

Archdiocese of Indianapolis



PAYROLL TRAINING

Meet the Payroll Team



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The payroll team supports 130+ legal entities, their business managers, and Archdiocesan employees. We process payroll for the Archdiocese, Catholic Charities entities, Mother Theodore Catholic Academies, Bishop Chatard High School, and several other locations throughout the Archdiocese. We manage billed wages (stipends, SECA, lay and priest wages). We prep payroll to be processed in non-payroll weeks, manage time and labor daily, and post wages and related expenses to our ledger for all Intacct-using entities (Arch, MTCA, Fatima, CYO, CYO Camp, CCI, CCB, CCTH, CCTC).

Archdiocese & Paylocity Structure

HR & PAYROLL

- All legal entities are separate companies

TIME AND LABOR

- One database for the entire Archdiocese
- Each employee has a single timecard with a single employee identification number

NOTE

- These are different databases and applications
- Oftentimes there are delays with the sync between the two systems

Payroll Processing Overview

TIME AND LABOR

- ❑ HOURLY EMPLOYEES CLOCK IN AND OUT
 - NOTE: hourly employees cannot be paid standard hours
- ❑ SALARIED EMPLOYEES HAVE SCHEDULES POST TO TIMECARDS
- ❑ SUPERVISORS ARE ASSIGNED TO ALL EMPLOYEES
- ❑ SUPERVISORS ARE REQUIRED TO APPROVE TIMECARDS
- ❑ TIME AND LABOR DATA MUST BE USED TO PROCESS PAYROLL
- ❑ TIME OFF PROGRAMMED & EMPLOYEES USE REQUESTING SYSTEM
 - ❑ NOTE: if employee is eligible; time off types should be added to employee record after the new hire is approved
- ❑ HOLIDAY LISTS MAINTAINED ANNUALLY

Payroll Processing Overview

TIME AND LABOR

- ❑ RUN TIMECARD REPORT
- ❑ EXPORT TIME WORKED FILE

HR & PAYROLL

- ❑ CREATE BATCH
- ❑ MERGE WITH T&L IMPORT FILE
- ❑ RUN AND REVIEW PREPROCESS REGISTER
- ❑ RUN NO PAY PRIOR TO PROCESS PAYROLL REPORT
- ❑ RUN PAYROLL AUDIT AND REVIEW ANY ERRORS
 - ❑ REVIEW THE ERRORS THAT YOU CAN SEE CENTRAL PAYROLL WILL TAKE CARE OF ANY OTHERS
- ❑ APPROVE PAY RUN
- ❑ EMAIL CENTRALPAYROLL@ARCHINDY.ORG APPROVAL MESSAGE

Time & Labor Supervisor Training

ARCHINDY.ORG

- ▶ OFFICES > FINANCE > PARISH & AGENCY PAYROLL >
 - ▶ PAYLOCITY ELETRONIC TIMEKEEPING RESOURCES
 - ▶ SUPERVISOR GUIDES
 - ▶ **ELECTRONIC TIMEKEEPING SUPERVISOR TRAINING (Video)**

Note: the link is too large to email

Home Archbishop Staff Parishes Offices Schools Newspaper Charities Support Us

Archdiocese of Indianapolis Finance and Administrative Services

Homepage
Archdiocesan Finances
Parish, School and Agency Finances
Policies and Forms
Intact and New Forms
Grant Opportunities
Building Construction
Insurance Forms & Info
Employee Payroll
Parish & Agency Payroll
OAS Messenger Newsletter
Information Systems
Staff

Search

Select Language

Parish & Agency Payroll

Payroll

- [2022 Location Payroll Processing Calendar](#)
- [Improving Payroll Processing Time](#)
- [Web Time Employee Time Card Report Setup](#) (Run and review prior to processing payroll)

Fair Labor Standards Act (FLSA) Guidance

- [Pay Compliance Cover Letter and Manual](#)

Paylocity Resources

- [Detailed WebTime to WebPay Processing Instructions](#)
- [Log on to the Paylocity payroll system to access personal payroll information](#)
- [Ensure Federal and State Unemployment tax setup is correct](#)
- [Making Changes to an Employee Profile When Changes Are Pending](#)
- [Bank Account Change Form](#)
- [Religious Employees Set Up](#)
- [Blocking Earnings and Deductions](#)
- [Importing Timecards into Web Pay](#)
- [Adding & Assigning Salaried Schedules in Paylocity](#)

Paylocity Electronic Timekeeping Resources

Implementation

- [Web Time Introduction](#)

Employee Guides

- [Employee Dashboard](#)
- [Employee Timesheet](#)
- [Paylocity Mobile Application Guide](#)

Supervisor Guides

- **[Electronic Timekeeping Supervisor Training \(Video\)](#)**
- [Paylocity Electronic Timekeeping Training Session Summary](#)
- [Supervisor Dashboard](#)
- [Supervisor Timecard](#)
- [Supervisor Approvals](#)
- [Filter In or Filter Out Employee Group Listings](#)
- [Add Holiday hours to Employee Timecard](#)

Payroll Processing

NON-PAYROLL WEEKS

- Requests for stipends and non-mass stipends due by **Tuesdays** in non-payroll weeks.

MONDAYS IN PAID WEEKS

- Require supervisors to approve timecards promptly
- Fix missed punches, attendance exceptions, clear time off requests and approve timecards.

Roman Catholic Archdiocese of Indiana [13000] paylocity

Time & Labor | Home | Employees | Payroll | Reports | Configuration | Help

Home | Time Card | Schedules | Time Off Calendar | Reports

Filter | Reset | -- Load Saved Filters --

Looking to increase your employee engagement? Check out our Time and Labor Adoption Toolkit for some tips. [Visit Now] [Dismiss]

Quick View

Insights	My Employees	Missed Punches	Pending Time Off Requests	Attendance Exceptions	Invalid Terminal Punches	Find New Employees
	5134	384	105	322	0	8

Find New Employees

Employee: Date Added: 1/30/2022 | 2/6/2022 | Search | < Last Week | This Week | Next Week >

<input type="checkbox"/>	Employee ^	Date Added ^	Last Updated
<input type="checkbox"/>	Allen, Sara	1/31/2022 12:00 AM	1/31/2022 7:17 AM
<input type="checkbox"/>	Barbu, Jallah	1/31/2022 12:00 AM	1/31/2022 7:21 AM

Payroll Processing

ENSURE ALL TIMECARDS ARE APPROVED IN TIME AND LABOR

- ▶ Employees > Time Card Approvals > Check Pay Period Date
- ▶ Use Filters to Filter by Company, Supervisors, Approved, or Not Approved

The screenshot shows the Paylocity interface for the Roman Catholic Archdiocese of Indiana. The 'Employees' menu is open, showing options like 'Employee Time Card', 'Time Card Approvals', 'Group Time Card', etc. The 'Time Card Approvals' option is selected, and a date range filter is set to '01/09/2022 - 01/22/2022'. Below the menu, a table displays employee time card data.

	OT1	OT2	Non Work	Total	Adjustments	Missed Punches	EE App	Supv App	Assigned Supv
	0 hrs	0 hrs	0 hrs	80 hrs	\$0.00	0	<input type="checkbox"/>	<input type="checkbox"/>	Augenstein, Rev Eric M.
	0 hrs	0 hrs	0 hrs	80 hrs	\$0.00	0	<input type="checkbox"/>	<input type="checkbox"/>	Bianchini, Terri M.
	0 hrs	0 hrs	0 hrs	80 hrs	\$0.00	0	<input type="checkbox"/>	<input type="checkbox"/>	Bianchini, Terri M.

The screenshot shows the Paylocity Quick View dashboard for the Roman Catholic Archdiocese of Indiana. The active filter is 'Employee Group: 13055 St Elizabeth of Hungary CC'. The dashboard displays key metrics in a 'Quick View' section:

Metric	Value
My Employees	1
Missed Punches	0
Pending Time Off Requests	0
Attendance Exceptions	0
Invalid Terminal Punches	0
Find New Employees	8

Payroll Processing

Time and Labor

- ▶ Employees > Time Card Approvals > Check Pay Period Date
- ▶ Use Filters to Filter by Company, Supervisors, Approved, or Not Approved

The screenshot displays the Paylocity interface for the Roman Catholic Archdiocese of Indiana [13000]. The navigation menu includes 'Time & Labor', 'Home', 'Employees', 'Payroll', 'Reports', 'Configuration', and 'Help'. The 'Employees' menu is open, showing options like 'Employee Time Card', 'Time Card Approvals', 'Group Time Card', 'Employee Schedules', 'Schedule Templates', 'Schedule Template Assignments', 'Time Off Request Calendar', 'Employee Search', 'Message Center', 'Punch Map', 'Punch Photo Gallery', 'Punch Import', and 'Manage Availability'. The 'Time Card Approvals' option is highlighted. A 'Filter' button is also visible. The main content area shows a table of employee time card data for the period 01/09/2022 - 01/22/2022. The table has columns for OT1, OT2, Non Work, Total, Adjustments, Missed Punches, EE App, Supv App, and Assigned Supv. The data is as follows:

	OT1	OT2	Non Work	Total	Adjustments	Missed Punches	EE App	Supv App	Assigned Supv
	0 hrs	0 hrs	0 hrs	80 hrs	\$0.00	0	<input type="checkbox"/>	<input type="checkbox"/>	Augenstein, Rev Eric M.
	0 hrs	0 hrs	0 hrs	80 hrs	\$0.00	0	<input type="checkbox"/>	<input type="checkbox"/>	Bianchini, Terri M.
	80 hrs	0 hrs	0 hrs	80 hrs	\$0.00	0	<input type="checkbox"/>	<input type="checkbox"/>	Bianchini, Terri M.

Payroll Processing

After all timecards are approved:

- ▶ Run a Timecard Report: Reports > 13XXX Employee Time Cards (Landscape)
- ▶ You will use this report to verify accuracy of data transferred

The screenshot displays the Paylocity web interface for the 'R C ARCHDIOCESE OF INDIANAPOLIS [13000]' organization. The top navigation bar includes 'Home', 'Employees', 'Payroll', 'Reports', and 'Configuration'. The 'Reporting' section is active, showing a search bar with '13010' entered and a filter for 'Time & Labor'. Below the search bar, a table lists reports. The table has columns for 'Report Name', 'Last Run On', 'Work Space', and 'Report Type'. One report is listed: '13010 Employee Time Cards (Landscape)', which was last run on 11/08/21 at 10:15 am in the 'Time & Labor' workspace and is marked as 'Revised'.

Report Name	Last Run On	Work Space	Report Type
<input type="checkbox"/> 13010 Employee Time Cards (Landscape) Displays the Employee Time Cards report with labor levels displayed horizontal (as columns)	11/08/21 10:15 am	Time & Labor	Revised

Payroll Processing

After all timecards are approved:

- ▶ Time & labor > Payroll > Payroll Data Transfer > Sort by Configuration Name to list locations in order
- ▶ Select Transfer Data

Roman Catholic Archdiocese of Indiana [13000] paylocity Search

Time & Labor Home Employees Payroll Reports Configuration Help

Home Time Card Schedules Time Cards

Payroll Data Transfer
Begin Payroll Lockout Reports
Close Pay Periods
Open Pay Periods

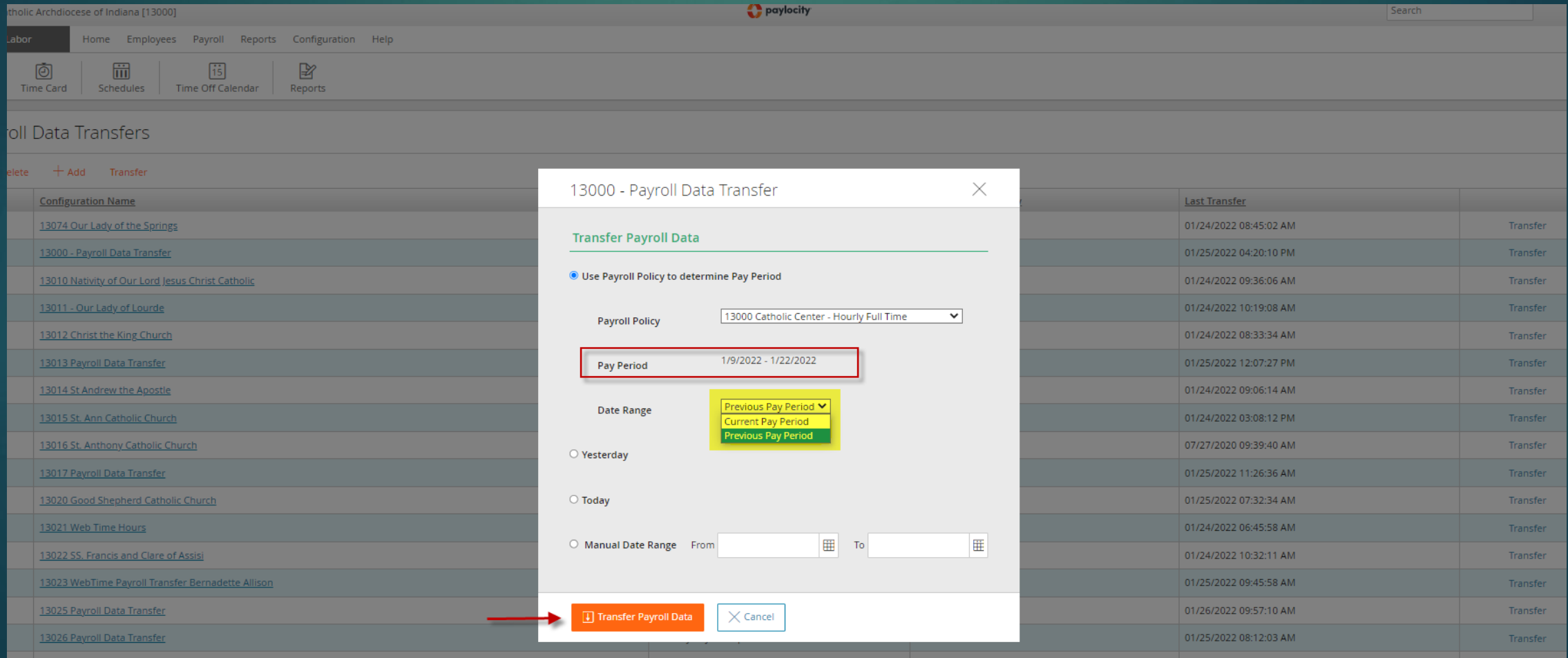
Payroll Data Transfers

✕ Delete + Add Transfer

<input type="checkbox"/>	Configuration Name	Report	HR & Payroll Company	Last Transfer	
<input type="checkbox"/>	13074 Our Lady of the Springs	WebPay Payroll Export	13074	01/24/2022 08:45:02 AM	Transfer
<input type="checkbox"/>	13000 - Payroll Data Transfer	WebPay Payroll Export	13000	01/25/2022 04:20:10 PM	Transfer
<input type="checkbox"/>	13010 Nativity of Our Lord Jesus Christ Catholic	WebPay Payroll Export	13010	01/24/2022 09:36:06 AM	Transfer
<input type="checkbox"/>	13011 - Our Lady of Lourde	WebPay Payroll Export	13011	01/24/2022 10:19:08 AM	Transfer

Payroll Processing

- ▶ VERIFY THE PAY PERIOD IS CORRECT
- ▶ THEN TRANSFER PAYROLL DATA



The screenshot shows the Paylocity interface for the Catholic Archdiocese of Indiana. A modal window titled "13000 - Payroll Data Transfer" is open, displaying the "Transfer Payroll Data" configuration. The "Pay Period" field is highlighted with a red box and contains the date range "1/9/2022 - 1/22/2022". The "Date Range" section includes a dropdown menu with "Previous Pay Period" selected, and radio buttons for "Yesterday", "Today", and "Manual Date Range". At the bottom of the modal, there are two buttons: "Transfer Payroll Data" (highlighted with a red arrow) and "Cancel".

13000 - Payroll Data Transfer

Transfer Payroll Data

Use Payroll Policy to determine Pay Period

Payroll Policy: 13000 Catholic Center - Hourly Full Time

Pay Period: 1/9/2022 - 1/22/2022

Date Range: Previous Pay Period

Yesterday

Today

Manual Date Range From: [] To: []

Configuration Name	Last Transfer	
13074 Our Lady of the Springs	01/24/2022 08:45:02 AM	Transfer
13000 - Payroll Data Transfer	01/25/2022 04:20:10 PM	Transfer
13010 Nativity of Our Lord Jesus Christ Catholic	01/24/2022 09:36:06 AM	Transfer
13011 - Our Lady of Lourde	01/24/2022 10:19:08 AM	Transfer
13012 Christ the King Church	01/24/2022 08:33:34 AM	Transfer
13013 Payroll Data Transfer	01/25/2022 12:07:27 PM	Transfer
13014 St Andrew the Apostle	01/24/2022 09:06:14 AM	Transfer
13015 St. Ann Catholic Church	01/24/2022 03:08:12 PM	Transfer
13016 St. Anthony Catholic Church	07/27/2020 09:39:40 AM	Transfer
13017 Payroll Data Transfer	01/25/2022 11:26:36 AM	Transfer
13020 Good Shepherd Catholic Church	01/25/2022 07:32:34 AM	Transfer
13021 Web Time Hours	01/24/2022 06:45:58 AM	Transfer
13022 SS. Francis and Clare of Assisi	01/24/2022 10:32:11 AM	Transfer
13023 WebTime Payroll Transfer Bernadette Allison	01/25/2022 09:45:58 AM	Transfer
13025 Payroll Data Transfer	01/26/2022 09:57:10 AM	Transfer
13026 Payroll Data Transfer	01/25/2022 08:12:03 AM	Transfer

Payroll Processing

HR & PAYROLL

- ▶ Payroll > Pay Entry > Batch Type = Regular > Add Batch

The screenshot displays the Paylocity HR & Payroll interface for the R.C. ARCHDIOCESE OF INDIANAPOLIS [13000]. The navigation menu includes HR & Payroll, Employees, HR, Payroll, User Access, Reports & Analytics, Document Library, Approvals, Tax & Finance, Configuration, and Help. The 'Payroll' menu is open, showing options like Check Calculator, Void Checks, Pay Entry Options, Print Checks, Third Party Sick Pay, and Pay Entry History. The 'Create Batch' button is highlighted in red. The 'Batch Type' dropdown is open, showing options like Regular, -- Select --, 310T, Empty, Exp Reimb, fixOps, Hourly, NetToGross, PriestRFEM, Regular (highlighted in blue), Salaried, TimeImprt, and Web Exp. The 'Add Batch' button is also highlighted in red. The 'Save' button is visible. The 'Payroll Setup' section shows 'Check Date' as 02/11/2022 - Bi-Weekly, 'Period Begin Date' as 01/23/2022, and 'Period End Date' as 02/05/2022. The 'Batches' table has columns for Batch, User, # Checks, Batch Type, Status, Ov Begin Date, Ov End Date, User, and Action. The 'Time Off Accrual Settings' section shows 'Block Frequency' as unchecked, with 'Calendar' and 'Go to Company Set Payroll' buttons.

HR & Payroll

Employees HR Payroll User Access Reports & Analytics Document Library Approvals Tax & Finance Configuration Help

Quick Nav Company Id

Feedback What's New

Create Batch

Check Calculator

Void Checks

Pay Entry Options

Print Checks

Third Party Sick Pay

Pay Entry History

Upcoming Payroll Deadlines and funding. Please review your check dates and plan for any early submissions of payrolls to ensure funds are available to your employees as expected. See PCTY-78530 for additional details.

Effective dates have been applied to this check date. [View Report](#)

Payroll Setup

Processing a Special Payroll

Notes

Payroll Notes

Check Date 02/11/2022 - Bi-Weekly

[Add One Time Check Date](#)

[Edit / Change](#)

Period Begin Date 01/23/2022

Period End Date 02/05/2022

Batch Type Regular

-- Select --

310T

Empty

Exp Reimb

fixOps

Hourly

NetToGross

PriestRFEM

Regular

Salaried

TimeImprt

Web Exp

Add Batch

Save

Batch	User	# Checks	Batch Type	Status	Ov Begin Date	Ov End Date	User	Action
<input checked="" type="checkbox"/>			Regular					

Time Off Accrual Settings

Block Frequency

Calendar Go to Company Set Payroll

Payroll Processing

HR & PAYROLL

- ▶ Batch Name = rename if desired > Start Batch

NOTE: Auto-Pay Employees is checked by default which means salaried employees will be added to the batch automatically

R C ARCHDIOCESE OF INDIANAPOLIS [13000] paylocity

HR & Payroll Employees HR Payroll User Access Reports & Analytics Document Library Approvals Tax & Finance Configuration Help

Pay Entry History > Payroll 2/11/2022

Batch Type: Regular

Batch Name 01-28-22

Batch By --Select--

Options

Auto-Pay Employees

Include Approved Time Off Requests

Include Expanded FMLA

Auto Post

Auto Post Items Regular [Override](#)

Employee Filter

Pay Group	-- All --	Status	Active
Pay Type	-- All --	Shift	-- All --
Pay Frequency	-- All --	Position	-- All --
Employment Type	-- All --	LocProg	-- All --
		Account	-- All --
		Proj_Grant	-- All --

Override Period Dates

Period Begin

Period End

Checkstub Memo

Memo Text

Payroll Processing

HR & PAYROLL

- ▶ Payroll > Pay Entry > Batch Type = Time Import > Add Batch

The screenshot shows the Paylocity HR & Payroll interface for the R.C. ARCHDIOCESE OF INDIANAPOLIS [13000]. The 'Payroll' menu is open, and the 'Batch Type' dropdown is set to 'Time Import'. The 'Add Batch' button is highlighted. The 'Batches' table shows a batch for 01-28-22 with 196 checks, created by ckendall.

Batch	Created	User	# Checks	Batch Type	Status	Ov Begin Date	Ov End Date	User
<input checked="" type="checkbox"/> 01-28-22		ckendall	196	Regular - View	Open	N/A	N/A	

Payroll Processing

HR & PAYROLL

- ▶ Batch = Merge Into Existing > Choose Batch > Select Import File > Then select Import

R C ARCHDIOCESE OF INDIANAPOLIS [13000] paylocity

HR & Payroll | Employees | HR | Payroll | User Access | Reports & Analytics | Document Library | Approvals | Tax & Finance | Configuration | Help

[Pay Entry History](#) > Payroll 2/11/2022

Batch Type: Regular

Create New

Batch Merge Into Existing

Time Import File

Select

Upload [View Sample File](#)

Include Approved Time Off Requests

Include Expanded FMLA

Auto Post

Auto Post Items

Override Period Dates

Period Begin

Period End

Check Type

Check Type

Checkstub Memo

Memo Text

Payroll Processing

HR & PAYROLL

- ▶ You'll either get a warning or a green message
- ▶ For either, click Status Report and review the report for any errors or save for your records.

The screenshot displays the Payroll Processing interface for R C ARCHDIOCESE OF INDIANAPOLIS [13000]. The top navigation bar includes 'HR & Payroll', 'Employees', 'HR', 'Payroll', 'User Access', 'Reports & Analytics', 'Document Library', 'Approvals', 'Tax & Finance', 'Configuration', and 'Help'. The main content area is titled 'Payroll 2/11/2022' and features a prominent orange warning banner: 'Warning. Time clock import included warning(s). The time clock import file contained 172 record(s) with 0 error(s) and 2 warning(s). To view errors, click on Status Report. To ignore the errors and create a batch, click on Ignore Errors and Import.' Below the banner, the 'Batch Type: Time Clock Import' is shown with a 'Batch Name' of '01-28-22'. A 'Batch Status' section is present but empty. At the bottom, three buttons are visible: 'Status Report' (highlighted with a red box), 'Ignore Errors and Import', and 'Cancel'. A small note at the bottom right of the main content area reads 'To view errors/warnings, click on Status Report.'

Payroll Processing

Run A Pre-Process Register:

- ▶ From Pay > Pay Entry > Click on the batch >
- ▶ Change the Batch Type to All
- ▶ Scroll down to the bottom of the page and click Register

<input type="radio"/>	130005003		1009999-12203.004-999		24.0000	0.00	0.0000	0.00	0.00	0.00	0.00	0.00	0.0000	0.0000	0.0000
<input type="radio"/>	130004869		1009999-12203.001-999		0.0000	0.00	0.0000	0.00	0.00	0.00	0.00	0.00	0.0000	0.0000	0.0000
<input type="radio"/>	130004435		1009999-12203.001-999		0.0000	0.00	0.0000	0.00	0.00	0.00	0.00	0.00	0.0000	0.0000	0.0000
<input type="radio"/>	130001115		1009999-12203.001-999		0.0000	0.00	0.0000	0.00	0.00	0.00	0.00	0.00	0.0000	0.0000	0.0000

R C ARCHDIOCESE OF INDIANAPOLIS [13000] paylocity

HR & Payroll | Employees | HR | Payroll | User Access | Reports & Analytics | Document Library | Approvals | Tax & Finance | Configuration | Help

Payroll: 02/11/2022 | 01-28-22 | 243 Check(s)

Batch Totals Filter

Batch: -- All Batches --
LocProg: -- All --
Account: -- All --
Proj_Grant: -- All --

Status: Open
Use Override Departments:

EVACM	VACATION MEMO	0.0000	131.2500	-131.2500	0.00	0.00	0.00	Details
TOTALS:		0.0000	5901.6800	-5901.6800	0	0	0	

Reports

Report Sort: Name

Payroll Processing

Run Payroll Audit:

- ▶ Pay Entry > Payroll Audit > click Run Payroll Audit
- ▶ Review any errors
- ▶ You can make changes if needed
- ▶ Include any details about audits that are okay in approval email to Central Payroll

R C ARCHDIOCESE OF INDIANAPOLIS [13000] paylocity Quick Nav Company Id

HR & Payroll Employees HR Payroll User Access Reports & Analytics Document Library Approvals Tax & Finance Configuration Help

Payroll Audit

Create Batch **Payroll Audit**

Payroll Audit
Audit Date-Time: [blank]
User: [blank]

Payroll Setup
Check Date: 02/11/2022
Period Begin: 01/23/2022
Period End: 02/05/2022

Audit Summary

Hold Reason	# Checks	Description	Steps to Resolve

Audit Details Hold Reason: -- All -- Show Released Holds

Release	Batch	Check	Empld	Employee Name	Cost Center	Hold Reason	Message
<input checked="" type="checkbox"/>							

Run Payroll Audit **Go to Company Set Payroll**

Payroll Audit

ⓘ The Payroll Audit has resulted in hold conditions. Please review below and fix any problems, then submit your payroll again to remove the hold.

Create Batch **Payroll Audit**

Payroll Audit
Audit Date-Time: [blank]
User: [blank]

Payroll Setup
Check Date: 02/11/2022
Period Begin: 01/23/2022
Period End: 02/05/2022

Audit Summary

Hold Reason	# Checks	Description	Steps to Resolve
Invalid Future Check date	1		
Pay Frequency Hours Exceeded	1		

Audit Details Hold Reason: -- All -- Show Released Holds

Release	Batch	Check	Empld	Employee Name	Cost Center	Hold Reason	Message
<input type="checkbox"/>						Invalid Future Check date	Payroll submitted with Check Date 9 or more days in the future
<input checked="" type="checkbox"/>	01-28-22	1				Pay Frequency Hours Exceeded	114.420000 hours for Bi-Weekly payroll

Run Payroll Audit **Go to Company Set Payroll**

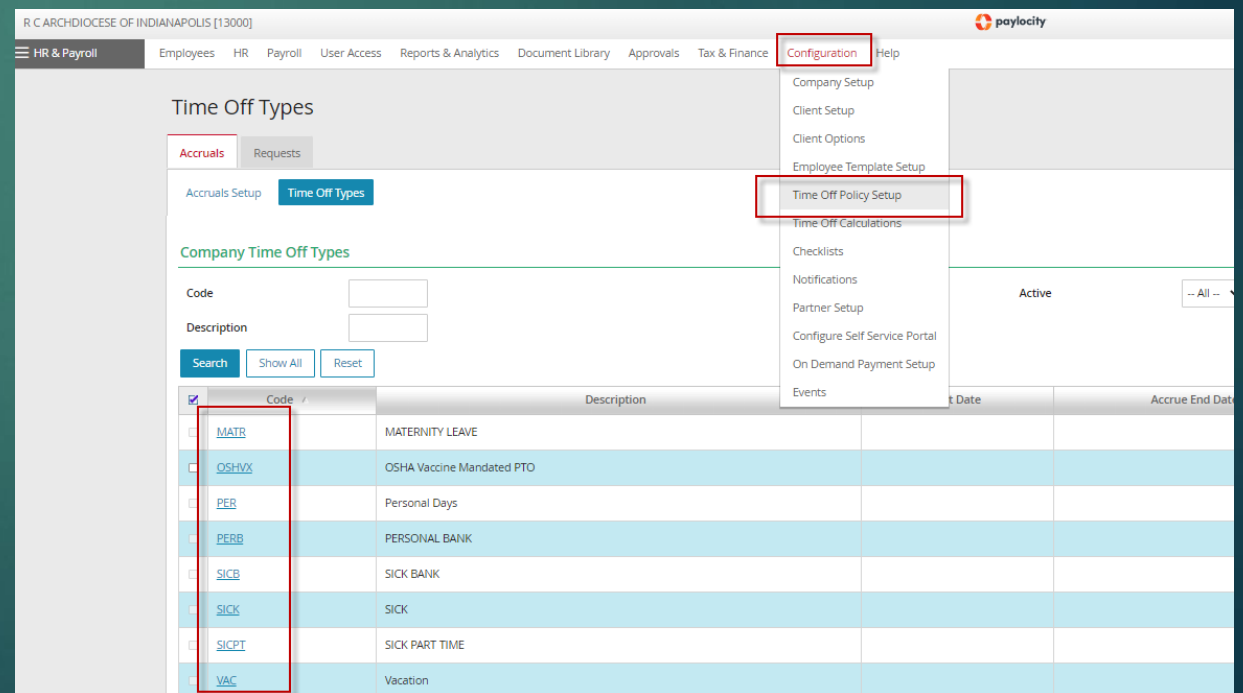
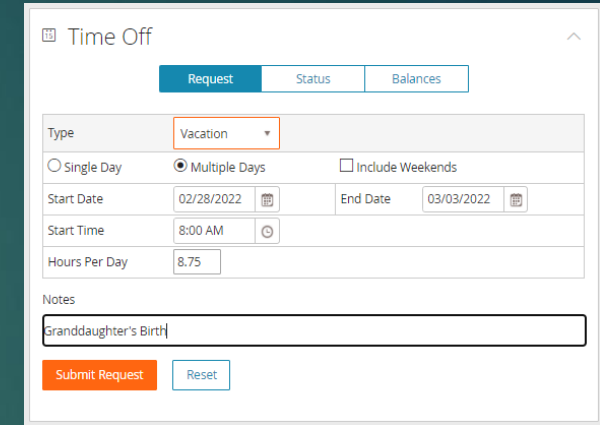
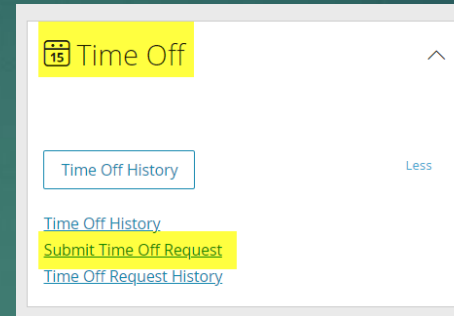
Payroll Processing

- ▶ Carefully review the pre-process register and run payroll audit
- ▶ Compare the register to the timecard report
- ▶ Run a “No Pay Prior to Process Report” to ensure all employees who worked are being paid
- ▶ Make any necessary adjustments
- ▶ Run a final pre-process register (you cannot get this same report after payroll has processed). Paylocity only stores the first original.
- ▶ If no further adjustments are required, email approval to centralpayroll@archindy.org
- ▶ After the approval, Central Payroll goes through ensuring all benefit changes are in place (health, dental, HSA, HAS Bonus, 403b), severance is being paid out appropriately, garnishments are in place, FMLA is being recorded, verifying direct deposit, and the payroll audits are cleared.

Time Off

HR & PAYROLL

- ▶ Paylocity programs time off types in HR & Payroll, not in Time & Labor
- ▶ Time Off is programmed according to your location's time off policy
- ▶ If you do not have a time off policy; you can use the HR Suggested Time Off Policy
- ▶ Time Off Types are added to the employee record after hire or reclassification (part-time to full-time)
- ▶ Employees request time off through the Employee Self-Service Portal (top right screen prints)
- ▶ Do you have time off programmed? If you are not sure, go to: Configuration > Time Off Policy Setup > Time Off Types (bottom screen print)
- ▶ You can reach out to ckendall@archindy.org for assistance with understanding how your time off types are currently programmed.
- ▶ If time off types need modified, Carey Kendall can assist with facilitating that process.



Holidays

TIME & LABOR

- ▶ Business Managers maintain and update Holiday Lists at least annually
- ▶ Holidays will not populate on the timecard if they are not present
- ▶ You can have multiple holiday lists for different groups of employees (teachers, parish staff, etc.)
- ▶ Please do not edit or copy a holiday list from any other location
- ▶ Add Holidays by clicking Edit

Roman Catholic Archdiocese of Indiana [13000] paylocity Search

Time & Labor Home Employees Payroll Reports Configuration Help

Home Time Card Schedules Time Off Calendar

Holidays

+ Add New Holiday List Regenerate Holidays

Holiday List Name ^

Holiday List Name	Number of Employees Assigned	Actions
13000 Holiday List Catholic Center	46	Edit Copy Delete
13000 Holiday List-Catholic Center Copy	446	Edit Copy
13010 Holiday List	0	Edit Copy Delete
13010 Holiday List	49	Edit Copy Delete
13011 Holiday	69	Edit Copy Delete
13011 Holiday List	2	Edit Copy Delete
13012 Holiday List	46	Edit Copy Delete

Holidays

TIME & LABOR

- ▶ Click +Add New Holiday
- ▶ Name the Holiday > Enter the Date(s) > click Update
- ▶ You must scroll down to the bottom and click Save or your changes will not be saved
- ▶ You can check Holiday policy assignments by running a Time & Labor set up report: HR & Payroll > Reports & Analytics > Employee Time & Labor Settings
- ▶ If changes need to be made email centralpayroll@archindy.org

The screenshot shows the 'Edit Holiday List' interface. At the top, there is a back arrow and the title 'Edit Holiday List'. To the right are two tabs: 'Details' (selected) and 'Members'. Below the title is a text input field for 'Holiday List Name (required)' containing '13000 Holiday List Catholic Center'. Underneath is a section titled 'Holidays' with a '+ Add New Holiday' link. A table lists the holiday details:

Holiday	Start Date and Time	End Date and Time	Active	Inc. Weekends	Co. Worked	Actions
New Year 2023	01/02/2023 12:00 AM	01/03/2023 12:00 AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Update Cancel

At the bottom of the interface, there is a pagination control showing '1 - 62 of 62 items' and a 'Save' button next to 'Cancel Changes'.

Noteworthy

Supervisor Reassignments

When you have an employee who is hired who is replacing a supervisor or becoming a supervisor of many employees.

- ▶ The supervisor must be set up on the Time and Labor tab which is managed by Central Payroll **AND** the supervisors Employee Group must be set up in Time and Labor.
- ▶ Email Central Payroll the supervisor's name so this can be set up
- ▶ We can reassign the supervisor in bulk if you provide a listing of employees.

Noteworthy

▶ Shared Employees

- ▶ Each employee has a single timecard and a single EEID
- ▶ Requires a special setup and if cost centers aren't available or supervisor can't see the timecard, please contact us

▶ New Hires

- ▶ The payroll team monitors a shared HR-Payroll spreadsheet to monitor employees who need time and labor enabled
- ▶ Oftentimes locations are aware of the approval prior to Central Payroll
- ▶ When this happens, email us and we'll work with HR to verify, then enable the timecard
- ▶ If any settings need adjusted; email changes to Central Payroll

Noteworthy

- ▶ Termed Employees
 - ▶ You don't have to wait for a final paycheck to term an employee
 - ▶ NOTE: as of the begin check date selected for termination; Time and Labor data will not transfer. You will have to manually add time worked to the pay run.
 - ▶ You can reach out to us for assistance with adding to the batch if needed
 - ▶ The user account should be enabled until the end of the tax season in the following calendar year

Terminate Employee in HR & Payroll

If an employee is permanently leaving the company either voluntarily or involuntarily (and the company is not using [Employee Action Forms](#)), then follow this process to terminate an employee:

1. Navigate to **HR & Payroll > Employees > Employee Search > Employee Record > Employment > Status & History**.
2. Select **Manage Status & History**.
3. Select **Terminate**.
4. Select **Terminated** from the **Employment Status** dropdown menu.
5. Enter the effective **Termination Date**.
6. Enter the **Begin Check Date** of the payroll date post-termination.
 - Select the first Check Date that takes place after the last Check Date in which the employee receives payment.
 - If a user selects the current Check Date and the employee still needs to be paid, then the terminated employee must be [manually added to the batch](#).
7. Select the termination reason from the **Change Reason** dropdown menu.
8. Select **Eligible for Rehire** if applicable.
9. Enter the **User Account Deactivation Date**.
 - After this date, the user will not be able to access the user's Paylocity account.

The screenshot displays two forms side-by-side. The left form, 'Current Employee Status', shows an employee with an 'Active' status, hired on 10/04/2004, with 13 years and 10 months of service. A 'Terminate' button is highlighted with a red box. The right form, 'Termination Details', is highlighted with a red border and contains the following fields: Employee Status (Terminated), Termination Date (8/5/2018), Begin Check Date (08/17/2018), Change Reason (-- Select --), Eligible for Rehire? (checkbox), and User Account Deactivation Date (8/5/2018). There are 'Save' and 'Cancel' buttons at the bottom of the 'Termination Details' form.

- For employees that are active in Time & Labor there are two options:
 1. Set the Time & Labor Payroll data transfer file to export hours for inactive employees if the employee's termination date is on or prior to the day of the employee's last check from Paylocity
 2. Create a manual final check to pay the employee outside of payroll.

Important Information: Companies that use Employee Action Forms should instead [change Employee Status using Employee Action Forms](#).

Noteworthy

- ▶ Communication
 - ▶ Include Paylocity Location Number in Email Subject Line
 - ▶ Include Paylocity Location Number when Requesting Stipends
- ▶ Reach out to Central Payroll for assistance with:
 - ▶ Adjustments within the payroll batch
 - ▶ Manual Checks
 - ▶ Bonuses
 - ▶ Should be paid through Paylocity – this takes care of recording the payment and taxes which are required (either grossed up or not)
 - ▶ Also ensures the full cost of bonus is realized (ER FICA + Gross up if applicable)
 - ▶ If you want to hand an employee a check; that can be arranged
 - ▶ You can provide Central Payroll an employee list with amounts prior to the planned bonus, and everything can be calculated and recorded prior to issuing bonuses.
 - ▶ Gift cards must be entered into the payroll system as a paid gift, so the employee pays the appropriate taxes on earnings. We advise against gift cards but if you do hand out gift cards, please email us the information so we can add it to the employee(s) record.

Additional Resources

- ▶ Archindy.org > Finance
 - ▶ Parish, School, and Agency Finances
 - ▶ Budget Guidelines
 - ▶ Policies and Forms
 - ▶ Parish Annual Financial Report
 - ▶ ADLF Deposit & Loan Fund
 - ▶ Parish Incorporation Info
 - ▶ Parish & Agency Payroll
 - ▶ Payroll & Time & Labor Resources
 - ▶ Employee Payroll
 - ▶ Payroll Calendars & Guides

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Parish & Agency Payroll

Payroll

- [2022 Location Payroll Processing Calendar](#)
- [Improving Payroll Processing Time](#)
- [Web Time Employee Time Card Report Setup](#) (Run and review prior to processing payroll)

Fair Labor Standards Act (FLSA) Guidance

- [Pay Compliance Cover Letter and Manual](#)

Paylocity Resources

- [Detailed WebTime to WebPay Processing Instructions](#)
- [Log on to the Paylocity payroll system to access personal payroll information](#)
- [Ensure Federal and State Unemployment tax setup is correct](#)
- [Making Changes to an Employee Profile When Changes Are Pending](#)
- [Bank Account Change Form](#)
- [Religious Employees Set Up](#)
- [Blocking Earnings and Deductions](#)
- [Importing Timecards into Web Pay](#)
- [Adding & Assigning Salaried Schedules in Paylocity](#)

Paylocity Electronic Timekeeping Resources

Implementation

- [Web Time Introduction](#)

Employee Guides

- [Employee Dashboard](#)
- [Employee Timesheet](#)
- [Paylocity Mobile Application Guide](#)

Supervisor Guides

- [Electronic Timekeeping Supervisor Training \(Video\)](#)
- [Paylocity Electronic Timekeeping Training Session Summary](#)
- [Supervisor Dashboard](#)
- [Supervisor Timecard](#)
- [Supervisor Approvals](#)
- [Filter In or Filter Out Employee Group Listings](#)
- [Add Holiday hours to Employee Timecard](#)

Q&A

