

Archdiocese Status Change Process for Position Changes, Compensation Changes and Time Off Changes

Status Change Forms (SCF) should be completed, and the appropriate signature secured from the authorized person (pastor, principal). Bookkeepers are to process the status change requests directly in Paylocity.

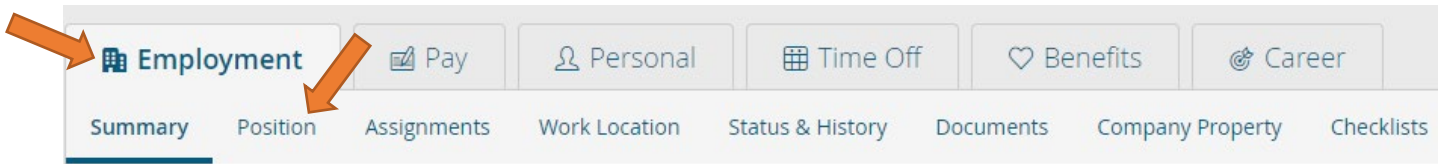
Once bookkeepers make the change(s) in Paylocity, they must also upload the completed/signed SCF form supporting the change and submit the request. Paylocity will alert the Human Resources department to review the request and approve.

Status Process Changes include: (1) Changing the necessary information in HR and Payroll (2) Changing the necessary information in the Benefits Tab (if applicable).

- **Position Changes**

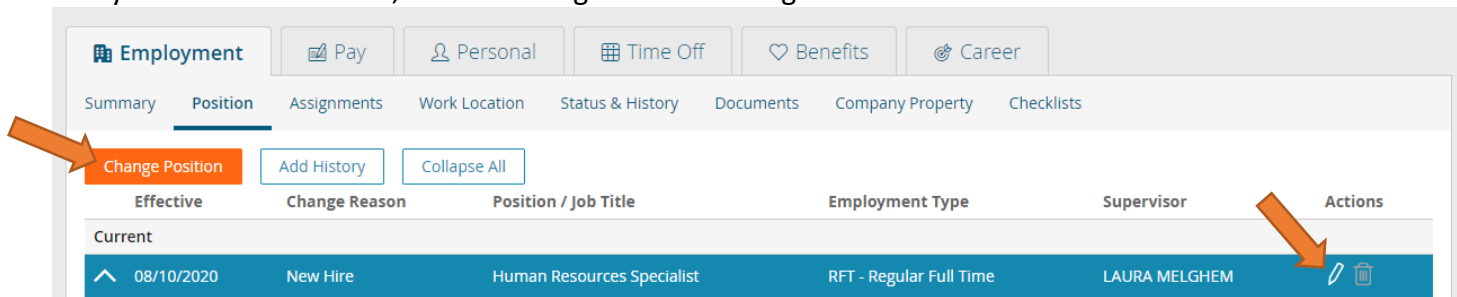
- Employment type: FT, PT, Seasonal, Temporary
- Job Title
- Supervisor change
- Cost Center Changes (Not Additional Cost Centers)

Navigate to the HR & Payroll > Employees > Employee Search > Employee Last Name > Employment Tab > Position Sub Tab



Click the orange “Change Position” button ALWAYS

**If you click the edit icon, it does not signal that a change occurred on the correct date



- Make sure effective date is inputted for the change
- Please include a change reason
- Update the remaining information on the page
- Click “Save” or “Submit for Approval”

Select HR Action

Select HR Action Status Change Position	Workflow Employee Position Corrective
<input type="button" value="Reset Form"/>	

Details

Effective Date (required) 08/10/2020	Change Reason New Hire
Begin Check Date 08/14/2020	

Change Supervisor / Reviewer

Select from only currently assigned Supervisors and Reviewers



Supervisor (required) MELGHEM, LAURA [285047][59200]	Reviewer (required) Unassigned
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Is Supervisor / Reviewer?



Change Position

Employment Type RFT - Regular Full Time	EEO Class 5 - Administrative Support Workers
Position ADMIN SUPPORT - ADMINISTRATIVE SUPPORT	Worker's Compensation 8810 - Clerical Office - Administrative, Bookkeeping, Clerical, & P
Job Title Human Resources Specialist	Location (required) 9200 - PASTORAL CENTER
Home Shift	Department (required) 100 - ADMINISTRATION
	Office (required) 1160 - HUMAN RESOURCES

Change Pay Settings?

Change Union Settings?

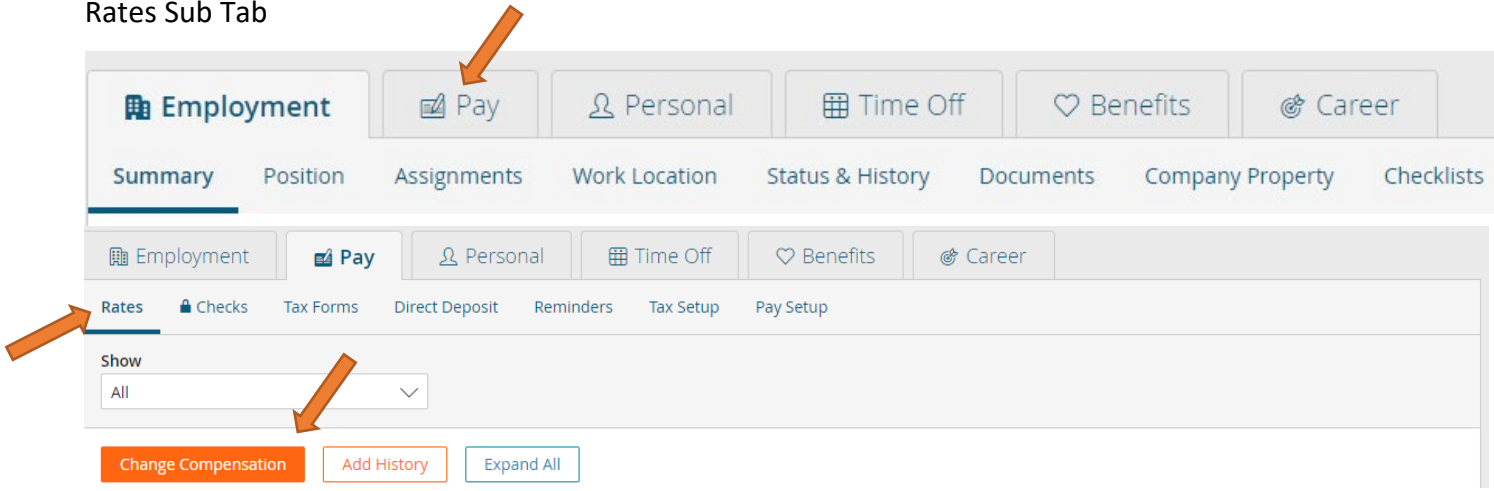
Note



- **Compensation Changes**

- Hourly to Salary or vice versa
- Hourly Rate changes or annual salary changes

Navigate to HR & Payroll > Employees > Employee Search > Employee Last Name > Pay Tab > Rates Sub Tab



- Orange “Change Compensation” button
- Add an “Effective Date,” the “Begin Check Date” should auto-populate
- Change Reason
- Make necessary changes
- “Save” or “Submit for Approval” button

If hourly (see picture on next page)

For employees:

Starting at an hourly rate (new hire)

Going from salary to hourly

Changing from a different hourly rate than before

- Base rate is the amount per hour they receive
- Per Hour should be selected
- Bi-Weekly, always, unless Priest
- Auto Pay: None, always
- Default hours:
 - This is 0 because hours week-to-week change, and OT is available to these employees
- Per check should be 0 as there is no defined way of knowing how many hours the employee will work

Select HR Action

Select HR Action

Status Change Compensation

Workflow

Employee Compensation

Reset Form

Details

Effective Date (required)

Change Reason

Begin Check Date (required)

Rate Setup

Pay Rate Calculator

New Annual Salary

Adjustment Amount

Adjustment %

Calculate Pay Rate

Reset All Changes

Pay Type

Salary **Hourly**

Base Rate

Per

Per Hour

Pay Frequency

B - Bi-Weekly

Auto Pay Type

None

Default Hours

0

Per Check Salary

0

Calculated Annual Salary ⓘ

\$0.00

Override

Pay Grade

Select Pay Grade

Based off Annual Salary

\$0.00

Min:

\$0.00

(NaN% of Annual Salary)

Mid:

\$0.00

(NaN% of Annual Salary)

Max:

\$0.00

(NaN% of Annual Salary)

Note

Save

Submit for Approval

Cancel

If Salary (see picture on next page)

For employees:

Starting at a designated salary rate (new hire)

Going from hourly to salary

Changing from a different annual salary than before

- Put in the default hours the employee is working (*especially if it is not 80, always do this first*)
 - o Default hours: how many hours the employee works BI-WEEKLY (weekly amount doubled)
 - 40/week → 80/biweekly (you would input 80 hours)
- Use the Pay Rate Calculator to the left
 - o Input the annual salary
 - o Click the orange “Calculate Pay Rate” button
- Per check salary should auto populate
 - o BUT this is always the salary divided by the number of pay periods
 - Parish: 26 pay periods
 - School: however many pay periods are remaining
- Bi-Weekly, always, unless Priest
- Auto Pay: Salary
- At the bottom, the annual salary should be exactly what the employee is being paid
 - o This is different when it comes to schools making changes in the middle of the school year
- The base rate will auto-populate, if not, use the Pay Rate Calculator

Select HR Action

Select HR Action

Status Change Compensation

Workflow

Employee Compensation Corrective

Reset Form

Details

Effective Date (required)

08/10/2020

Change Reason

Begin Check Date

08/14/2020

Rate Setup

Pay Rate Calculator

New Annual Salary

Adjustment Amount

Adjustment %

Calculate Pay Rate

Reset All Changes

Pay Type

Salary Hourly

Per Check Salary (required)

Pay Frequency

B - Bi-Weekly

Auto Pay Type

Salary

Default Hours

Calculated Annual Salary ⓘ

\$0.00

Override

Base Rate

\$0.00

Based on 40 hours per week

Override

Pay Grade

Select Pay Grade

Based off Annual Salary

\$0.00

Min:

\$0.00

(NaN% of Annual Salary)

Mid:

\$0.00

(NaN% of Annual Salary)

Max:

\$0.00

(NaN% of Annual Salary)

Note

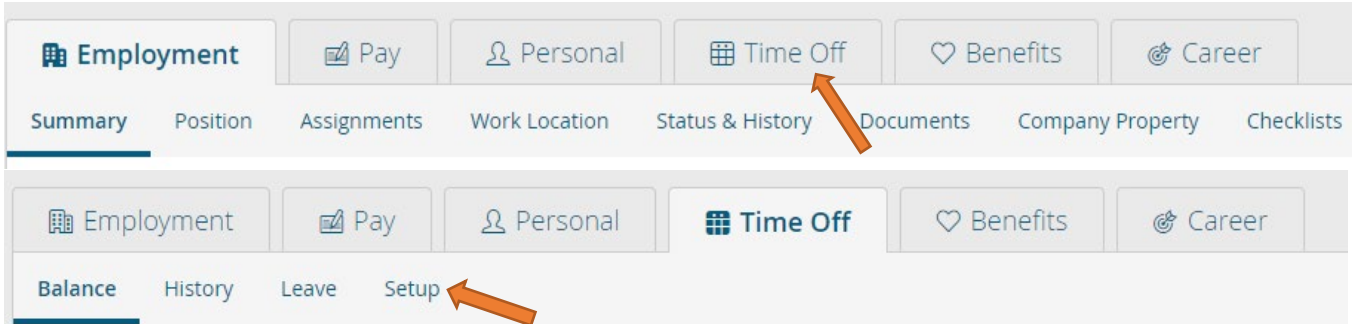
Save

Submit for Approval

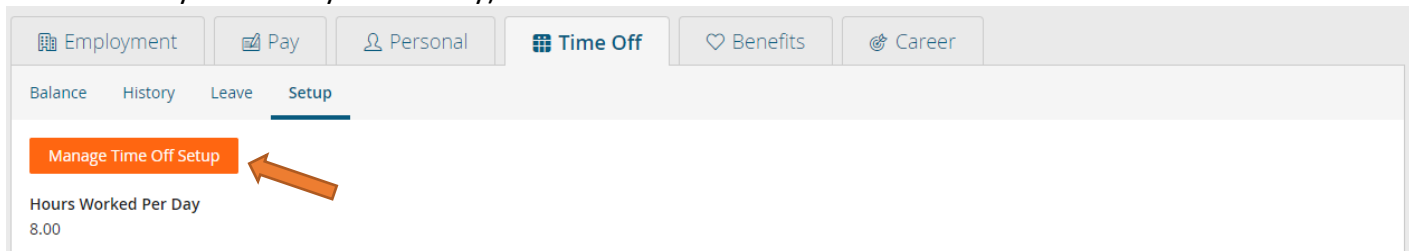
Cancel

- **Time Off Changes**

Navigate to HR & Payroll > Employees > Employee Search > Employee Last Name > Time Off Tab > Setup Sub Tab



**Balance is where you will see the time off banks and their accrual rates (should match how many hours they work a day)



- 1. Press "Manage Time Off Setup"

Setup & Balance


• Hours Per Work Day Override?

Time Off Types

<input checked="" type="checkbox"/>	Type /	Start Date	Used Hours / Days	Available Hours / Days	Used \$	Available \$	Length Of Service
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- 2. Orange "Add" Button (if you need to add a different accrual rate)

Setup & Balance Details

• Time Off Type -- Select -- 

• Start Date

Accrue End Date

Length of Service Date Override?

Months of Service

Hours of Service

Accrue Ongoing

Enabled

Hours Worked Override?

Accrual Rate Override?

Max Balance Override?

Clear and Transfer Balances

Enabled

Max Carry Over Override?

Current Balance

Available	0.0000	Dollars Available	0.0000
Used	0.0000	Dollars Used	0.0000
Total	0.0000	Dollars Total	0.0000

Manual Adjustment

	Starting Hours	Change	Adjusted Hours		Starting Dollars	Change	Adjusted Dollars
Available				Available			
Used				Used			
Total		0.0000		Total		0.0000	
Notes	<input type="text"/>						

- 3. Choose the correct “Time off Type”
 - o Do for both Sick and Vacation and once for Teachers/Admin PTO
 - Sick and Vacation should be based on the number of hours the employee works a day
 - **Example:**
 - o My FT employee works 8 hours a day, 40 hours a week→Sick/Vacation 8 hours
 - o My PT employee works 4 hours a day, 20 hours a week→Sick Vacation 4 hours
- 4. Choose the correct “Start Date,” do not put an “Accrual End Date”
 - o It will auto populate the rate (**this is not decided upon by HR**)
- 5. Scroll to the bottom, press “Save”
- ****If you need to retro time off, then multiply the accrual rate by the number of pay periods missed**** and then add amount in the manual adjustment section in the “Available” tab
- ****If you need to transfer hours**** follow steps 1-5 above, and then add amount (from past accrual) in the manual adjustment section in the “Available” tab for the new accrual rate