This guide contains detailed instructions for adding and assigning schedules in Paylocity. You are welcome to request the payroll team's assistance with setting up or assigning schedules by emailing your request to: centralpayroll@archindy.org.

ADDING & ASSIGNING SCHEDULES in PAYLOCITY TIME & LABOR

All salaried employees need to have a schedule set up that automatically posts to their timecards. The purpose of this is to ensure Supervisors are positively approving each salaried employee to be paid each pay period. Oftentimes, employment ends abruptly or there may be delays in employees terming either through paper forms or electronic approvals. With salaried employees set to be automatically paid, bi-weekly supervisor approval of salaried employees' timecards has proven to be a good control to ensure employees do not continue to be paid after employment ends.

Please note schedules are strictly in use for salaried employees only. Hourly employees are required to clock in and out.

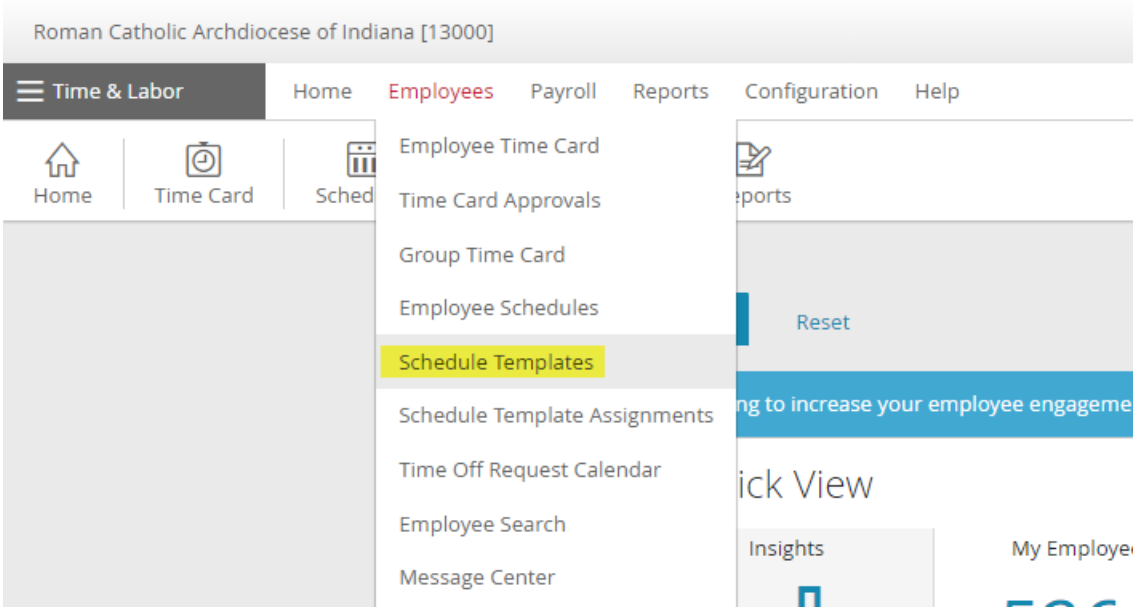
To ensure all salaried employees have schedules assigned:

Run the "Employees Without a Schedule Template Report" for salaried employees at your location. This report lists all employees who have not been assigned to a schedule template.

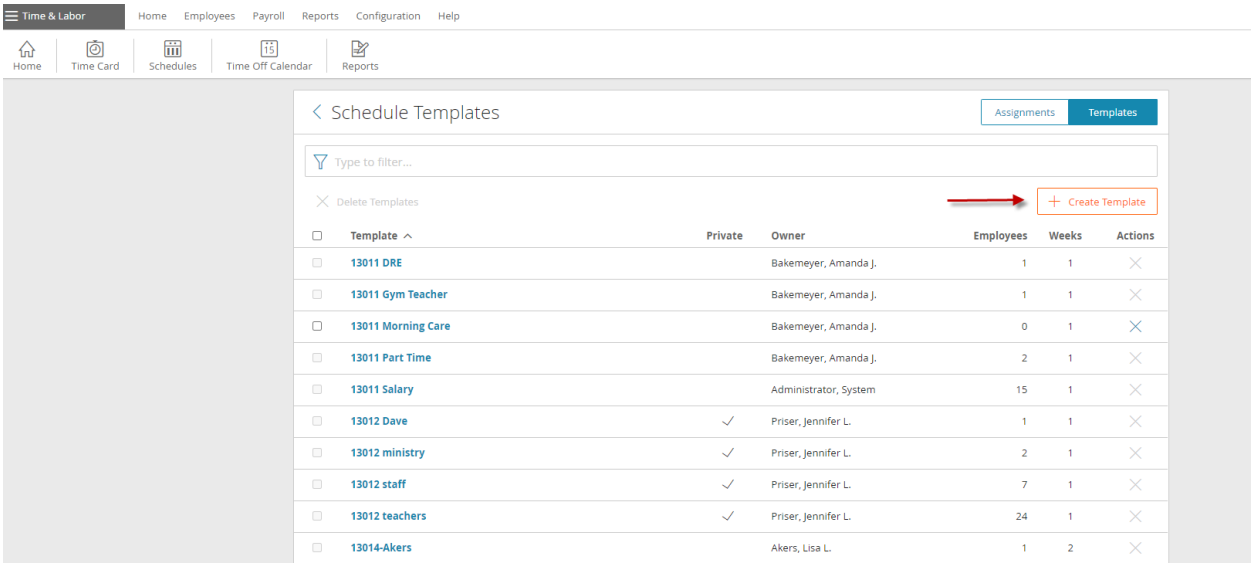
If you find salaried employees are missing schedules, you'll need to set up schedules in Time & Labor. To do so, you'll review the listing of Schedule Templates already available to determine if one is available that can be assigned already or if you'll need to create a new schedule.

To view the listing of current schedules or find the area to create a new schedule:

Select Employees from the main menu, then select Schedule Templates



A list of available schedules will appear. Click on the word “Template” in the first column to sort the schedules by location. In this listing there are site specific schedules which are named starting with the location number, there are generic schedules that do not have a preceding location number, and there are schedules that have been set up for specific employees. Some schedules are marked private and can only be used by the creator or “owner”. You can see the number of employees assigned to the schedule and if the schedule is set up for 1 or 2 weeks.



To set up a new schedule, view site location schedules, or find a generic schedule:

Scroll through the schedule template to ensure there isn’t a generic schedule that can be used or a schedule that has already been set up for your location that will work for the employee or group of employees that need schedules assigned.

We advise that you should try to use a generic schedule for a group of employees.

We advise that you should avoid setting up schedules for specific employees, although in some cases, it is necessary (part-time salaried employees for example may need a special schedule).

When creating a new schedule, always precede the schedule with your location number.

To create a new schedule:

When creating a schedule, the total weekly hours would be dependent on whether your location’s payroll policy automatically applies a lunch to the schedule or not. First, you’ll need to verify if your location’s “Payroll Policy” is set to automatically add a lunch or not. Note that you should only view these settings, do not change or update any settings as they will affect other areas of the system.

To view your Payroll Policy:

From the main menu, select Configuration, then select configuration home. Select Payroll Policies. Find your locations Payroll Policy, then select View. Select Lunch from the left-hand menu. Review the options selected under Lunch Type. If your Payroll Policy is set to automatically add a lunch, the radio button will be selected that says, "The system automatically subtracts lunch from the employees' shifts".

For example, full-time Catholic Center salaried employees are scheduled to work 4 days a week, 8.75 hours per day, for a total of 35 hours worked hours per week. The Catholic Center's Payroll Policy for salaried employees is set up to add a 45-minute lunch to salaried schedules. Therefore, the salaried scheduled hours will need to be set for 9.5 hours per day instead of 8.75 hours per day. A generic schedule of 8am – 5:30pm is applied to all full-time salaried employees at the Catholic Center. Actual salaried hours and schedules may vary but this schedule is appropriate to apply and approve each pay period.

As shown in the screen print above, to the right of the red arrow, click on +Create Template to create a new schedule. A right slide out window appears.

Name the schedule template (we advise you use your location number to precede the name).

Mark the schedule template Private by sliding the No to Yes if necessary.

Our work week always begins on Sunday so do not change this setting.

We advise to use 1 as the Number of Weeks unless in a rare case where a special schedule for alternating weeks for a group or single employee exists.

Click on + Add Week and a 1 will appear along with boxes under each day.

New Template

Close | Save

Template Information

Template Name (required): New Template

Owner: Kendall, Carey

Private: No | Yes

Schedule Generation

The Day and Number of Weeks settings only apply when this template is assigned to an employee indefinitely (without an end date). In this case, schedules are generated for the employee on the periodic basis according to the Day and Number of Weeks. Any changes will not take effect until the next time the schedule template is generated and will be amended to the end of the number of weeks specified. Ex. If you apply a change to a template with your schedule generation Day set to 'Sunday' and Number of Weeks set to '3' then your changes will go in to effect 3 weeks from the next Sunday.

Day: Sunday

Number of Weeks: 1

☐ **Auto-fill shifts with the assigned employee's home cost center.** This option can only be selected if the template shifts below have no cost centers assigned.

Week	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Totals

+ Add Week

0 Employees Assigned to This Template

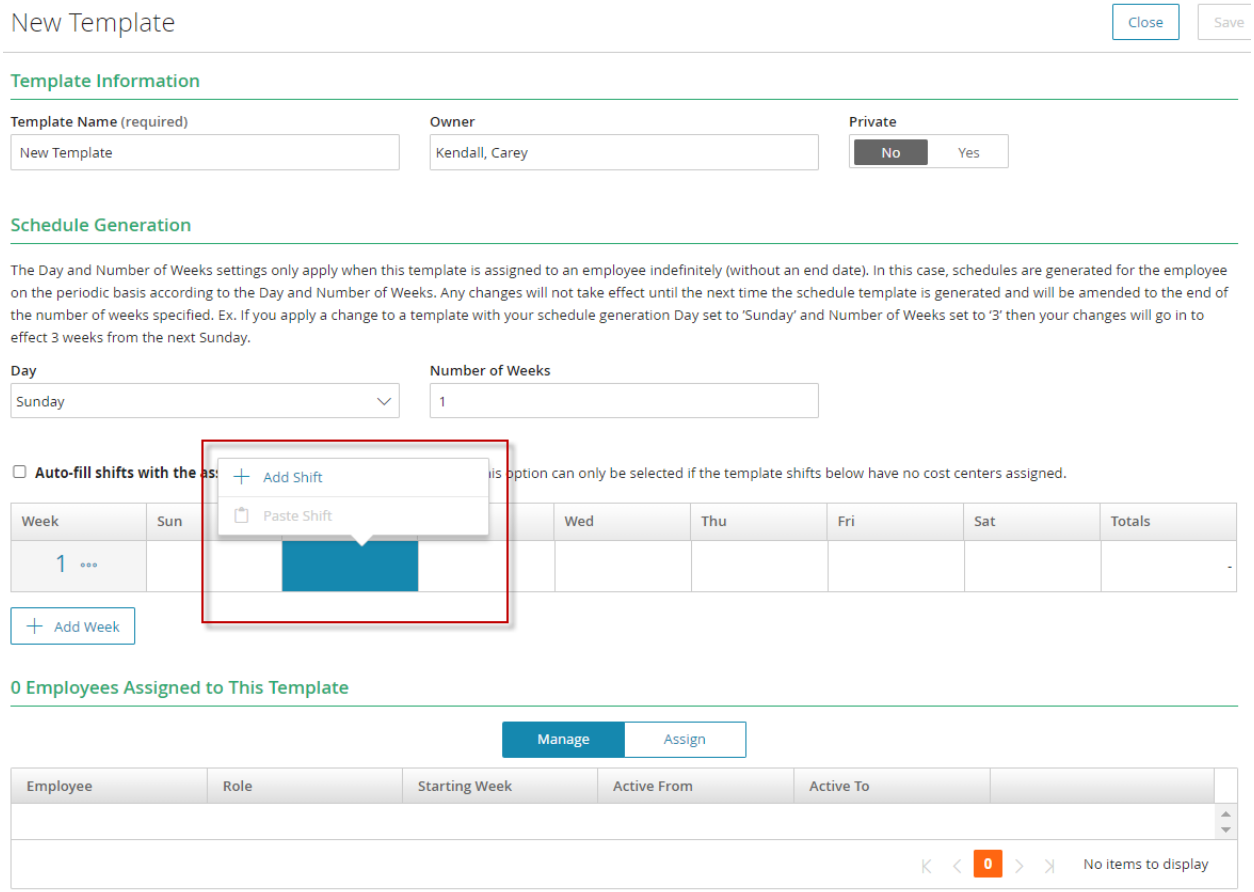
Manage | Assign

Employee	Role	Starting Week	Active From	Active To	

0

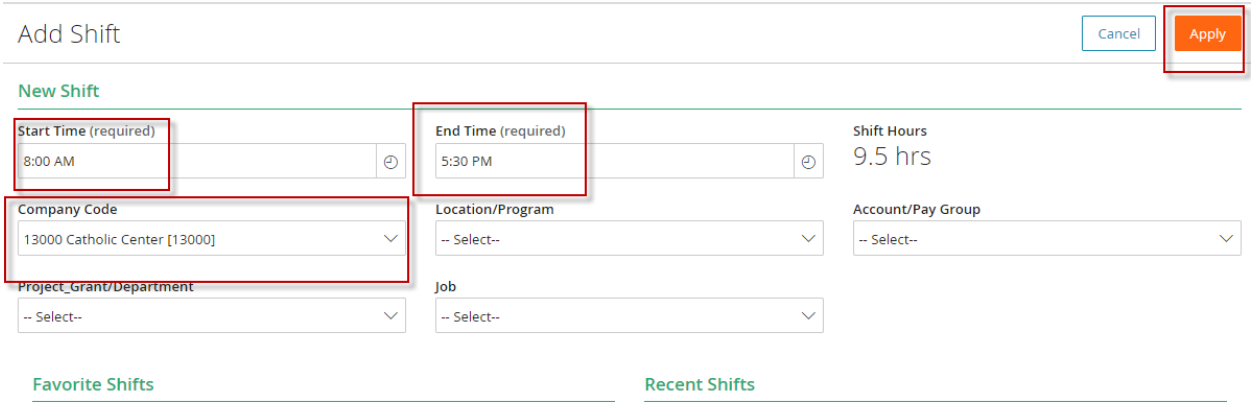
No items to display

Click on the first day of the work week which is usually Monday. Then select + Add Shift

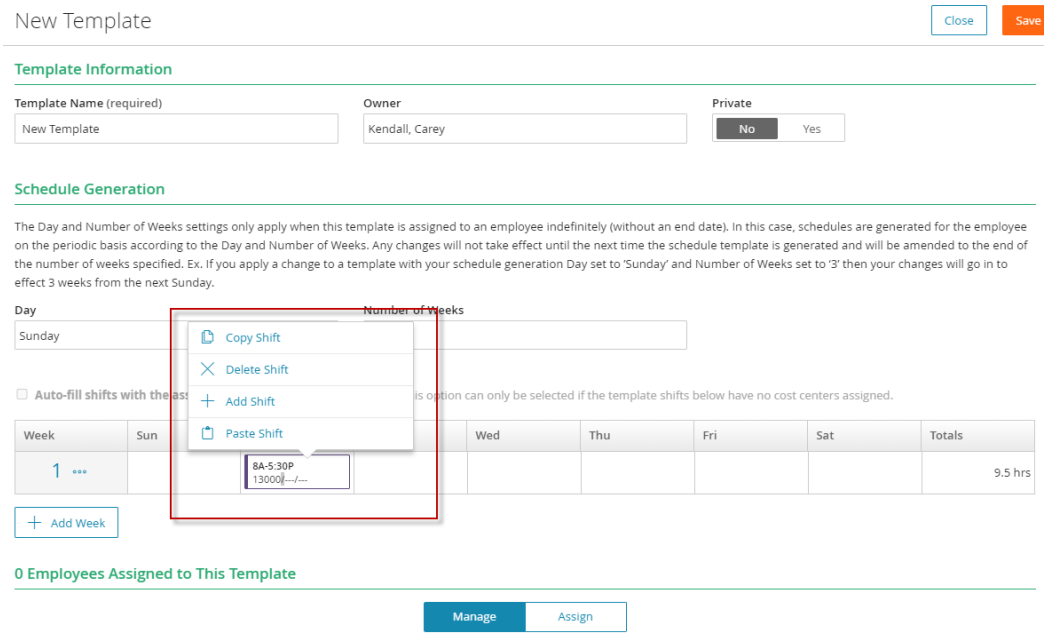


As shown below, enter a Start Time, an End Time, choose your location in the Company Code field, then click Apply.

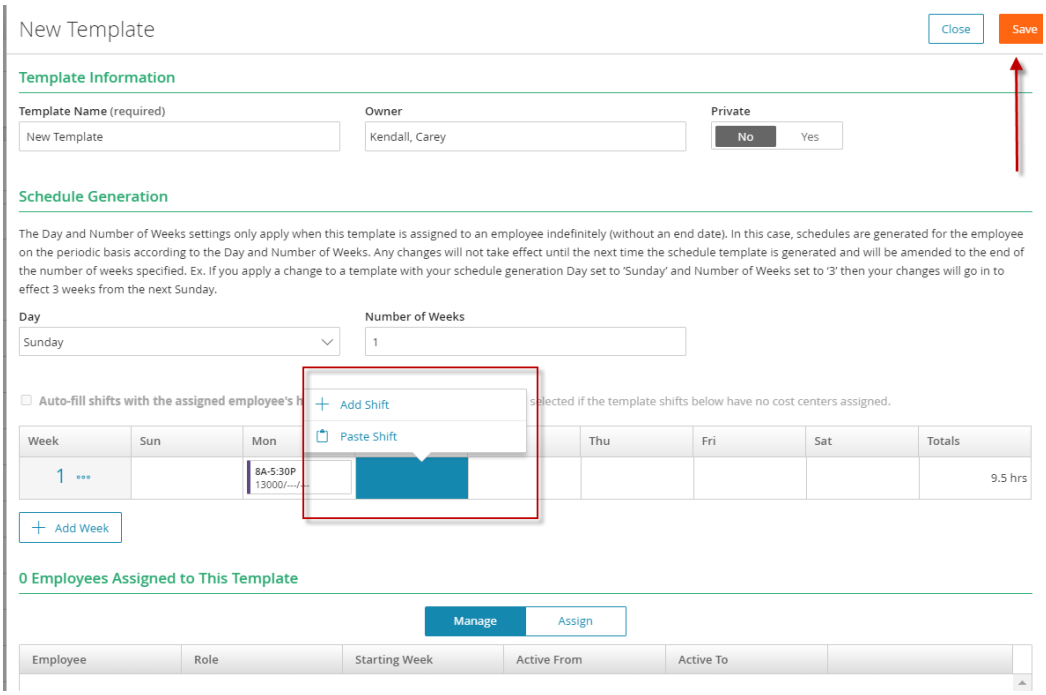
In almost all cases, you do not need to populate the other fields. Most schedules are generic, intended for a group of employees, and even if it is for a specific employee, the employee's default cost centers will populate in the timecard. If an employee needs cost centers assigned to hours other than their default hours (split shift for example), a special report is set up for that specific employee ensuring that the cost centers are applied. You can reach out to centralpayroll@archindy.org for assistance with these types of special situations.



The schedule for that day will populate under the day of the week as shown below. Left click on the schedule for that day, then choose "Copy Shift".



Left click on the next workday (Tuesday for example), then click +Add Shift. Continue adding the shift to each workday. Then select Save.

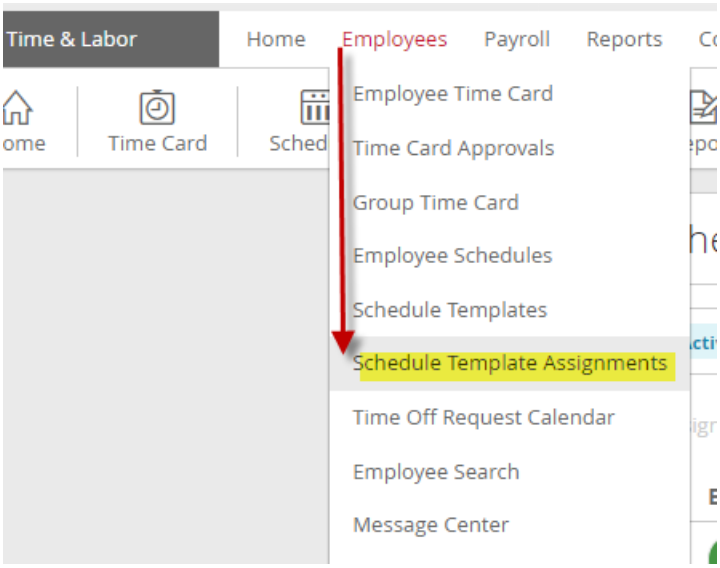


After the Schedule Template is identified or created, you'll need to assign the schedule to the salaried employee.

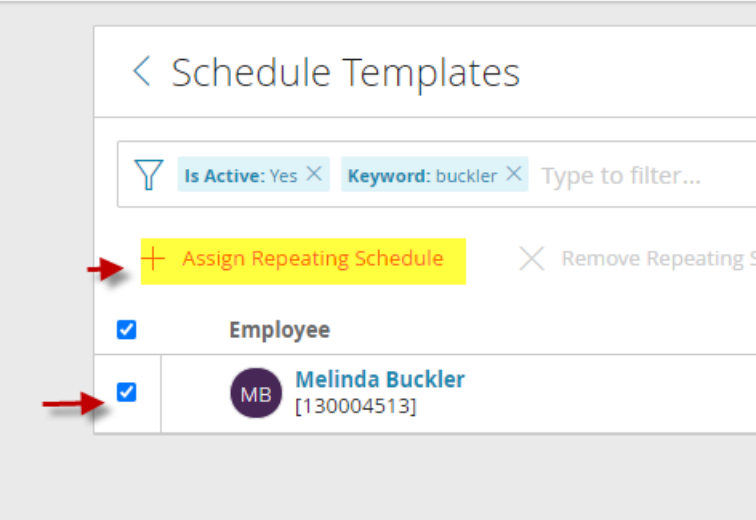
There are two ways to assign a schedule to an employee: (1) from Time & Labor and (2) from Web Pay.

(1) Assign a Schedule to a salaried employee from Time & Labor:

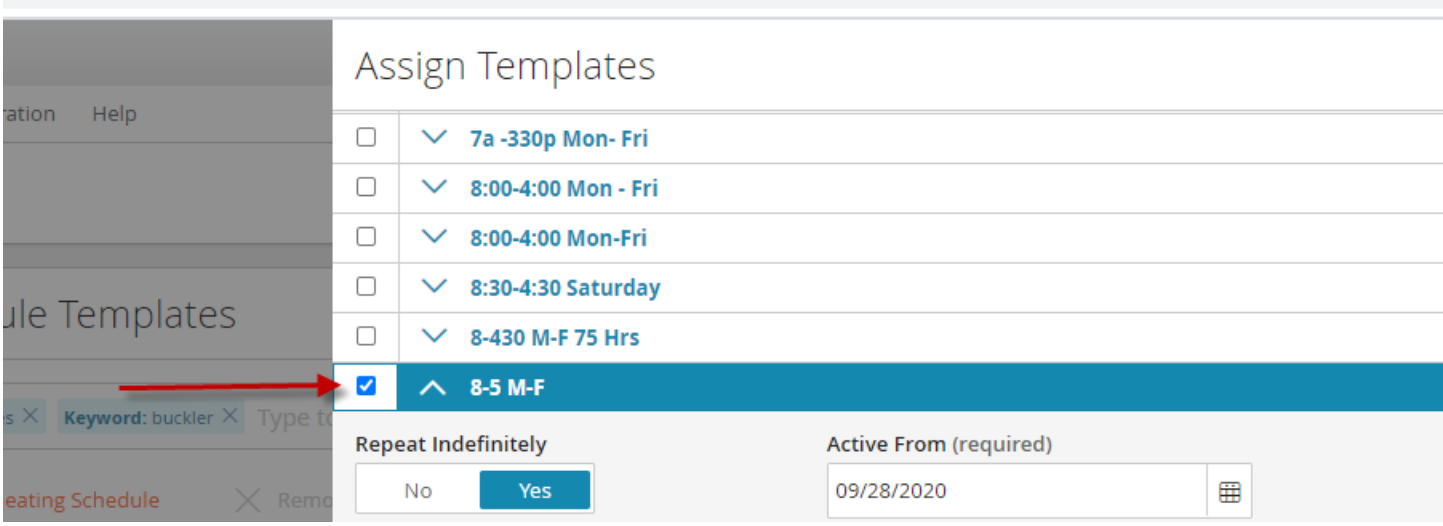
From the main menu, select Employees, then select Schedule Template Assignments.



In the search menu, enter in the employee's name. Check the box to the left of employee name. This will allow you to click +Assign Repeating Schedule.

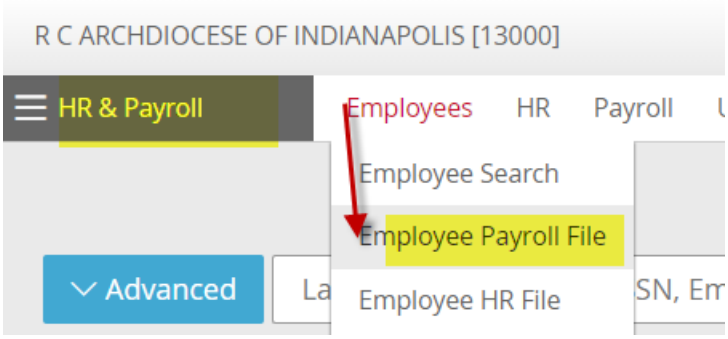


Find the appropriate schedule, then check mark the box to the left of the schedule and click Save.

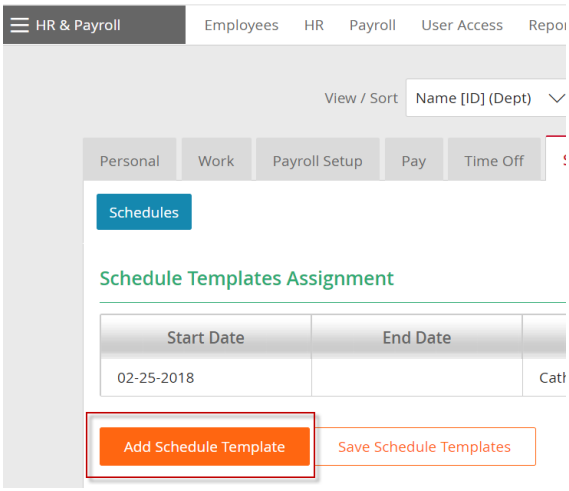


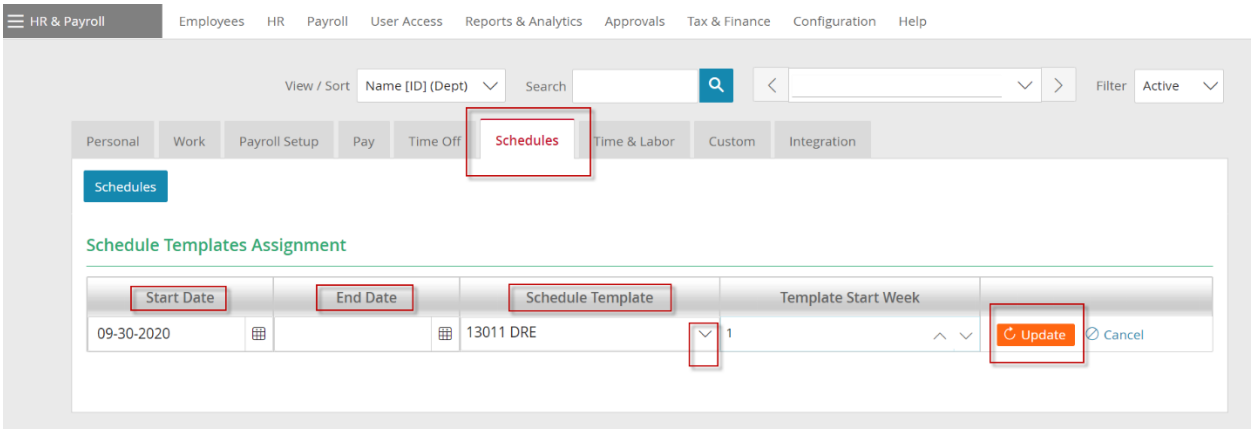
(2) Assign a Schedule to a salaried employee from Web Pay:

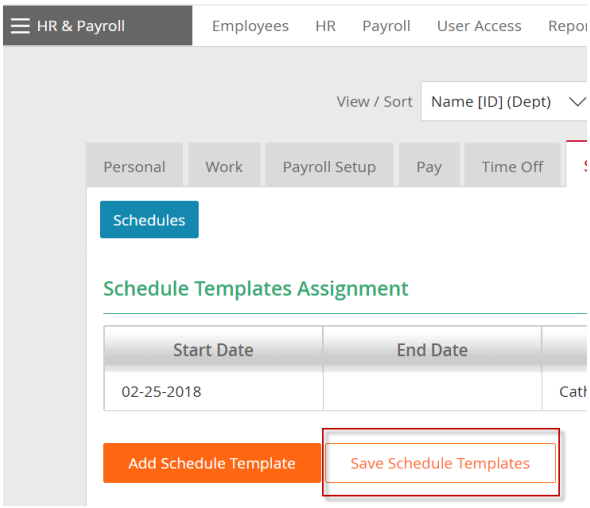
From HR & Payroll, select Employees from the main menu, then select Employee Payroll File.



Find and click on the salaried employee who needs to be assigned a schedule. Go to the Schedules tab, then click the orange button Add Schedule Template. Choose start date and remove the end date. Choose Schedule. Click update. Be sure to also click Save Schedule Templates.







If you get an error message when trying to add a schedule to an employee that is salaried reach out to centralpayroll@archindy.org for assistance with updating the Time & Labor tab. Although the settings in the Time & Labor tab are view only, you can run a report to verify the settings for your employees are correct.

To verify Time & Labor settings for Employees:

In Paylocity > go to Reports & Analytics > then type in "Employee Time & Labor Settings" to search for and pull up the report. Run this report in an Excel format for Active & Leave of Absence employees. After you download the report, columns E, F H, L, O, and Q should be reviewed for accuracy. If any of the data in these columns isn't correct, you can note the corrections on the spreadsheet and email the information to centralpayroll@archindy.org so we can update the information. Please note that if a badge number is missing (column E) that may be appropriate if the employee is shared, the shared employee may have an active timecard at another location. If the employee is shared, central payroll needs to ensure the shared employee has the ability to transfer between locations. We don't necessarily want to add a badge number if it is missing because that will create a duplicate timecard.