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 <u>checklist</u> of all the <u>critical data fields</u> that you should ensure are completed when you enter a new hire in the payroll system <u>on page 13</u> 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

New Hire	
Select Template	New Hire Web Time Integrated 🔻
🕼 Load	
New Hire Web Tin	na Interrated
△ Employee	
Employee Id	130004693
2 Last Name	
 First Name 	
Middle Name	
Salutation	
Suffix	Select V
Nickname	
Prior Last Name	
3 SSN / EIN	
Birth Date	4
5 Gender	Select T
Ethnicity	Select T
Marital Status	Select 🔻 6
Smoker	
Disability	
Veteran	

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

△ Address and Conta	ıct
Address 1	
Address 2	1
City/State/Zip	· · ·
Country	UNITED STATES
County/Province	2
3 Home Phone	
Mobile Phone	
Email Address	4
Additional Address	
AdditionalAddress Type	Select V
Additional Country	Select 🔻

Enter Pay Rate Information:

- 1. Enter Pay Type = Hourly or Salary
- Enter Salary amount (the amount per pay period not annual salary) to be paid <u>if salary employee</u>
- 3. Enter Base Rate Per Hour <u>if hourly employee</u> (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

△ Pay Rate					
1 Pay Type	Salary Hourly				
Salary	0.00 2				
3 Base Rate / Per	0.0000 / Hour V				
Pay Frequency	S - Semi-Monthly 🔻 4				
5 Default Hours	0.00				
Auto Pay	Select • 6				

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 • Effective Date	Active 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	
∆ Taxes	4380 - 4380 7290 - 8us Drivers	
• Tax Form	8742 - 8742 8810 - 8810	1099R Distribution Code Select V
△ Federal Taxes	8868 - Clerical, Teachers, and Clergy 9101 - Maintenance and Kitchen Workers 9220 - Compton: Workers	
9 mili olu i	5220 - Cemetery workers	

Web Time Integration

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

- 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.

·· <u> </u>	
△ Web Time Integra	tion
Enable Time and Labor Access? Allow clock in / clock out	
through web	
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 V
Holiday List	13000 Holiday List-Catholic Center 🔻 6
Holiday Override Minutes	
Enforce Schedule	
Charge Rate	0.0000
Benefit Code / Accrual	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 V
Clock In / Clock Out Time	1
Submit Time Sheet for Non-worked hours	
Default Non-worked	
Track Attendance Only	
Shift Length in Minutes	
Feature Access Template	User Access Only 11
Permission To Manager	Select options
IP Access Policy	Unlimited Access 13
Company Code	13000 Catholic Center T 14
Job	Unmapped V

Custom Fields

∧ Custom Fields				
Safe & Sacred Certification No.				
403b Opt Out	Select 🔻			
Shared Employee	Select 🔻			
Benefit_Custom4	Select 🔻			
Background Check Completion Date		Ê		
Religious Order Affiliate				

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

△ Benefits Setup				
Effective Date	Benefit Class	Benefit Location	Benefit Division	Part Time
02/25/2016				
Add Delete	1997 - C. 1997 -			
∆ Taxes				

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: <u>DO NOT USE this code. This code will be used by the</u> <u>Central Payroll office ONLY.</u>

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

r Benefits Setup		
Effective Date	9/17/2015	v
Benefit Class	Select	T
Benefit Location	Select 🔻	
Benefit Division	Select 🔻	
Part Time?		
Benefit Termination Date		v
Benefit Salary Effective Date		v
Benefit Salary	\$0.00	🗌 🗌 Override?
Benefit Hours per Week	0.00	
Current Rate Annual Salary	\$0.00	
Save Save & Return	Cancel	

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

∆ Taxes	
1 • Tax Form W2 • 1099R Distribution Code Select •	SSN / EIN
ے Federal Taxes	△ Primary State Taxes
• Filing Status - Select - V 2	6 • Primary State IN - Indiana SITW •
3 • Exemptions 0.00	Filing Status Select Y
Amount Type Default Amount 4	8 • Exemption 1 0.00
5 Amount 0.00	Exemption 2 0.00
Percentage 0.00	9 Amount Type Default Amount
943 Agricultural Employee	Amount 0.00
	Percentage 0.00
	Supplemental Check Select T
	Notes
	SUI State Indiana SUI
	Custom Text Field 1
	Custom Text Field 2
	Custom Text Field 3
	Custom Text Field 4
	Field 1 Select V
	Field 2
	Lustom Number Pield
	Custom Number Field
	Custom Checkbox Field
	Custom Checkbox Field

- 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.

Perso	nal	Work	Payro	oll Setup	Pay	Time Off	Scheuu
Rate	25	Taxes	Earning	s Dec	luctions	Direct Dep	osit La
Taxe	s						
		Тах	Code			Filing Statu	15
	<u>FITW</u>	- Federa	l Income	Tax	Single		
	<u>IN - I</u>	ndiana S	ITW		Single		
Ado	d	Delete	Chang	e State			
۵ddi	itiona	al Tax Ir	format	ion			
Addi	itiona	al Tax Ir	nformat	ion			
Addi sui	i tiona State	al Tax Ir	nformat	ion			
Addi SUI Tax	i tiona State Form	al Tax Ir	IN	2 •			
Addi SUI Tax 1099	itiona State Form 9R Dist	al Tax Ir	IN IN Code	ion /2 • Select			Y
Addi SUI Tax 1099	itiona State Form 9R Dist	al Tax Ir	IN IN Code	ion /2 • Select	• Rea	son Code	Ţ
Addi SUI Tax 1099	itiona State Form 9R Dist Ta FITW	al Tax Ir tribution x Code ' Exempt	IN IN Code	r2 v Select	• Rea	son Code	
Addi SUI Tax 1099	itiona State Form 9R Dist Ta FITW SITW	al Tax Ir tribution x Code / Exempt / Exempt	IN W Code	2 v Select Select	• Rea 	son Code T	Y
Addi SUI Tax 1099	itiona State Form PR Dist Ta FITW SITW SS E:	al Tax Ir tribution x Code / Exempt / Exempt xempt	IN N Code	ion 2 Select Select Select Select	• Rea 	son Code	*
Addi SUI Tax 1099	itiona State Form ØR Dist Ta FITW SITW SS E: Med	al Tax Ir tribution x Code / Exempt / Exempt Exempt	IN N Code	ion 2 Select Select Select Select	• Rea 	son Code	•
Addi SUI Tax 1099	itiona State Form PR Dist Ta FITW SITW SS E: Med FUTA	al Tax Ir tribution x Code / Exempt / Exempt Exempt & Exempt	IN W Code	ion 2 Select Select Select Select Select Select Select	• Rea 	son Code	v

Enter Direct Deposit Information

- 1. Click ADD
- 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
- 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.

Direct Deposit Detail	Direct Deposit Details				
1 Priority					
Account Type	Checking V 2				
Transit Routing Number	2				
Account Number					
Amount Type	Flat • 4				
5 Amount					
Skip Pre-Note?	✓ 6				
Block Special?					
Account Description	None T				
Name on Account					
Save Save & Return Ca	ancel				

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
- Enter the check Frequency some examples include: One-time, Semimonthly (each pay period), MF – Monthly take first pay, or ML – Monthly take last pay

Save and Return

Deduction Details	
Effective Date	✓ 1
2 Begin Check Date	Select V
End Check Date	Select V 3
4 • Deduction Code	Select
• Calculation Code	Select 5
6 Rate / Amount	
Frequency	All 7
Goal	
Paid To Date	
Agency	Select 🔻
Priority	
Pay Period Minimum	
Pay Period Maximum	
Annual Maximum	
Misc Info	
Loan Number	
Child Support States	Select V
Child Support Case Identifier	
Child Support FIPS Code	
Child Support Medical Support	
Child Support Report as Terminated	
Location	Select V
Pay Group	Select 🔻
Department	Select 🔻
Loan Issue Date	×
Loan First Payment Date	×
Notes	
Save Save & Return Ca	ancel

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
 - o Click on the drop down arrow and select ALL
 - Click "SEARCH" or "SHOW ALL"

Pending Changes

Employee Updates

Pay Rates Approval Options

Pending Changes

Page	All items checked	\sim		
Current Status	4 items checked	~		
	🔲 All			
Current Status By / Next Actor	Approved			
Comment Status Do	Declined			
Current Status By	🗹 Pending Add			
	🖉 Pending Approval			
Next Actor	Pending Change			
	Pending Delete			

- 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)
 - o Update the information and then click SAVE

			Page / Current Status		
	Page	Current Status	Status Date 🛛		
	■ New Employee (130004542)	Pending Add	7/13/2016 11:53:57 AM		
		Pending Add	6/30/2016 2:08:56 PM		
Approve Selected Decline Selected		Approve All De	cline All		

Page	Current Status	Status Date 🛛					
■ New Employee (130004542)	Pending Add	7/13/2016 11:53:57 AM					
Demographics							
Taxes Direct Deposit (274074066) Custom Field (Benefit_Custom4) Custom Field (Religious Order Affiliate)							
					Employee Status (A)		
						Page Image: New Employee (130004542) Image: Demographics Image: Taxes Image: Direct Deposit (274074066) Image: Custom Field (Benefit_Custom4) Image: Custom Field (Religious Order Affilia) Image: Employee Status (A)	PageCurrent StatusImage: New Employee (130004542)Pending AddImage: DemographicsImage: Image: Image

- 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.

(\$) Web Pay	Home	Employees	HR	Payroll	Company	Applicant	Tax & Finance	Reports & Analytics	
\sim Advanced	✓ Advanced Last Name, First Name, SSN, Employee Id						Active	▼ Q Search	R
Active Filters: 🗙	Status: Active	Save	searcha	as	Save				

- 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"

