

FINANCE OFFICE UPDATE – May 23, 2025

Employee News...Please share with your staff!

AFFIDAVIT DUE SOON – TAKE ACTION NOW!!

If an employee elected family medical during the recent open enrollment period, and their spouse is employed they MUST have the Spouse Employer Affidavit Letter (attached) completed by the spouse's employer and returned to the benefits department by Monday, June 2, 2025.

If the employee elected family medical during the recent open enrollment period, and there is another parent who is a legal guardian of the employee's dependent children, the other parent MUST have their company complete the Other Parent Employer Affidavit Letter (attached). The completed affidavit needs to be returned to the benefits department by Monday, June 2, 2025.

IMPORTANT NOTE: If the Spouse Employer Affidavit Letter or the Other Parent Affidavit Letter is not returned by Monday, June 2, 2025 – the monthly surcharge for family medical coverage will be applied starting with the first payroll in July 2025.

The appropriate affidavit must be completed each plan year. If you or your employees have any questions about the affidavit process, please contact Cheryl Engel at 513-263-5174.

MAY IS MENTAL HEALTH MONTH

Please share the attached article on How to Talk with Your Doctor About Mental Health with your employees. Talking with a healthcare provider about your mental wellbeing is just like talking about any other health concern. Be honest about how you are feeling and ask about treatment options.

Employees can also contact an Anthem Health Guide. The Anthem Health Guides are knowledgeable and experienced customer service experts selected for the AOC members. The Health Guide will answer questions, advocate for your health, and explain how they can use your benefits. If you need help finding a provider, the Health Guide can match you with an in-network provider that meets your needs. You can call a Health Guide at 844-995-1752 or chat from your mobile phone using the Sydney App. Lastly, employees can log onto www.anthem.com then select Customer Support – Contact Us.

Remember, ALL employees (and anyone living in their household) have other resources as well. They can utilize our EAP services to access well-being resources, counseling, community resources, crisis consultation and more. EAP can be accessed by calling 800-865-1044 or navigating to their website at www.anthemEAP.com use company code: AOC.

Business Manager News...Resources, Information, Updates and Training Opportunities to help you!

PAYLOCITY

Occasional Employee Status

The status code OCCASIONAL in Paylocity is to be used for Occasional employees (such as coaches, musicians, security guards, etc.). This is a separate category than those employees who may be on a Leave of Absence for medical reasons.

- When using the New Hire Template for an occasional employee, please choose ACTIVE with the correct Hire Date.
- To provide the new hire with login credentials, go to User Access/ User Accounts. Click on the Emp ID. A new window opens. Type in a Username. Checkmark the Box for Change Password. Type in a Password. Click Save at bottom right. Provide the new hire with the username and password – they will be forced to choose a new password for security.
- When you have completed the New Hire Template & the employee has login credentials, please go to HR & Payroll/ Employment TAB/ Status & History/ Manage Status & Seniority. Change Employee Status to Occasional dated *one day after the hire date*.

Please be sure to use “O” to represent your actual occasional status employees and “L” to represent those employees who qualify for being on a Leave of Absence. Occasional employees (such as coaches, musicians, security guards, etc.) should be Employment Type: Occasional and Employee Status: Occasional.

Direct questions to: [Mary Jones](#) - 513.263.3353

Teacher Terminations

Follow these steps to Terminate a Paylocity Record:

1. Navigate to the Employee's Paylocity Record
2. Click on **Employment** tab then click on the **Status & History** link
3. Click on the button titled **Manage Status & Seniority** then click on orange button titled **Change Employee Status**
4. Under **Select HR Action** select **Status Change Termination**
5. Under **Employee Status (required)** select **Terminated**
6. Under **Change Reason (required)** select
 - a. **Terminated** if the teacher resigned
 - b. **Continuation of Coverage** if the school is not renewing the teacher's contract (terminating the teacher)

7. In the Note section box include additional details
8. Under Termination Date (required) enter date of termination

Do NOT terminate a teacher if they are transferring to another School within the Archdiocese of Cincinnati Health Care Plan.

Payroll Processing for Teachers

The 2025/2026 teacher salary compensation will begin with the August 15, 2025, paycheck (payroll period of 7/27/2025 through 8/9/2025).

This pertains to ALL Teacher contracts for the 2025/2026 fiscal year. This change is to effectively use the EFFECTIVE DATE of the PAY RATE in Paylocity instead of the Annual Salary Amount.

For most locations with teacher minister contracts 08/01/2025 is the effective date of the rate change, with a payroll date of 8/15/2025.

Follow these steps to change payrate effective date in Paylocity:

1. Navigate the employee's paylocity record.
2. Go to PAY TAB/ Rates.
3. Click on Change Compensation button.
4. Effective Date
 - a. Enter 08/01/2025 in the Effective Date (required) field. Be sure to use the drop-down menu and choose 08/15/2025 in the Begin Check Date (required) field. * This may not default to the correct date if entering prior to the 08/15/2025 payroll.
5. Enter the new per check salary into the Per Check Salary (required) field. Do not enter the Annual Salary.
6. Click the save button
7. When processing...
8. When processing the payroll for 08/15/2025, note that the payroll period is from 07/27/2025 through 08/9/2025.
9. Paylocity creates an additional Tab shown as Prorated/Retro Pay whenever there is a rate change during a payroll period. Click on the Prorated/Retro Pay Tab
10. Paylocity shows the prorated amount as well as the current salary amount. Click on Accept Calculation for the prorated amount.

You can find these instructions with screenshots in the Business Managers Resource page under Paylocity Guidance.

More Understanding Using ProRate TAB

The retro pay tab is a feature within the Proration and Retro Pay Calculation Tool in Paylocity that allows companies to manage and apply retroactive pay adjustments for employees. When a payroll batch is created, the retro pay tab appears alongside other views, enabling administrators to review employees flagged for retroactive pay. This tab provides filters to identify employees needing action, such as those with rate changes or terminations, and allows for detailed calculations based on selected pay periods. To use the retro pay tab, navigate to the payroll batch, select the Prorated/Retro Pay tab, and review the employee lists and calculations displayed. This functionality is available exclusively on the web platform.

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Proration and Retro Pay Calculation Tool

The Proration and Retro Pay Calculation tool tracks employee [pay rate](#) changes and is available directly inside payroll batches, allowing a company to save time when applying either prorated or retroactive pay to an employee.

- This feature appears as a tab within a payroll batch.
- Once a company has created a batch, the Prorated/Retro Pay tab appears to the right of Detail View and Grid View.
- No changes occur to an employee's pay if the company chooses not to use the tool.
- Review this [video](#) for additional information.

The Paylocity Service Team, 888.873.8205, is available to help with instructions on how to enter the new salary by utilizing the effective date. Direct questions to Mary Jones, 513.263.3353

Have a great holiday weekend!