Company Demographics

EvoWeb Main Workflow Menu displays navigational links. "Company Management" allows the user to view global company details, but does not allow the user to make changes. Questions about these fields should be directed to your Client Service Representative.

Click on the link "Company Management"  Click Information 

- **Address/Bank Accounts**
  - Review the detail for accuracy.

- **EIN/Rates**
  - This screen displays the employer Federal and State EIN's. Unemployment and local taxation rates are also indicated on this screen.

- **ED Codes**
  - Earning and Deduction codes are used in payroll to enter wages earned (E Codes) and Deductions from an employee check (D Codes). This screen displays all available Earnings and Deductions currently set up on the company. The fields can be sorted by any of the available headers. The Code ID is the name the system uses to call on a specific code, the type is what the payroll software uses to apply specific settings and the description of the code is unique to the company.

- **DBDT** (Division, Branch, Department, Team)
  - This acronym defines the potential labor distribution options for employees. Department structure must be set up with PayData prior before use in EvoWeb.

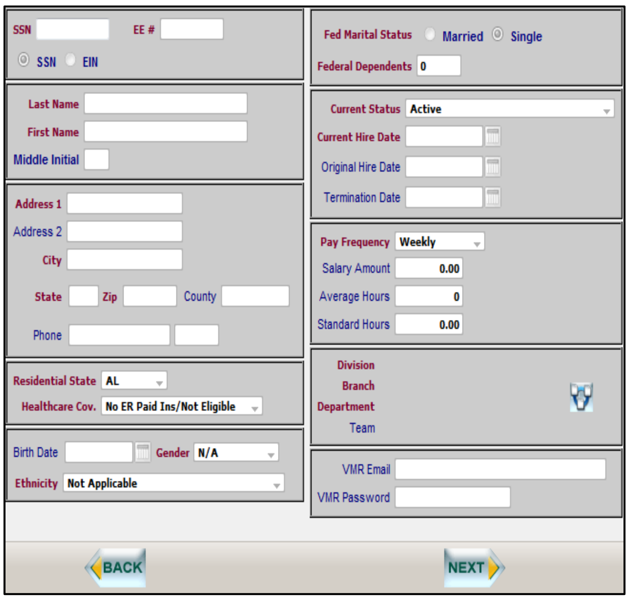
**If you have reviewed all the information you need to confirm, click the icon at the bottom of the screen to return to the main menu, and begin inputting data. **

Employee

This link allows the user to create a new W2 employee, or 1099 Independent Contractor before setting up deductions and payroll. Alternately, the user can edit existing employee data from this screen as well. These menus allow the user to review all available settings and customize a new hire before the first checks are created.

- From the Main Workflow Menu list, click on Employee to access the Employee Workflow Menu
- Click new W2 Employee
- Populate all fields in Employee Entry- Red Titled fields are mandatory

***If upon entering a social security number subsequent employee data populates the screen you must STOP. This indicates the person is already set up in the payroll software. Do not continue adding the employee. Click the back button find the person on the inactive employee list. Update the demographics on the existing person; <u>do not</u> set up a second employee/person. (See Edit Employee)**



- **SSN**- Employee social security number- IF AN SSN IS NOT AVAILABLE STOP NOW
- **EE Code** – If EvoWeb doesn't default to the next available ID; enter the ID code on file.
- **Name/Address/Phone/DOB** -Basic employee demographics
- **Gender** – This is now a required item on Quarterly Unemployment Returns
- **Federal Marital Status** – Select the Status per form W4.
- **Federal Dependents** – Enter the number of dependents per line 5 on form W4.
- **Current Status** – A new hire will typically be an active employee
- **Hire Date** – Enter the current and original hire dates for the new hire.

- **Pay Frequency** – Select the pay frequency applicable for your company
- **Salary Amount** – If the employee will receive a regular salary, enter in the *per pay period* salary amount here. If the employee will receive an hourly rate, leave this blank.
- **Standard Hours** – Any hours entered in this field will automatically create in payroll each time this employee has a check created.
- **DBDT** - Division, Branch, Department and Team (or DBDT)
  If your company utilizes department structure, these fields are mandatory. If not, these can be left blank.
  - To select the correct DBDT click on the DBDT icon  to display available DBDT's. Click the correct DBDT for this employee and click select.

    If a new DBDT is required contact your Client Service Representative for assistance
- **VMR** (Virtual Mail Room) - VMR email and VMR password should be left blank unless you have signed up for electronic reporting.
- **Click -** 

- **General Information Screen 2**

The second screen required to set up a new employee will default to existing company settings. Review the fields for accuracy, but understand that changes will rarely be necessary. Questions about screen 2 can be directed to your Client Service Representative.

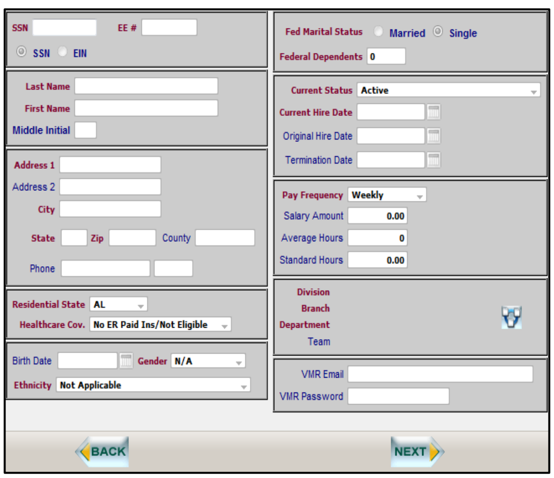
- **States -**Click the green plus key to add the employee home state. This is where work is performed, NOT always the same as the residential state. Enter the employee marital status and dependents as applicable.
- **Rates-** Click the green plus key to add the employee primary, and any subsequent rates of pay. Salary employee's must be set up with a primary rate 1 of $0.00/hour

Click the green check mark to save then click Finish

New Hire 1099

- From the Main Workflow Menu, click Employee
- Click New 1099 Subcontractor
- Populate all fields in Employee Entry- Red Titled fields are mandatory

***If upon entering a SSN or EIN subsequent employee data populates the screen you must STOP. This indicates the person is already set up in the payroll software. Do not continue adding the 1099. Click the back button to find the person on the inactive employee list. Update the demographics on the existing person; <u>do not</u> set up a second employee/person. (See Edit Employee)** Continue by adding the 1099 information, red fields are required. The default W4 status for a **1099 only** earner is **Single 99** for both **Federal** and **State**. *This does NOT apply if the earner is both a W4 employee and 1099 earner. –If this is the case, set up as an employee not a 1099.*



- **SSN**- Individual Social Security number OR Federal EIN for the company- *If an identification ID is not available stop now!*
- **EE Code** – If EvoWeb doesn't default to the next available ID; enter the ID code on file.
- **Name/Address/Phone/DOB** -Basic employee demographics
- **Gender** – This is now a required item on Quarterly Unemployment Returns
- **Current Status** – A new hire will typically be an active employee
- **Hire Date** – Enter both the current and original hire dates for the new hire.
- **Pay Frequency** – Select the pay frequency applicable for your company
- **Salary Amount** – A contractor will rarely have a salary amount in payroll, leave blank.
- **Standard Hours** – A Contractor will rarely have recurring standard hours. Leave Blank
- **DBDT** - Division, Branch, Department and Team (or DBDT)

If your company utilizes department structure, these fields are mandatory. If not, these can be left blank.

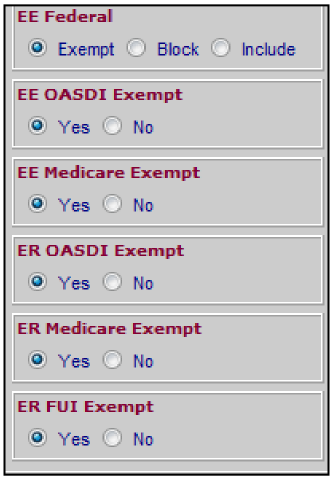
  - To select the correct DBDT click on the DBDT icon to display available DBDT's. Click the correct DBDT for this employee and click select.

    If a new DBDT is required contact your Client Service Representative for assistance

- **VMR** (Virtual Mail Room) - VMR email and VMR password should be left blank unless you have signed up for electronic reporting.
- **Click –** NEXT

General Information Screen 2

- The second screen required to set up a new employee will default to existing company settings. Review the fields for accuracy, but understand that changes will rarely be necessary. Questions about screen 2 can be directed to your Client Service Representative.



- Verify on Screen 2 the employee and employer taxes default to exempt; this will ensure the contractor is taxed correctly in payroll. Click Next
- **States**- Although a contractor will not have state tax withheld, the state screen must be set up on the employee ID. Click the green plus key to add the employee home state. A 1099 contractor should be set up with *Single/99* on this screen as well as the primary demographics screen.
- **Rates**- Although a contractor may not have an hourly rate, a primary rate of $0.00 will be required to save the new employee ID. Click the green plus key to add the primary, and any subsequent rates of pay if applicable.

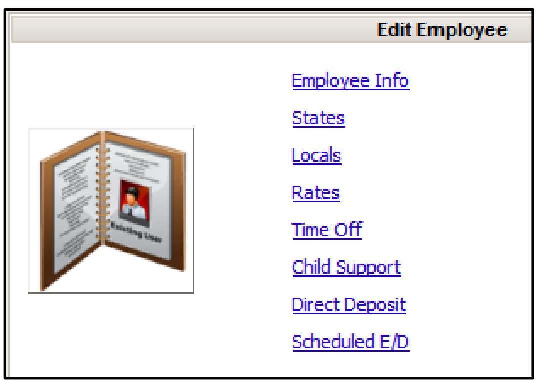
Click the green check mark to save then click Finish.
You have successfully added a new 1099 contractor!

Edit Employee: Modify Employee Information

This link allows the user to select various employee demographic options to change, and then select an employee to work with from a list of active staff, or all employees in company history. This option will allow the user to review all existing settings and make changes as needed.

- From the Main Workflow Menu list, click Employee

- Select a field option for edit



- Options are available on the lower portion of the Workflow Screen. Click the title link to select change types.

To view inactive employees 'uncheck' the box indicating Show Active Only

Using the menu options on the left, the user can select an edit topic. Each menu item is a link to initiate changes through the chosen topic. Employee Info provides the user with 2 options. Choose to update General Information, or Employee Details. The employee ID number and name are listed along the top of the screen. Use the left and right arrows to move between employees when making changes, or use the drop down menu to pick and employee name from the staff list.

General Information:

- This field displays primary employee demographics.
- Click in the fields to make changes.

- To change department structure, click on the icon in the lower right corner near the DBDT field
- Click the DBDT name to choose the new DBDT for the selected employee.

Employee Details:

- The second screen contains data, which defaults to company settings. Contact PayData to make permanent changes to the defaulted settings.
- Once changes have been made, click Save Save

States and Locals

These screens will display the list of currently used states/locals for the employee selected. From the menu, the user can choose to add, edit, or delete the selected location.

NOTE: Employee home state/local is reflected at the bottom of the screen. Employee HOME state refers only to the state where work is performed, and is not always a match for the employee RESIDENTIAL state.

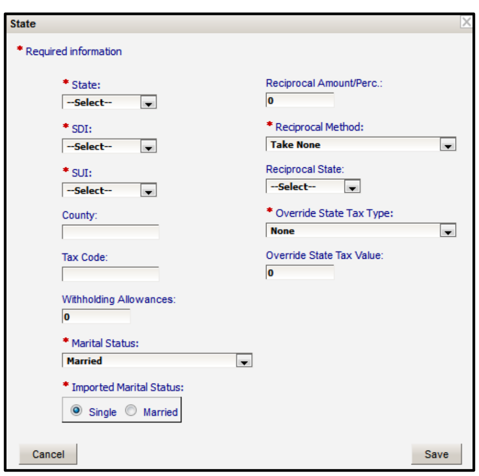
NOTE: States and locals can ONLY be deleted if there is NO payroll history attached to the locality. The system will refuse a delete change if the state has history.

- To change the details of an existing location, click on the icon underneath the Edit Column Header
- This selection will display the location detail, including the withholding, SDI and SUI State, number of allowances and marital status (indicated by employee on form W4), reciprocal tax method and state, overrides to W4 status, and override values. Locality details are indicated as well on the local detail screen.

Click Save Save to commit the changes To add a NEW location, click Add State from the bottom of the location list

***NOTE:* Employee state and local changes can only be added once multiple locations have been added to the company level. Contact PayData to make changes to the company state set up.**

The screen will display a blank page, with the same entry fields as the existing locations.



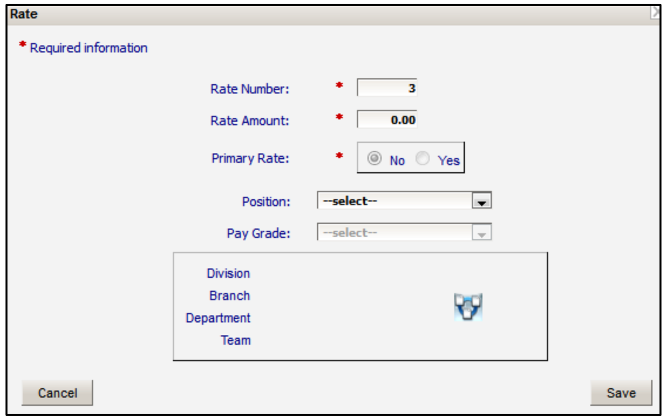
-Use the drop down menus to select the applicable data fields.
-Click Save to save the changes.
-Once the new location has been saved, the user will be directed back to the employee display. From this list, the home locations can be changed to any of those recently added.

Pay Rates

- Salary employees will list the salary amount on the employee set up screen, as well as a rate #1 of $0.00 in the pay rates screen.
- Employees can have multiple rates of pay beyond salary wages, and they will be called upon by rate numbers such as 2, 3, etc.
- When the Employee Rates Screen is displayed, the employee can be changed using the arrows, or drop down menu.
- The primary menu screen displays the employee primary and any subsequent rates. Employees with only salary will display rate 1 at $0.00.
- The edit and delete icons can be used to change, or remove an existing rate of pay.

******NOTE: Salary only employees must retain primary rate 1 at $0.00***

- Click Add Rate to add a new rate of pay to the selected employee.
- The new rate screen will display options to add the rate number, rate amount, and assign a new department if applicable.
- Click the green check mark to save the new rate, and return to the employee rates list.



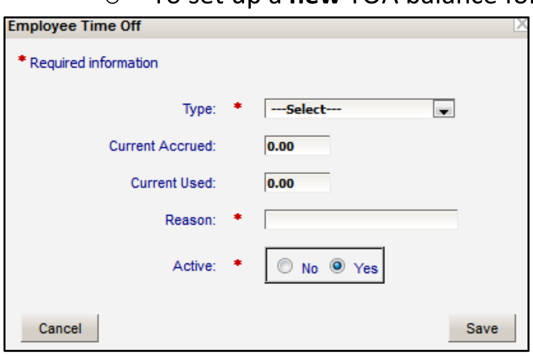
Click Save when changes are complete

Time Off **NOTE* TOA set up fields should only be added to each employee ONCE. Be sure to check for inactive TOA types prior to creating a new one on existing employees*

Time off Accrual rules must be set up with PayData prior to employee set up. If all TOA set up is complete, use this section to add, change or remove accrual rules from individual employees.

The main screen will display current Time off Accrual buckets. By unchecking the icon box “Show Active Only” the user will be able to view inactive TOA buckets as well.

- To set up a **new** TOA balance for the selected employee, click Add TimeOff



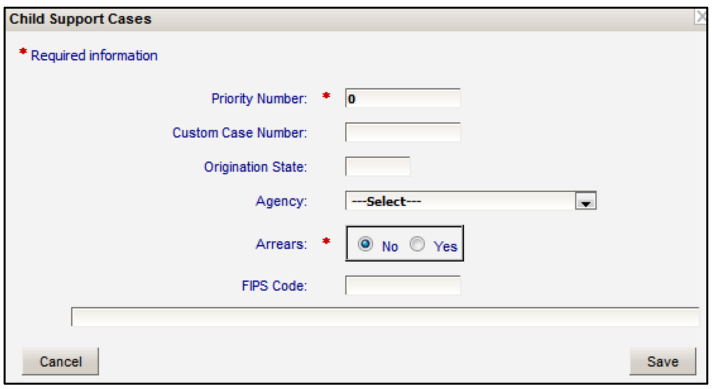
-The “Time off Accrual” screen will display
Click this button, enter the number of hours accrued and used, enter a reason in the mandatory reason field and click a radial to indicate Active Yes or No.
-Click Save to finalize the change. Continue to add additional Time Off Types as need. Contact PayData Payroll Services to add new accrual types to your company set if necessary.

- **Child Support Deductions** *NOTE: Child support cases with payroll history attached CANNOT be deleted. PayData highly recommends adding additional case ID's, rather than changing any existing case.*

Child support deduction codes must be set up by PayData prior to initializing active deductions from employee checks. If this step has not been done, stop and contact PayData Payroll Services.

Before an employee scheduled deduction code can be set up, a Case ID must be in place for the system to reference.

- Click [Add Child Support Case] to add a new case ID. The new child support case screen will display fields to add the mandatory priority number, case ID, originating state, agency if applicable, arrear status and FIPS code. The child support order received should contain all of the necessary data to populate this screen.
  - ***NOTE: Priority numbers are required in some states.***
  - ***NOTE: Agency checks can be generated for Child Support deductions. Contact PayData to arrange for a new agency check if one is not already in place.***



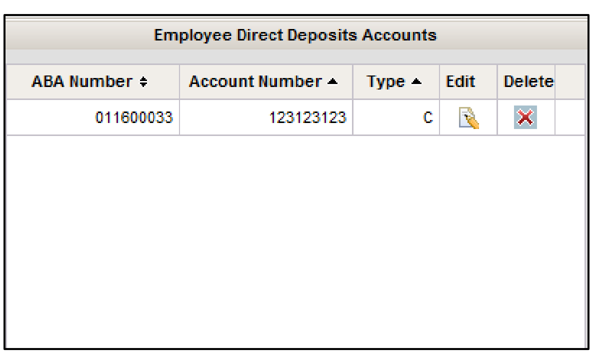
-Click Save to save the new case ID, and return to the employee child support cases list.

-The edit and delete icons can be used to change, or remove an existing child support case ID.

Direct Deposit

NOTE: Direct Deposit accounts with payroll history attached CANNOT be deleted. PayData highly recommends adding additional account numbers, rather than changing any existing account.

Direct Deposit is a service provided by PayData. The service and corresponding deduction codes must be set up **prior** to initializing direct deposit for an employee. Direct Deposit requires an agreement between the client and PayData, as well as an agreement between employee and employer. Be sure to utilize the Direct Deposit Authorization Agreement available at www.paydata.com/resource.html



Existing account information will display for the selected employee. Click [Add Direct Deposit Account] to add a new account to the selected employee. The new account screen will display fields to add the routing number, account number, account type, and pre-note status.

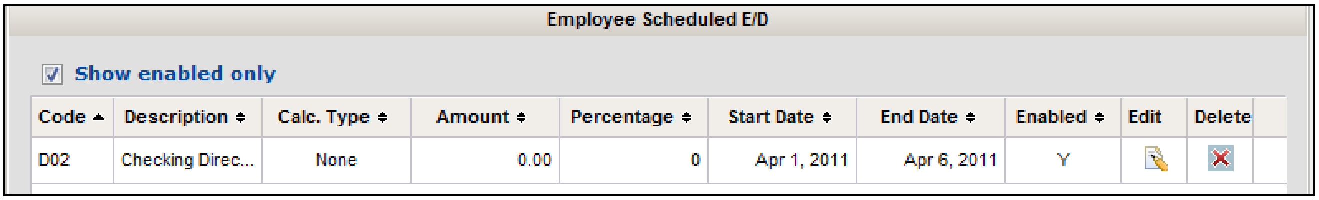
NOTE: PayData recommends the pre-note on all new deposit accounts with the exception of H.S.A. Deductions. If the user declines to pre-note, they assume all risks and liabilities associated with incorrect bank account information.

Click Save to commit the new account, and return to the employee direct deposit list.

Scheduled E/D's *NOTE: Earning and deduction codes must be added to the company by PayData prior to use in EvoWeb. If new code types are required, contact PayData to initiate the mandatory change forms.*

This link can be used to create recurring scheduled earnings or deductions for an employee. The change screens allow the user to customize calculation amounts, frequency, and conditional changes for any scheduled Earning or Deduction code (E/D Code)

- This screen will display any existing deductions, and allows the user to create new deductions associated with the new account number/Case ID etc.

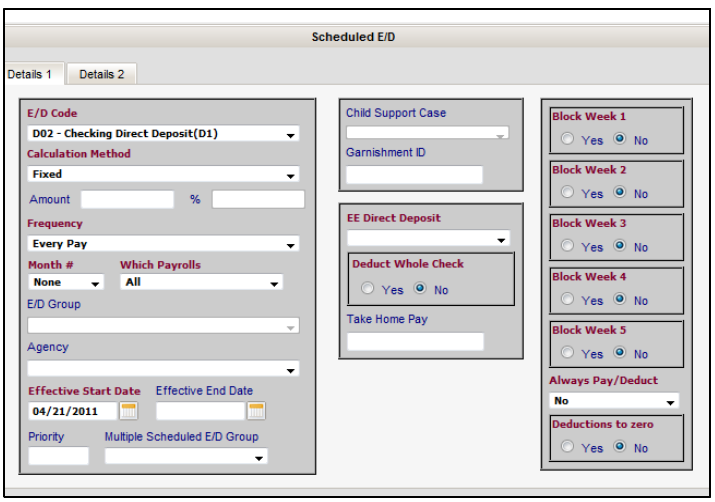


Employee Scheduled E/D

☑ Show enabled only

Code	Description	Calc. Type	Amount	Percentage	Start Date	End Date	Enabled	Edit	Delete
D02	Checking Direc...	None	0.00	0	Apr 1, 2011	Apr 6, 2011	Y		

- Click Add Scheduled E/D to add a new deduction code to the selected employee. The Scheduled ED screen will display fields to add the scheduled defaults to the employee deduction.



Select the appropriate ED Code from the drop down menu. Many required fields will default as needed. Fields that commonly need review are calculation method, amount or %, frequency, start/end dates, agency, and Child Support or Garnishment ID's.

Once the default settings have been entered, use the drop down menu in the middle column to select the bank account, or case ID to match this deduction if applicable.

NOTE: If a deduction is scheduled to be a NET direct deposit, the calculation method MUST be NONE and the field "deduct whole check" must be marked YES. Otherwise, this field must remain at NO.

- Click Save to Commit the new deduction code, and return to the Employee Scheduled E/D list.
- The edit and delete icons can be used to change, or remove an existing account number.

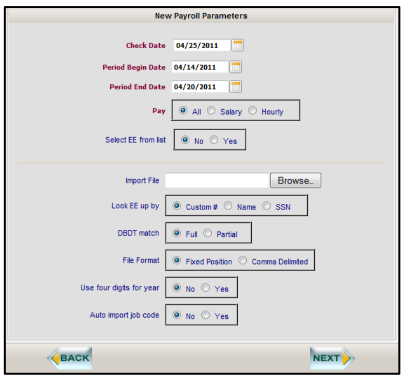
NOTE: Scheduled Deductions with payroll history attached CANNOT be deleted. To restart a stopped deduction, be sure to edit the existing deduction, DO NOT set up the same deduction code more than once for any employee.

Payroll: Create Payroll *NOTE: All payrolls must be processed at least 2 business prior to the check date. If the day that the payroll will be processed on is less than 2 business days from the check date, you MUST change your check date!*

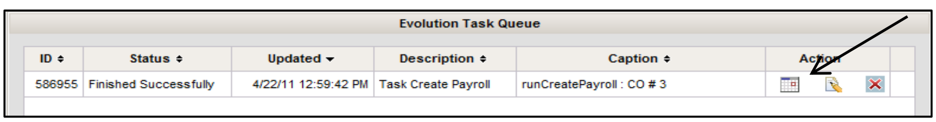
Creating and processing payroll is the primary function of EvoWeb. Questions about this section should be addressed with your Client Service Representative. Once you have submitted payroll, it is immediately processed, and changes can't be made without processing an additional correction run.

- Click Payroll from the main workflow menu.
- Verify the next scheduled check date, and if correct Click Create Payroll

- Verify the mandatory fields under New Payroll Parameters, and click NEXT when complete
  - If you are importing your payroll from a time clock file or an Excel E-sheet provided by PayData, you'll need to use the Browse button on this screen to access the file to import.
  - Once the file is selected from your PC, verify the import field selections.



- Look EE Up By should always reflect Custom #, DBDT Match and File Format can vary depending on the file type to be imported. Questions about these settings should be directed to your Client Service Representative.
- The Evolution Task Queue will display current payroll actions. Once the field "Status" reads "Finished Successfully" click to open, view, or delete payroll using an icon in the action column.
- Click the calendar icon to open the payroll, and work with auto created checks.

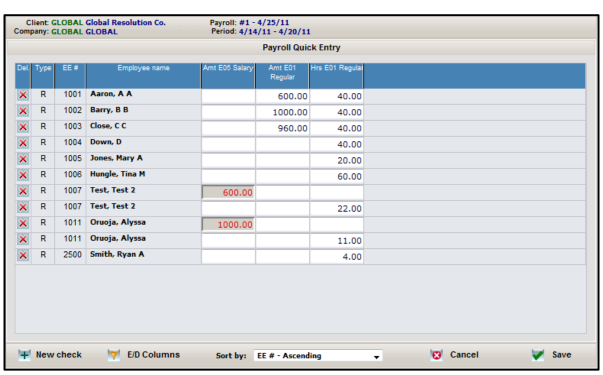


The payroll workflow menu will display with a series of options. When processing payroll, you must begin my verifying the checks have generated in Quick Entry, and you can move on to individual check edits.

Click Quick Entry from the Payroll Workflow Menu

Active employees will auto create in the payroll. Salary amounts and standard hours will auto populate. Use the quick entry screen to key current hours, or changes to the payroll.

NOTE: Hourly employee amounts will not calculate until the payroll is pre-processed.



Use the icons at the bottom of the quick entry screen to change the display settings. Add additional ED codes, create second checks, or re-sort the screen to desired specifications. Changes are applied, and the screen will hold these settings for the next payroll.

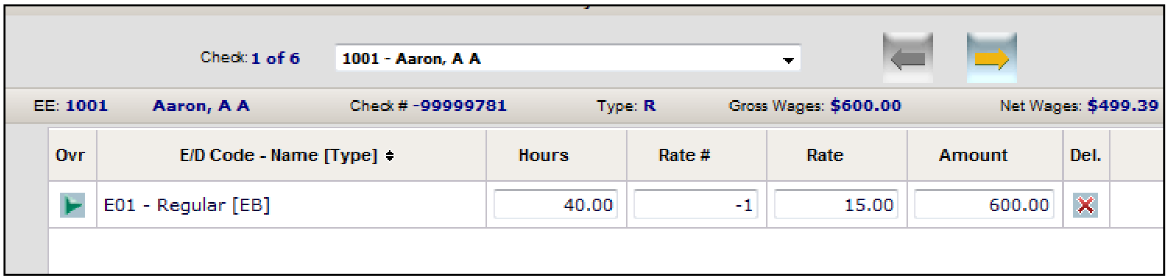
- Click save Save when changes are complete

Edit Checks

Before or after pre-processing a payroll, you can edit payroll checks that have been created.

- Click Payroll from the main workflow menu Then choose 

- Click the drop down menu to select a specific employee's check to edit.

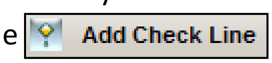


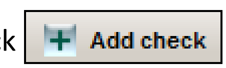
- Add check lines, delete the check, add another check, or edit what has already been keyed into payroll. 

  - Add Check- Regular or Void
  - Add Check Lines- Include additional E/D codes in the selected check
  - Delete Check- Remove this check from the payroll altogether
- Enter hours, wages, or deductions as needed.
- Click Save to keep the changes on the check, or Cancel to abandon changes.

NOTE: EvoWeb will auto-save changes anytime the arrow keys at the top of the screen are used!

How to:

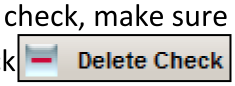
- To delete a check line, click the red on the line you want to delete.
- To add another check line, click add check line 

- Choose the specific code that you would like to add to the employee's selected check.
- To add a second, or subsequent check, click Add Check 

  - Choose the check type of regular or void as needed.
  - Click to pay salary or regular hours as need.

When editing checks if an override rate is not entered on a new check line, the line will default to the employee's primary rate, even if that rate is Zero.

Note: <u>Overtime</u> will automatically calculate at time and a half; do not manually calculate the time and a half rate. Put in the normal rate and the system will calculate.

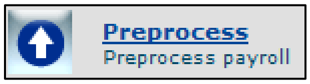
- To override a job, or department for an individual check line click the green arrow on the left of the screen.
- Click the drop down menu's to choose the override job or department needed, and click the green check mark to save the change
- To delete a check, make sure you are on the check you want to delete and select delete check 

- Save all changes
  - Click the green check mark to return to the payroll workflow menu

Preprocess/Check Totals

Once payroll has been keyed, preprocess the payroll in order to confirm totals. After preprocessing, you can view payroll checks through the Edit Checks menu to see the gross and net amounts displayed.

From the main, payroll workflow menu:

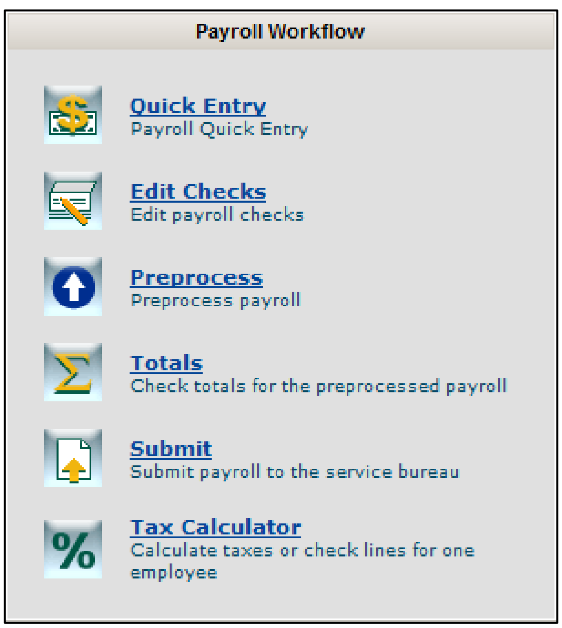
- Click Preprocess 

    - This will direct the user to the Evolution Task Queue.

Evolution Task Queue

ID	Status	Updated	Description	Caption	Action
591704	Finished Successfully	4/26/11 4:08:21 PM	Task Preprocess Payrc	Pre-process 4/27/11-1 payroll	
591702	Finished with Exception:	4/26/11 4:07:26 PM	Task Preprocess Payrc	Pre-process 4/27/11-1 payroll	
591657	Finished Successfully	4/26/11 3:39:23 PM	Task Create Payroll	runCreatePayroll : CO # 3	

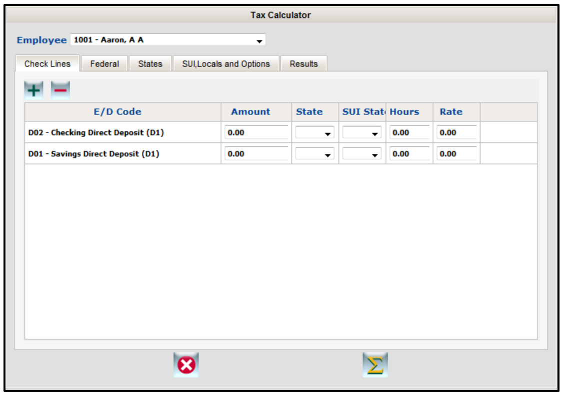
- The Task Queue status should update to “Finished Successfully” in a few moments.
    - If the task queue status updates to “Finished with Exceptions” click the icon to view the exception log . The log will display whatever errors needs to be addressed before payroll can process. Payroll will not process until this screen reflects “Finished Successfully”
- Once the task “Preprocess Payroll” is “Finished Successfully”, click on the calendar icon to open the payroll again.
- Click on Quick Entry, or Edit Checks to view/change the payroll entry.



- Once payroll entry is complete, Click “Payroll Totals” to verify the total wages, hours and dollars in payroll before processing the run. Several reports can be run on the preprocessed payroll.
- Click on Reports to run those reports associated with the payroll at preprocess stage.
- If everything matches the expected payroll output, click the dollar sign icon to return to the workflow menu and submit payroll.

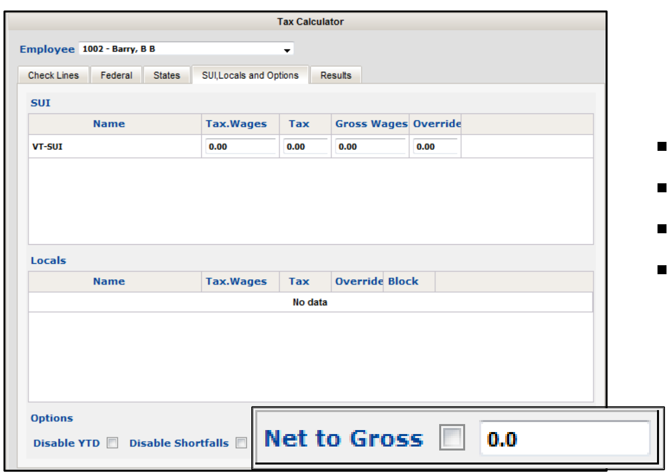
- ## Tax Calculator

Should you need a check calculation outside of payroll processing; the Tax Calculator can be used to preview wages, hours, deductions and taxes. The Tax Calculator can be accessed through the Payroll Workflow Menu.



- Select the employee to calculate wages for from the drop down menu at the top of the Tax Calculator screen
- Use the green plus key at the top of the Calculator screen to add earn codes.
- Enter hours, rates and salary amounts in the check lines.
- Click on the Federal, States, and SUI tabs to make changes to the employee default settings before calculating the check.
- Once all entries have been made, click the calculate icon at the bottom of the screen
- The results will display in the results tab including the gross amount, taxes deducted and net check amount. For state details, click on the state tabs in the tax calculator.

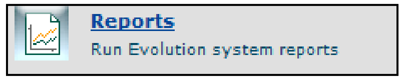
  - In some cases, it will be necessary to calculate a gross check from a pre-determined NET amount. To do so, click the SUI, Locals and Options tab in the tax calculator.



- At the bottom of the screen is the field "Net to Gross"
- Click to enter a check mark in the open box
- Key the NET amount in the entry field.
- Click the Calculate Icon at the bottom of the screen to preview the gross amount before taxes.
  - NOTE: if there are still check lines in the calculator, the net to gross function will not work. Be sure to delete any lines which maybe populated before calculating the NET to Gross figures.

- ## **Reports**

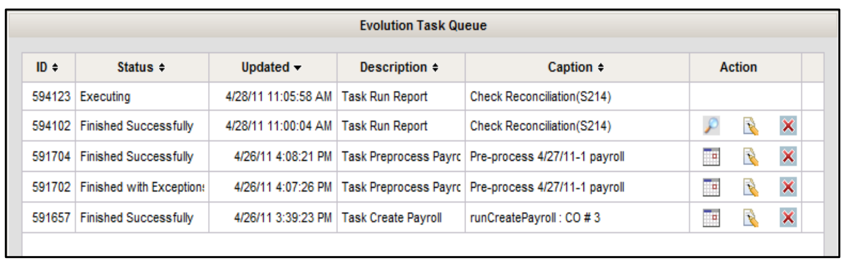
  Reporting is an essential piece of payroll processing. There are limited report options via EvoWeb. If additional reports are needed, contact your Client Service Representative at PayData Payroll Services.

- From the Main Workflow menu click Reports 

- Click the report name you wish to run from the list of available reports
- Use the Check Date Period screen to filter for available check dates. Select a payroll date to run the report for.
- Click the funnel icon to filter based on manual input dates in the “from” and “to” fields

- Click the Misc. Filter tab to select alternate report features, such as sort order, Employee info, and total displays.
- Click the Employee filter tab to limit the results by specific employees. If no employee names are selected, the report will run including all employees.
- Once all parameters have been selected, click the RUN icon 

- The Evolution Task Queue will display the current action. When the status field updates to “finished successfully” click the icon to view the report



Evolution Task Queue

ID	Status	Updated	Description	Caption	Action
594123	Executing	4/28/11 11:05:58 AM	Task Run Report	Check Reconciliation(S214)	
594102	Finished Successfully	4/28/11 11:00:04 AM	Task Run Report	Check Reconciliation(S214)	
591704	Finished Successfully	4/26/11 4:08:21 PM	Task Preprocess Payrc	Pre-process 4/27/11-1 payroll	
591702	Finished with Exception:	4/26/11 4:07:26 PM	Task Preprocess Payrc	Pre-process 4/27/11-1 payroll	
591657	Finished Successfully	4/26/11 3:39:23 PM	Task Create Payroll	runCreatePayroll : CO # 3	

- A pop up screen will display the report, and the window will allow you to save or print the report(s) as desired.

- Available EvoWeb reports:
  - **Payroll Register** - (S109)-Detail listing of payroll checks includes all wages, deductions and taxes. Sort by division, branch, department, and team.
  - **Labor Distribution Report** (Summary or Detail) - (S121)-Totals by division, branch, department, and team.
  - **Check Reconciliation Report** - (S214)-Net check and direct deposit data by check number.
  - **401K Report**-(S125) Pension report featuring pretax deduction detail, employee wage detail and employer match detail on existing pension set up.
  - **Personnel Register** - (S344)-Listing of employees with demographic data.
  - **Job Costing**- (S584) Per payroll job detail by employee
  - **TOA Register**- (S920) Time Off Accrual detail by employee, or TOA type.
  - **Employee Change Listing**- (S1075) Reflects changes made to employees since the last processed payroll.