

Diocese of Des Moines

New 403b Eligibility:

All regular full-time and part-time employees are eligible to participate in the 403b plan and receive the match. If an employee has an employment type in Paylocity of temporary or seasonal, they are not eligible.

Paylocity-Fidelity Integration:

Paylocity and Fidelity (Christian Brothers) will soon be integrated automatically.

Once the initial integration is live: (Laura will email you when you are going live)

- You will no longer need to send money to Christian Brothers. The funds will be auto-debited from your bank account by Fidelity.
 - As we begin this new process, Christian Brothers will send you an email confirming the amount that will be debited from your bank account. It is important that you compare this amount to the amount on your payroll register for 403b. Once you respond to that email confirming the amount, the funds will be pulled. This step might be removed as we get more comfortable with the process.
- You will no longer need to upload or enter information onto the Christian Brothers portal. This information will be transmitted electronically from Paylocity to Christian Brothers/Fidelity once you process payroll.
- No longer need to contact Christian Brothers when you have a new-hire or termination. This information will be transmitted to Christian Brothers when you enter it into Paylocity.
 - New hires will receive an email (or letter if no email address is listed in the work email in Paylocity) from Fidelity/Christian Brothers inviting them to participate in the 403b plan.
 - Thru the above email, new employees will create a log in with Fidelity and set up their account. They will also select what amount/percentage they want withheld from their paycheck.
 - This information will then be transmitted back to Paylocity from Fidelity automatically (no action needed by parish admin).

Setup work needed before going live: (Laura will also email you asking for this information before going live).

- **Parish/School Action:**
 - If you have employees that you would currently classify as Temporary or Seasonal (substitute teachers, summer staff etc.) please make sure their employment status is set to Temporary or Seasonal in Paylocity. Otherwise they will be offered the 403b plan.

- If you have an ACH block set up on your parish/school bank account, you will need to add Fidelity. Laura will send this information out when she notifies the location when they are going live.

- **Laura Action Items:**
 - We will create a list of existing employees that are newly eligible for the 403b due to the eligibility change so that they can be loaded into the Fidelity/Christian Bros database. Laura is working with Paylocity to have a report created that will give us the information we need. Laura will run the report in Paylocity on your behalf.
 - We will also need a list of employees who are currently eligible for the 403b plan but have previously waived coverage. They will receive an email from Fidelity asking them to participate, which they can choose to do or not. These employees will hopefully be included on the report that Laura is working to create with Paylocity. Laura will run the report in Paylocity on your behalf.
 - Christian Brothers/Fidelity will need to load all existing employee deferral amounts and percentages. Laura can pull this information from Paylocity for each location.