



Paylocity Conversion

LAURA HOFSTRAND – DIOCESE OF DES MOINES

Current Status

- ▶ Currently have 21 entities live on Paylocity
- ▶ In the process of converting 9 other entities that will go live July 1st.
- ▶ Leaves 26 entities to convert.

Items to Consider before Converting:

- ▶ **Pay Schedule:** Pay period end date vs. Paycheck date: Paylocity will need at least 48 hours between when you click the “submit” button and when the funds are direct deposited into employee’s accounts.
 - ▶ I'd suggest leaving at least 5-7 days when the pay period ends and when the check date is. This gives you flexibility in case there is a holiday/weekend.
 - ▶ Example Bi-weekly schedule: Pay period covers Saturday June 1st thru Friday June 14th, and paychecks are dated the following Friday (June 21st).
 - ▶ Example Monthly schedule: Pay period covers June 1st to June 30th (the whole month) and checks are issued on the 7th of the month (gives you at least 1 week to process the payroll).
 - ▶ For monthly, it's better to have a set date that checks are issued – i.e. in the above checks are always dated on the 7th.
- ▶ If you want to change your pay schedule, this would be a great time to do it.
- ▶ If you have more than one pay schedule – i.e. Priests are paid monthly and lay employees paid bi-weekly, consider consolidating to one for all staff for simplicity.

Items to Consider before Converting:

- ▶ **Work week** – what is the normal work week for your employees? Is it Saturday thru Friday? Or Monday – Sunday? Something else? This will need to be determined so that over-time is calculated correctly.
- ▶ **Hours per week** – Is the normal work week 40 hours per week for full-time employees (not including Priest)? Or is it something else?

Items to Consider before Converting:

- ▶ **Time Off Policy:** Will you be going to the Diocesan time off policy? If not, is your policy written in detail? Items to consider:
 - ▶ We do suggest you consider utilizing the Diocesan time off policy for simplicity. The policy has already been built in Paylocity and would just be transferred over to your location.
 - ▶ Whether you are going to the Diocesan time off policy or not, you will need to note how many hours per week each full-time employee (not the Priest) are scheduled to work? 40? 35? something else?
- ▶ If you are staying with your own time off policy:
 - ▶ Is vacation/sick accrued each pay period or is it front-loaded at the beginning of the fiscal year or calendar year?
 - ▶ Is there a max balance that employees can have at one time or is there a max balance that can be carried over at fiscal or calendar year-end?
 - ▶ Weeks of time off will need to be converted to hours, which is why it's important to clarify how many hours per week an employee is expected to regularly work.

Items to Consider before Converting:

- ▶ **Supervisor:** Every employee (minus the Priest) will need to have a “Supervisor” in Paylocity.
 - ▶ This supervisor will approve the employee’s hours worked (for hourly employees)
 - ▶ If a full-time employee requests time off, the supervisor will approve the request.
 - ▶ In most locations the supervisor would probably be the Priest, but it’s good to have this determined before converting.

Miscellaneous Information

- ▶ The training and meetings with Paylocity will all happen via Zoom, so if you don't have a webcam at your computer, I suggest you get one. You will need to be able to talk with the Paylocity folks and show them your screen.
- ▶ Paylocity Reps we are working with:
 - ▶ Bret Oberbroeckling Sales: will be contacting you soon with a contract for your Pastor to sign and other information needed.
 - ▶ Kristy Fleming Implementation: She is our project manager.
 - ▶ Rhonda Flaherty Database Implementation: She does all of the technical work and will assist you with processing 2-3 payrolls.

Parish Services offered by Diocese

- ▶ Payroll review and submission
 - ▶ Separation of Duties
- ▶ Onboarding

- ▶ There will be a fee charged by the Diocese for the above services that will be later determined as we get an idea of how much time it takes us to do these tasks. We just want to cover our time/costs (not looking to make money.)