Action Required: Expense Reimbursement Process Changes

May 6, 2019

Employees of the Archdiocese and related agencies,

We are excited to introduce a new means by which to submit expense reimbursements! Paylocity Web Expense will be used for processing expense reimbursements. Imagine, no more spreadsheets, PDFs, emails, or manually keeping track of when you'll be reimbursed! All your receipts and reports will be stored on your Paylocity self-service portal and the status of your expense reimbursements will be displayed on your Paylocity dashboard. The system is very intuitive and all employees will be able to efficiently submit their own expense reimbursements.

Catholic Center employees successfully tested the new process in April and we will begin implementation for all employees of the Catholic Center, NDAA, CCI, CCB, CCTC, CCTH, Brute, and Fatima beginning next week. Employees will have four virtual training opportunities to learn how to submit expense reimbursements through their Paylocity self-service portal. Training sessions are being held virtually via GoToMeeting so you can view the demonstrations from the comfort of your office and easily follow along in your Paylocity self-service portal. Virtual training sessions are being held on the following dates:

Monday May 13th, Tuesday May 14th, Monday May 20th and Tuesday May 21st from 10-11am.

On your chosen training date, join the virtual training session and enter in Meeting ID: 986412717. After joining the meeting, conference call information will appear on your screen so you may dial in using your phone if you are not using computer audio: 1-669-224-3412 Access Code: 986-412-717.

The **Paylocity Web Expense Guide** can be found on the archindy.org website by going to the Office of Finance & Administrative Services, select Intacct and New Forms in the Expense Reimbursements and Employee Stipend area or by using this direct link to the guide:
http://www.archindy.org/finance/files/intacct/Paylocity%20Web%20Expense%20Guide.pdf

Action items to be completed prior to your chosen training date:

- **Pick a training date** and mark your calendar.
- **Familiarize yourself with GoToMeeting** before your chosen training date.
  If you are new to GoToMeeting: download the app now to be ready for your first GoToMeeting
- **Ensure you can access your Paylocity Self-Service Portal:** https://access.paylocity.com/.
  If you have never used Paylocity self-service, select Register User and follow the prompts.
  Please refer to this guide if you need assistance registering to access Paylocity self-service.
  - Archdiocese of Indianapolis (includes Catholic Center and Brute Seminary)   13000
  - Notre Dame ACE Academies   13250
  - Fatima   13350
  - Catholic Charities Indianapolis   33602
  - Catholic Charities Bloomington   33608
  - Catholic Charities Tell City   33619
  - Catholic Charities Terre Haute   33621
- **Download Paylocity's free mobile app**. The Paylocity Mobile app is available on both Android and iOS devices. The app is no longer supported on Windows phones, Amazon Kindles, or other devices. Per Paylocity, requirements are subject to change:
  - Android Requirements**:** Paylocity Mobile (Google Android version) is available for all Android devices. To download and install the app on an Android device, the device must be running Android OS 5.x or higher.
  - iOS Requirements: Paylocity Mobile (Apple iOS version) is available for iPhone, iPad, and iPod Touch. To download and install the app on an Apple iOS device, the device must be running iOS 9.0 or higher.

If you need assistance prior to or after your training, please reach out to the payroll team: centralpayroll@archindy.org.