paylocity
Forward Together.

Lay Employee New Hire Guide for Business Managers

As of October 2025

Multi-location Employees

paylocity
Forward Together.

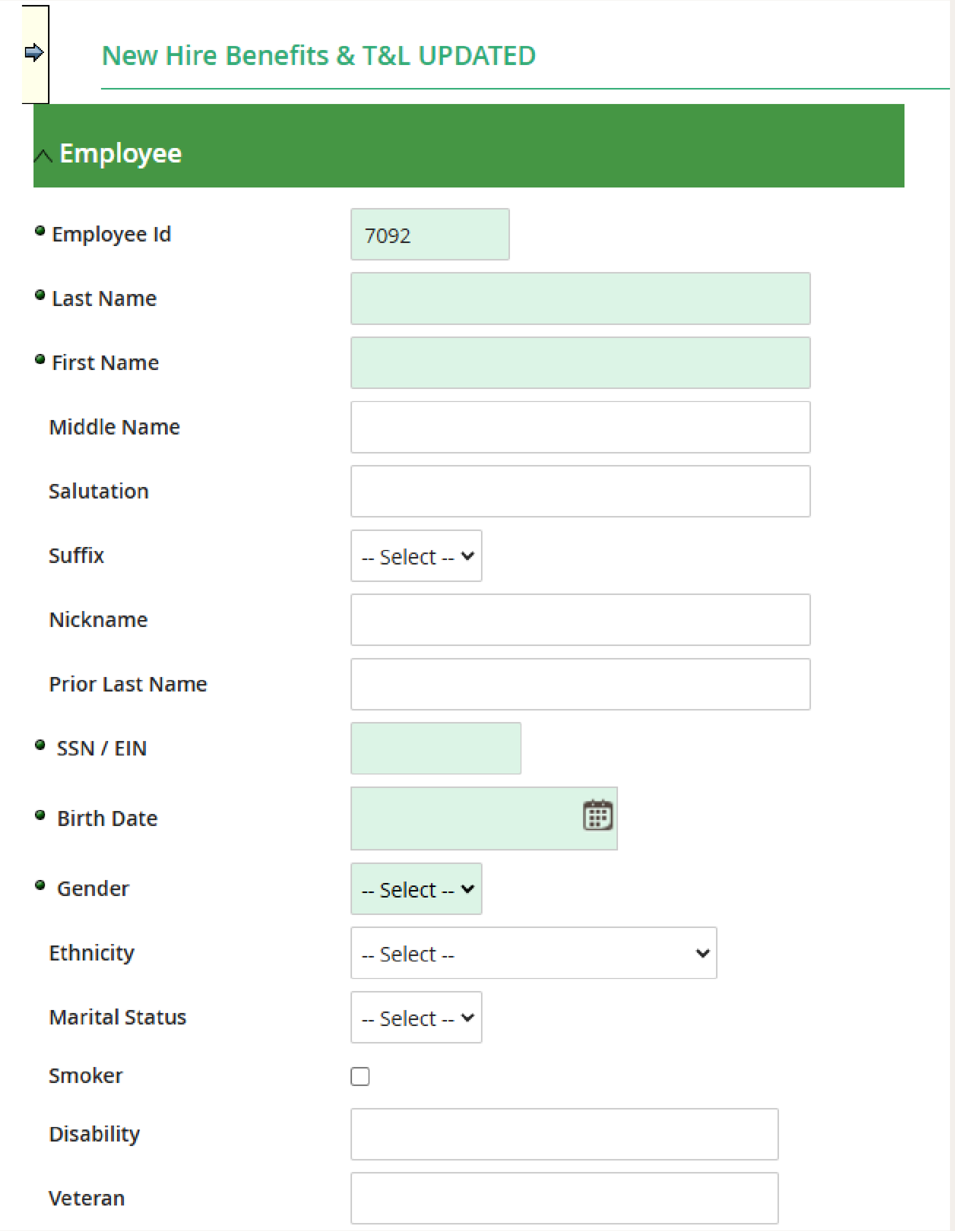
- Step 1: Ask the employee if they are working at multiple Archdiocesan locations.
  - If they say yes, **STOP** you need to contact **Mary Jones** prior to entering data into the new hire template. There is a special process for multi-location Employees (MLE) that **NEEDS** to be followed.
  - If no,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

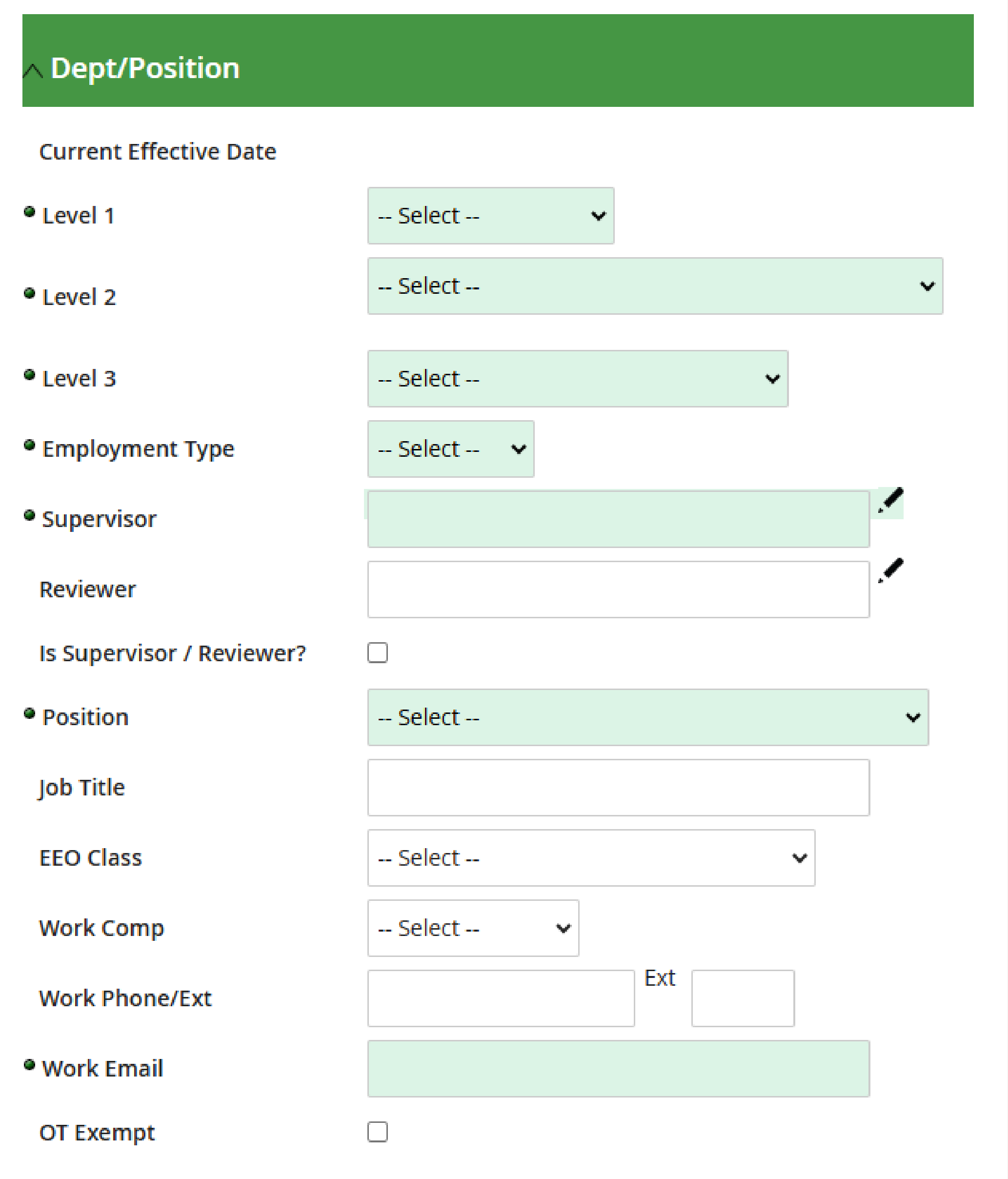
New Hire Template



- All **green** fields are required fields to complete the New Hire process.
- Leave the pre-populated Employee ID value as is.

Department & Position

paylocity
Forward Together.



- All <u>**green**</u> 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.

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

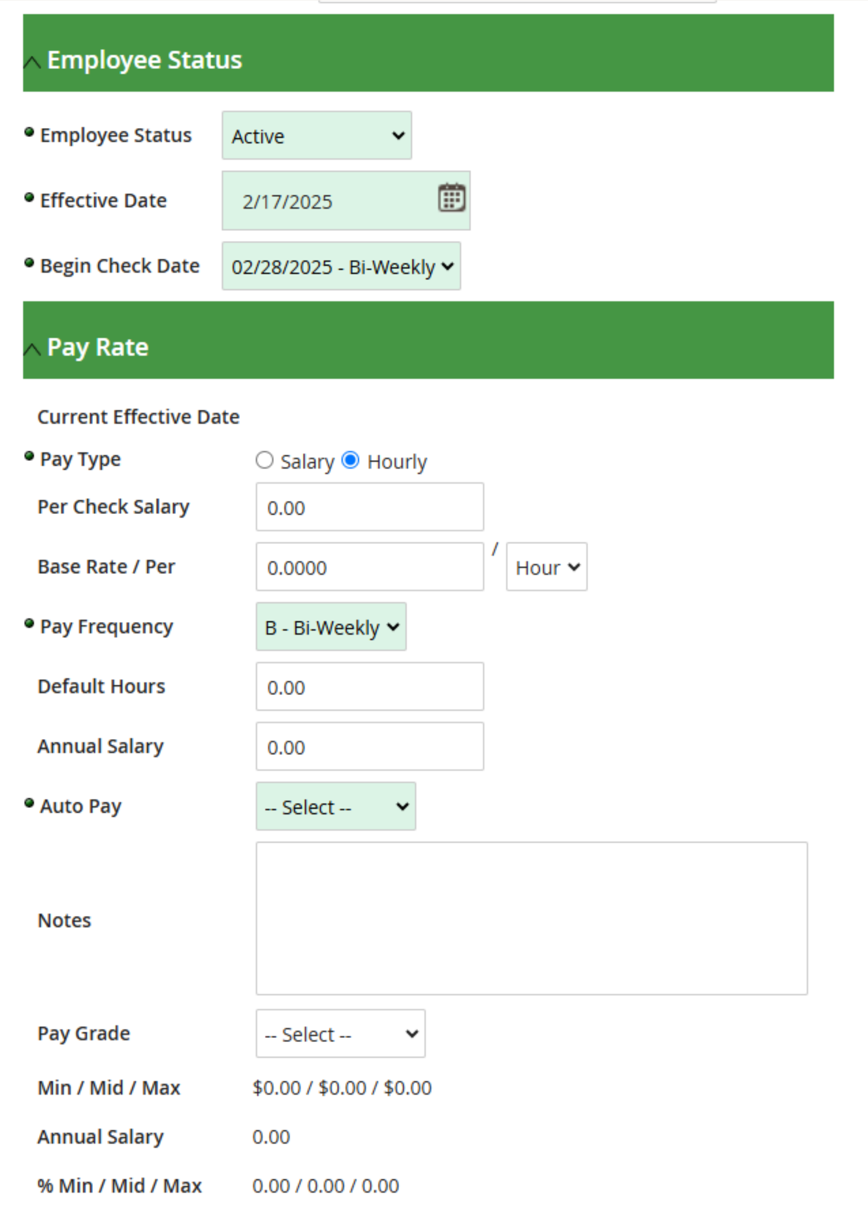
paylocity
Forward Together.

Employment Type Code (K)	Note Ref	Measurement	Health Benefit Eligibility Code	Healthcare Offered (G)	Life, AD&D and LTD (H)	FLSA Exempt? (J)	401K Status	401K Loan	401K SH (I)	401K Deferral Eligibility	Employee Required to Use the Time & Labor Module in PCTY
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 purpses.
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 purpses. 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 threshhold for Medical Benefits is 30 hours or more. Stated as >29 above
H	Benefit Threshhold for Life, AD&D and LTD is 20 hours or more. Stated as >19 above
I	Benefit Threshhold 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

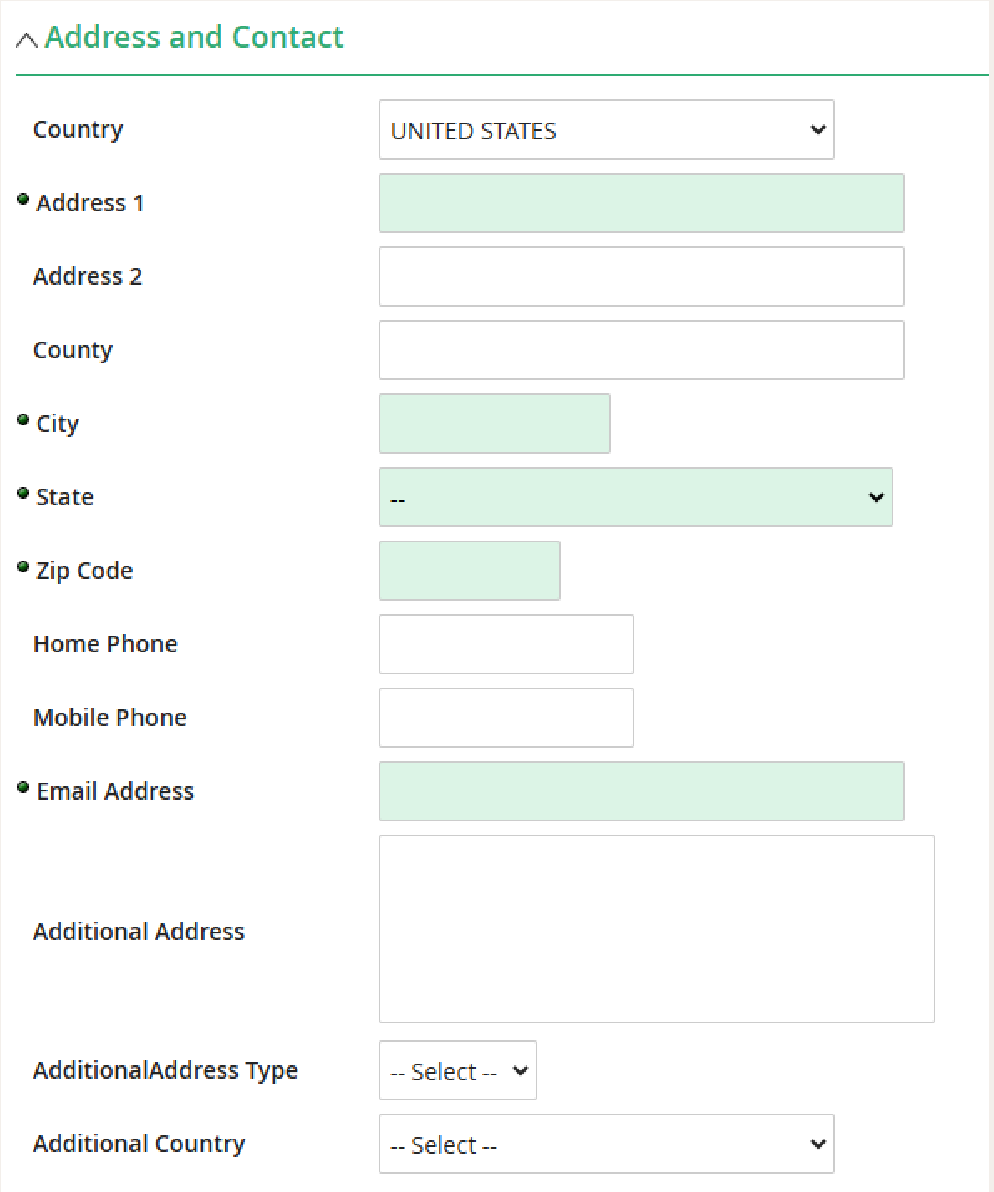


- All green fields are required fields to complete the New Hire process.
- The effective date of the Employee Status section is the employee’s hire date.
- Auto Pay for hourly employees should be filled out as ‘None’.
- Auto Pay for salaried employees should be filled out as ‘Salary’.
- Default Hours: 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)

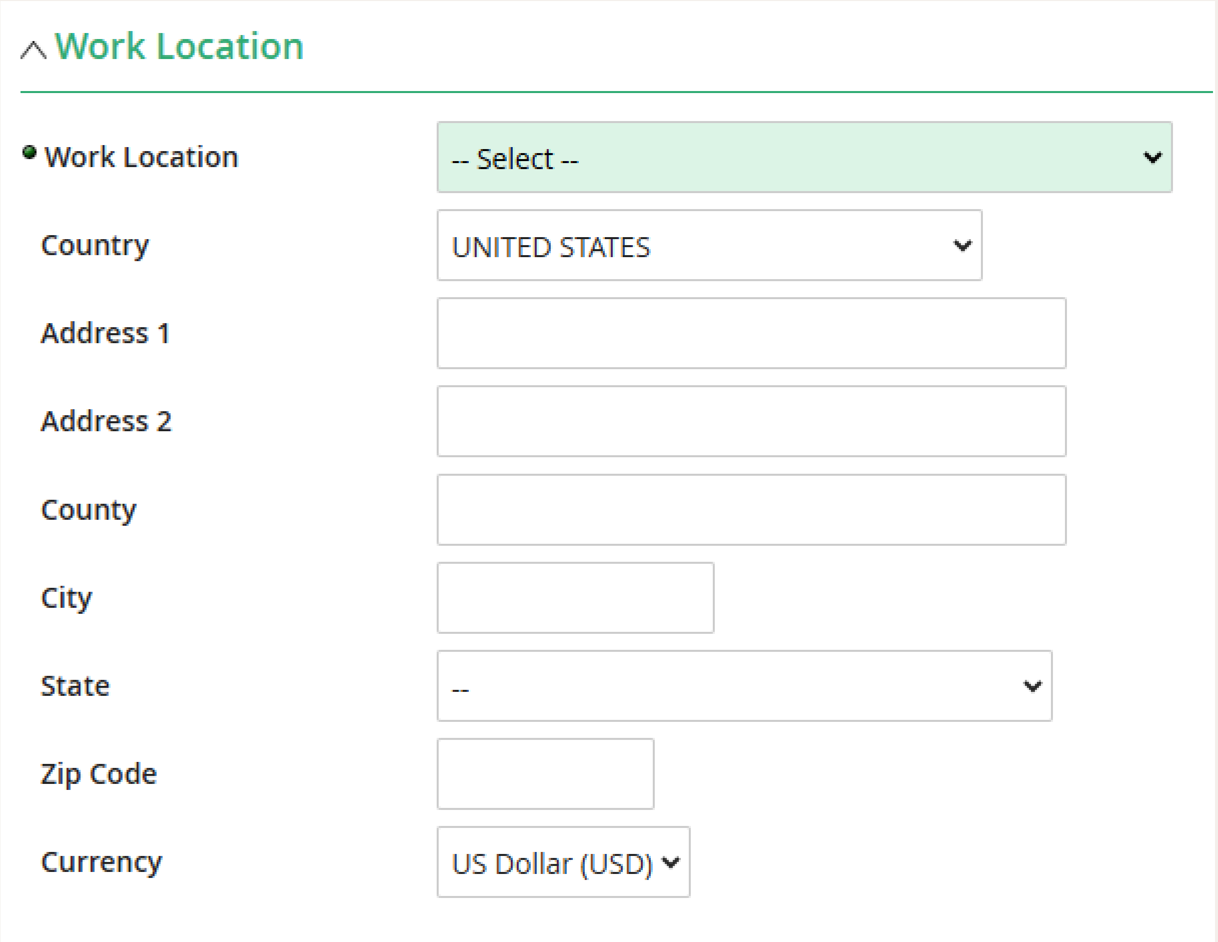
Address and Contact

paylocity
Forward Together.

- 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
- Email Address is a required field.
- Mobile Phone is a preferred field for reporting purposes.



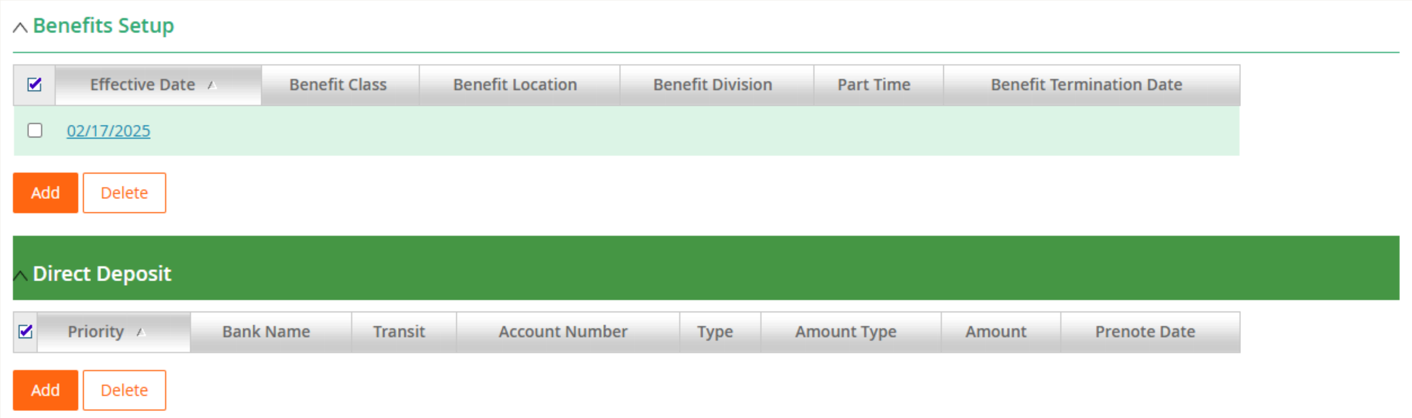
Work Location

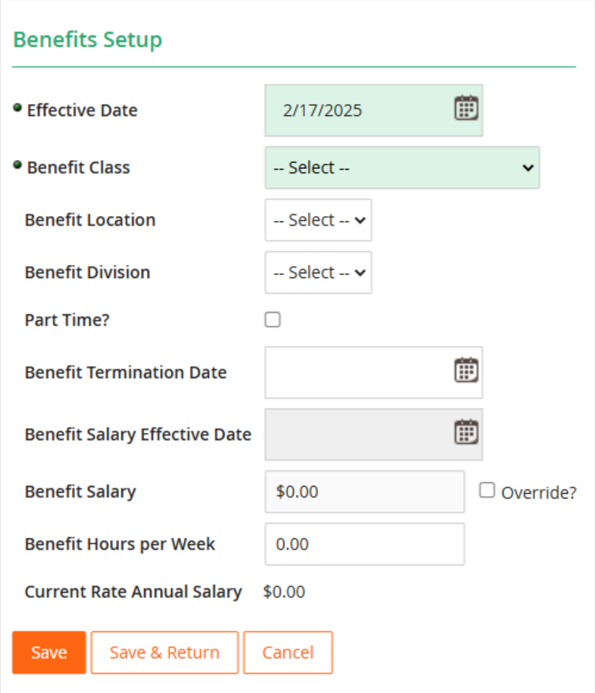


- All **green** fields are required fields to complete the New Hire process.

Benefit Class

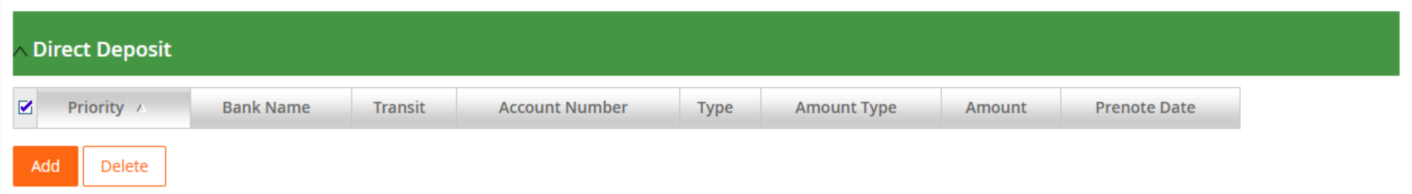
paylocity
Forward Together.





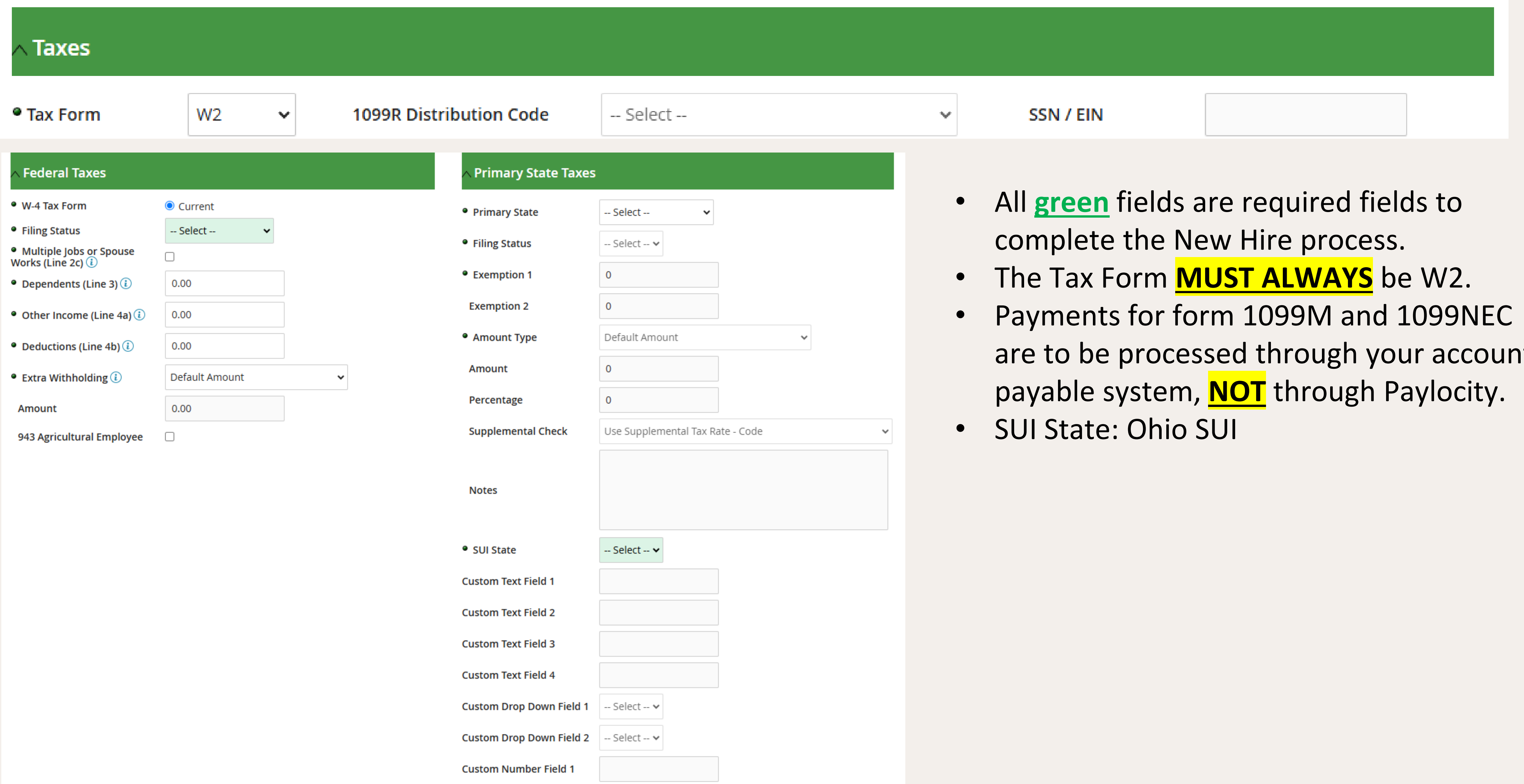
- All **green** fields are required fields to complete the New Hire process.
- The Benefit Class effective date **NEEDS** to be the same value as the hire date/status effective date on slide 4.
- The Benefit Class **MUST** align with the Employment Type Code assigned to the employee. Please review slides 6&7.

Direct Deposit – Skip for Now



- 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**

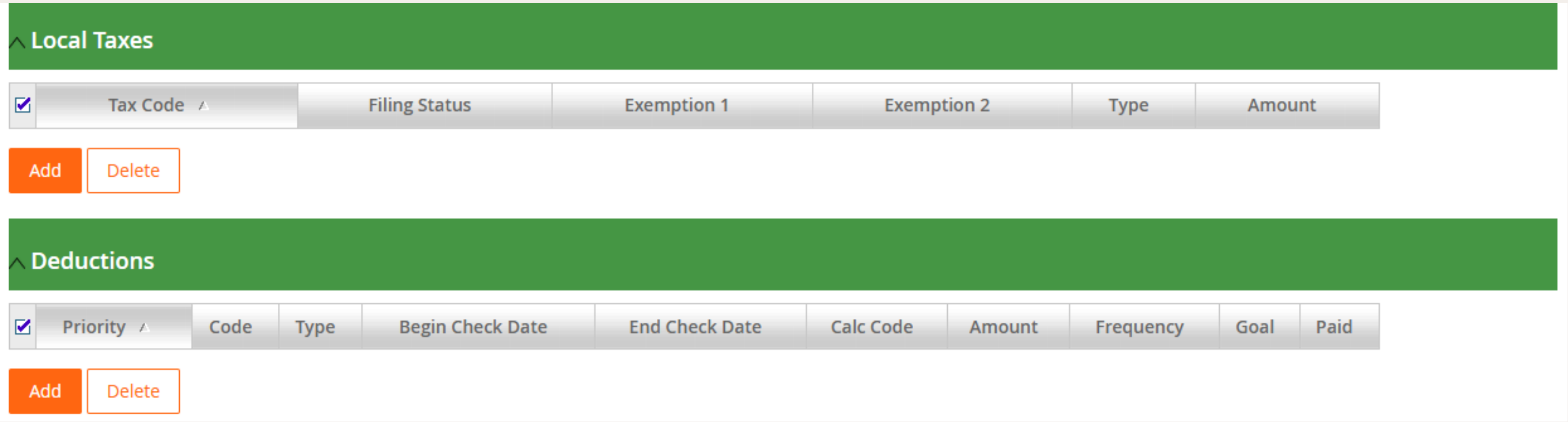
Taxes – Lay Employees



- 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.
- SUI State: Ohio SUI

Taxes cont.

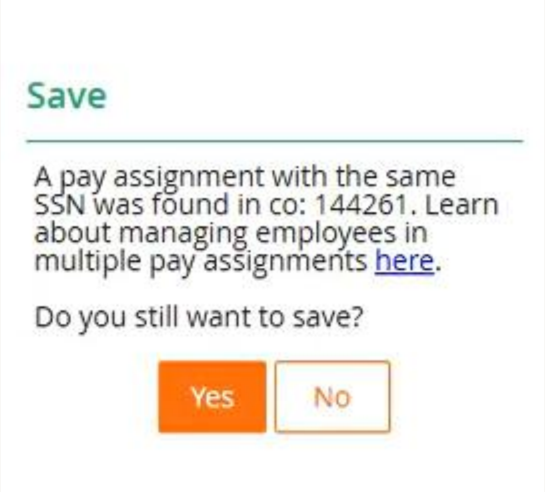
- All **green** fields are required fields to complete the New Hire process.
- Local taxes can be added via the new hire template but should be verified once hired . **SEE AFTER NEW HIRE SECTION.**
- Deductions should **NOT** be entered on the new hire template.



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



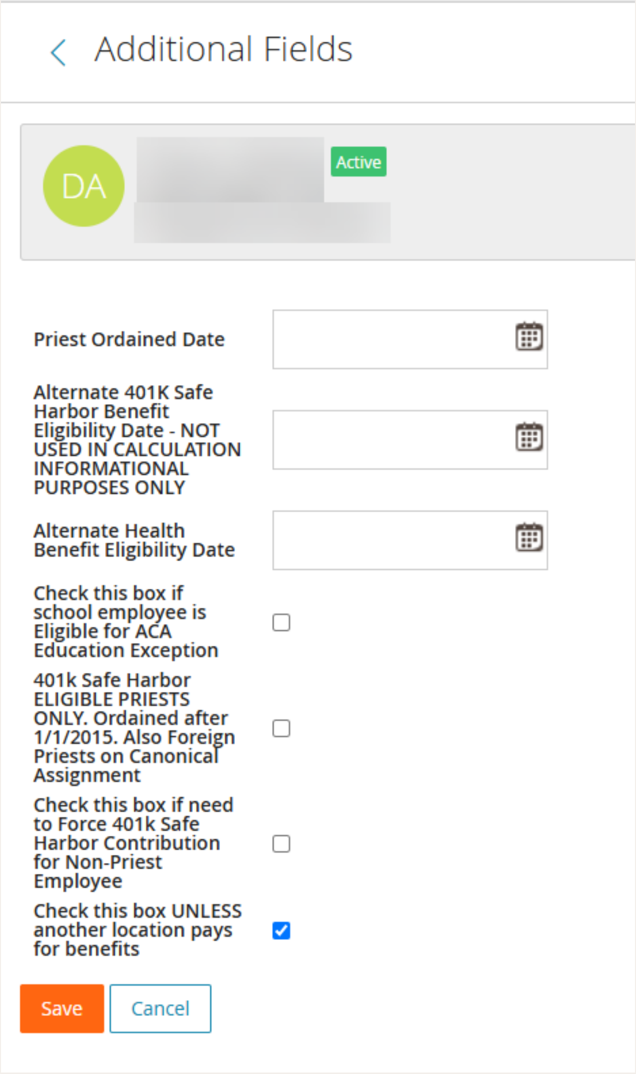
paylocity

Forward Together.

Lay Employee After New Hire

As of February 2025

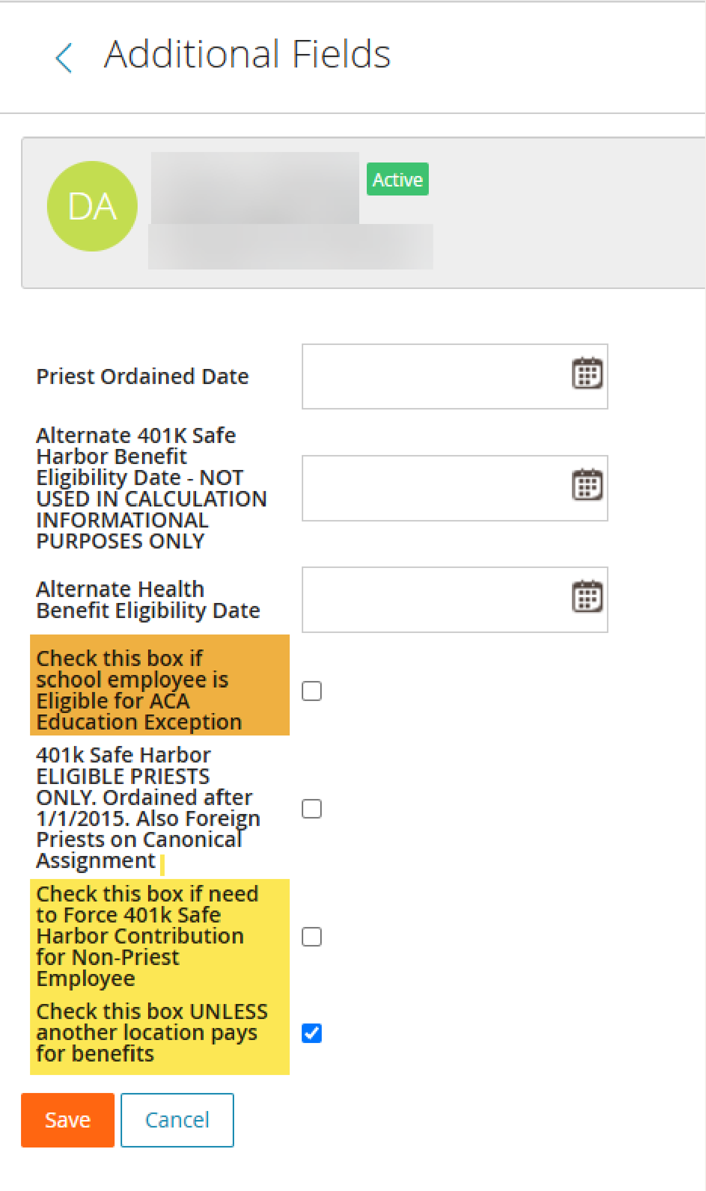
Custom/Additional Fields



- 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.

Lay Employee - Custom/Additional Fields

paylocity
Forward Together.

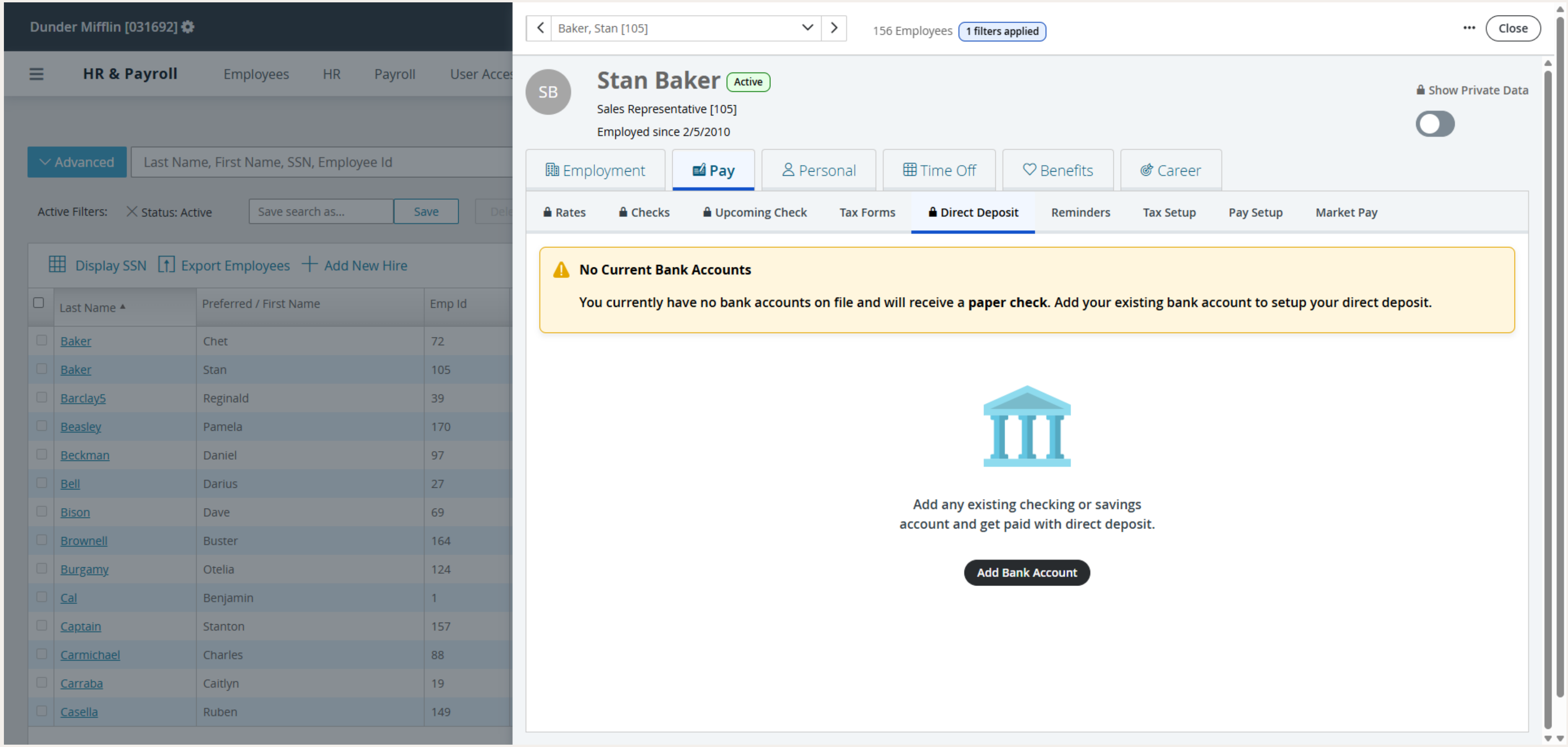


- The primary location for an employee **MUST** have the bottom checkbox labeled “Check this box UNLESS another location pays for benefits” checked. Employees that are multi-location employees should have the box unchecked if not at their primary location.
- Secondary locations where an employee is benefit eligible at another location **NEED** to check the box labeled “Check this box if need to Force 401k Safe Harbor Contribution for Non-Priest Employee”.
- If an employee is employed at a school location they **NEED** to have the box labeled “Check this box if school employees is Eligible for ACA Education Exception” checked.

Direct Deposit

paylocity
Forward Together.

- If adding Direct Deposit on a new hire's behalf please navigate to their record > Pay > Direct Deposit. Please note it is recommended that employees enter their direct deposit information themselves.
- In this section you will see the option to add a bank account.

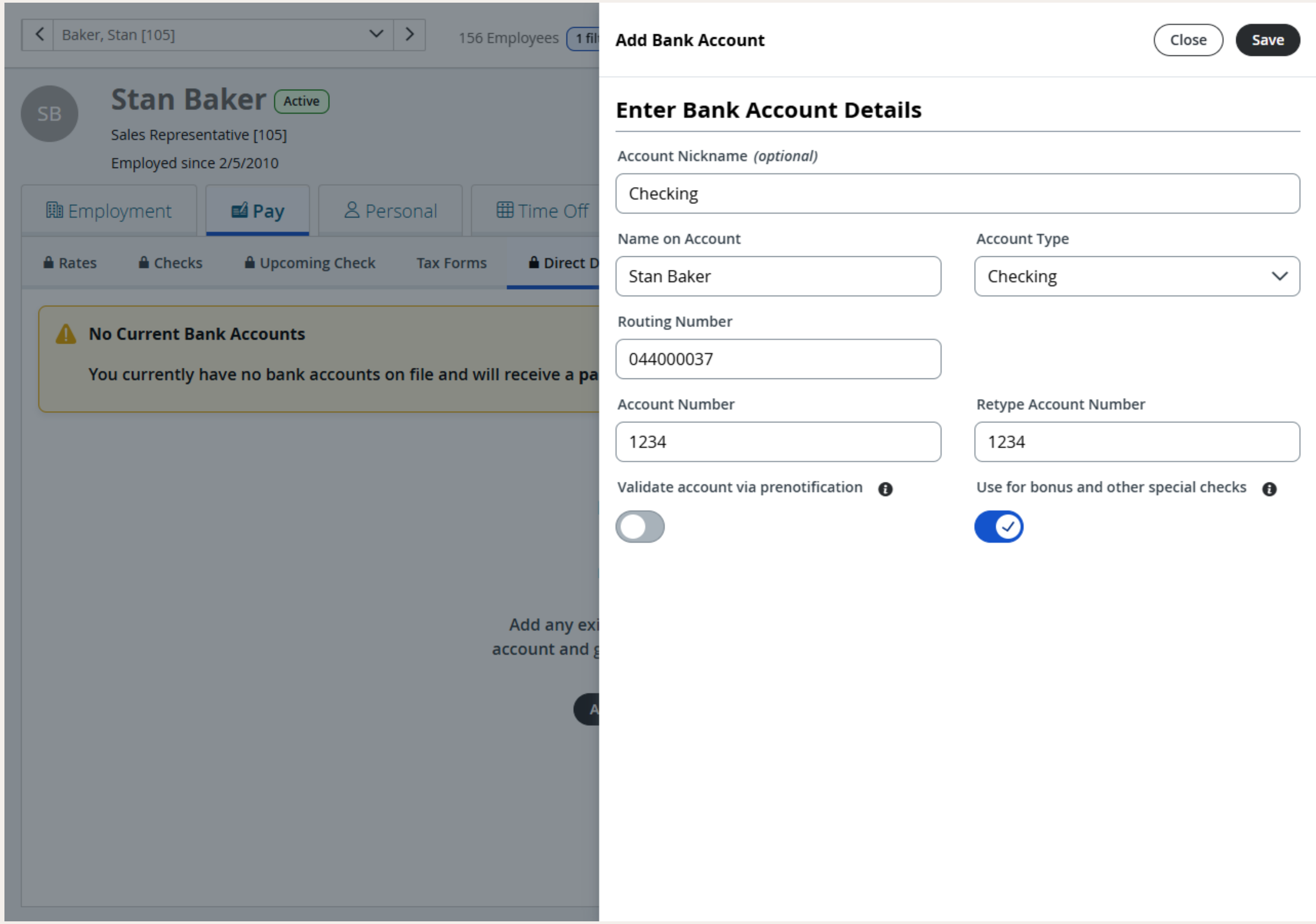


Direct Deposit cont.

- 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.

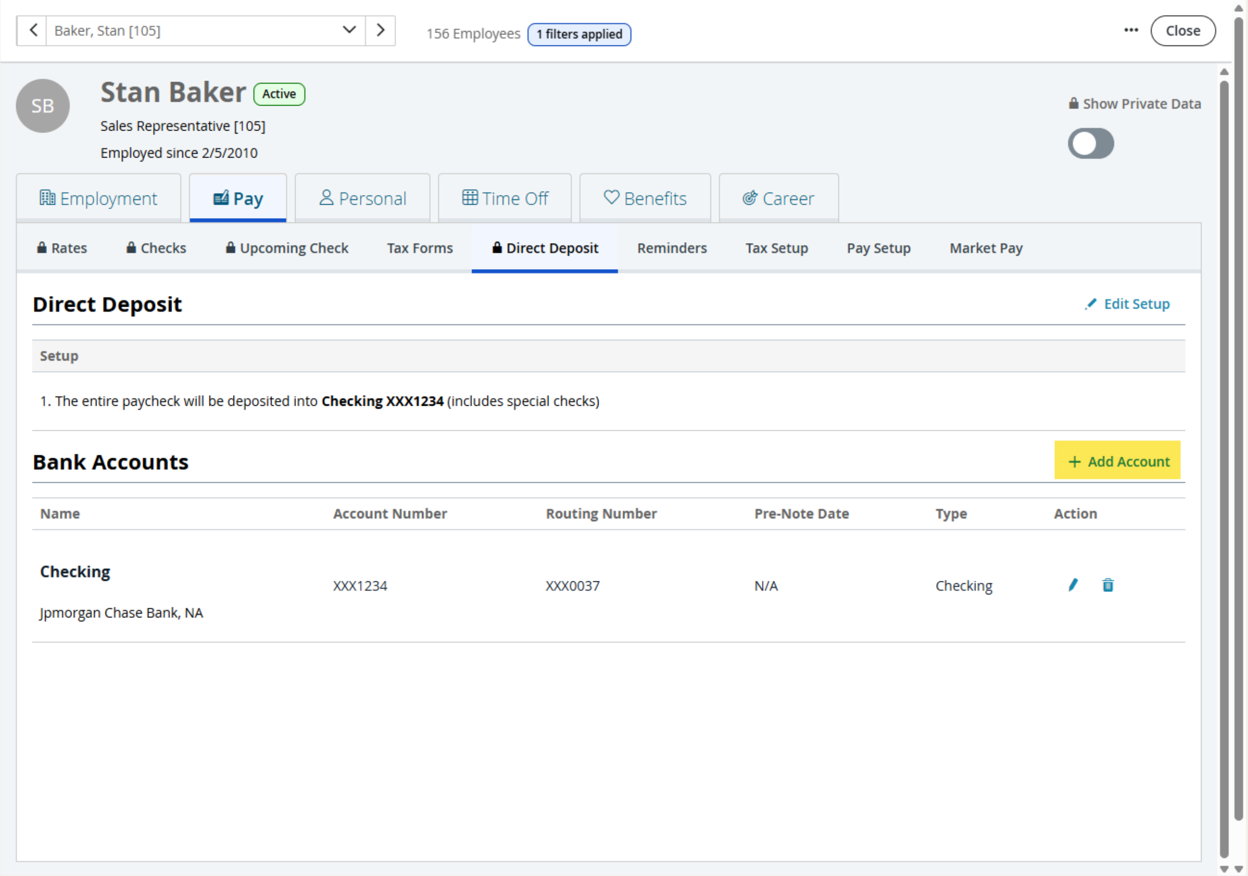
Special checks are payments separate from your regular paycheck, such as bonuses. If this option is not selected for your Main Account, then all special checks will be issued as paper checks.

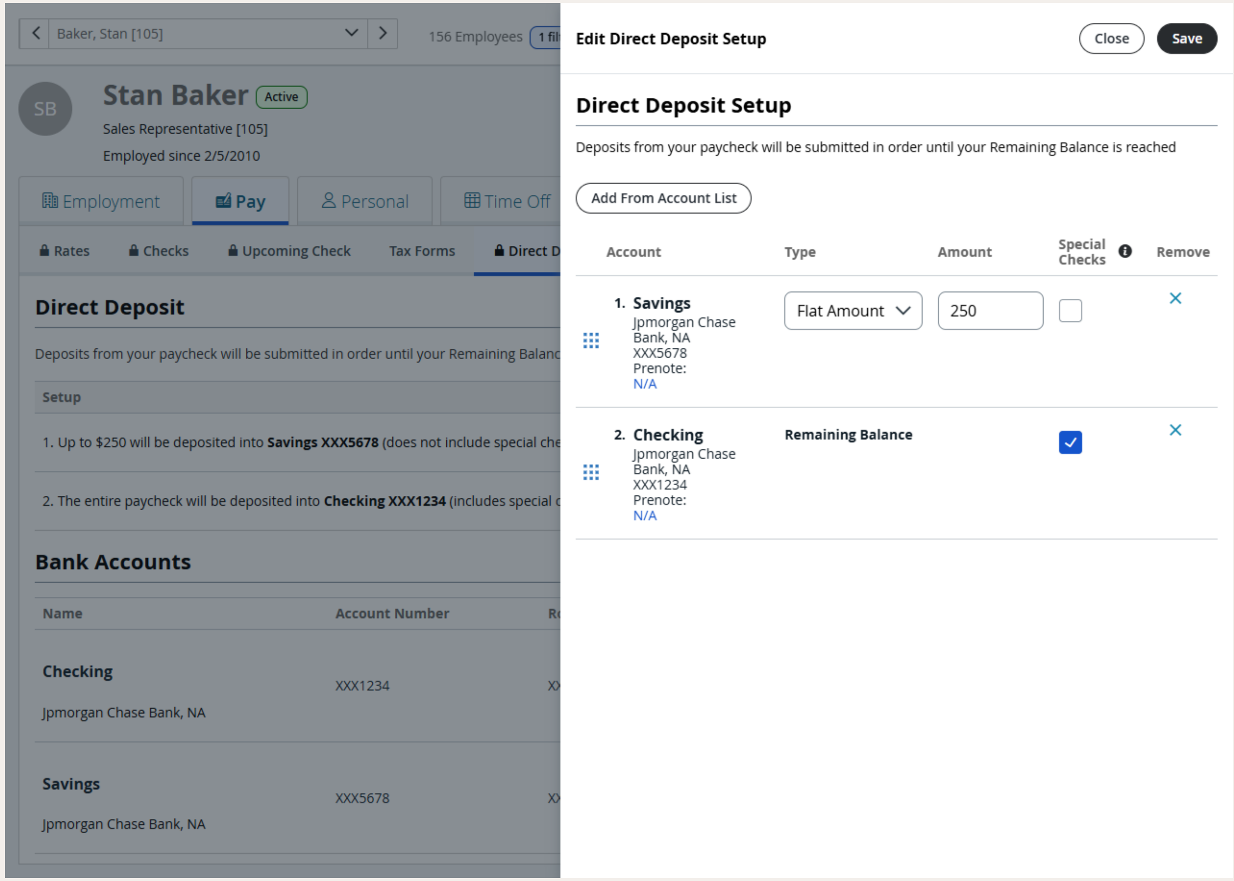


Direct Deposit cont.

paylocity
Forward Together.

- If an employee has multiple accounts and wants to split their net pay, then you are able to click "+ Add Account" and then edit the setup of the accounts to accommodate. In the example below the employee has a savings account setup to receive $250 of their net pay first and the remaining will deposit into their checking account.

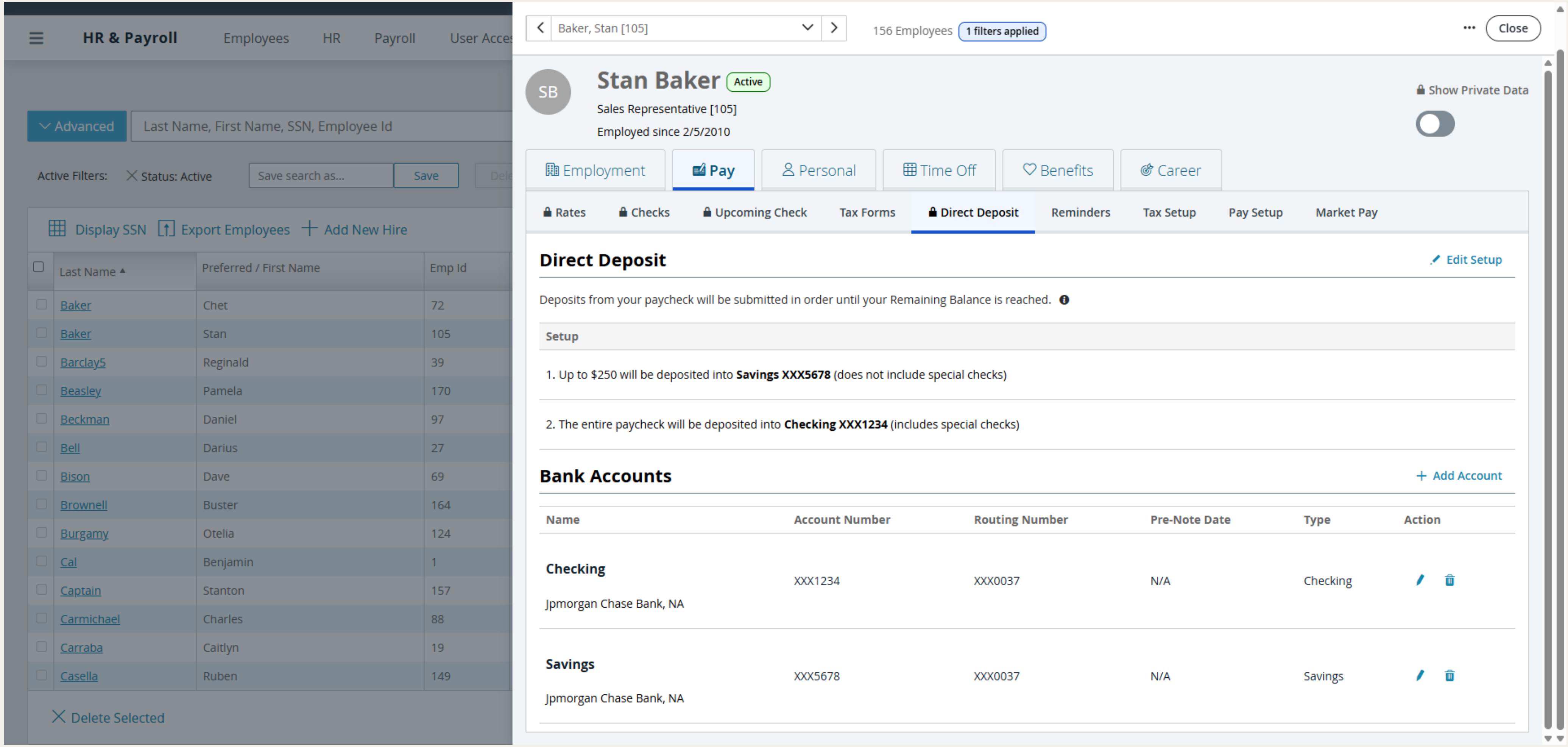




Direct Deposit cont.

paylocity
Forward Together.

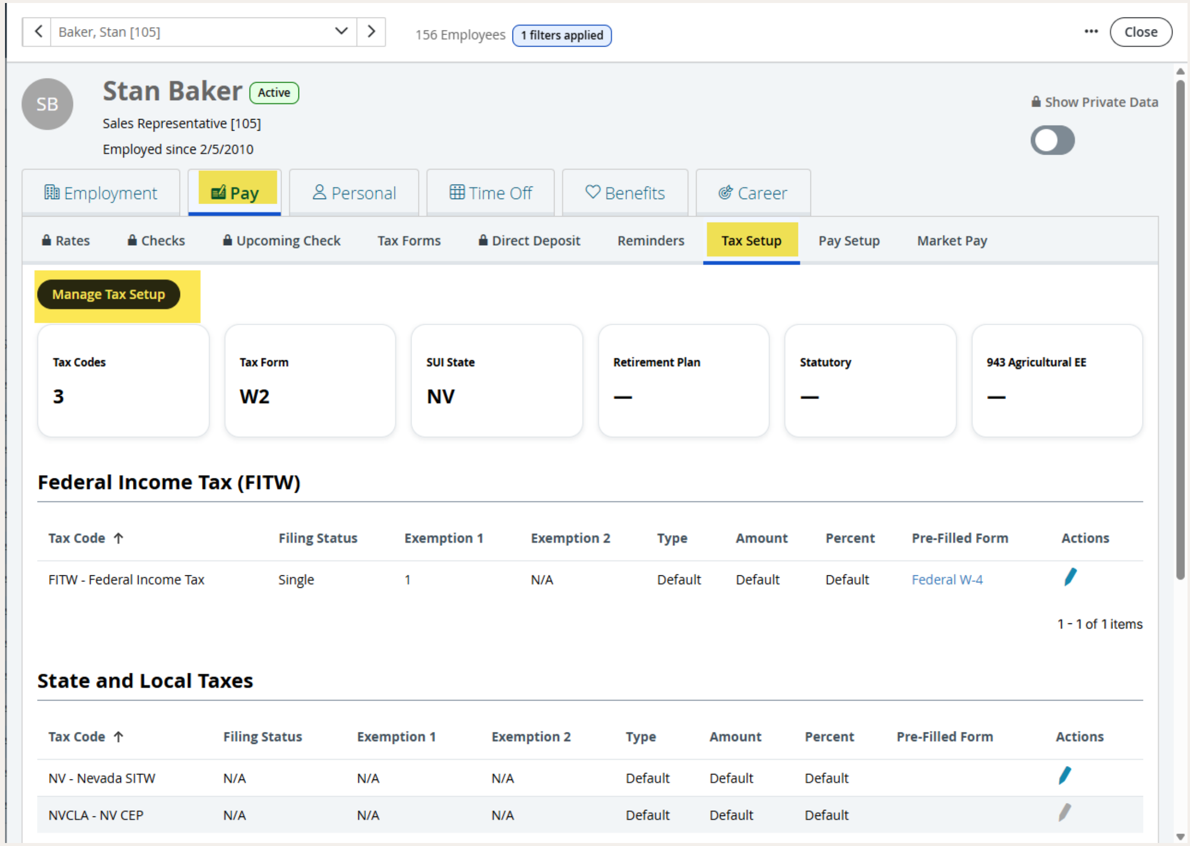
- The below is an example of how the direct deposit screen will look like if an employee has multiple accounts setup.
- Note in this scenario the employee elected for “special” checks to only deposit into their main account and not split to the savings account.

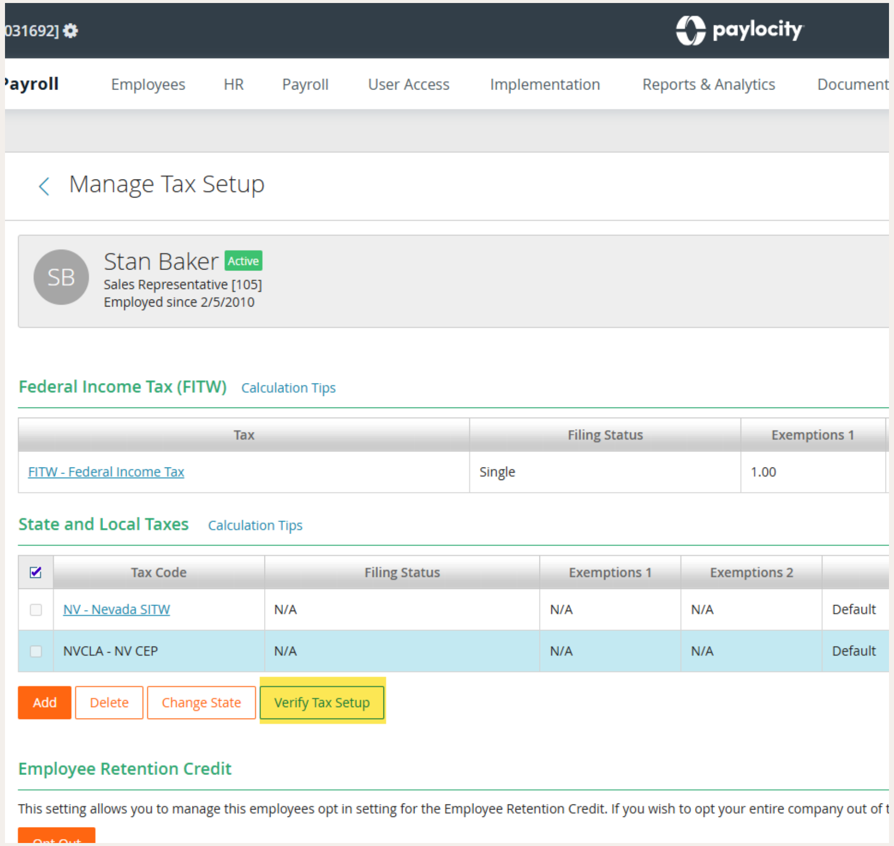


Tax Verification

paylocity
Forward Together.

- To verify an employee's local tax setup please navigate to the employee record > Pay > Tax Setup > Manage Tax Setup.
- Once on the Manage Tax Setup page, click Verify Tax Setup.
- The verify tax setup tool will determine an employee has the correct tax code setup per their work and home address.





Tax Verification cont.

- The Geolocation (Verify Tax Setup) feature recommends a residence (RES) tax code if the employee resides in the specific locality. If the employee does not reside, but works in the locality, the system recommends an employment (EMP) tax code. Ohio employers have the option to withhold an employee's RES tax as a courtesy in addition to any required workplace tax. Employers are not required to participate in Courtesy Withholding. If the client prefers to setup a residential employee with the EMP local tax code, the employer should ignore the recommendation to setup the residence local tax code.
- You can also confirm if an employee needs to be setup with a local by using the Ohio local tax finder linked here: https://thefinder.tax.ohio.gov/StreamlineSalesTaxWeb/AddressLookup/LookupByAddress.aspx?taxType=Municipal

Verify Tax Setup

Close

RC Ruben Casella

Home Address
525 Vineward Way
Doylestown, OH
44230

Work Address
525 Vineward Way
Doylestown, OH
44230

Recommended Changes

Code	Description	Type
OH-BAR2 *Unneeded tax code*	Barberton, OH (Emp)	LOCAL
OH-DOY2 *This code is not set up for your company. Please click here to download the "Request to Add or Remove Tax Codes form", and email the completed form here. Contact your account manager if you need assistance.*	Doylestown, OH (Res)	LOCAL

Verified

Code	Description	Type
OH	Ohio SITW	SITW
OH-CHI3	8501 Chippewa S.D.	LOCAL
OHSUI	Ohio SUI	SUI

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.

paylocity®

Forward Together.