

## Processing Employee Related Items

### How to Process New Hire

1. Have the employee complete the Benefit Enrollment form (if working 30+ weekly hours). The original copy is for the parish file, pink copy is for the employee and yellow copy goes to the *Personnel Office*.
2. The *Personnel office* will add to Life and LTD coverage.
  - a. If the employee elects medical and/or dental coverage, then complete the Humana enrollment form and send to *Personnel Office* with Archdiocese Benefit Enrollment form (*Sample included in the Appendix.*)
3. If employee elects to contribute to flexible spending account, add to AIM worksheet and send copy of benefit enrollment form to Michele at AIM.
4. If employee elects STD, add to STD payment worksheet.
5. Use benefit enrollment form to setup any elected benefits in Paycor.
6. Be sure to provide employee with current year Employee Benefits Program and Summary Plan Description, Archdiocese of Louisville Personnel and Policies and Procedures Manual, and EAP/Work Life brochure from Humana.

### How to Process Employee Termination

1. Complete Notification of Employee Benefit Change Form and Humana Change Form if applicable and send to *Personnel Office*.
2. Upon receipt of the change forms, *Personnel Office* will process termination of medical benefits and generate COBRA notice.
  - If the employee is eligible for Early Retiree Group and wishes to continue medical coverage only, complete Archdiocese and Humana change form changing division to #180.
3. Provide employee with information on benefits for terminating employees. *A copy of this form is located in the Appendix.*
4. If employee has STD, mark terminated on STD payment worksheet.
5. If employee participates in Flexible Spending Accounts, as soon as you know when employee is leaving, email Michele at AIM with termination date and benefit end date.
6. If employee is eligible for retirement, do not uncheck 401k deduction in Paycor until all payments have been made.

7. Once final payment has been issued, enter termination date and reason. If this is an employee that may return to do temporary work or substitute teaching, remove check mark on calculate in deductions screen in Paycor.

All benefits end on the last day of the month of termination. Termination date is the last day worked except for contract employees whose last day is the last day on their contract.

### **How to Process Employee Transfer**

1. Business manager/bookkeeper from both locations must communicate with each other, share information and copies of information such as benefit enrollment forms, background checks, safe environment training, etc.
2. Complete Notification of Employee Benefit Change Form and Humana Change Form (if employee has Humana medical/dental) send to *Personnel Office*.
3. If employee has STD, mark transfer on payment worksheet and write in the new group number.
4. If employee participates in the flexible spending account, email Michele at AIM.
5. Complete Employee transfer guide/checklist (*sample included in Appendix and available on website*) and email *Personnel Office* to notify to transfer Paycor file. The *Personnel Office* will notify both groups once the transfer has been completed.

## **How to Process Paycor Payroll**

1. Log on to Paycor
2. Click on Pay Employees
3. Select pay run for current payroll date
4. Begin / Continue
5. Select Employee
6. Enter hours in Regular, OT, Sick, Vac, Personal, Holiday
7. Review pay run
8. Click on Pre-Post Payroll Journal (alpha or department)
9. Compare to spreadsheet
10. Close out / "X" out
11. Click on Submit Payroll
12. Click on Yes

## **Paycor Reports**

1. Reporting
2. Online Reporting
3. Select Parish
4. Current or Past
5. Open or Download

## How to Process Fifth Third Retirement File

Paycor generates the retirement report from the payroll files and transmits to Fifth Third. Run the Paycor 401k report to have the total dollar amount to process the retirement file.

1. Login to Fifth Third website at <https://express.53.com/portal/auth/login/Login>
2. Select Investment Advisors
3. Select Plan Service Center
4. Select Contribution
5. Select Pending Contribution
6. Select the reference number next to your file
7. Ensure payroll date matches actual pay date
8. Enter expected contribution amount and select continue
9. Check each "verify source" box and check box " I have read and accept all warnings and notices on this pay" select continue
10. Ensure cash effective date matches payroll date
11. Check complete
12. Continue