



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, 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

☐

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, 513-263-3353

Department & Position

^ Dept/Position

Current Effective Date

• Level 1

-- Select --

• Level 2

-- Select --

• Level 3

-- Select --

• Employment Type

-- Select --

• Supervisor

Reviewer

Is Supervisor / Reviewer?

☐

• Position

-- Select --

Job Title

EEO Class

-- Select --

Work Comp

-- Select --

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
- 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&D and LTD (H)</u>	<u>FLSA Exempt? (J)</u>	<u>401K Status</u>	<u>401K Loan</u>	<u>401K SH (I)</u>	<u>401K Deferral Eligibility</u>	<u>Employee Required to Use the Time & Labor Module in PCTY</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 <u>fifteen or more classroom hours per week</u> for <u>2 or more consecutive months</u>) 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	<u>Occasional Workers</u> 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. DOES NOT INCLUDE SUBSTITUTE TEACHERS.											
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. DOES NOT INCLUDE SUBSTITUTE TEACHERS.											
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

UNITED STATES

• Address 1

Address 2

County

• City

• State

--

• Zip Code

Home Phone

Mobile Phone

• Email Address

Additional Address

AdditionalAddress Type

-- Select --

Additional Country

-- 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
-------------------------------------	------------	-----------	---------	----------------	------	-------------	--------	--------------

Add Delete

Benefits Setup

• Effective Date 2/17/2025

• Benefit Class -- Select --

Benefit Location -- Select --

Benefit Division -- Select --

Part Time? ☐

Benefit Termination Date

Benefit Salary Effective Date

Benefit Salary \$0.00 ☐ Override?

Benefit Hours per Week 0.00

Current Rate Annual Salary \$0.00

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

^ Direct Deposit

<input checked="" type="checkbox"/>	Priority ^	Bank Name	Transit	Account Number	Type	Amount Type	Amount	Prenote Date
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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
 - ☐ Previous
- Filing Status

-- Select --
- Multiple Jobs or Spouse Works (Line 2c) [i](#)☐
- Dependents (Line 3) [i](#)

0.00
- Other Income (Line 4a) [i](#)

0.00
- Deductions (Line 4b) [i](#)

0.00
- Extra Withholding [i](#)

Default Amount
- Amount

0.00
- 943 Agricultural Employee ☐

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

☒

Tax Code ▲

Filing Status

Exemption 1

Exemption 2

Type

Amount

Add

Delete

^ Deductions

☒

Priority ▲

Code

Type

Begin Check Date

End Check Date

Calc Code

Amount

Frequency

Goal

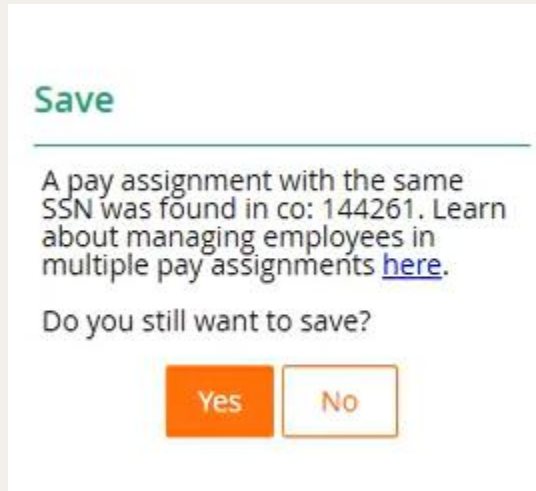
Paid

Add

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, 513-263-3353





Religious Order Priest/Nun After New Hire

As of February 2025

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

- 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 displays the Paylocity HR & Payroll interface. On the left, a sidebar shows the 'Dunder Mifflin [031692]' organization and navigation tabs for 'HR & Payroll', 'Employees', 'HR', 'Payroll', and 'User Access'. Below these is an 'Advanced' search filter for 'Last Name, First Name, SSN, Employee Id' with 'Active Filters: Status: Active' and a 'Save' button. A table lists employees with columns for 'Last Name', 'Preferred / First Name', and 'Emp Id'. The main content area shows the profile for 'Stan Baker', a 'Sales Representative [105]' who has been 'Employed since 2/5/2010'. The 'Pay' tab is selected, and the 'Direct Deposit' sub-tab is active. A yellow warning box states: 'No Current Bank Accounts. 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, a blue icon of a classical building is shown, followed by the text 'Add any existing checking or savings account and get paid with direct deposit.' and a black button labeled 'Add Bank Account'.

<input type="checkbox"/>	Last Name ▲	Preferred / First Name	Emp Id
<input type="checkbox"/>	Baker	Chet	72
<input type="checkbox"/>	Baker	Stan	105
<input type="checkbox"/>	Barclay	Reginald	39
<input type="checkbox"/>	Beasley	Pamela	170
<input type="checkbox"/>	Beckman	Daniel	97
<input type="checkbox"/>	Bell	Darius	27
<input type="checkbox"/>	Bison	Dave	69
<input type="checkbox"/>	Brownell	Buster	164
<input type="checkbox"/>	Burgamy	Otella	124
<input type="checkbox"/>	Cal	Benjamin	1
<input type="checkbox"/>	Captain	Stanton	157
<input type="checkbox"/>	Carmichael	Charles	88
<input type="checkbox"/>	Carraba	Caitlyn	19
<input type="checkbox"/>	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

CloseNext

\$ 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

Amount

Validate account via prenotification
☐

Use for bonus and other special checks
☒

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

Close

SB

Stan Baker Active

Sales Representative [105]

Employed since 2/5/2010

Show Private Data

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

Tax Form

SUI State

Retirement Plan

Statutory

943 Agricultural EE

3

W2

NV

—

—

—

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 employees 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](#)

Opt Out

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.

Employee Record: Darius Bell (Active) | Software Developer | Employed since 9/13/2011

Navigation: Employment, Pay, Personal, Time Off, Benefits, Career

Sub-navigation: 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:

Save | Save & Add New | Cancel

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 or (888)-873-8205.
- Paylocity is available from 8am – 8pm EST Monday – Friday. We are closed Saturday and Sunday and on Federal Holidays.

