



# **Religious Order Priests/Nuns New Hire Guide for Business Managers**

As of October 2025

# Multi-location Employees

- Step 1: Ask the employee if they are working at multiple Archdiocesan locations.
  - If they say yes, **STOP** you need to contact **Mary Jones** prior to entering data into the new hire template. There is a special process for multi-location Employees (MLE) that **NEEDS** to be followed.
  - If no, you can continue with the checklist and following slides.

Mary Jones: [mjones@catholicaoc.org](mailto:mjones@catholicaoc.org), 513-263-3353

# Possible Rehire?

- Does this employee exist in your company database? Within HR&P navigate to Employee Search and search for the employee's SSN. If the employee already exists you will need to follow the separate rehire guide. **STOP: DO NOT process this employee as a new hire.**

# New Hire Template

→ New Hire Benefits & T&L UPDATED

Employee

• Employee Id	7092
• Last Name	
• First Name	
Middle Name	
Salutation	
Suffix	-- Select --
Nickname	
Prior Last Name	
• SSN / EIN	
• Birth Date	
• Gender	-- Select --
Ethnicity	-- Select --
Marital Status	-- Select --
Smoker	<input type="checkbox"/>
Disability	
Veteran	

- All **green** fields are required fields to complete the New Hire process.
- Leave the pre-populated Employee ID value as is.
- **Verify details of pay, benefit coverage, and pension with Religious Order and then contact Pastoral Center prior to entering in Paylocity.**

Mary Jones: [mjones@catholicaoc.org](mailto:mjones@catholicaoc.org), 513-263-3353

# Department & Position

Dept/Position

Current Effective Date

• Level 1

• Level 2

• Level 3

• Employment Type

• Supervisor    

Reviewer  

Is Supervisor / Reviewer?

• Position

Job Title

EEO Class

Work Comp

Work Phone/Ext  Ext

• Work Email

OT Exempt

- All **green** fields are required fields to complete the New Hire process.
- Please **see slides 6 & 7** if you are unsure what value to select for Employment Type and Position.
- Religious Order Priests should have an Employment type of “Reg GE 30h”
- If Religious is working part time, please contact Mary Jones below.
- Suggested Position for Religious Order Priest: CHC Priest No Pen
- Suggested Position for Religious Order Nun: CHC Admin Staff

An employee's employment type plays a critical role in determining what fields need to be filled out correctly on their record for Benefits and reporting purposes. Please review the charts on the next 2 slides in detail to determine what category your employee belongs to.

If you have any questions about what employment type to utilize please reach out to Mary Jones at the Archdiocese.

- [mjones@catholicaoc.org](mailto:mjones@catholicaoc.org)
- 513-263-3353

# Lay Employee Classification Grid

<u>Employment Type Code (K)</u>	<u>Note Ref</u>	<u>Measurement</u>	<u>Health Benefit Eligibility Code</u>	<u>Healthcare Offered (G)</u>	<u>Life, AD&amp;D and LTD (H)</u>	<u>FLSA Exempt? (J)</u>					<u>Employee Required to Use the Time &amp; Labor Module in PCTY</u>	
							<u>401K Status</u>	<u>401K Loan</u>	<u>401K SH (I)</u>	<u>401K Deferral Eligibility</u>		
Reg GE 30h	A	Hours	I - Benefits Eligible Lay Employee	Y	Y	Y	Full Time	Y	Y	Y	Not Required	
Reg GE 30h	A	Hours	I - Benefits Eligible Lay Employee	Y	Y	N	Full Time	Y	Y	Y	Yes - FLSA	
Reg GE 20h	A	Hours	XI - Life and LTD Only	N	Y	N	Full Time	Y	Y	Y	Yes - ACA Rptg + FLSA	
Reg LT 20h	A	Hours	NBE - Not Benefits Eligible	N	N	N	Part Time	N	N	Y	Yes - FLSA	
Tea GE 15h	B	Classroom Hours	I - Benefits Eligible Lay Employee	Y	Y	Y	Full Time	Y	Y	Y	Not Required	
Tea GE 12h	B	Classroom Hours	XI - Life and LTD Only	N	Y	Y	Full Time	Y	Y	Y	No-Default Hrs will be used for ACA Reporting	
Tea LT 12h	B	Classroom Hours	NBE - Not Benefits Eligible	N	N	Y	Part Time	N	N	Y	No-Default Hrs will be used for ACA Reporting	
Tea LT Sub	B	Classroom Hours	I - Benefits Eligible Lay Employee	Y	Y	Y	Part Time	N	N	Y	No-Default Hrs will be used for ACA Reporting	
Tea ST Sub	B	Classroom Hours	NBE - Not Benefits Eligible	N	N	Y	Part Time	N	N	Y	No-Default Hrs will be used for ACA Reporting	
Tea OC Sub	B	Classroom Hours	NBE - Not Benefits Eligible	N	N	Y	Part Time	N	N	Y	No-Actual Hours will be entered on Pay grid	
Occasional	C	Hours	NBE - Not Benefits Eligible	N	N	N	Part Time	N	N	Y	No-Actual Hours will be entered on Pay grid	
Temporary	D	Hours	NBE - Not Benefits Eligible	N	N	N	Part Time	N	N	Y	Yes - FLSA	
Sem GE 14h	E	Semester Hours	I - Benefits Eligible Lay Employee	Y	Y	Y	Full Time	Y	Y	Y	Not Required	
Sem GE 9h	E	Semester Hours	XI - Life and LTD Only	N	Y	Y	Full Time	Y	Y	Y	No-Default Hrs will be used for ACA Reporting	
Sem GE 4.5	E	Classroom Hours	NBE - Not Benefits Eligible	N	N	Y	Full Time	Y	Y	Y	No-Default Hrs will be used for ACA Reporting	
Sem LT 4.5	E	Classroom Hours	NBE - Not Benefits Eligible	N	N	Y	Part Time	N	N	Y	No-Default Hrs will be used for ACA Reporting	
Prj GE 30h	F	Hours	I - Benefits Eligible Lay Employee	Y	Y	Y	Full Time	Y	Y	Y	Not Required	
Prj GE 30h	F	Hours	I - Benefits Eligible Lay Employee	Y	Y	N	Full Time	Y	Y	Y	Yes - FLSA	
Prj GE 20h	F	Hours	XI - Life and LTD Only	N	Y	N	Full Time	Y	Y	Y	Yes - ACA Rptg + FLSA	
Prj LT 20h	F	Hours	NBE - Not Benefits Eligible	N	N	N	Part Time	N	N	Y	Yes - FLSA	

# Lay Employee Classification Grid cont.

Notes												
A	For Non-Teachers, this is the most common classification											
B	Teachers include a board-certified teacher <u>or</u> individual with primary instructional control of a classroom. This classification <u>does not include Aides</u> . The ratio of classroom hours to regular hours is measured on a ratio of 2:1.											
B	<u>Long Term subs</u> (Defined as an individual that is expected to work fifteen or more classroom hours per week for 2 or more consecutive months) should be classified as "Tea LT Sub".											
B	<u>Short Term</u> (Defined as an individual that is expected to work less than fifteen classroom hours per week OR less than 2 consecutive months) should be classified as "Tea ST Sub"											
B	<u>Occasional subs</u> (Defined as an individual that fills in occasionally. I.e. only when needed and NOT regularly scheduled) should be classified as "Tea OC Sub". Default Hours will be zero. When these employees are paid, hours must be entered in the pay grid for ACA Reporting purposes.											
C	Occasional Workers include Coaches, Musicians, Police Officers and others who are only paid occasionally throughout the year. When these employees are paid, hours must be entered in the pay grid for ACA Reporting purposes. <b>DOES NOT INCLUDE SUBSTITUTE TEACHERS.</b>											
D	Temporary employees are hired for a specific length of time not to exceed three months. If employment lasts longer they should be transferred to Regular status. <b>DOES NOT INCLUDE SUBSTITUTE TEACHERS.</b>											
E	Teachers employed by the Athenaeum of Ohio include a board-certified teacher <u>or</u> individual with primary instructional control of a classroom											
F	Project workers are hired for a specific project > 3 mos in duration. If less than three months classify as Temporary											
G	Benefit threshold for Medical Benefits is 30 hours or more. Stated as >29 above											
H	Benefit Threshold for Life, AD&D and LTD is 20 hours or more. Stated as >19 above											
I	Benefit Threshold for 401K safe Harbor is 20 hours or more. Stated as >19 above											
J	If an employee meets the FLSA exemption rules for OT and Minimum wage, that employee must be paid on a salaried basis.											

# Employee Status & Pay Rate

**Employee Status**

- Employee Status: Active
- Effective Date: 2/17/2025
- Begin Check Date: 02/28/2025 - Bi-Weekly

**Pay Rate**

Current Effective Date

- Pay Type:  Salary  Hourly
- Per Check Salary: 0.00
- Base Rate / Per: 0.0000 / Hour
- Pay Frequency: B - Bi-Weekly
- Default Hours: 0.00
- Annual Salary: 0.00
- Auto Pay: -- Select --

Notes

Pay Grade: -- Select --

Min / Mid / Max: \$0.00 / \$0.00 / \$0.00

Annual Salary: 0.00

% Min / Mid / Max: 0.00 / 0.00 / 0.00

- All **green** fields are required fields to complete the New Hire process.
- The effective date of the Employee Status section is the employee's hire date.
- Auto Pay for religious should be set to 'Salary'. Religious employees should have a per check salary of \$0.
- The earning code REL with the per check amount will be need to be added after the hiring process. **SEE AFTER NEW HIRE SECTION.**
- Default Hours: For all regularly paid employees (Salary OR hourly) default hours **NEED** to be entered. Enter the number of hours that the employee is normally scheduled in the two-week pay period. (Reference Lay Employee Classification Grid on slides 6 & 7)

# Address and Contact

- All **green** fields are required fields to complete the New Hire process.
- Address 1 requirements:
  - Common Street Abbreviations should be utilized:
    - Ave: Avenue
    - Blvd: Boulevard
    - Cir: Circle
    - Ct: Court
    - Dr: Drive
    - Ln: Lane
    - Rd: Road
    - St: Street
- Mobile Phone and Email Address are Archdiocesan preferred fields for reporting purposes.

^ **Address and Contact**

---

Country	<input type="text" value="UNITED STATES"/>
• Address 1	<input type="text"/>
Address 2	<input type="text"/>
County	<input type="text"/>
• City	<input type="text"/>
• State	<input type="text" value="--"/>
• Zip Code	<input type="text"/>
Home Phone	<input type="text"/>
Mobile Phone	<input type="text"/>
• Email Address	<input type="text"/>
Additional Address	<input type="text"/>
Additional Address Type	<input type="text" value="-- Select --"/>
Additional Country	<input type="text" value="-- Select --"/>

# Work Location

## ^ Work Location

### • Work Location

-- Select --

Country

UNITED STATES

Address 1

Address 2

County

City

State

--

Zip Code

Currency

US Dollar (USD) ▾

- All **green** fields are required fields to complete the New Hire process.

# Benefit Class

^ Benefits Setup

<input checked="" type="checkbox"/>	Effective Date	Benefit Class	Benefit Location	Benefit Division	Part Time	Benefit Termination Date
<input type="checkbox"/>	02/17/2025					

**Add** **Delete**

^ Direct Deposit

<input checked="" type="checkbox"/>	Priority	Bank Name	Transit	Account Number	Type	Amount Type	Amount	Prenote Date
<input type="checkbox"/>								

**Add** **Delete**

Benefits Setup

• Effective Date

• Benefit Class

Benefit Location

Benefit Division

Part Time?

Benefit Termination Date

Benefit Salary Effective Date

Benefit Salary   Override?

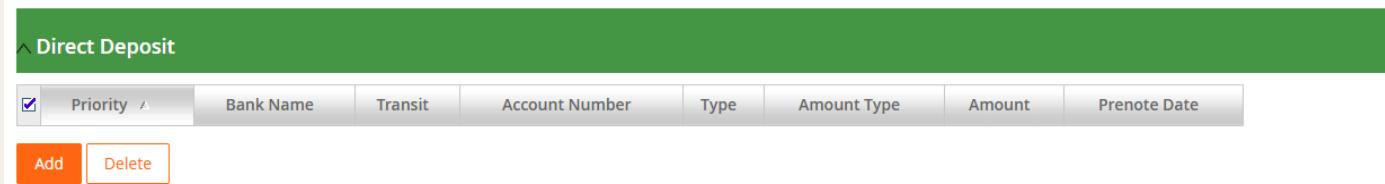
Benefit Hours per Week

Current Rate Annual Salary

**Save** **Save & Return** **Cancel**

- All **green** fields are required fields to complete the New Hire process.
- The Benefit Class effective date **NEEDS** to be the same value as the hire date/status effective date on slide 4.
- The Benefit Class **MUST** align with the Employment Type Code assigned to the employee. Please review slides 6&7
- Benefit Class should be Benefit Eligible Religious, (if benefit eligible - verify benefit coverage with Religious Order).

# Direct Deposit – Skip for Now



Priority	Bank Name	Transit	Account Number	Type	Amount Type	Amount	Prenote Date
<input checked="" type="checkbox"/>							

**Add** **Delete**

- Do **NOT** use the Direct Deposit field in the New Hire Template. Direct Deposit information can be entered on the employee record after the employee is hired.
- **SEE AFTER NEW HIRE SECTION**

# Taxes – Religious Order Priests or Nuns

## ^ Taxes

• Tax Form **W2** ▾ 1099R Distribution Code -- Select -- ▾ SSN / EIN

**^ Federal Taxes**

- W-4 Tax Form **Current**
- Filing Status **-- Select --**
- Multiple Jobs or Spouse Works (Line 2c) **0**
- Dependents (Line 3) **0.00**
- Other Income (Line 4a) **0.00**
- Deductions (Line 4b) **0.00**
- Extra Withholding **Default Amount**
- Amount **0.00**
- 943 Agricultural Employee **0**

**^ Primary State Taxes**

- Primary State **-- Select --**
- Filing Status **-- Select --**
- Exemption 1 **0**
- Exemption 2 **0**
- Amount Type **Default Amount**
- Amount **0**
- Percentage **0**
- Supplemental Check **Use Supplemental Tax Rate - Code**
- Notes
- SUI State **-- Select --**
- Custom Text Field 1
- Custom Text Field 2
- Custom Text Field 3
- Custom Text Field 4
- Custom Drop Down Field 1 **-- Select --**
- Custom Drop Down Field 2 **-- Select --**
- Custom Number Field 1

- All **green** fields are required fields to complete the New Hire process.
- The Tax Form **MUST ALWAYS** be W2.
- Payments for form 1099M and 1099NEC are to be processed through your accounts payable system, NOT through Paylocity.
- Filing Status would be Single
- SUI State: Ohio SUI
- **SEE AFTER NEW HIRE SECTION**

# Taxes cont.

- All **green** fields are required fields to complete the New Hire process.
- Local taxes can be added via the new hire template but should be verified once hired . **SEE AFTER NEW HIRE SECTION.**
- Deductions should **NOT** be entered on the new hire template.

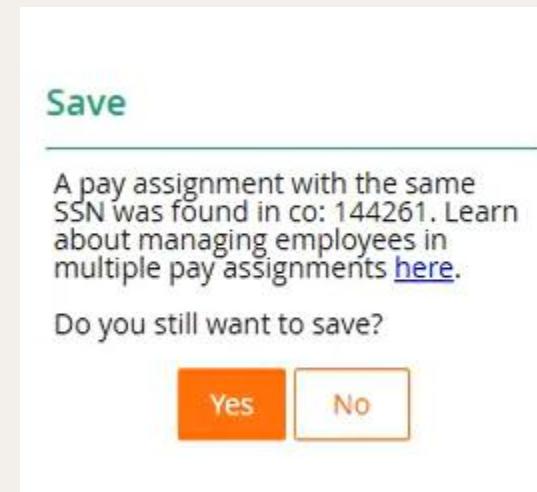
Local Taxes								
<input checked="" type="checkbox"/>	Tax Code	Filing Status	Exemption 1	Exemption 2	Type	Amount		
<input type="button" value="Add"/>	<input type="button" value="Delete"/>							

Deductions										
<input checked="" type="checkbox"/>	Priority	Code	Type	Begin Check Date	End Check Date	Calc Code	Amount	Frequency	Goal	Paid
<input type="button" value="Add"/>	<input type="button" value="Delete"/>									

# Duplicate SSN Notification

- If this notification pops up at the end of your new hire process you need to **STOP** and contact **Mary Jones**. This notification means the employee's SSN is present in another location within the Archdiocese. Do **NOT** merge the records. There is a special process for multi-location Employees (MLE) that **NEEDS** to be followed.
- Mary Jones: [mjones@catholicaoc.org](mailto:mjones@catholicaoc.org), 513-263-3353





# **Religious Order Priest/Nun After New Hire**

As of February 2025

# Custom/Additional Fields

< Additional Fields

DA Active

Priest Ordained Date	<input type="text"/> 
Alternate 401K Safe Harbor Benefit Eligibility Date - NOT USED IN CALCULATION INFORMATIONAL PURPOSES ONLY	<input type="text"/> 
Alternate Health Benefit Eligibility Date	<input type="text"/> 
Check this box if school employee is Eligible for ACA Education Exception	<input type="checkbox"/>
401k Safe Harbor ELIGIBLE PRIESTS ONLY. Ordained after 1/1/2015. Also Foreign Priests on Canonical Assignment	<input type="checkbox"/>
Check this box if need to Force 401k Safe Harbor Contribution for Non-Priest Employee	<input type="checkbox"/>
Check this box UNLESS another location pays for benefits	<input checked="" type="checkbox"/>

Save Cancel

- Once the employee record is created via the New Hire Template the custom/additional fields section needs to be updated if applicable.
- To locate the custom/additional fields navigate to the employee record via Employee search > Personal > Additional Fields > Edit Additional Fields.

# Priest Custom/Additional Fields

< Additional Fields

DA Active

Priest Ordained Date

Alternate 401K Safe Harbor Benefit Eligibility Date - NOT USED IN CALCULATION INFORMATIONAL PURPOSES ONLY

Alternate Health Benefit Eligibility Date

Check this box if school employee is Eligible for ACA Education Exception

401k Safe Harbor ELIGIBLE PRIESTS ONLY. Ordained after 1/1/2015. Also Foreign Priests on Canonical Assignment

Check this box if need to Force 401k Safe Harbor Contribution for Non-Priest Employee

Check this box UNLESS another location pays for benefits

**Save** **Cancel**

- The Religious Order Priest Ordained Date is utilized in the 401k match calculation for priests. A Priest **MUST** have a date in this field. In general, the ordination date determines if a priest retirement benefit is paid to his personal 401k or The Priest Retirement Corporation.
- If the Priest is ordained after 1/1/2015 or a Foreign Priest on Canonical assignment the box labeled “401k Safe Harbor ELIGIBLE PRIESTS ONLY. Ordained after 1/1/2015. Also Foreign Priests on Canonical Assignment” **NEEDS** to be checked.
- Nuns, Brothers, and Deacons should **never** have an ordination date entered here.

# Direct Deposit

- If adding Direct Deposit on a new hire's behalf please navigate to their record > Pay > Direct Deposit.
- In this section you will see the option to add a bank account.
- Use the **Religious Order** routing and account numbers. Name on account defaults to the employee's name in Paylocity. Edit during the creation process to use the name of the **Religious Order**.

The screenshot shows the Paylocity HR & Payroll software interface. On the left, a list of employees is displayed, with Stan Baker selected. On the right, the employee details for Stan Baker are shown, including his name, title (Sales Representative), and employment start date (2/5/2010). The 'Pay' tab is selected in the navigation bar. A prominent yellow box displays a warning: 'No Current Bank Accounts' with the message 'You currently have no bank accounts on file and will receive a paper check. Add your existing bank account to setup your direct deposit.' Below this, there is an icon of a bank building and the text 'Add any existing checking or savings account and get paid with direct deposit.' A 'Add Bank Account' button is located at the bottom of this section.

Last Name	Preferred / First Name	Emp Id
Baker	Chet	72
Baker	Stan	105
Barclay	Reginald	39
Beasley	Pamela	170
Beckman	Daniel	97
Bell	Darius	27
Bison	Dave	69
Brownell	Buster	164
Burgamy	Otelia	124
Cal	Benjamin	1
Captain	Stanton	157
Carmichael	Charles	88
Carraba	Caitlyn	19
Casella	Ruben	149

# Direct Deposit cont.

- After selecting “Add Bank Account” you will see the window below. Please note the blurbs on the side relating to prenotification and special checks to determine whether or not they should be utilized. If an employee does not have special checks selected on at least one of their accounts, they will receive a live check for that payment.

Prenotification is used to validate a bank account. The Name on Account, Routing Number and Account Number are used for validation. When validation is enabled, it may take up to 14 business days from the Prenotification Validation Date before direct deposit accounts will receive funds.

Special checks are payments separate from your regular paycheck, such as bonuses. If this option is not selected for your Main Account, then all special checks will be issued as paper checks.

**Step 1: Add Bank Account** Close Next

**Add Bank Account** In Progress Review Direct Deposit Setup Not Started

**Enter Bank Account Details**

Account Nickname (optional)  
Checking

Name on Account  
Sisters of Mercy

Account Type  
Checking

Routing Number  
044000037

Account Number  
1234

Retype Account Number  
1234

Allocation Type:  
Select a type

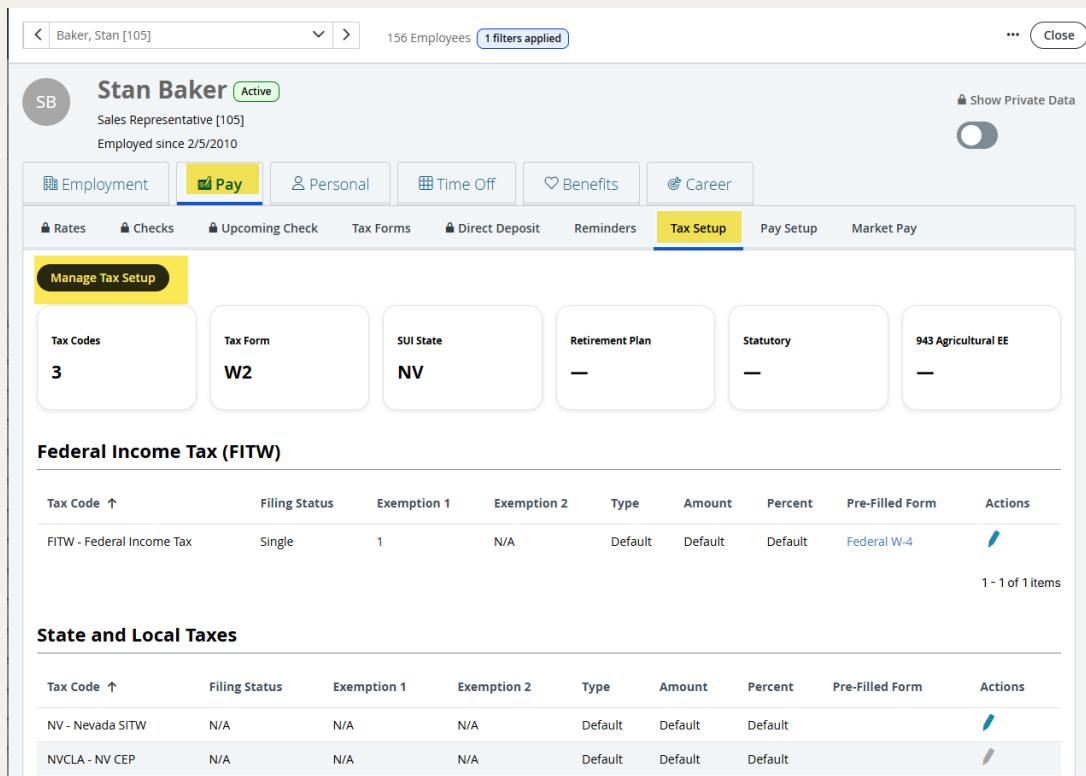
Validate account via prenotification ?

Use for bonus and other special checks ?

Amount

# Tax Exempt Setup

- Religious employees are exempt from all Taxes. Please navigate to the employee record > Pay > Tax Setup > Manage Tax Setup.
- Once on the Manage Tax Setup page, click exempt for all taxes with a reason of Clergy/Religious.



Baker, Stan [105] 156 Employees 1 filters applied

Stan Baker (Active)  
Sales Representative [105]  
Employed since 2/5/2010

Employment Pay Personal Time Off Benefits Career

Rates Checks Upcoming Check Tax Forms Direct Deposit Reminders Tax Setup Pay Setup Market Pay

Manage Tax Setup

Tax Codes 3	Tax Form W2	SUI State NV	Retirement Plan —	Statutory —	943 Agricultural EE —
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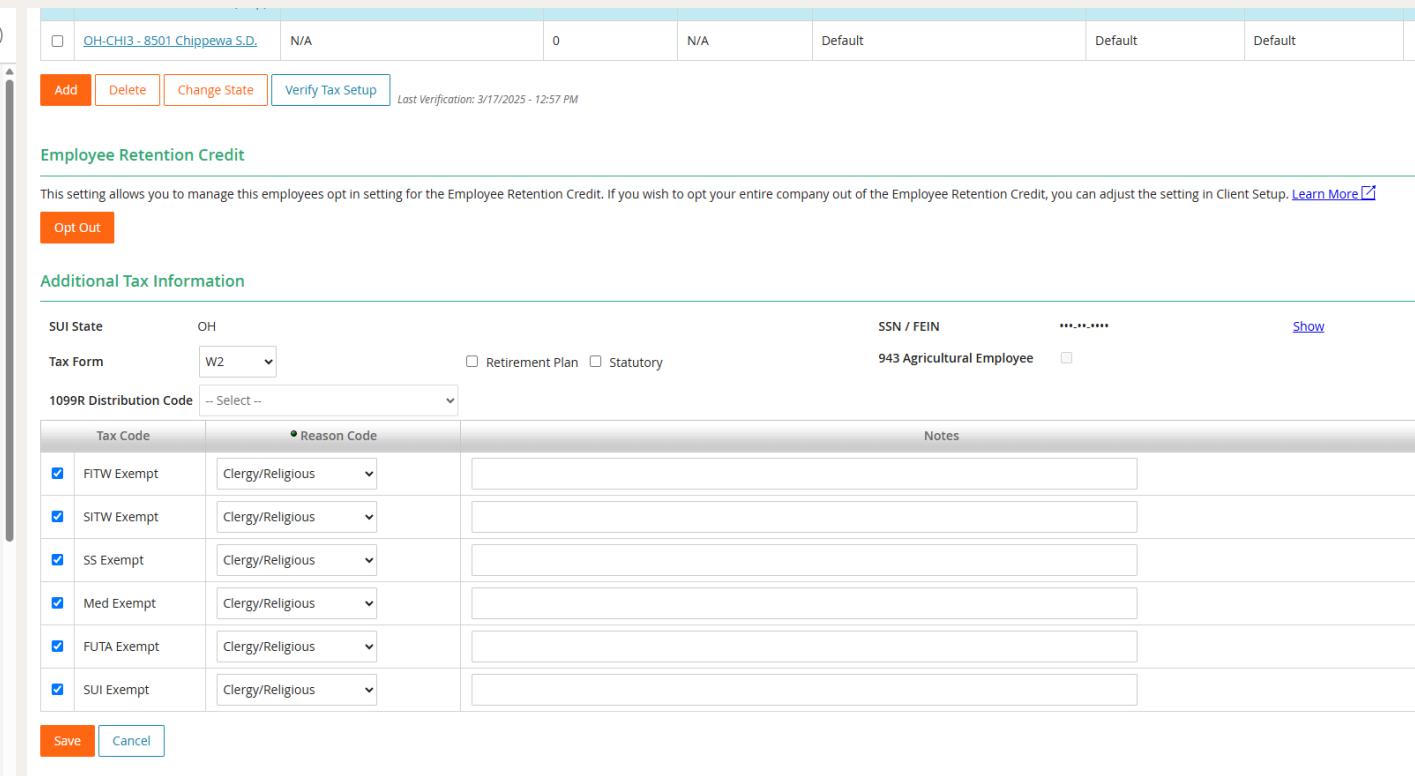
**Federal Income Tax (FITW)**

Tax Code	Filing Status	Exemption 1	Exemption 2	Type	Amount	Percent	Pre-Filled Form	Actions
FITW - Federal Income Tax	Single	1	N/A	Default	Default	Default	Federal W-4	

1 - 1 of 1 items

**State and Local Taxes**

Tax Code	Filing Status	Exemption 1	Exemption 2	Type	Amount	Percent	Pre-Filled Form	Actions
NV - Nevada SITW	N/A	N/A	N/A	Default	Default	Default		
NVCLA - NV CEP	N/A	N/A	N/A	Default	Default	Default		



OH-CHI3-8501 Chippewa S.D. N/A 0 N/A Default Default Default

Add Delete Change State Verify Tax Setup Last Verification: 3/17/2025 - 12:57 PM

**Employee Retention Credit**

This setting allows you to manage this employee's opt-in setting for the Employee Retention Credit. If you wish to opt your entire company out of the Employee Retention Credit, you can adjust the setting in Client Setup. [Learn More](#)

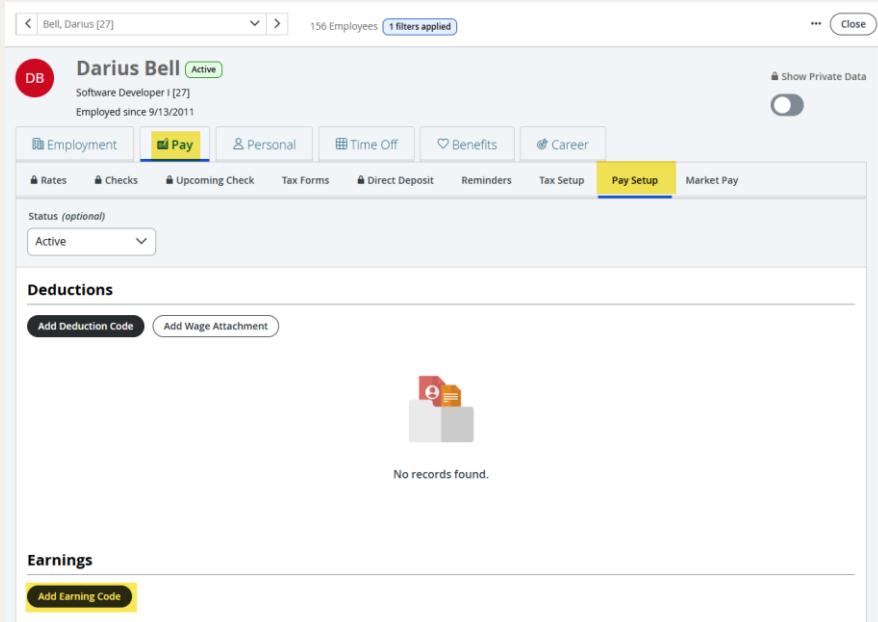
**Additional Tax Information**

SUI State	OH	SSN / FEIN	...	Show
Tax Form	W2	Retirement Plan	Statutory	943 Agricultural Employee
1099R Distribution Code	-- Select --			
Tax Code	Reason Code	Notes		
<input checked="" type="checkbox"/> FITW Exempt	Clergy/Religious			
<input checked="" type="checkbox"/> SITW Exempt	Clergy/Religious			
<input checked="" type="checkbox"/> SS Exempt	Clergy/Religious			
<input checked="" type="checkbox"/> Med Exempt	Clergy/Religious			
<input checked="" type="checkbox"/> FUTA Exempt	Clergy/Religious			
<input checked="" type="checkbox"/> SUI Exempt	Clergy/Religious			

Save Cancel

# Add REL Earning Code

- Contact Mary Jones at the Archdiocese to add the needed REL earning code.
- Below is a preview of where this information can be verified once added by the Archdiocese.
- Navigate to the employee record > Pay > Pay Setup > Earnings.



Bell, Darius [27] 156 Employees 1 filters applied

**Darius Bell** Active

Software Developer | 27 | Employed since 9/13/2011

Employment Pay Personal Time Off Benefits Career

Rates Checks Upcoming Check Tax Forms Direct Deposit Reminders Tax Setup Pay Setup Market Pay

Status (optional) Active

**Deductions**

Add Deduction Code Add Wage Attachment

No records found.

**Earnings**

Add Earning Code

### Earnings Details

Earning Code: REL - Religious Salary

Earning Type: Standard

Frequency: All

Amount: 500

Self Insured?:

### Calculation

Rate: 0.0000

Calculation Code: -- Select --

Hours / Units:

Rate Code: -- Select --

Pay Period Minimum: 0.00

Pay Period Maximum: 0.00

### Agency Info

Agency: -- Select --

Miscellaneous Info:

### Effective Date

Effective Date: 3/17/2025

Begin Check Date: 03/21/2025 - Weekly

End Check Date: -- Select --

### Distribution

Job Code: -- Select --

Location: -- Select --

Department: -- Select --

Job Title: -- Select --

### Limits

Goal:

Paid to Date:

Annual Maximum: 0.00

Paid Year to Date:

### Automatic Employee Record Updates

Source: None

# Questions?

- Please contact your account manager via [service@paylocity.com](mailto:service@paylocity.com) or (888)-873-8205.
- Paylocity is available from 8am – 8pm EST Monday – Friday. We are closed Saturday and Sunday and on Federal Holidays.

