates but works in one department. This is setup on the rates tab under additional rates where you can connect the “job” to the additional rate. Please reach out to Central Payroll for assistance with this special setup.



Web Time Integration

Enable Time and Labor Access?	☑	1
Allow clock in / clock out through web	☐	2
Web Time Badge Number	130004737	3
Title		
Personal Email		
Payroll Policy	13000 Catholic Center - Hourly Full Time	4
Mobile Policy	-- Select --	5
Shift Differential	-- Select --	
Holiday List	13000 Holiday List-Catholic Center	6
Holiday Override Minutes		
Enforce Schedule	☐	
Charge Rate	0.0000	
Benefit Code / Accrual Code	13000 Catholic Center Full Time	7
Override Default Supervisor Email		
Employee Time Zone	(GMT-05:00) Eastern Time (US & Canada)	
Allow Employee to Submit Time Sheet	☐	8
Submit Time Sheet for Worked hours	☐	9
Schedule Template	-- Select --	10
Template Start Week	-- Select --	
Clock In / Clock Out Time	/	
Submit Time Sheet for Non-worked hours	☐	
Default Non-worked hours to Paid	☐	
Track Attendance Only	☐	
Shift Length in Minutes		
Feature Access Template	User Access Only	11
Permission To Manager Group	Select options	12
IP Access Policy	Unlimited Access	13
Company Code	13000 Catholic Center	14
Job	-- Unmapped --	

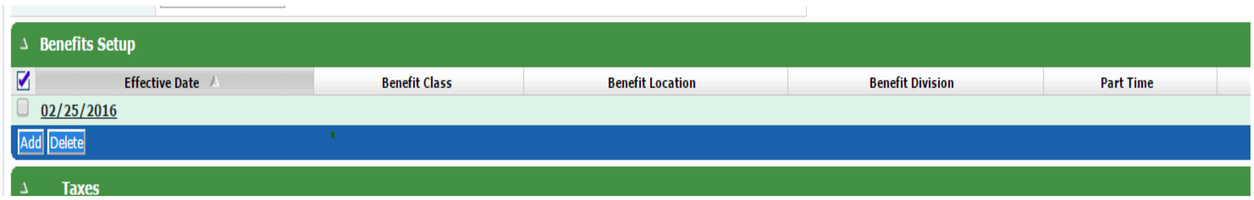
Custom Fields



Click on select for “Shared Employee” if this is a shared employee who will also be working at another location within the archdiocese.

Click on select for “Benefit_Custom4” and select your location number if the employee will be full time and eligible for benefits. If the employee will not be eligible for benefits, select “N/A”

Benefits Set-up



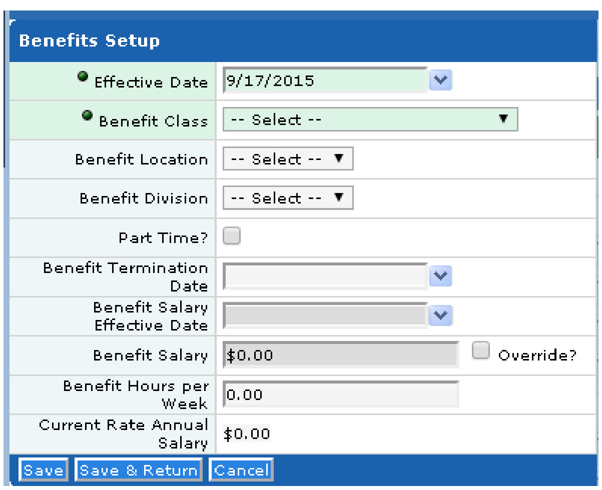
Click on Effective Date

For Effective Date: Please enter the employee's hire date (make sure effective date matches hire date)

For Benefit Class: Please use the following descriptions below to determine the correct "Benefit Class" code to assign to your new employee:

- Contracted Employee: Select this code for any full time contracted employee who is eligible for benefits (Teachers and Principals for example).
- Clergy: **Do NOT USE this code. This code will only be used by the Central Payroll office for Priests and benefits eligible Seminarians ONLY.**
- FT EE Lay: Select this code for any FULL TIME employee that will be eligible for benefits. (This will be the main code you will be using if your employee will be eligible to enroll in benefits.)
- Do Not Send to Web Benefits: Select this code for any employee that is not eligible for benefits such as PART-TIME employees or Seasonal employees.
- Not Benefit Eligible But Billable: **DO NOT USE this code. This code will be used by the Central Payroll office ONLY.**

Click on "Save & Return" to save this information.



Enter Tax Information

Federal Taxes:

1. Tax Form = W2
2. Filing Status = From Line 3 on Form W-4
3. Exemptions = from line 5 on Form W-4
4. Amount Type is usually Default Amount, if the employee wants a flat amount deducted or an additional amount is indicated on Form W-4, select the appropriate option and then fill in boxes:

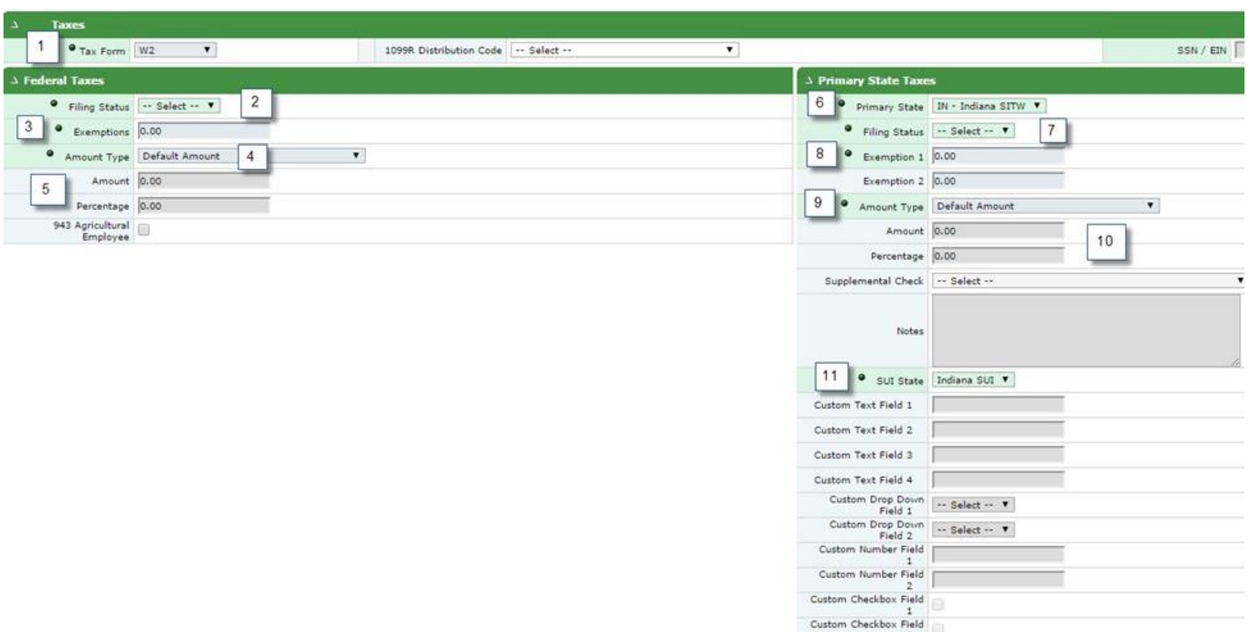
- For a flat or additional amount or
- For a percentage indicated if applicable

Primary State Taxes:

5. IN – Indiana SITW
6. Filing Status = Married or Single
7. Enter in the number of Exemptions noted on line 5 of Form WH-4
8. Amount Type is usually Default Amount, if the employee wants a flat amount deducted or an additional amount is indicated on Form W-4, select the appropriate option and then fill in boxes:

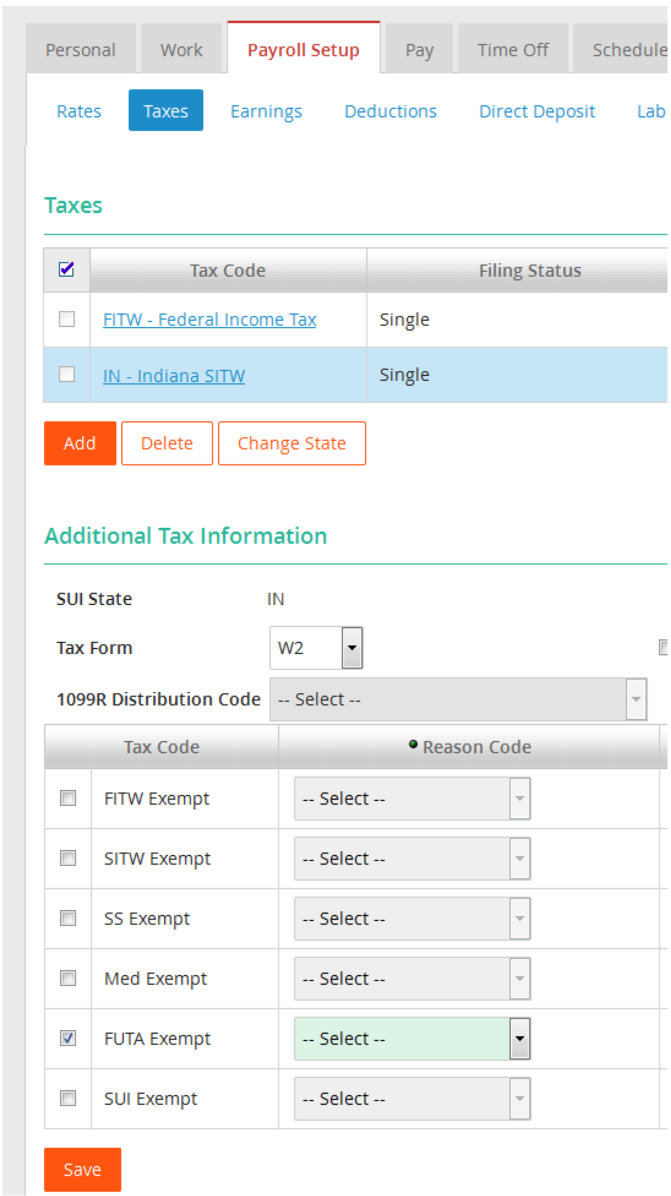
- For a flat or additional amount or 1
- For a percentage indicated if applicable

*SUI State will default to Indiana SUI



9. ***IMPORTANT: You will also need to add the following tax information. (If this is not accessible through your new hire template you can access these fields by going into the employee record >> "Employee Search>Employee Last Name>Payroll Set-up>Taxes – Additional Tax Information")

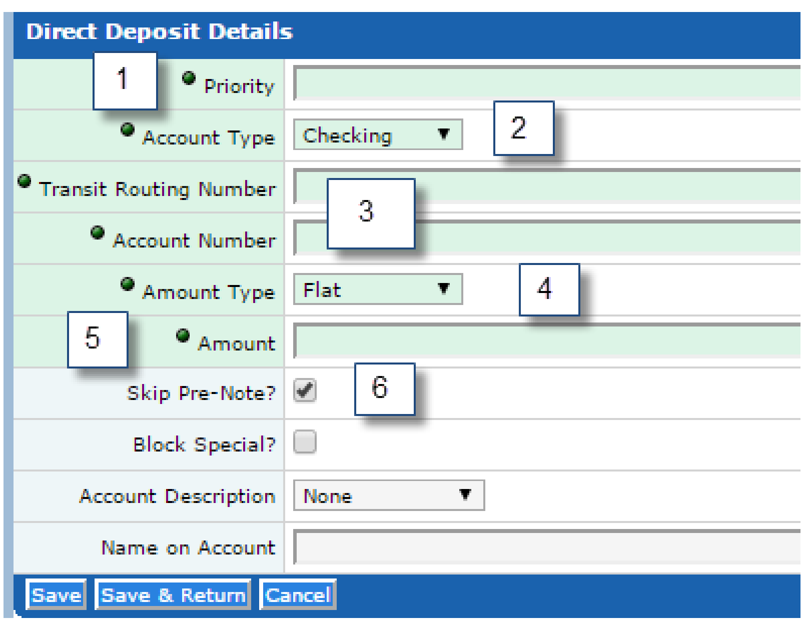
- ADD Indiana Local County Tax – Select Local then select County of Residence for employee and enter number of exemptions. ***Please contact Paylocity for help setting-up additional Local Tax Codes.
- ADD the Federal and State Unemployment Tax Setup - Check the boxes for FUTA & SUI Exempt and then select 501(c) (3) Organization as the reason.



Enter Direct Deposit Information

1. Click ADD
2. Priority for Primary bank account = 99
   *If employee has an additional bank account (their direct deposit would be split), the priority would be "1". Subsequent additional bank accounts are sequentially numbered (2, 3, 4, 5, 6, etc.)
3. Account Type = Checking or Savings
4. Enter Transit Routing Number and Account Number
5. Amount type = Percentage (always use this for their primary account)

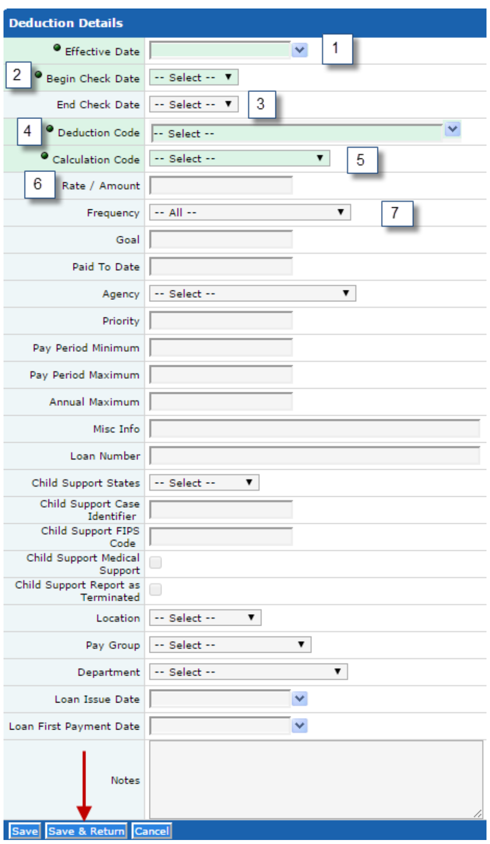
   *Flat amount would only be used for subsequent bank accounts
6. If a flat amount is indicated for subsequent bank accounts, enter the indicated amount in this field
7. Skip Pre-Note is check marked by default. If you prefer to pre-note direct deposits, please note that this process will require ten business days.
8. Name on Account – enter employee's name.



Enter any Deduction Details – please note that all benefit related deductions are set up through human resources and central payroll:

1. Enter effective date
2. Enter the Check Date to begin the deduction
3. Enter the Check End date if that is known
4. Choose the appropriate deduction code
5. The Calculation Code automatically populates
6. Enter the Rate or Amount if appropriate
7. Enter the check Frequency – some examples include: One-time, Semi-monthly (each pay period), MF – Monthly take first pay, or ML – Monthly take last pay

   Save and Return



After all information is entered, choose Save and Add New or Save and Exit. The Central Office will review and approve all New Hires on a per pay period basis.

Please use the following checklist to ensure that you have filled in all the critical data fields required by central payroll:

NEW HIRE CHECKLIST OF REQUIRED FIELDS IN PAYLOCITY

- ☐ **Last and first name (legal name; use nickname field if needed)**
- ☐ **Street address, city, state and zip code**
- ☐ **Social security number**
- ☐ **Date of birth**
- ☐ **Gender**
- ☐ **Home or mobile phone**
- ☐ **Email address (provide personal email if no work email available)**
- ☐ **Hire Date**
- ☐ **Supervisor**
- ☐ **Employment Type**
- ☐ **Position or Job Title**
- ☐ **Work Comp code (8868=Admin | 7380=Bus Drivers | 9101 Maintenance & Kitchen or Cafeteria | 9920 Cemetery)**
- ☐ **OT Exempt (if employee's job is salary and exempt from overtime)**
- ☐ **Minimum Wage Exempt (select for Teachers, Substitute Teachers and Coaches)**
- ☐ **Work Phone**
- ☐ **Email (work email)**
- ☐ **Rate (pay rate)**
- ☐ **Pay Frequency (bi-weekly)**
- ☐ **Default hours (scheduled hours per pay period for salary employees ONLY; field is visible when setting up pay rate)**
- ☐ **Benefits Set-up – Effective Date (date <u>must</u> equal hire date) and Benefit Class:**

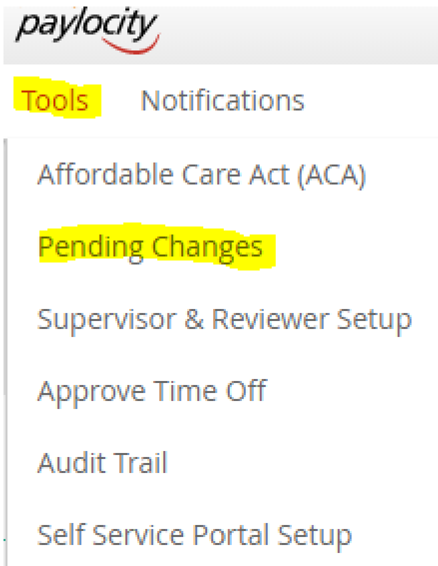
  -FT Employee Lay for full time employees

  -Contracted Employee for teachers, principals, vice principals, etc. -Do Not Send to Web Benefits for part-time or seasonal employees

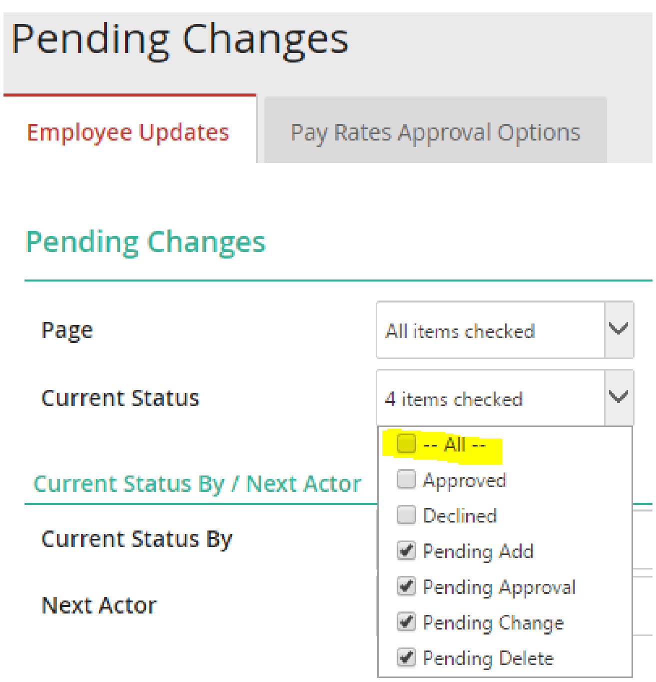
  -Clergy for priests and seminarians
- ☐ **Taxes (Federal, State and Local Indiana tax**
- ☐ **FUTA and SUI Exempt (with 501(c)(3) Organization selected as the reason)**
- ☐ **Direct Deposit**

Additional Tips:

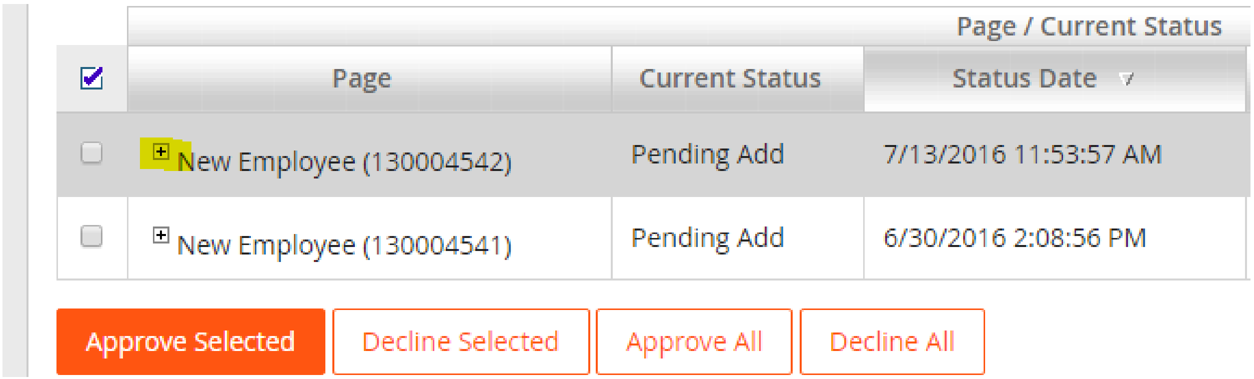
1. Updating information on a pending new hire record:
   - Go to “Tools” > “Pending Changes”

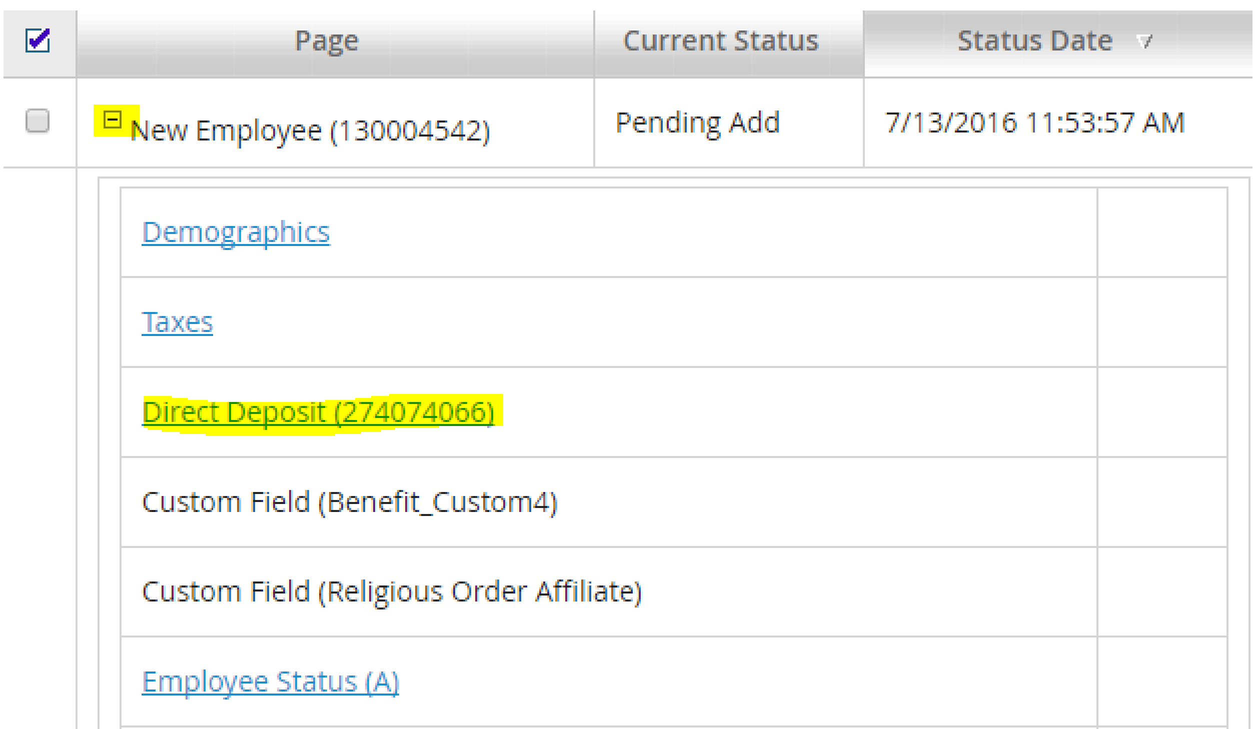


   - Deselect the check box for “Limit list to changes I can Approve/Decline only
   - Under Pending Changes – Current Status
     - Click on the drop down arrow and select ALL
     - Click “SEARCH” or “SHOW ALL”

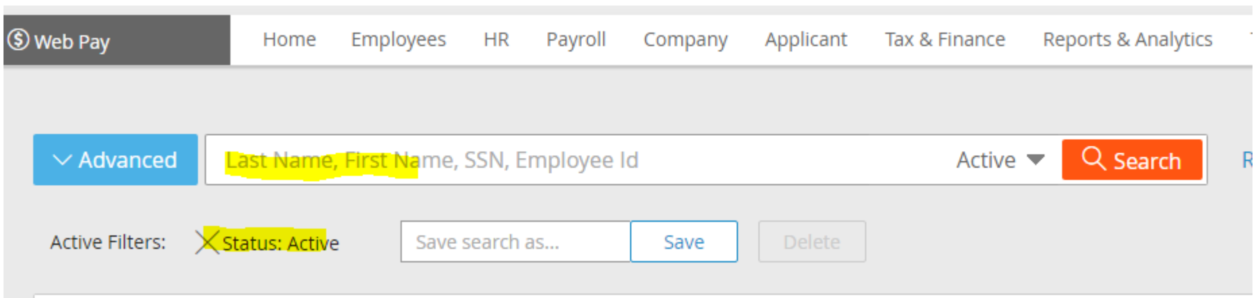


- When pending “New Employee” records appear
    - Click on the plus sign “+” (or the expand button) to show all tabs under the employee record
    - Click on the name of the tab (such as “Direct Deposit” for direct deposit changes)
    - Update the information and then click SAVE

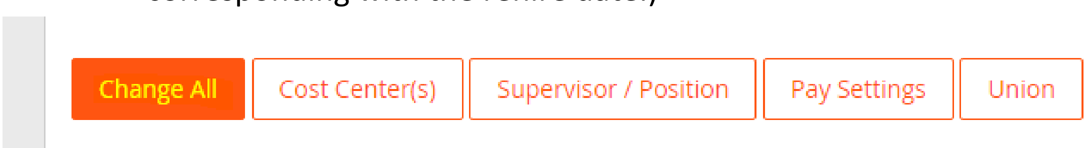




2. Updating an employee record through the Employee List View
    - You can also update a pending new hire record or the terminated record for a rehire through your employee list view.
    - First, search for the employee by last name on your home page in Web Pay. If the employee is not ACTIVE you must deselect or remove the filter “X Status: Active” by clicking on it.



    - Select the employee by clicking on their name.
    - To make updates to a new hire record
        - Click on the effective date at the bottom of the screen under Dept / Position History to make updates to department or position information
        - Other info may be updated by directly updating the info on the desired tab/field and clicking SAVE. (This can be done with Pay Rates, Direct Deposits, Taxes, etc.)
    - To make updates to a terminated record for a rehire
        - Click on CHANGE ALL to make changes to information under Department / Position tab. Make sure to use correct effective date (corresponding with the rehire date)
        - Other info may be updated by directly updating the info on the desired tab/field and clicking SAVE. (Please make sure you are using the correct effective date corresponding with the rehire date.)



        - To reactivate or rehire the employee click on “WORK > EMPLOYEE STATUS” and then click on “REHIRE”