

# Payroll

Archdiocese of Indianapolis

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# Agenda

- Payroll Tutorial
- Frequently Used Reports
- Custom Reporting
- Improvement Opportunities
- What's Ahead
- List of Contacts
- Q & A

# Payroll Tutorial

Adding an  
Employee

Processing Payroll

Useful Reports

Custom Reporting

# Adding An Employee

- From the Client Profile:
  - Click the Employees tab, then click Add Employee

The screenshot displays the 'Paycor for Windows' application window. The title bar reads 'Client Profile - #10002 - Cookie Crumb Industries'. The 'Employees' tab is selected in the top navigation bar. Below the navigation bar, there are buttons for 'Paycor HR+', 'Edit', 'Add Employee' (highlighted with a red box), 'Sort', and 'Find'. A table of employees is visible, with columns for Employee #, Status, Last Name, First Name, M.I. Suffix, and Base Department. A 'Show Only' dropdown menu is open on the right, showing a list of cities: Chicago, Cincinnati, Cleveland, Columbus, and Covington. The 'Show Only Active Employees' checkbox is located at the bottom left of the table area.

Employee #	Status	Last Name	First Name	M.I. Suffix	Base Department
2	A	Adelta	Danielle	R.	3101 Cookie Production
91	A	Anderson	Charleen		10001 Cookie Production - Toledo
62	A	Anne	Taylor		7001 Cookie Production - KC
52	A	Bagel	Natalie		7002 Donut Production - KC
24	A	Barker	Mile	K.	2000 Production-Cincinnati
19	A	Bauer	Anita	M.	3102 Donut Production
63	A	Beagle	Cameron		7001 Cookie Production - KC
21	A	Blancher	Carter	B.	3101 Cookie Production
4	A	Bouche	John	M.	3002 Donut Sales
22	A	Brink	Billie	S.	2001 Wedding Cake Production
8	A	Brown	Theresa	K.	1001 Wedding Cake Sales
41	A	Chester	Rich		4001 Wedding Cake Production
23	A	Chesterfield	Renae	C.	2001 Wedding Cake Production
82	A	Cheyenne	Lisa		9101 Cookie Sales
53	A	Chip	Dorset	J.	7201 Cookie Sales - KC
51	A	Coffee	Joy	L.	7001 Cookie Production - KC
72	A	Cooker	Niel		8001 Wedding Cake Production
9	A	Crawford	George	C.	2100 Delivery- Cincinnati
49	A	Depp	Kristin		6001 Wedding Cake Sales - Indy

# Adding An Employee

- Complete the following Identity tab fields.

Smith, Tim #93 - Cookie Crumb Industries #10002

Paycor HR+ Add Employee Smith, Tim, E Show Only Chicago

Identity General Earnings Deductions Taxes Direct Deposit Benefit Accruals Retirement Notes / Allocation Custom EasyView Pay History

Business	Name Type (Prefix)	First	Middle	Last	(Suffix)	Accredited
<input type="checkbox"/>	Prim	Tim	E	Smith		

New Delete

<b>Country</b> United States Of America	<b>Address Type</b> Primary	<b>Base Department</b> 1003 Cookie Sales	<b>Paygroup</b> Covington - Semi Monthly
<b>Address 1</b> 8 Nutmeg Way	<b>Address 2</b>	<b>SSN</b> 312-34-6431	<b>Hire Date</b> 05/10/2007
<b>Address 2</b>	<b>Zip</b> 45039	<b>Filing Status</b> S	<b>Exemptions</b> 1
<b>City</b> Maineville	<b>State</b> OH	<b>County</b> Warren	<b>Employee Status</b> Active - Full Time - Regular
<b>Region</b>	<b>Area Code</b> (513)	<b>Local Number</b> 644-3131	<b>E-mail Address</b> tsmith@cookiecrumb.com
<b>Extension</b>	<b>Phone Type</b> Home	<b>Job Title</b>	<b>Base Shift</b>

Rate	Type	Pay Rate	Effective Date	Description	Reason
1	S	\$2,500.00	05/10/2007	Rate 1	New Hire Rate

New Delete

Save Cancel

Enter zip  
City State  
will populate

May be a  
future date

additional WH  
on EE tax tab

will default to  
current date

# Important Fields & Maintenance

- **Identity Tab:**
  - ensure job title is entered & accurate.
  - determine exempt (salary) or non-exempt (hourly) status
  - ensure base department and pay-group are accurate
- **General Tab:**
  - enter Annual Hours for hour & salary employees
  - ensure termination dates are entered
  - enter part-time, full-time, or seasonal status
  - ensure employee's gender is entered
- **Earnings Tab:**
  - ensure religious pay is coded as such
  - ensure worker's compensation codes are entered & accurate
- **Taxes Tab:** ensure accurate tax deductions, including local county taxes
- **Notes/Allocation Tab:** ensure Base Department assignment is accurate
- **Custom Tab:** ensure 3-digit Arch assigned location number is entered

# Processing Payroll

- Seven Main Steps

1. Select the payroll & paygroup you would like to process from the PayPlanner
2. Open Pay Data
3. Select the appropriate PayData options for the payrun
4. Enter the payroll
5. Verify totals
6. Produce the pre-post payroll journal
7. Transmit the payroll file to Paycor

# Processing Payroll

- (1) Select the payroll and paygroup from PayPlanner

The screenshot displays the PayPlanner software interface for Client Profile #10002 - Cookie Crumb Industries. The 'Payrolls' list on the left shows 'Cincinnati' selected. The 'Paygroups' list on the right shows 'Cincinnati - Weekly' selected. An orange box highlights the 'Open PayData' button. Below, the 'Paygroup Schedule' table is shown with callouts for 'Run Type', 'Scheduled Date', 'Period End Date', and 'Check Date'.

Run Type	Scheduled Date	Period End Date	Check Date
Regular	2/11/2009 12:00 AM	02/06/2009	2/13/2009
Regular	2/25/2009 12:00 AM	02/20/2009	2/27/2009
Regular	3/04/2009 12:00 AM	02/27/2009	3/06/2009
Regular	3/11/2009 12:00 AM	03/06/2009	3/13/2009
Regular	3/18/2009 12:00 AM	03/13/2009	3/20/2009
Regular	3/25/2009 12:00 AM	03/20/2009	3/27/2009
Regular	4/01/2009 12:00 AM	03/27/2009	4/03/2009
Regular	4/08/2009 12:00 AM	04/03/2009	4/10/2009
Regular	4/15/2009 12:00 AM	04/10/2009	4/17/2009
Regular	4/22/2009 12:00 AM	04/17/2009	4/24/2009



# Processing Payroll

- (2) Open Pay Data &
- (3) Select appropriate options

**PayData Setup for Client # 10002 - Cookie Crumb Industries**

Setup | Exceptions | Select Starting Employee

**Period End Date**  
05/26/2007

**Check Date**  
06/01/2007

**Payroll Type**  
Regular Payroll

**Quarter**  
2

**PayData Options:**

- All Employees
- Employees By Employee Number or Name
- Sets of Employees Alphabetically
- Sets of Employees by Department
- Sets of Employees by Employee Number

**Sort Order:**

- Alpha by Department
- Alphabetical
- Employee Number
- Employee Number by Department

**Check Stub Message**

One Time Only  Recurrent

Time Clock Import  
PayData Entry  
Manual / Void Entry  
Cancel

add a second level of sorting to customize your view of the payroll entry screen

All Employees - load all active EEs  
EE by EE# or Name - select specific EEs  
Sets of EEs Alphabetically - select EEs in order  
Sets of EEs by Dept - select EEs by base dept.  
Sets of EEs by EE# - select by EE #

# Processing Payroll

- (4) Enter Pay Data

The screenshot shows a payroll entry window for 05/24/2007 for Client # 10002 - Cookie Crumb Industries. The interface includes tabs for Earnings, Deductions, Taxes, Benefit Accruals, Gross to Net, History, and Notes. A data table lists employees with their respective earnings and hours. Callouts highlight key features: a spreadsheet-like format for data entry, tabs for benefits and taxes, a gross-to-net calculation view, YTD pay info, and a link to employee profile notes.

NP	Emp #	Ck #	Base	Employee	NDD	Shift	Rate	Regular	Ot	Hours	Code	Earnings	Code
<input type="checkbox"/>	000008	1	1001	Brown, Theresa K.	<input checked="" type="checkbox"/>		0.00					325.00	
<input type="checkbox"/>	000005	1	1002	DuMorea, Jenny S.			14.00	40.00					
<input type="checkbox"/>	000006	1	1002	MacIntosh, Judith A.			12.50	80.00	3.00				
<input type="checkbox"/>	000014	1	1001	Meyers, Donald C.			17.75	80.00	5.00				
<input type="checkbox"/>	000025	1	1002	Poe, Deborah A.			0.00					450.00	
<input type="checkbox"/>	000003	1	1001	Williams, Brian W.			16.50	75.00					

quick-entry spreadsheet format for keying hours & earnings amounts for EEs selected

view the gross to net calc per EE

YTD pay info per EE

view EE notes from EE Profile here

Benefits, Deudctions, Taxes, Benefit Accruals - easy tabs to access for updating per EE changes per processing.

Client Profile | Diary | Totals | Delete Payroll | Find | Next | Previous

# Processing Payroll

- (4) Enter Pay Data

PayData Entry for 05/24/2007 for Client # 10002 - Cookie Crumb Industries

Payroll Entry | Earnings | Deductions | Taxes | Benefit Accruals | Gross to Net | History | Notes

Covington - Covington - Biweekly | Period End: 5/24/2007 | Check Date: 5/24/2007

Set: All | Regular: 275.00 | O.T.: 8.00 | Coded: 0.00 | # Paid: 8

NP	Emp #	Ck #	%	Base	Employee	NDD	Shift	Rate	Regular	OI	Hour	Code	Earnings	Code
<input checked="" type="checkbox"/>	C00008	1	1001		Brown, Theresa K.	<input checked="" type="checkbox"/>		0.00					325.00	
<input type="checkbox"/>	C00005	1	1002		DuMores, Jenny S.			14.00	40.00					
<input type="checkbox"/>	C00006	1	1002		MacIntosh, Judith A.			12.50	80.00	3.00				
<input type="checkbox"/>	C00014	1	1001		Meyers, Donald C.			17.75	80.00	5.00				
<input type="checkbox"/>	C00025	1	1002		Pos, Deborah A.			0.00					450.00	
<input type="checkbox"/>	C00003	1	1001		Williams, Brian W.			18.50	75.00					

access tabs of client profile without closing the Pay Data Entry window

access PayGroup Totals window: select from standard reports like Payroll Journal

this option deletes everything for current payroll

reference, change, or add diary items with the push of a button

find an EE by name or number

navigate quickly through EE list on Earnings - Notes tabs

Client Profile | Diary | Totals | Delete Payroll | Find | Next | Previous

# Processing Payroll

- (4) Enter Pay Data – all one time entries

**Payroll Entry for 05/24/2007 for Client # 10002 - Cookie Crumb Industries**

Covington - Covington - Biweekly Period End: 5/24/2007 Check Date: 5/24/2007  
 Set: All Regular: 275.00 OT: 0.00 Coded: 0.00 # Paid: 6

NP	Emp #	Ck #	%	Base	Employee	NDD	Shift	Rate	Regular	OT	Hourly
<input type="checkbox"/>	000008	1	1001		Brown, Theresa K.	<input checked="" type="checkbox"/>		0.00			
<input type="checkbox"/>	000005	1	1002		DuMorea, Jenny S.			14.00	40.00		
<input type="checkbox"/>	000006	1	1002		MacIntosh, Judith A.			12.50	80.00	3.00	
<input type="checkbox"/>	000014	1	1001		Meyers, Donald C.			17.75	00.00	5.00	
<input type="checkbox"/>	000025	1	1002		Poe, Deborah A.			0.00			
<input type="checkbox"/>	000003	1	1001		Williams, Brian W.			16.50	75.00		

Icon	Shortcut	Function
	Alt+T	Terminate Employee
	Ctrl+L	Add a Line
	Ctrl+M	Add Manual/Void Check
	Ctrl+K	Add Check
	Ctrl+Del	Delete Entry
	Alt+E	Add Employee

Add Check	Ctrl+K
Add Employee	Alt+E
Add Line	Ctrl+L
Add M/V Check	Ctrl+M
Add Sub-Total	Ctrl+U
Gross Up	Alt+U
Add NCCI Code	Alt+O
Add Sole Prop/Part Ad	Alt+J
Add Local Tax	Alt+Q
Delete Entry(s)	Ctrl+Del
Delete Check	Ctrl+Del
Reset Manual/Void	Alt+W
Recal Adjustment	
Change Sort [Ctrl+S]	
Change Starting Column	Ctrl+W
Go To	
Employee Profile	
Display Manual/Void	Alt+Z
Calculate G/L Premium	
Gross Receipts	
Re-calculate Employee	Ctrl+C
Re-calculate All	Ctrl+R
Calculation On	Ctrl+O
Print	Ctrl+Y
Display Exceptions	
Fill In	Ctrl+F
Display Color Legend	Ctrl+X

# Processing Payroll

- (4) Enter Pay Data – all one time entries

PayData Entry for 05/24/2007 for Client # 10002 - Cookie Crumb Industries

Payroll Entry | Earnings | Deductions | Taxes | Benefit Accruals | Gross to Net | History | Notes

Covington - Covington - Biweekly | Period End: 5/24/2007 | Check Date: 5/24/2007

Set: All | Regular: 275.00 | OT: 8.00 | Coded: 0.00 | # Paid: 6

NP	Emp #	Ck #	%	Base	Employee	NDD	Shift	Rate	Regular	Qt	Hours	Code	Earnings	Code
<input type="checkbox"/>	000008	1		1001	Brown, Theresa K.	<input checked="" type="checkbox"/>		0.00					325.00	
<input type="checkbox"/>	000005	1		1002	DeMorea, Jenny S.	<input type="checkbox"/>		14.00	40.00					
<input type="checkbox"/>	000006	1		1002	Machinosh, Judith A.	<input type="checkbox"/>		12.50	80.00	3.00				
<input type="checkbox"/>	000014	1		1001	Meyers, Donald C.	<input type="checkbox"/>		17.75	86.00	5.00				
<input type="checkbox"/>	000025	1		1002	Poe, Deborah	<input type="checkbox"/>		0.00					450.00	
<input type="checkbox"/>	000003			1001	Williams, Brian W.	<input type="checkbox"/>		16.50	75.00					

The sort order can be redefined by using Ctrl+W

automatic labor distribution You may change per payroll

NP - click this box to not pay an employee for the current payroll

CK# = Sequential Check Types Indicator:  
M=Manual Check  
V = Void Check  
T = Third Party Sick Pay  
G = Gross Up

Indicates an employees base dept.

checked box appears if EE has Net Direct Deposit

EEs active rate of pay can be overridden for current payroll

Regular - Code Used to input & code hours & or earnings. Add a line by using Ctrl+L

navigate quickly through your EE list on Earnings - Notes tabs

Client Profile | Diary | Totals | Delete Payroll | Find | Next | Previous

# Processing Payroll

- (4) Enter Pay Data – deductions tab

PayData Entry for 03/06/2009 for Client # 1 - Paycor Training Client

Payroll Entry Earnings **Deductions** Taxes Benefit Accruals Gross to Net History Notes

#17 - Maino, Joe 200 - Jacksonville Location Status: A

Employee Profile One Time Change Data keyed on this screen will affect this check only. Check: 1 of 1

Effective Date	PDD	Code	Deduction	Hold	Amount	Rate
04/20/2004		401k	401(k)	No		0.050000
12/16/2005		Garn1	Garnishment1	Yes		
03/13/2006		KitchTr	401(k) Match Contrib Tiered	No		

Permanent Deduction Changes

Turn off Partial Direct Deposit per line for current payroll only

Current payroll only additions. Permanent changes must be made on EE profile

Amount = to be deducted  
Rate = % of Gross Check

HOLD  
No = Active  
Yes = Inactive

Client Profile Diary Totals Delete Payroll Find Next Previous



# Processing Payroll

- (4) Enter Pay Data – taxes tab

The screenshot shows the 'Paycor for Windows' application window. The title bar reads 'PayData Entry for 05/24/2007 for Client: Cookie Crumb Industries'. The main window has several tabs: 'Payroll Entry', 'Earnings', 'Deductions', 'Taxes', 'Benefit Accounts', 'Gross to Net', 'History', and 'Notes'. The 'Taxes' tab is selected and highlighted with an orange box. Below the tabs, there is a dropdown menu for 'Employee Profile' showing '00 - Brown, Theresa K.' and a note: 'Data keyed on this screen will affect this check only'. Below this, there are fields for 'W/H Freq' (set to 'Biweekly') and 'Live In / Z' (set to 'Live'). A callout box points to the 'Employee Profile' dropdown with the text: 'Click to make a permanent change to EE profile'. Another callout box points to the 'W/H Freq' dropdown with the text: 'Change W/H Frequency'. A third callout box points to the 'Taxes' tab with the text: 'Override calculated tax amounts for selected EE'. The main area contains a table with columns 'Code', 'Tax Description', and 'Live In / Z'. The table lists several tax items:

Code	Tax Description	Live In / Z
SOC	Social Security - Employee	Live
MED	Medicare - Employee	Live
FTWH	Federal Income Tax	Live
DH	DIV State Treasurer	Live
KYCDV	Coverson, Ky Finance Dpt	Live
KYKTN	Kenton County Fiscal Ct.	Live
DHON	D	Live In

At the bottom of the window, there are buttons for 'Client Profile', 'Day', 'Totals', 'Delete Payroll', 'Find', 'Next', and 'Previous'.

# Processing Payroll

- (4) Enter Pay Data – Gross to Net tab

PayData Entry for 05/24/2007 for Client # 10002 - Cookie Crumb Industries

Payroll Entry | Earnings | Deductions | Taxes | Benefit Accruals | **Gross to Net** | History | Notes

#8 - Brown, Theresa K. | 1001 - Wedding Cake Sales | Status: A  
Check: 1 of 1

Earnings		Deductions		Taxes		Benefits	
Type	Current	Type	Current	Type	Current	Type	Current
Reg	325.00	401k	19.50	SOC	20.15	AccVac	4.0000
		KMchTr	9.75	MED	4.71		
		DD-SAV	35.00	FITWH	0.00		
				OH	12.25		
				KYCOV	8.13		
				KYKTN	2.31		
				OHCIN	0.00		
<b>Total (Gross)</b>	<b>325.00</b>	<b>Total</b>	<b>54.50</b>	<b>Total</b>	<b>47.55</b>		
				<b>Net</b>	<b>222.95</b>		

Client Profile | Diary | Totals | Delete Payroll | Find | Next | Previous

Navigate through each EE with the drop down box

features a check stub layout that captures gross to net information



# Processing Payroll

- (4) Enter Pay Data – History tab

PayData Entry for 05/24/2007 for Client # 10002 - Cookie Crumb Industries

Payroll Entry | Earnings | Deductions | Taxes | Benefit Accruals | Gross to Net | **History** | Notes

1001 - Wedding Cake Sales      Status: A  
Check: 1 of 1

Year to date information displayed does not include the payroll being keyed.

Earning	YTD
Regular	1,625.00
<b>Total:</b>	<b>1,625.00</b>

Deduction	YTD
401(k) Deduction	97.50
Employee Purchase	10.00
H125 - Family	81.75
401(k) Match Contrib Tiered	48.75
Partial Savings	175.00

Tax	YTD
Social Security - Employee	95.70
Medicare - Employee	22.40
Federal Income Tax	.00
Ohio State Treasurer	60.10
Cincinnati Ohio	.00
Covington, Ky Finance Dpt	40.65
Kenton County Fiscal Crt.	11.55

Select from list of EE from drop down menu

View Year to Date history of Earnings, Deductions, & Taxes on each EE

Client Profile | Diary | Totals | Delete Payroll | Find | Next | Previous

# Processing Payroll

- (4) Enter Pay Data – Notes Tab

PayData Entry for 05/24/2007 for Client # 10002 - Cookie Crumb Industries

Payroll Entry | Earnings | Deductions | Taxes | Benefit Accruals | Gross to Net | History | **Notes**

#8 - Brown, Theresa K. | 1001 - Wedding Cake Sales | Status: A  
Check: 1 of 1

One Time Check Message

Note

Place a One Time Check Message for an individual EE

Displays notes from employees profile

Client Profile | Diary | Totals | Delete Payroll | Find | Next | Previous

# Processing Payroll

- (5) Verify Totals
- Prior to Totaling always recalculate to ensure all transactions are calculating. Shortkey Ctrl+R

The screenshot displays a payroll software window titled "PayData Entry for 05/24/2007 for Client # 10002 - Cookie Crumb Industries". The window has several tabs: "Payroll Entry" (selected), "Earnings", "Deductions", "Taxes", "Benefit Accruals", "Gross to Net", "History", and "Notes". Below the tabs, there is a summary bar showing "Covington - Covington - Biweekly", "Period End: 5/24/2007", "Check Date: 5/24/2007", "Set: All", "Regular: 275.00", "OT: 8.00", "Coded: 0.00", and "# Paid: 6".

NP	Emp #	Ck #	%	Base	Employee	NDD	Shift	Rate	Regular	OT	Hours	Code	Earnings	Code
<input checked="" type="checkbox"/>	000008	1		1001	Brown, Theresa K.	<input checked="" type="checkbox"/>		0.00					325.00	
<input type="checkbox"/>	000005	1		1002	DuMorea, Jenny S.			14.00	40.00					
<input type="checkbox"/>	000006	1		1002	MacIntosh, Judith A.			12.50	80.00	3.00				
<input type="checkbox"/>	000014	1		1001	Meyers, Donald C.			17.75	80.00	5.00				
<input type="checkbox"/>	000025	1		1002	Poe, Deborah A.			0.00					450.00	
<input type="checkbox"/>	000003	1		1001	Williams, Brian W.			16.50	75.00					

A callout box with a blue border and a white background points to the "Totals" button in the bottom navigation bar. The text inside the callout reads: "Click totals button on Payroll Entry Tab". The bottom navigation bar contains buttons for "Client Profile", "Diary", "Totals" (highlighted in yellow), "Delete Payroll", "Find", "Next", and "Previous".

# Processing Payroll

- (6) Produce the pre-post payroll journal
- Select the Reports tab and Payroll Journal Prepost
- Message appears: Create a transfer file? Click Yes

Paygroup Totals for Client # 73421 - Anissa Ret Testing - PC Client

Paygroup Totals | Paygroup Summary |

Entries that were keyed in Payroll Entry may be reviewed on this screen.  
To review a complete Payroll Journal, click Reports and select from the list.

Description	Hours Keyed	Control Total Hours	Difference	Total Earnings	Control Total Earnings	Difference
Regular	0.00	0.00	0.00	1,300.00	0.00	1,300.00
Totals:	0.00	0.00	0.00	1,300.00	.00	1,300.00

Deduction	Adjustment Amount	Control Total Deductions	Difference	Set: All

Reports

# Processing Payroll

- (7) Transmit payroll file to Paycor
- All payrolls must be submitted by 3pm by last processing date on Archdiocese Payroll Calendar

Paygroup Totals for Client # 76032 - Anissa HR P

Paygroup Totals | Paygroup Summary

Entries that were keyed in Payroll Entry may be reviewed on this screen.  
To review a complete Payroll Journal, click Reports and select from the list.

Description	Hours Keyed	Control Total Hours	Difference	Total Earnings	Control Total Earnings	Difference
Regular	360.00	0.00	360.00	5,500.00	0.00	5,500.00
Totals:	360.00	0.00	360.00	5,500.00	.00	5,500.00

Deduction	Adjustment Amount	Control Total Deductions	Difference	Set: All

Continue | Review from Beginning | **Process Payroll** | Reports

# Frequently Used Reports

- From Report Wizard (within Paycor module)
  - New Hire & Terminations: lists new hire and terminations for a specified period
  - Employee Change Reports: lists changes made to employees per user
  - General Ledger Report: can be used to post payroll to accounting ledger
  - Labor Distribution Report: lists labor distributed per base department
  - Organizational Summary:
  - Payroll Journal:
  - Cash Requirements Report: summary of cash required to support specified payroll

The screenshot displays the Paycor software interface. The main window shows a menu with options like Client Search, Process Payroll, Confidential PayData, Employee Import, Benefit Import, Reports, and Customize Toolbars... The Reports menu is open, showing options like Export Wizard (F4), Report Wizard, and Report Flex (F3). A dialog box titled 'Report Wizard - Roman Catholic Archdiocese of Indianapolis #49042' is open, showing a list of reports and their types.

Report name	Report type
401k - Date Range	External
Anniversary Report	External
Benefit Notification - Date Range	External
Benefits Notification	External
Birthday Report	External
Deduction Caps Report	External
DEDUCTIONS	External
Deductions Not Taken	External

Buttons: Next > Cancel

# Frequently Used Reports

- Online Reporting (same options as Report Wizard)

The screenshot shows the Paycor web application interface. At the top right, there are links for "Welcome, Carey", "My Settings", and "Sign Out". The main navigation bar includes "Home", "Payroll", "Time and Attendance", "Reporting", and "Online Learning". The "Reporting" menu is open, showing "Custom Web Reporting" and "Online Reporting" (which is highlighted). Below the navigation, the client name "Roman Catholic Archdiocese of Indianapolis" is displayed, along with the ID "49042" and a "Select another client" link. On the right, there is a "Get ADOBE READER" button. A sidebar on the left lists report categories: "Current payroll", "Past payroll", "Recent Returns", "Past Returns", and "Employer W2s / 1099s". The main content area displays the message: "Your organization is set up with the following payrolls. Please select the payroll for which you want to view reports:". Below this message, two payroll options are listed: "Semi" and "zLocations" (which is highlighted).

Paycor

Welcome, Carey My Settings Sign Out

Home Payroll Time and Attendance Reporting Online Learning

49042

Roman Catholic Archdiocese of Indianapolis

Select another client

Current payroll

Past payroll

Recent Returns

Past Returns

Employer W2s / 1099s

Custom Web Reporting

Online Reporting

Get ADOBE READER

Your organization is set up with the following payrolls. Please select the payroll for which you want to view reports:

Semi

zLocations

# Frequently Used Reports

- Custom Web Reporting: Dashboard

## Dashboard, Standard Templates, Custom Templates, Saved Reports

**Dashboard** – Shows report templates that you have selected as a Favorite. Also shows visual representations of employee information to help you make better people decisions.

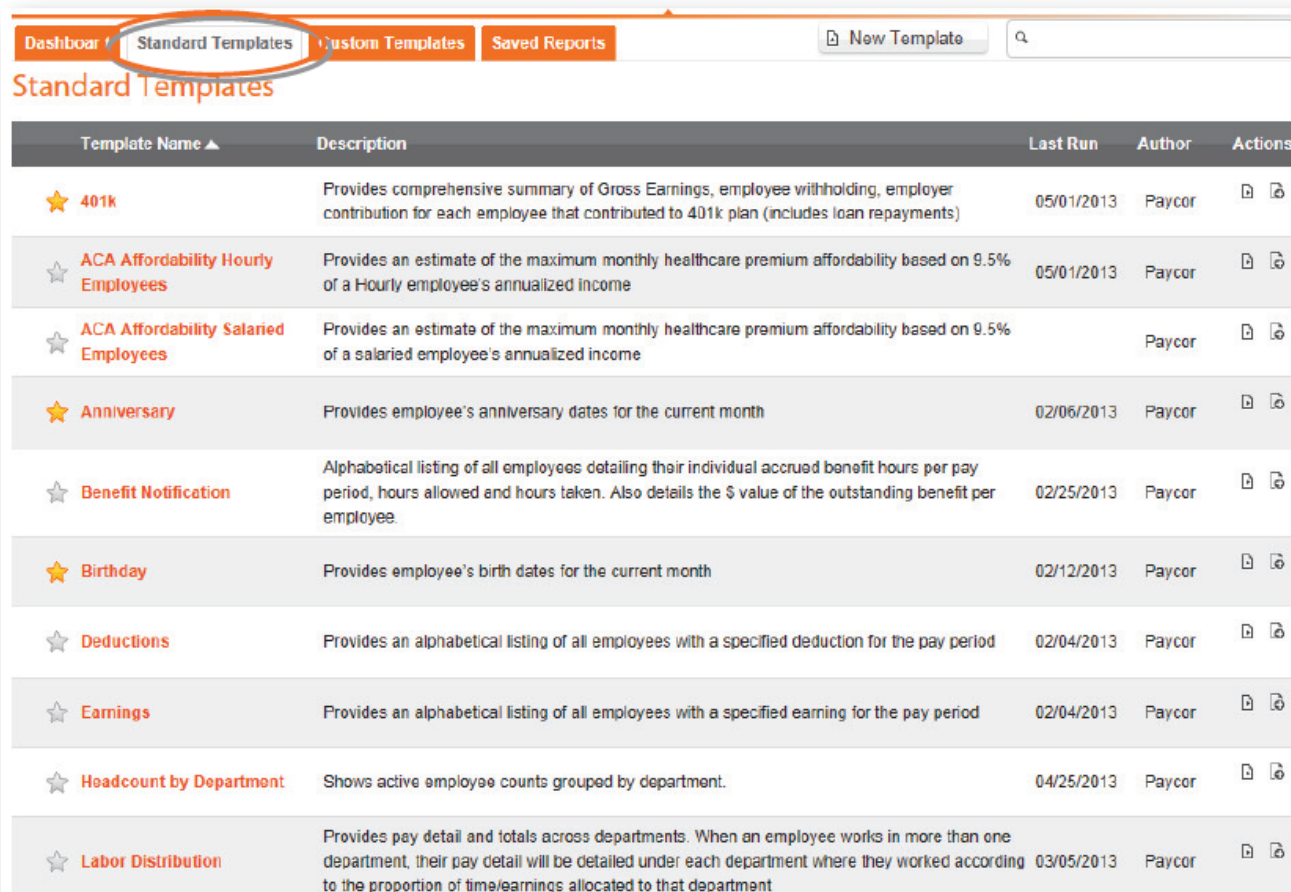




# Frequently Used Reports

- Custom Web Reporting: Standard Reports

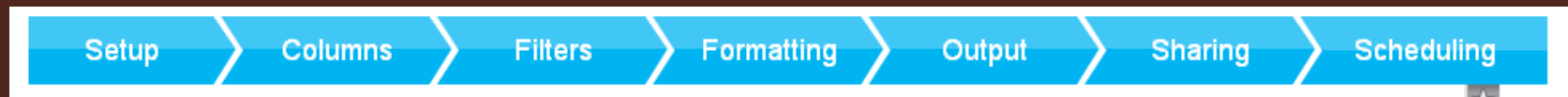
**Standard Reports** – These are report templates already setup by Paycor.



Template Name ▲	Description	Last Run	Author	Actions
★ 401k	Provides comprehensive summary of Gross Earnings, employee withholding, employer contribution for each employee that contributed to 401k plan (includes loan repayments)	05/01/2013	Paycor	📄 🔄
☆ ACA Affordability Hourly Employees	Provides an estimate of the maximum monthly healthcare premium affordability based on 9.5% of a Hourly employee's annualized income	05/01/2013	Paycor	📄 🔄
☆ ACA Affordability Salaried Employees	Provides an estimate of the maximum monthly healthcare premium affordability based on 9.5% of a salaried employee's annualized income		Paycor	📄 🔄
★ Anniversary	Provides employee's anniversary dates for the current month	02/06/2013	Paycor	📄 🔄
☆ Benefit Notification	Alphabetical listing of all employees detailing their individual accrued benefit hours per pay period, hours allowed and hours taken. Also details the \$ value of the outstanding benefit per employee.	02/25/2013	Paycor	📄 🔄
★ Birthday	Provides employee's birth dates for the current month	02/12/2013	Paycor	📄 🔄
☆ Deductions	Provides an alphabetical listing of all employees with a specified deduction for the pay period	02/04/2013	Paycor	📄 🔄
☆ Earnings	Provides an alphabetical listing of all employees with a specified earning for the pay period	02/04/2013	Paycor	📄 🔄
☆ Headcount by Department	Shows active employee counts grouped by department.	04/25/2013	Paycor	📄 🔄
☆ Labor Distribution	Provides pay detail and totals across departments. When an employee works in more than one department, their pay detail will be detailed under each department where they worked according to the proportion of time/earnings allocated to that department	03/05/2013	Paycor	📄 🔄

# Frequently Used Reports

- Custom Web Reporting: Custom Templates
  - Report templates created or shared with you
- Creating a custom report



- SETUP

Paycor

Welcome, Carey | My Settings | Sign Out

Home | Payroll | Time and Attendance | **Reporting** | Online Learning

Give Feedback

Dashboard | Standard Templates | Custom Templates | Saved Reports | **New Template**

← Custom Template List | Run Report

Setup | Columns | Filters | Formatting | Output | Sharing | Scheduling

**Template Name**

(1) Name Report  
(2) Choose Type of Report

**Type**

Pay Detail – Distributed Only

Bank/Direct Deposit

Employee Current

**Sample Report Fields**

- **Personal Information**  
First Name, Last Name, Address 1, Birth Date...
- **Employment Information**  
Base Dept. Code, Client ID, Employee Number, Job Title...
- **Check Summary**  
Check Date, Total Hours, Net Amount...

Available fields listed here



# Frequently Used Reports

- Creating a Custom Report
- FILTERS

The screenshot displays the Paycor Reporting interface. At the top, the Paycor logo is on the left, and user information 'welcome, Carey' and 'My Settings' are on the right. A navigation bar includes 'Home', 'Payroll', 'Time and Attendance', 'Reporting' (highlighted), and 'Online Learning'. Below this is a sub-navigation bar with 'Dashboard', 'Standard Templates', 'Custom Templates', and 'Saved Reports' (highlighted). A 'New Template' button and a search box are also present. The main content area is titled 'Prist Mass Stp' and features a progress bar with steps: 'Setup', 'Columns', 'Filters' (active), 'Formatting', 'Output', 'Sharing', and 'Scheduling'. A 'Run Report' button is visible. A callout box points to the 'Date Filters' section, stating 'Open Data Drawers to set filters such as Date Range'. The 'Date Filters' section is expanded, showing options for 'Check Date Filters (mm/dd/yyyy)'. The 'Check Date' option is selected, with a date range of '2013' to '04/15/2013'. The 'Date Range' option is also visible, with 'From' and 'To' date pickers. A 'Prompt to change filters' checkbox is checked. At the bottom, there are buttons for 'Save & Close', 'Save & Continue', 'Run Report', and 'Cancel'.

Paycor

Home Payroll Time and Attendance Reporting Online Learning Give Feedback

Dashboard Standard Templates Custom Templates Saved Reports New Template

Prist Mass Stp Custom Template List Run Report

Setup Columns Filters Formatting Output Sharing Scheduling

Open Data Drawers to set filters such as Date Range

Client Filters

Date Filters

Employee Filters

Pay Detail Filters

Custom Fields Filters

My Columns Filters

Date Filters

Check Date Filters (mm/dd/yyyy)

Last Check Date

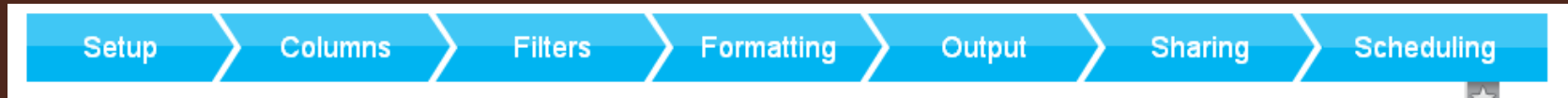
Check Date 2013 04/15/2013

Date Range From To

Prompt to change filters

Save & Close Save & Continue Run Report Cancel

# Frequently Used Reports



- **FORMATTING**
  - add a logo, change fonts, title report
- **OUTPUT**
  - review report summary data & select output type such as Excel or PDF
- **SHARING**
  - select from a list of people who you may share your report with
- **SCHEDULING**
  - select the frequency reports should be run, select email recipients, and compose messages.

# Frequently Used Reports

- Custom Web Reporting: Saved Reports

**Saved Reports** – These are reports that have been saved by you. You may save reports simply by clicking the checkbox before opening a report, or when scheduling the report.

The screenshot shows a web application interface with a navigation bar at the top. The 'Saved Reports' tab is highlighted with an orange circle. Below the navigation bar, there is a search bar and a 'New Template' button. The main content area is titled 'Saved Reports' and contains a table of reports. The table has columns for Name, RunDate, Type, File Size (KB), Template Author, and Actions. There are five reports listed in the table. At the bottom of the table, there is a 'Show' dropdown menu set to '15 reports per page' and a pagination control showing 'Page 1 of 1'.

Name	RunDate	Type	File Size (KB)	Template Author	Actions
▶ 2013.1 Demo	02/01/2013	HTML (Online)	19.61	paycor-l_78394agadgil	×
▶ NCCI Codes	02/01/2013	Excel	9.90	paycor-l_78394agadgil	×
▶ Payroll Journal	02/04/2013	Excel (with totals)	127.08	Paycor	×
▶ Test 111	02/04/2013	HTML (Online)	178.83	paycor-l_78394agadgil	×
▶ Test 138	02/01/2013	Excel	26.96	paycor-l_78394agadgil	×

# Opportunities for Improvement

- Database maintenance
  - See Important Fields & Maintenance List
  - All benefit-related deduction code maintenance is managed through Central Payroll
- Early / Late Processors
  - Presents challenges with benefits funding
  - Ensure your location is following the Payroll Calendar  
<http://www.archindy.org/finance/parish/payroll.html> (handout)
- New hires and terminations
  - Use the newly created hire and term forms (handout)
- Anthem (handout)
  - Ensure new hires fill out appropriate paperwork
  - Ensure an Anthem change for is filled out for terminations
- Health Savings Accounts
  - Ensure employees understand that there are maximum contributions (handout)
- Retirement 403(b)
  - Direct all employees to providers website to make contribution changes
  - Remember there is automatic enrollment and automatic increases for employees hired after July 1, 2008
  - <http://www.archindyhr.org/retirement/403b-plan/>

# Onboarding & Off-boarding Guidance

- New Procedural Forms for New Hires & Terminations

<http://www.archindyhr.org/important-forms>

**Our Commitment to Your Total Well-Being**  
Office of Human Resources

ARCHDIOCESE OF INDIANAPOLIS  
The Church in Central and Southern Indiana

**“Aligning Your Values and Vocati**

Home Money Health Retirement More Benefits Career Newsletter Contact Us Sign-Up

## Important Forms

**Parish Comings and Goings**

[New Employee Checklist](#) (completed by Parish Business Manager/School Administrator)

[New Hire Forms For Full and Part-Time Employees](#)

[Benefits 2013 \(employed 1500 hours +\)](#)

[Employee Termination Checklist](#) (completed by Parish Business Manager/School Administrator)

[Benefits for Those Leaving Employment](#)

New Employee Checklist

Termination Checklist

Search

**SIGN UP**  
AUTOMATICALLY GET HR EMAIL NOTICES

**New Employees:**  
Review your benefits. [Click Here.](#)

**Forms You'll Need**

Healthcare Blue Book  
YOUR FREE GUIDE TO FAIR HEALTHCARE PRICING



# What's Ahead

- Benefits
  - Archdiocese will create lay health assessments from Anthem database
  - Exploring Human Resource Modules (HRM) type options to bridge benefit gap with parishes
- Paycor Upgrade
  - Paycor is expected to transition to a web-based payroll system in the fall
  - Exploring the use of their web-based payroll system that has batch processing capabilities

# Contact List

- Archdiocese of Indianapolis
  - Carey Kendall, Supervisor Parish & Agency Services
    - Payroll, Billing, ADLF, PICA
    - [ckendall@archindy.org](mailto:ckendall@archindy.org)
    - 317-236-1519
  - Robyn Roller, Payroll and Billing Specialist
    - Payroll and billing related questions
    - Stipend requests, benefit related deduction changes, any tax notices for periods prior to Paycor servicing.
    - [rroller@archindy.org](mailto:rroller@archindy.org)
    - 317-236-1439
- Paycor
  - Gigi Gonzalez
    - Assistance with technical difficulties accessing systems or reports.
    - Gigi can provide assistance with the following:
      - ✓ Setting up a new employee
      - ✓ Check stub access for employees
      - ✓ Entering manual check or voiding a check
      - ✓ Changes to employees base pay, salary, or tax withholding
      - ✓ Adding a **NON-benefit** related deduction
      - ✓ Adding a new earning code or tax code
      - ✓ Tax notices for periods during Paycor servicing
      - ✓ Stop payment for live checks