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

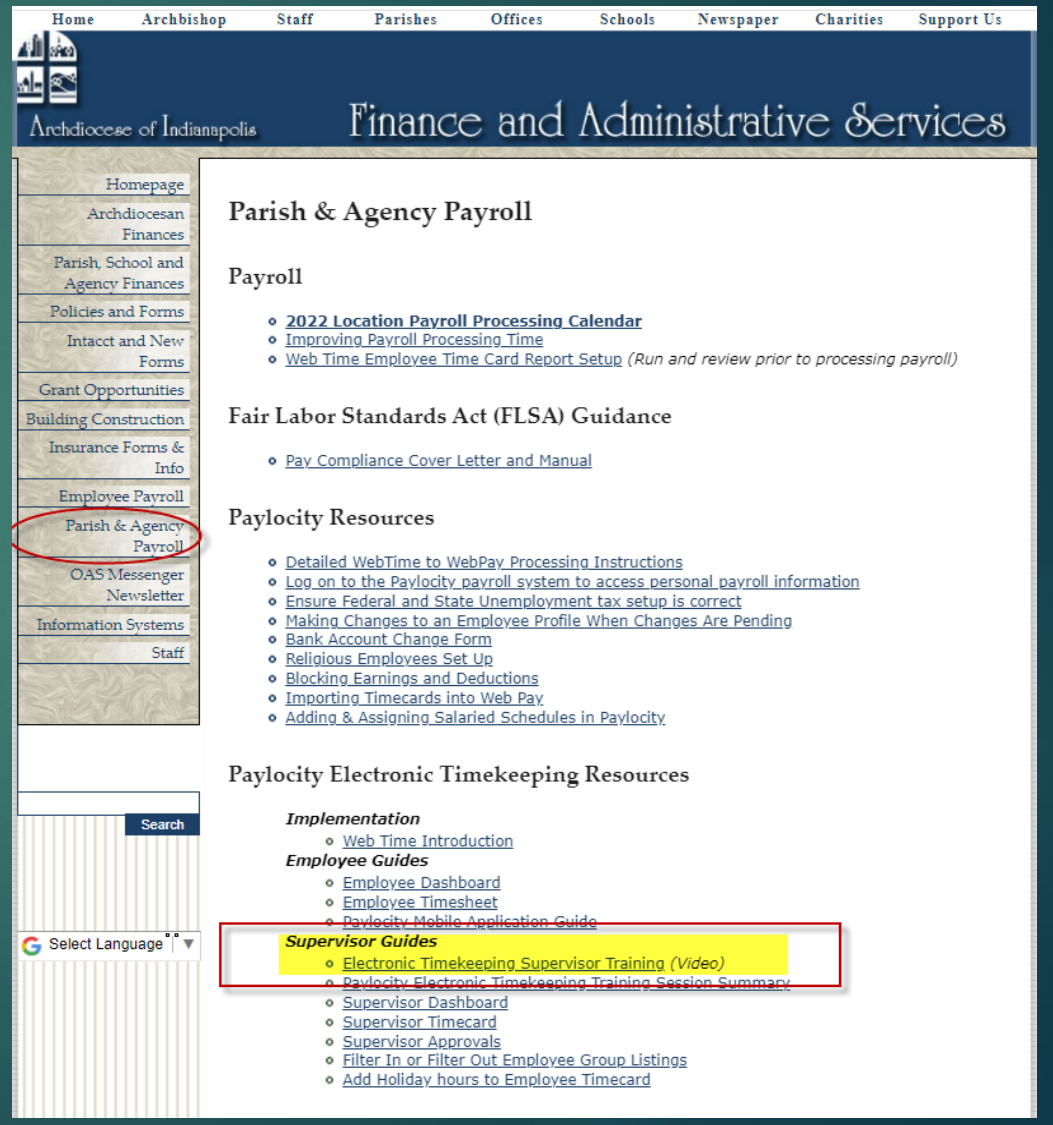
- CREATE BATCH
- MERGE WITH T&L IMPORT FILE
- RUN AND REVIEW PREPROCESS REGISTER
- RUN NO PAY PRIOR TO PROCESS PAYROLL REPORT
- RUN PAYROLL AUDIT AND REVIEW ANY ERRORS
  - REVIEW THE ERRORS THAT YOU CAN SEE CENTRAL PAYROLL WILL TAKE CARE OF ANY OTHERS
- APPROVE PAY RUN
- EMAIL CENTRALPAYROLL@ARCHINDY.ORG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



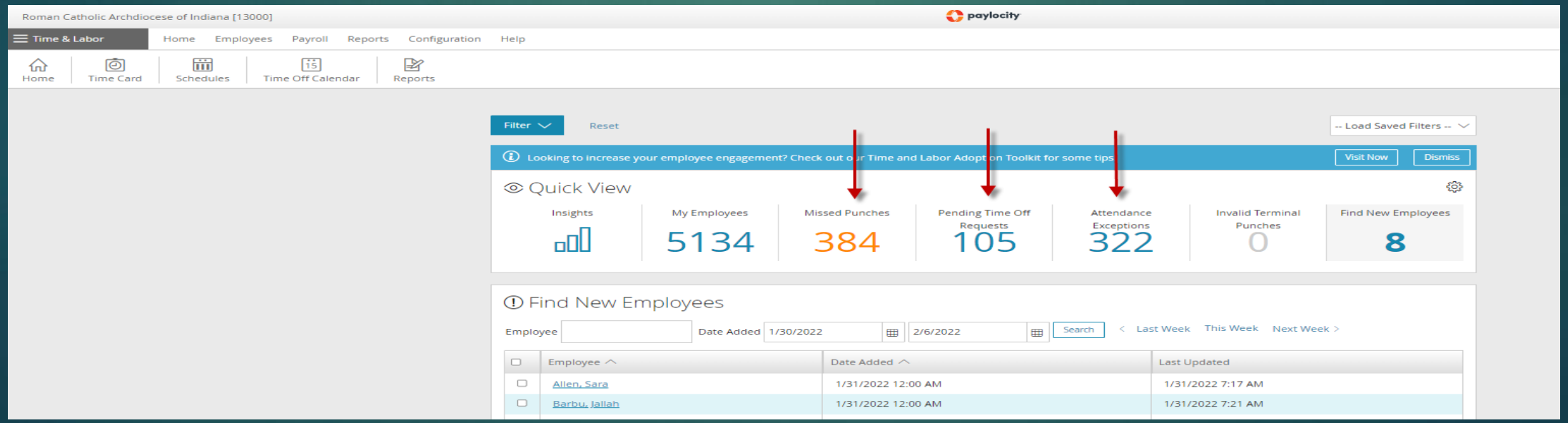
Payroll Processing

NON-PAYROLL WEEKS

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

MONDAYS IN PAID WEEKS

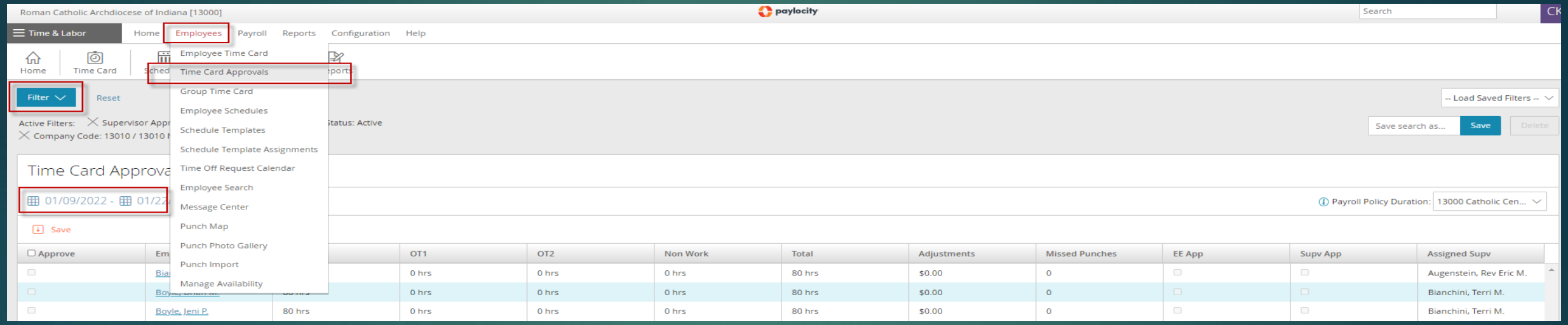
- Require supervisors to approve timecards promptly
- Fix missed punches, attendance exceptions, clear time off requests and approve timecards.

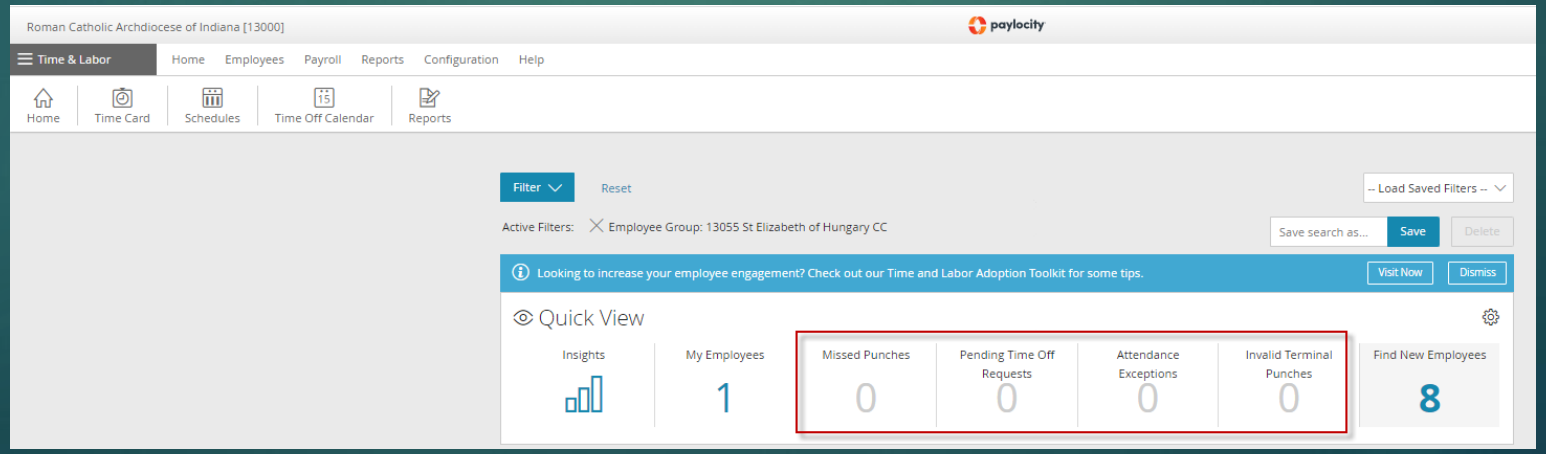


Payroll Processing

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





Payroll Processing

Time and Labor

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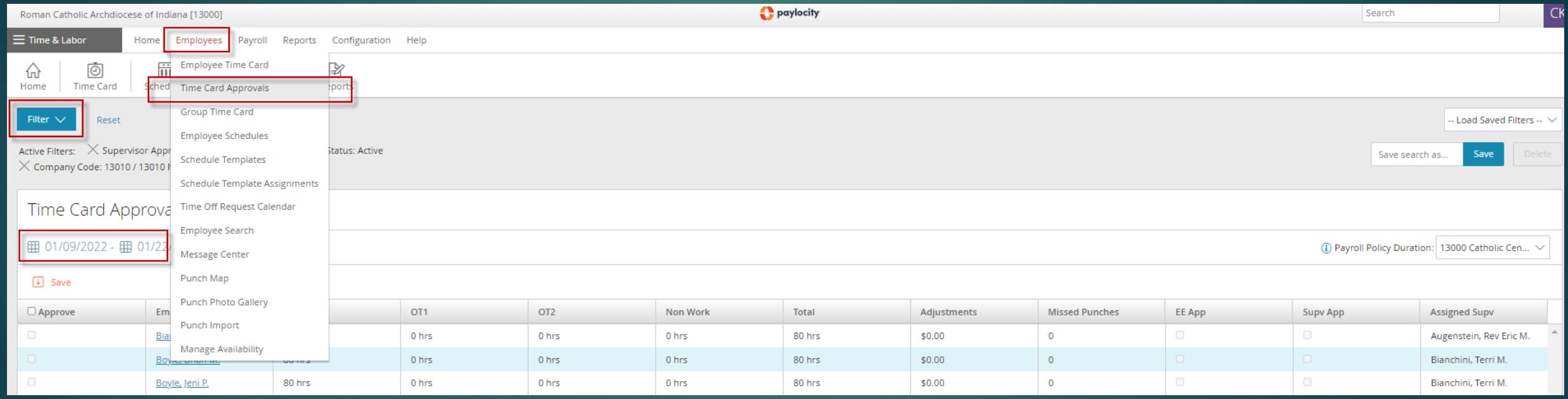
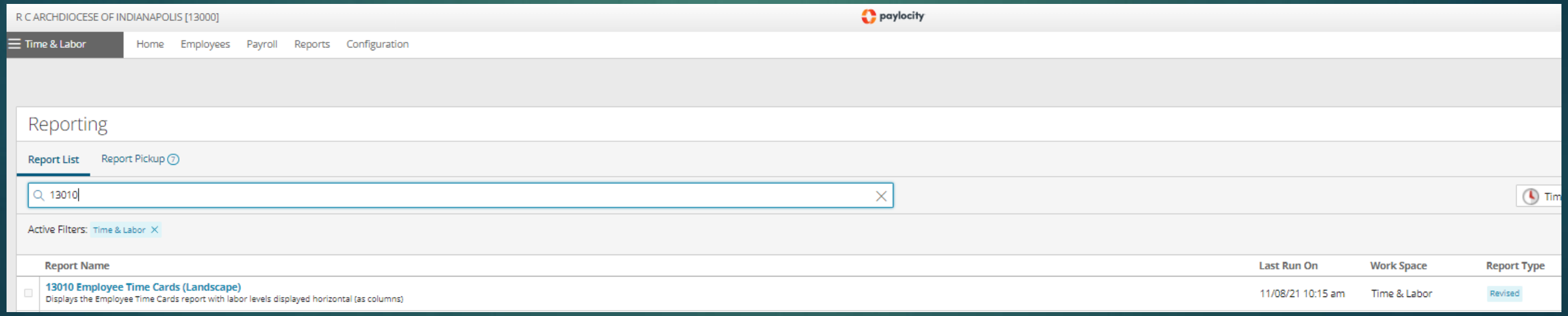


Payroll Processing

After all timecards are approved:

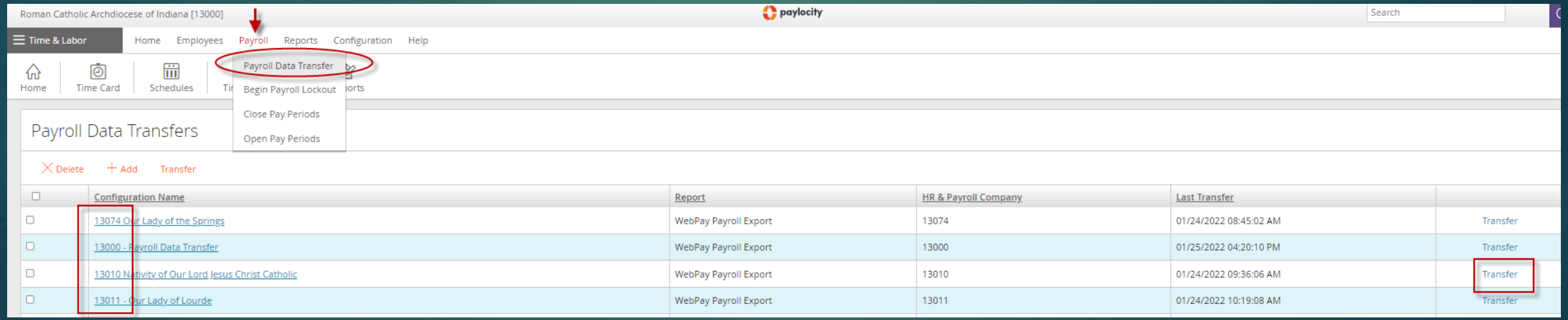
- Run a Timecard Report: Reports > 13XXX Employee Time Cards (Landscape)
- You will use this report to verify accuracy of data transferred



Payroll Processing

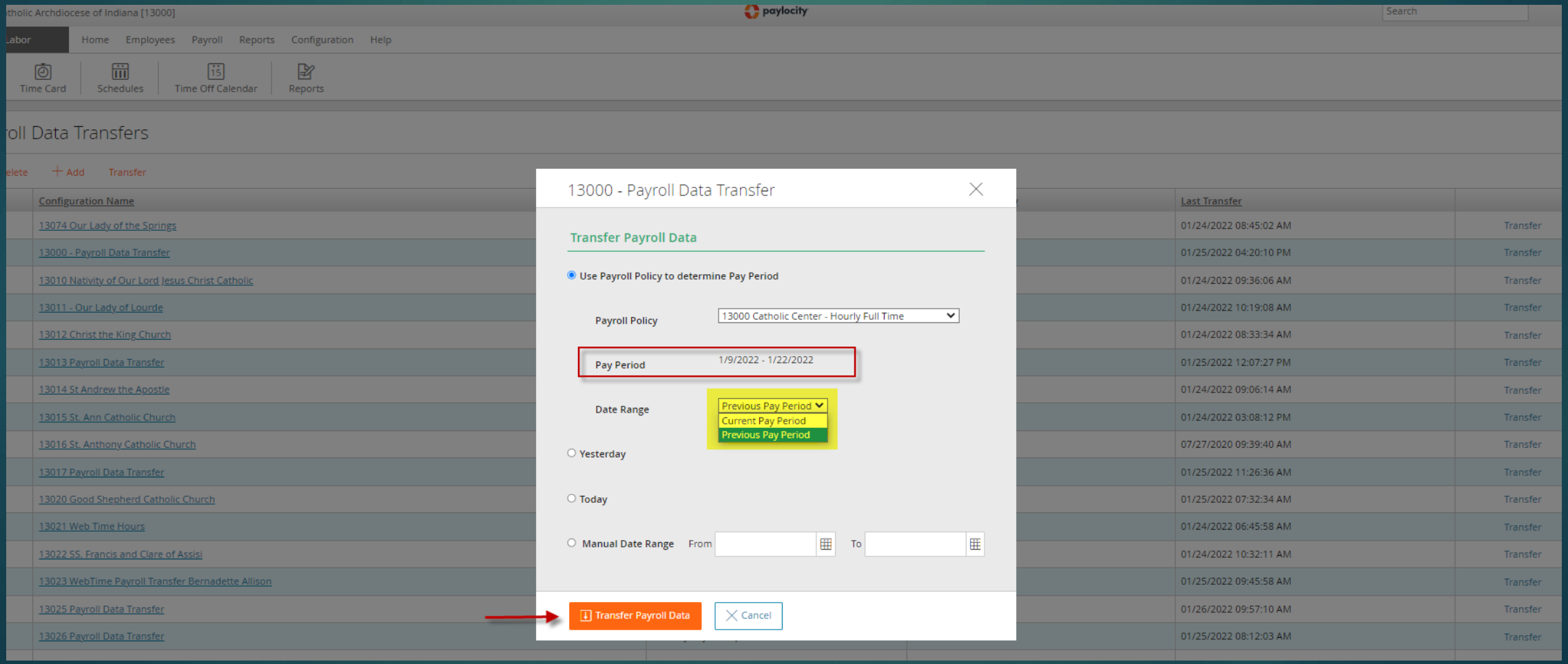
After all timecards are approved:

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



Payroll Processing

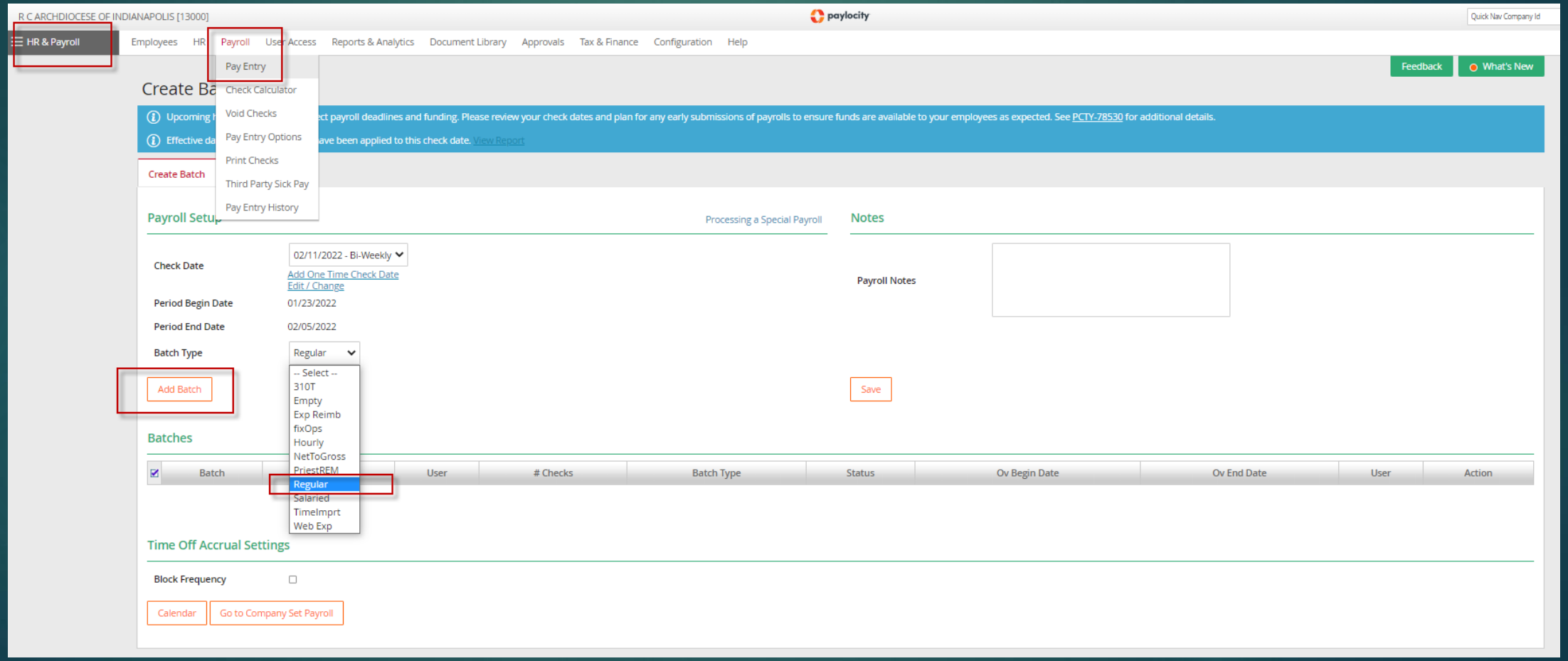
- VERIFY THE PAY PERIOD IS CORRECT
- THEN TRANSFER PAYROLL DATA



Payroll Processing

HR & PAYROLL

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

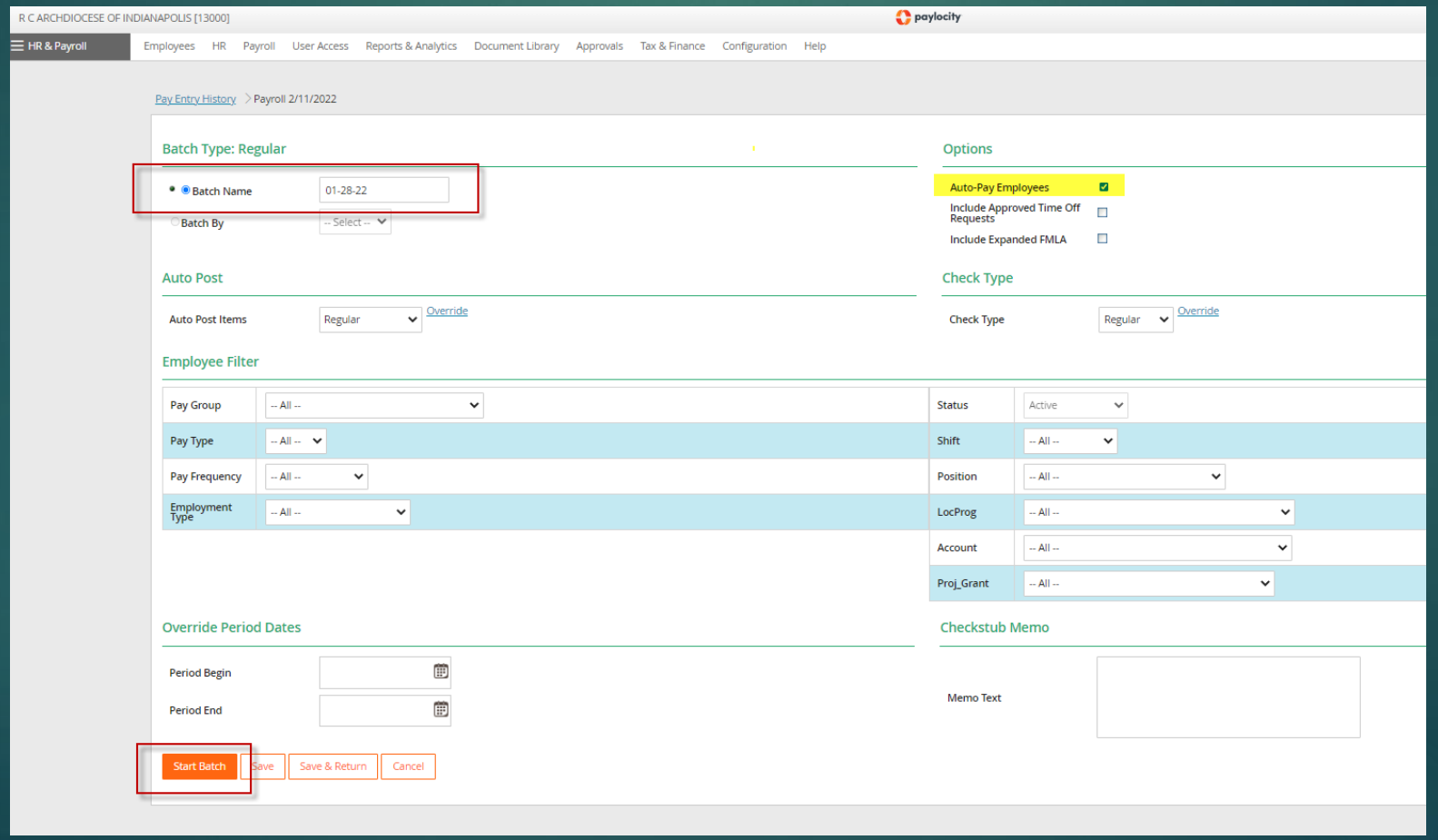


Payroll Processing

HR & PAYROLL

- Batch Name = rename if desired > Start Batch

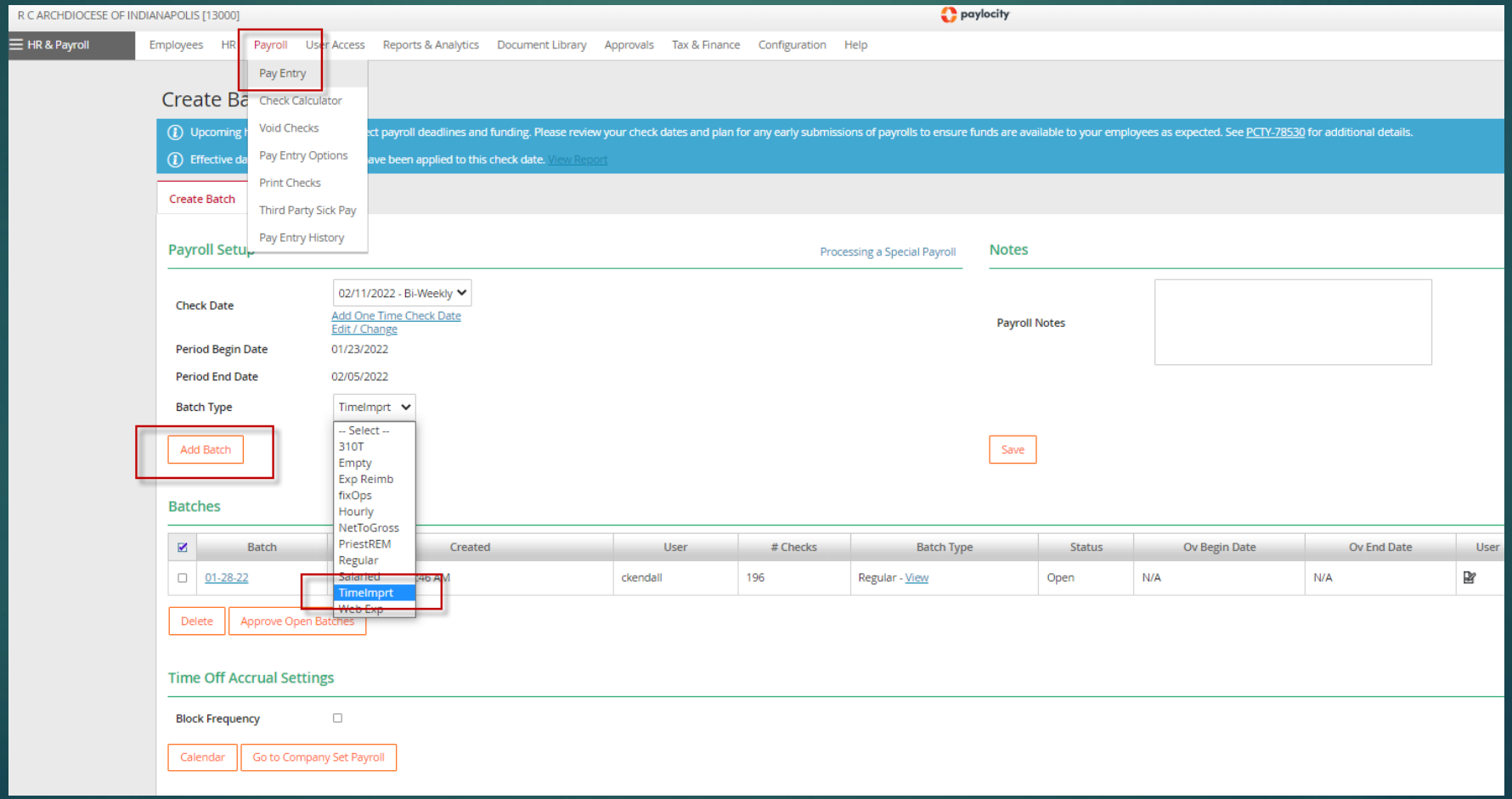
  NOTE: Auto-Pay Employees is checked by default which means salaried employees will be added to the batch automatically



Payroll Processing

HR & PAYROLL

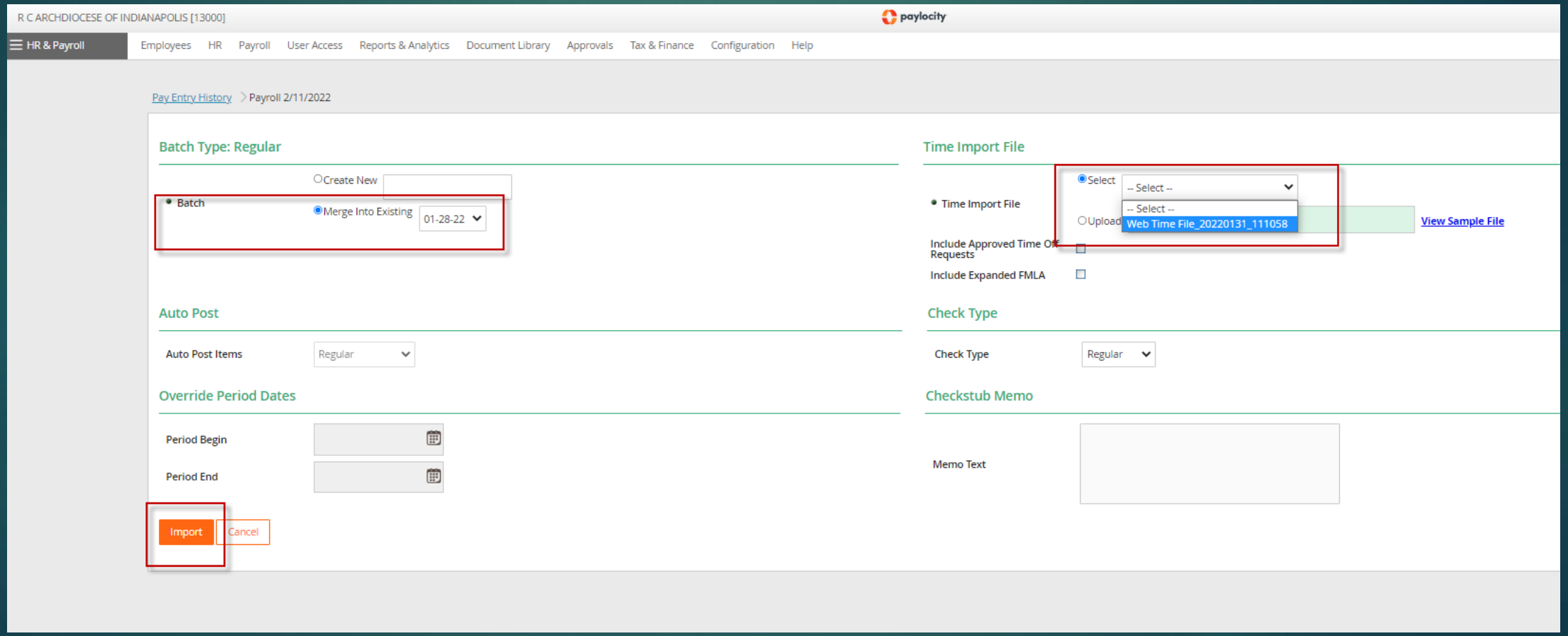
- Payroll > Pay Entry > Batch Type = Time Import > Add Batch



Payroll Processing

HR & PAYROLL

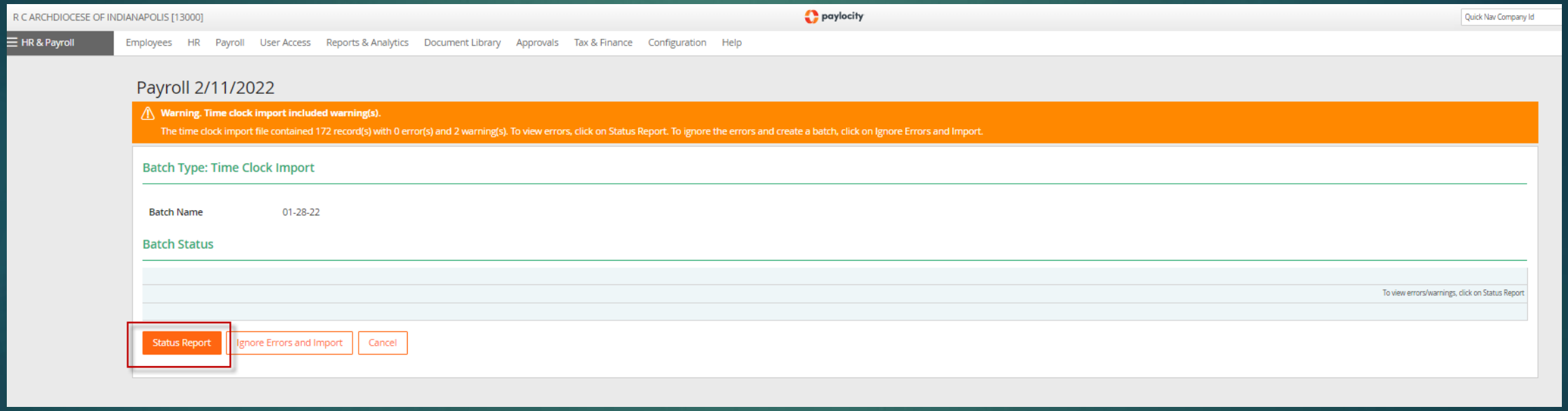
- Batch = Merge Into Existing > Choose Batch > Select Import File > Then select Import



Payroll Processing

HR & PAYROLL

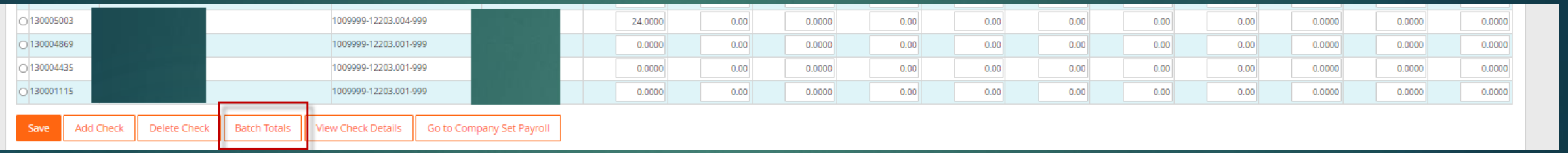
- You'll either get a warning or a green message
- For either, click Status Report and review the report for any errors or save for your records.

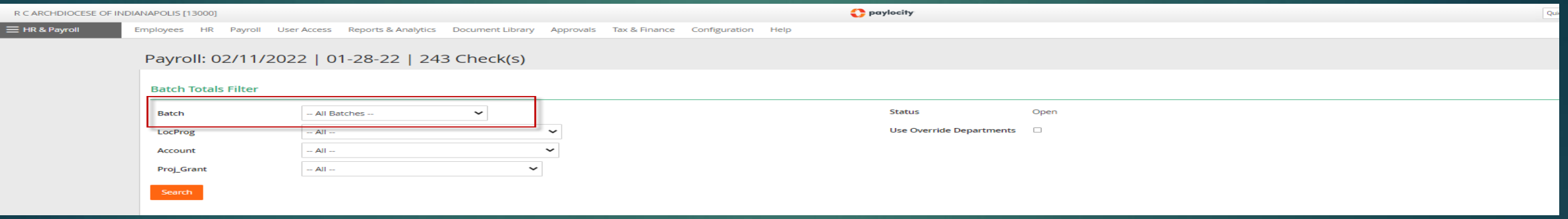


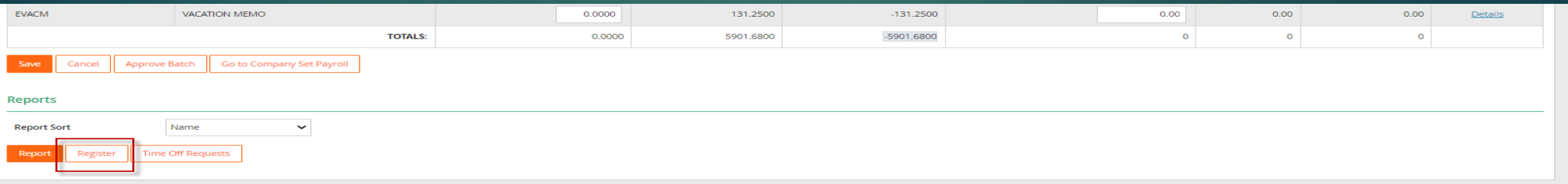
Payroll Processing

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



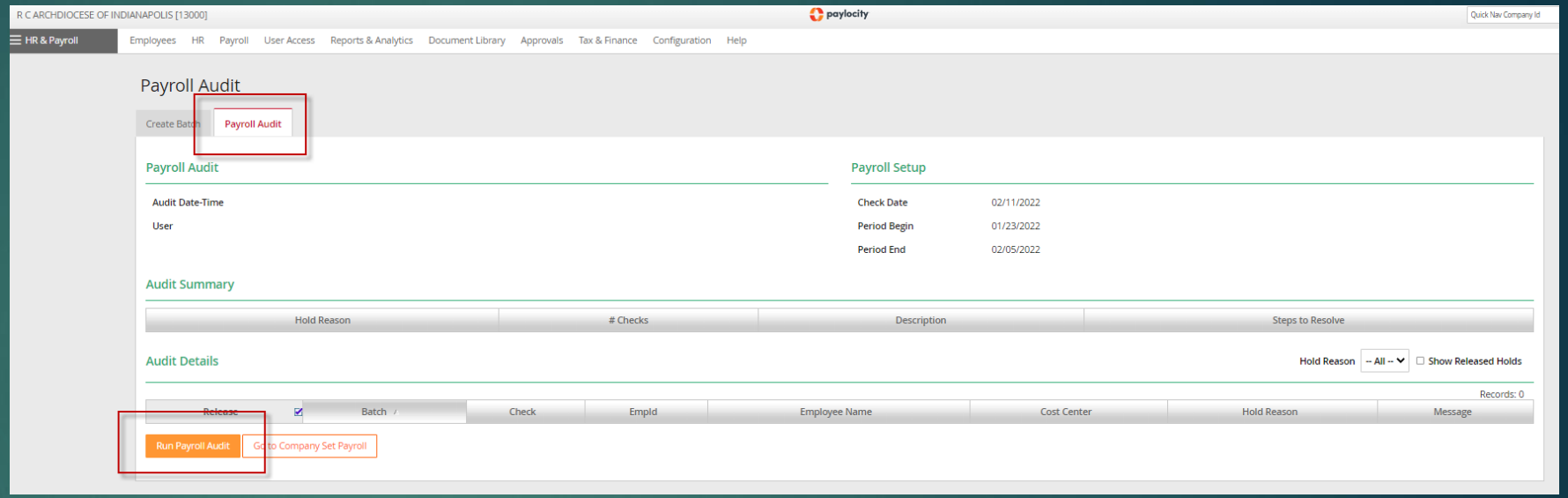


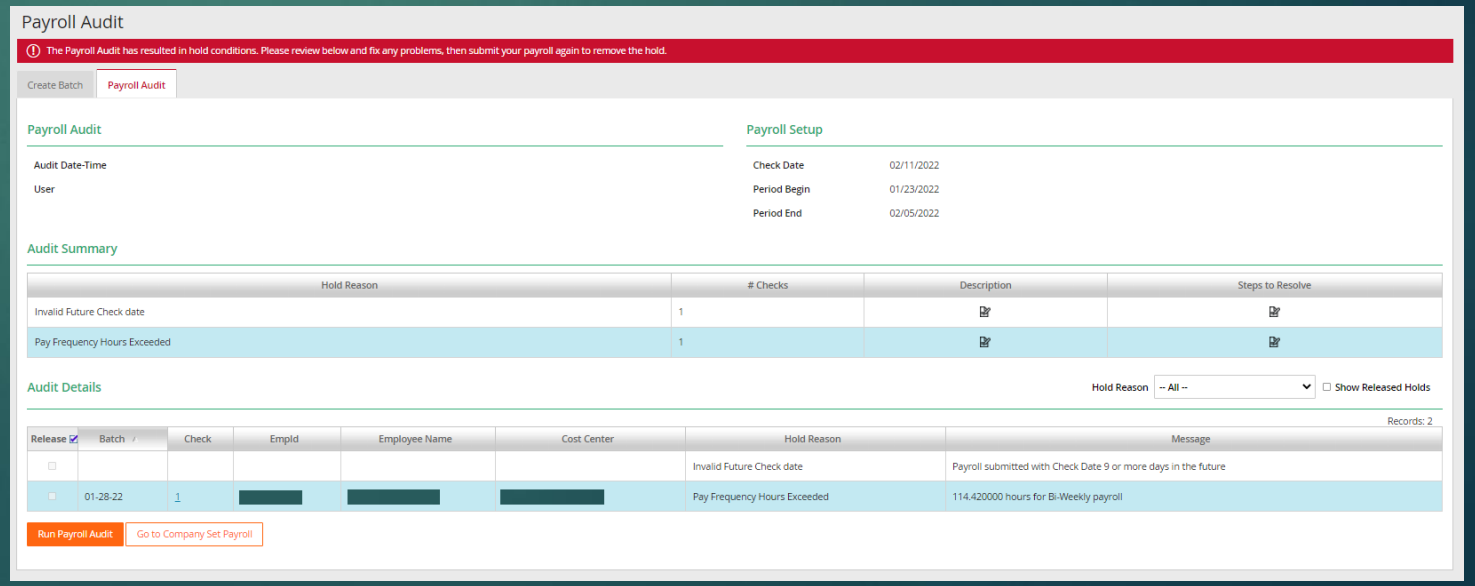


Payroll Processing

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





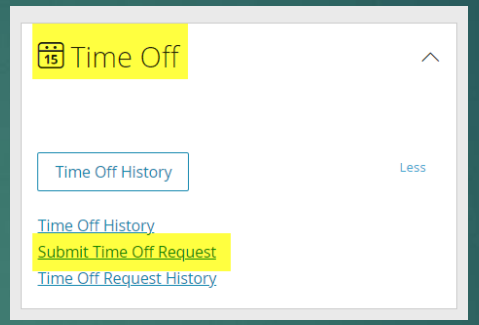
Payroll Processing

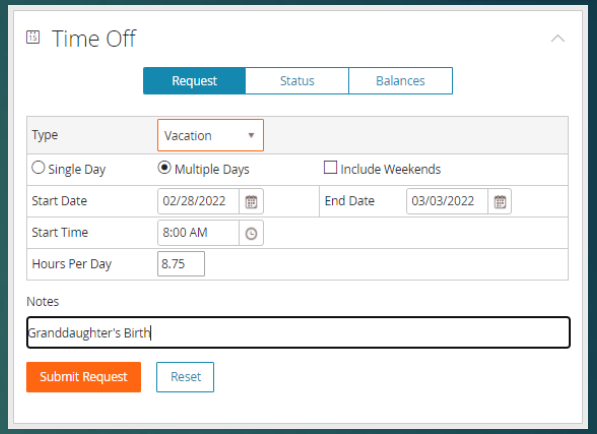
- Carefully review the pre-process register and run payroll audit
- Compare the register to the timecard report
- Run a "No Pay Prior to Process Report" to ensure all employees who worked are being paid
- Make any necessary adjustments
- Run a final pre-process register (you cannot get this same report 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.

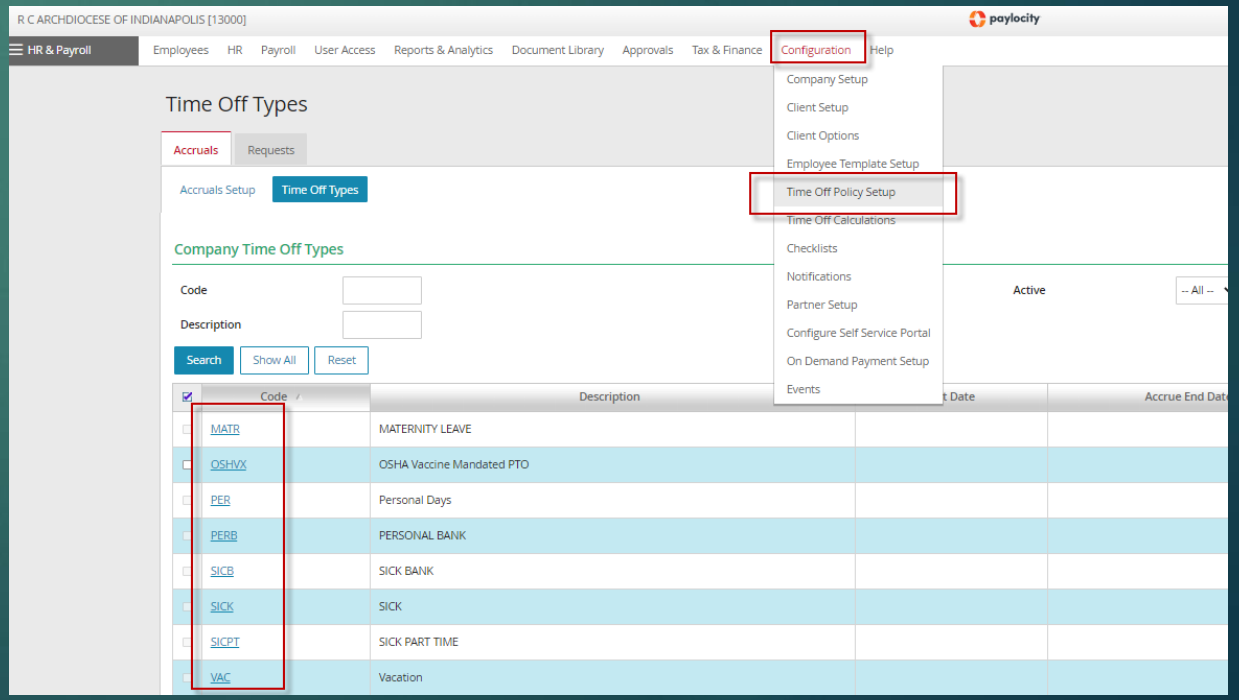
Time Off

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.



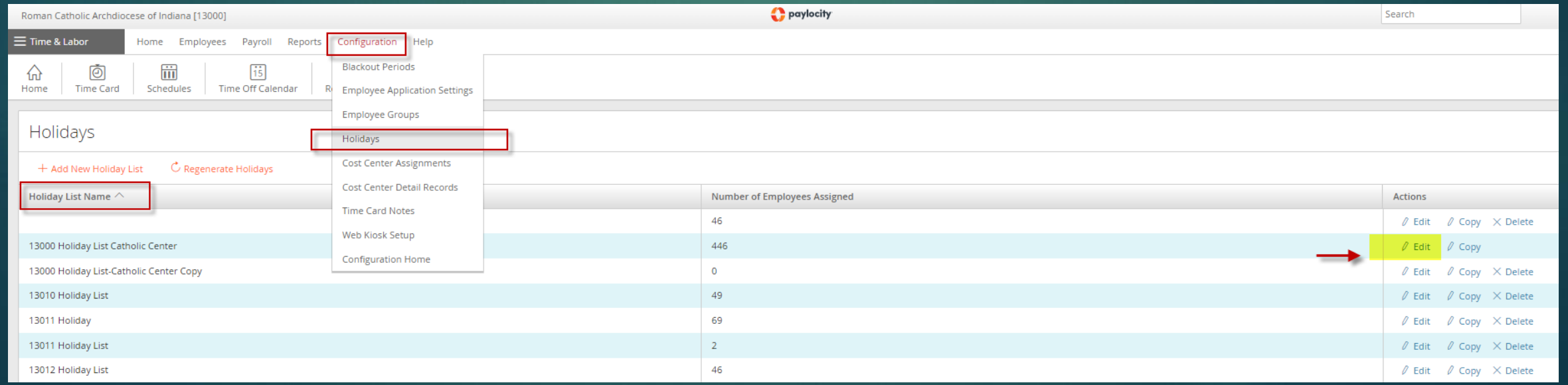




Holidays

TIME & LABOR

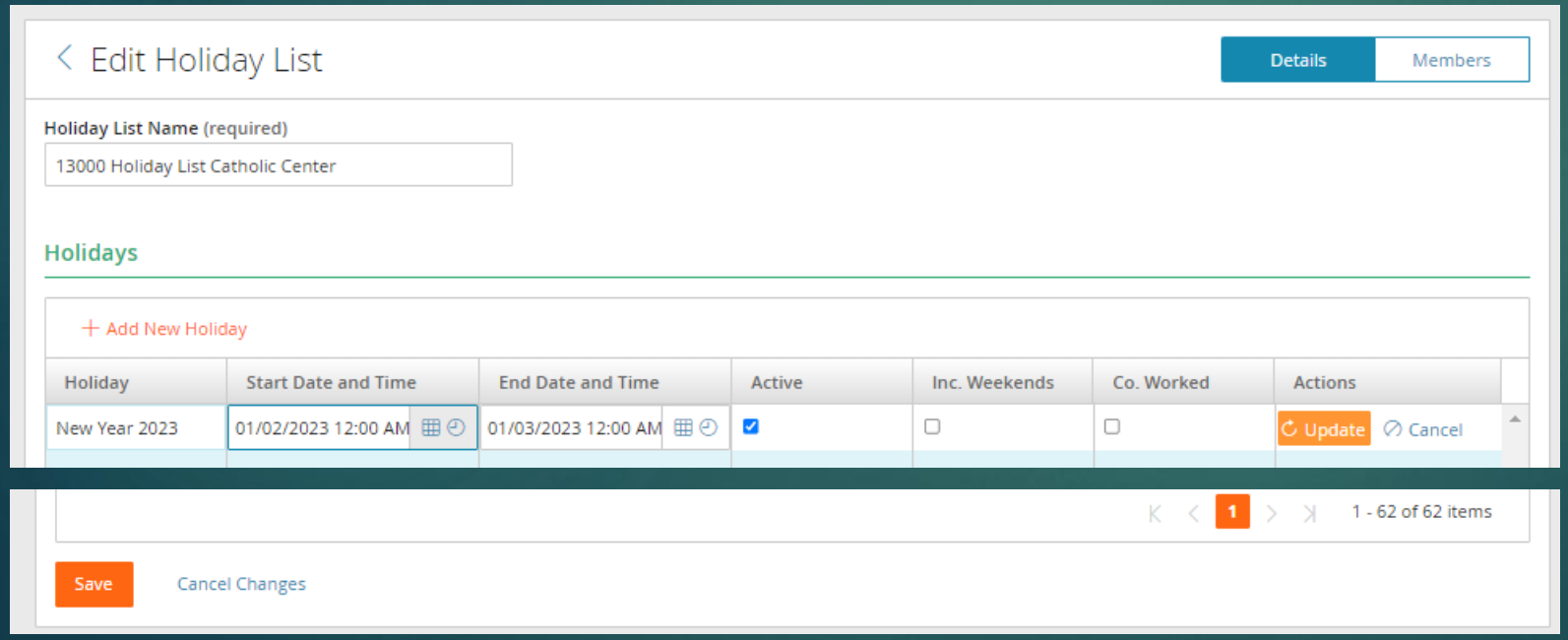
- Business Managers maintain and update Holiday Lists at least annually
- Holidays will not populate on the timecard if they are not present
- You can have multiple holiday lists for different groups of employees (teachers, parish staff, etc.)
- Please do not edit or copy a holiday list from any other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



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



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

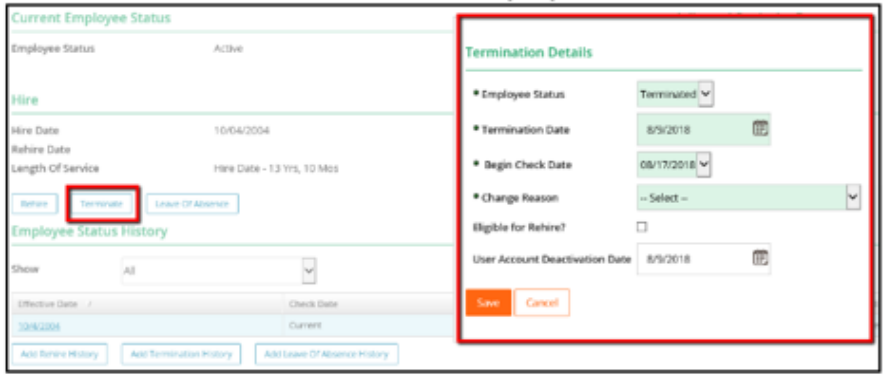
Noteworthy

- 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.



   - 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.

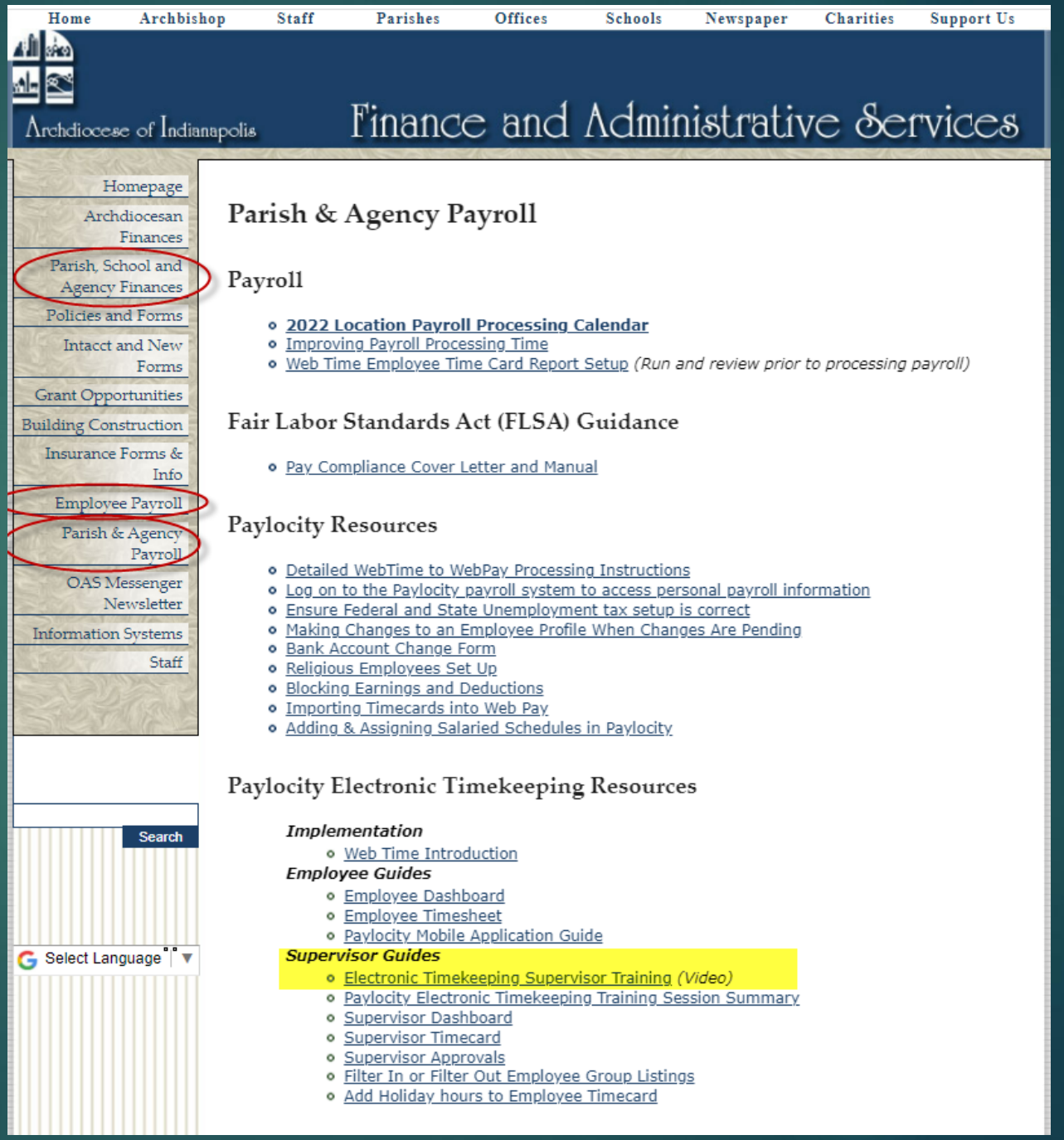
Important Information: Companies that use Employee Action Forms should instead change Employee Status using Employee Action Forms.

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



Q&A