



Evolution User Manual

PayData...A Vermont Company Working for You!

Introduction

Welcome to the Evolution® Employee Set Up and Payroll Processing Reference Manual! This manual is one part of an ongoing initiative to provide comprehensive and user friendly learning tools and reference material for your Evolution® software. This program gives you the dynamic tools with which to perform all payroll, tax, and human resource functions for your business.

As we move forward and continue to develop more training tools and reference materials for you to effectively use our products in your business, we consider you our partner in communicating your experiences to help us create the best products and materials possible.

Overall Goals and Objectives

Our goals and objectives are to provide comprehensive training tools and resource materials to assist you in using Evolution® effectively.

- Set up new employees in Evolution® for your companies.
- Utilize the functionalities listed in the user manual to perform all the tasks associated with employee set up.
- Create payrolls for your companies utilizing the functionalities listed in the user manual to do the following:
 - Enter all the unique data for individual employees to set up their payroll information
 - Verify all company payroll totals
 - Process all of a company's payroll accurately and in a timely fashion
 - Review payroll register reports for final accuracy verification

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Adding an Employee



To add a new employee, go to **Employee-Employee**.

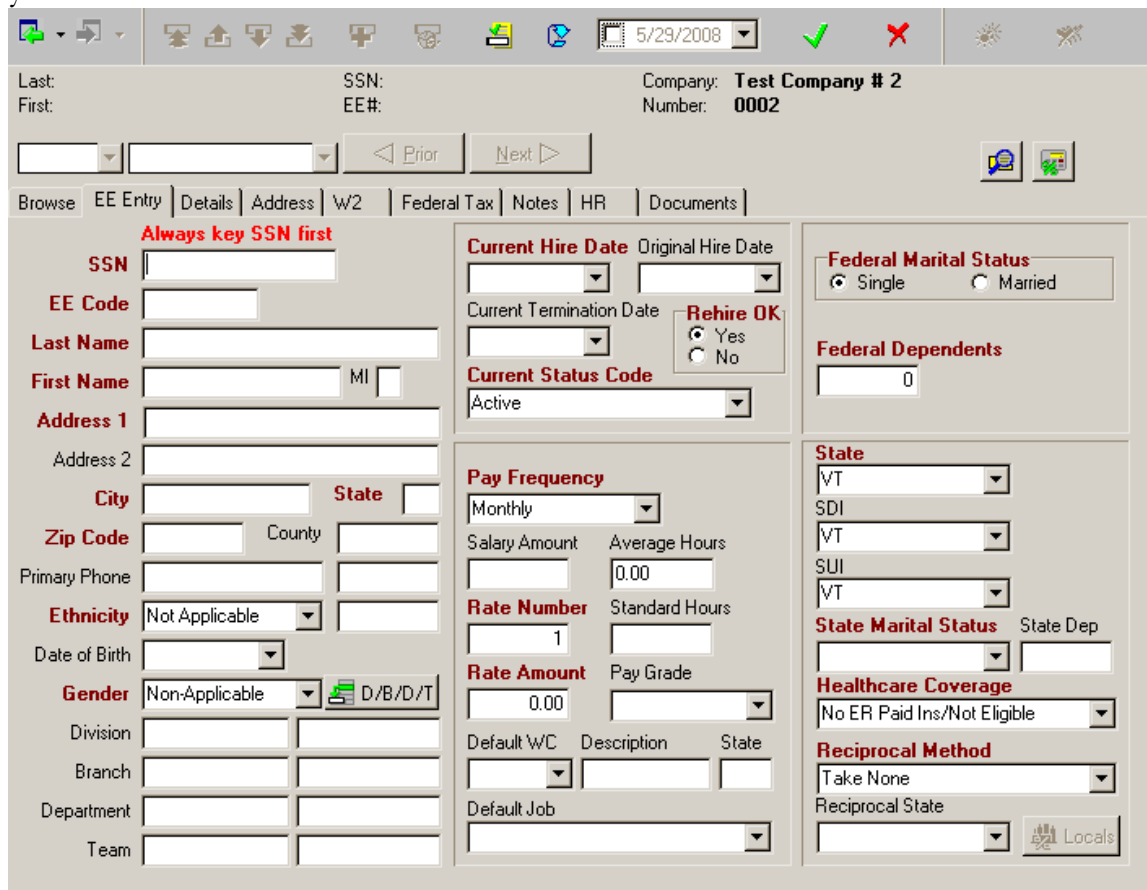
1. Click on the EE Entry tab.

2. Click the green plus  key located at the top left hand side of the screen or Alt-Insert. This will give you a blank employee screen.

****You will notice that some of the field labels are bold red. Any field that is a “Red” field is a required field and must have data entered into that field to be able to successfully save the data.**

****To move around from field to field in all employee screens, use your Tab key.**

****Once you have entered all the necessary data, click the Green Check mark  or F10 to save and the Yellow Sun to Commit.  These are located in the top right hand corner of your screen.**




The screenshot displays the 'Employee-Employee' screen in the PAYDATA application. At the top, there is a toolbar with navigation icons and a date dropdown set to 5/29/2008. Below the toolbar, the company information is shown: 'Company: Test Company # 2' and 'Number: 0002'. The main form is divided into several sections:

- Personal Information:** Fields for Last Name, First Name, SSN (labeled 'Always key SSN first'), EE Code, Last Name, First Name, Address 1, Address 2, City, State, Zip Code, County, Primary Phone, Ethnicity, Date of Birth, Gender, Division, Branch, Department, and Team.
- Employment Details:** Fields for Current Hire Date, Original Hire Date, Current Termination Date, Current Status Code (set to 'Active'), Pay Frequency (set to 'Monthly'), Salary Amount, Average Hours (set to '0.00'), Rate Number (set to '1'), Standard Hours, Rate Amount (set to '0.00'), Pay Grade, Default W/C, Description, State, and Default Job.
- Marital and Dependent Information:** Fields for Federal Marital Status (radio buttons for 'Single' and 'Married'), Federal Dependents (set to '0'), State, SDI, SUI, State Marital Status, and State Dep.
- Healthcare and Reciprocal Information:** Fields for Healthcare Coverage (set to 'No ER Paid Ins/Not Eligible'), Reciprocal Method (set to 'Take None'), and Reciprocal State.

At the bottom right, there are icons for saving (Green Checkmark) and committing (Yellow Sun).

3. **SSN** - You must always put in the social security number prior to trying to enter data into any other field. When typing in the number the system will place the dashes in for you.
4. **EE Code** – All employees must have an EE Code, or an Employee ID number. This number is unique to that employee. The system may be defaulted to give you the next available number.

****If you are using any type of payroll imports, for example Time Clock Imports, this number must match the ID # of the employee in your other system.**

5. **Name/Address/Phone/DOB** - Complete the necessary fields to enter the employee, again focusing on filling in the required Red fields.
6. **Gender** – You must select Male or Female gender for your employee as this is now required on all Quarterly Unemployment Returns
7. **DBDT** - Even though the Division, Branch, Department and Team (or DBDT) fields are not red, your company may have specifically been set up to use these fields. To select the correct DBDT click on the DBDT Picker or F4 and it will bring up what has been set up for your company.  Select the correct DBDT for this employee then click select and you will see that DBDT now loaded on the employee.

****If you need a new DBDT added to the list, you must contact your Client Service Representative for assistance.**

8. **Hire Date** - Enter in the correct Current Hire Date for the employee. You should also enter in an Original Hire Date.
9. **Pay Frequency** – Your default pay frequency has been set up on your company and all employees will default to that frequency. If you are using multiple pay frequencies, select the correct frequency for that employee.
10. **Salary Amount** – If your employee is a salary paid employee, enter in the per pay period salary amount here. If they are not salary, leave this blank.
11. **Average Hours** – This will take a salary amount and divide it out to come up with an hourly rate. Normally you would always leave this at the default of 0.00 to prevent data entry errors in payroll.
12. **Rate Number** – This is always a 1. Please refer to the Additional Pay Rate section for information on how to set up multiple rates.

13. **Standard Hours** – Any hours put in this field will automatically pull into the payroll. This is used for employees in which you want to consistently pay them the same number of hours each payroll.
- **If you are using a Time Clock Import, be very careful that you are not putting Standard Hours on an employee that will also have hours in the time clock.**
14. **Rate Amount** – Enter in the employee's hourly rate. If they are a salaried employee, this should always be 0.00.
15. **Pay Grade** – This is an HR Module field to be used only if you have the Evolution HR Module.
16. **Default WC** – If you are using Workers Comp, please select the correct code for this employee.
17. **Default Job** – If you are using Job Costing, please select the correct code for this employee.
18. **Federal Marital Status** – Select the appropriate Status as per the employee's W4.
19. **Federal Dependents** – Enter the correct number of dependents per the employee's W4. If the employee has marked Exempt in line 7, you need to enter 99 as the number of dependents. A W4 that indicates an exempt status generally means not to deduct federal withholding tax; it doesn't necessarily mean that the employee is exempt from federal taxable wages.
20. **State** – This is the state that the employee works in and is needed for Withholding purposes.
- **If the employee is living in one state, but working in another state you have the option of withholding income tax for both those states. Please see the section on Reciprocal State Setups for details. Be aware that you must apply for Tax Withholding ID's for any state in which you will have tax withholdings.**
21. **SDI – State Disability Insurance** - This is the state that the employee needs to have for SDI purposes. If the state(s) that your company has ID#'s for does not have an SDI, you still need to pull in a state for this field.
22. **SUI – State Unemployment Insurance** - This is the state that the employee's wages are getting reported to for unemployment reasons. This state should relate to the state in which an employee works.

****Be aware that there are different rules for certain types of employees such as Sales People. If you are unsure how to set up an employee, please contact the**

PayData Tax Department for documentation to allow you to make the best decision on the set up prior to paying any wages to an employee.

23. **State Marital Status** – Select the appropriate Status as per the employee's State W4. If the applicable state does not have a specific W4 form, use the status from the Federal W4.
24. **State Dependents** - Enter the correct number of dependents per the employee's State W4. If the applicable state does not have a specific W4, use the number of dependents per the Federal W4 form. If the employee has marked Exempt in line 7, you need to enter 99 as the number of dependents. A W4 that indicates an exempt status generally means to not deduct state withholding tax; it doesn't necessarily mean that the employee is exempt from state taxable wages.
25. **Reciprocal Method** – Please refer to the section on setting up Reciprocal States.
26. **Reciprocal State** – Please refer to the section on setting up Reciprocal States
27. **Locals** – If the employee is subject to a Local Tax Withholding, click on the Locals button to get the list of available locals. Please refer to the section on setting up a local for additional information.

Entering Notes on an Employee

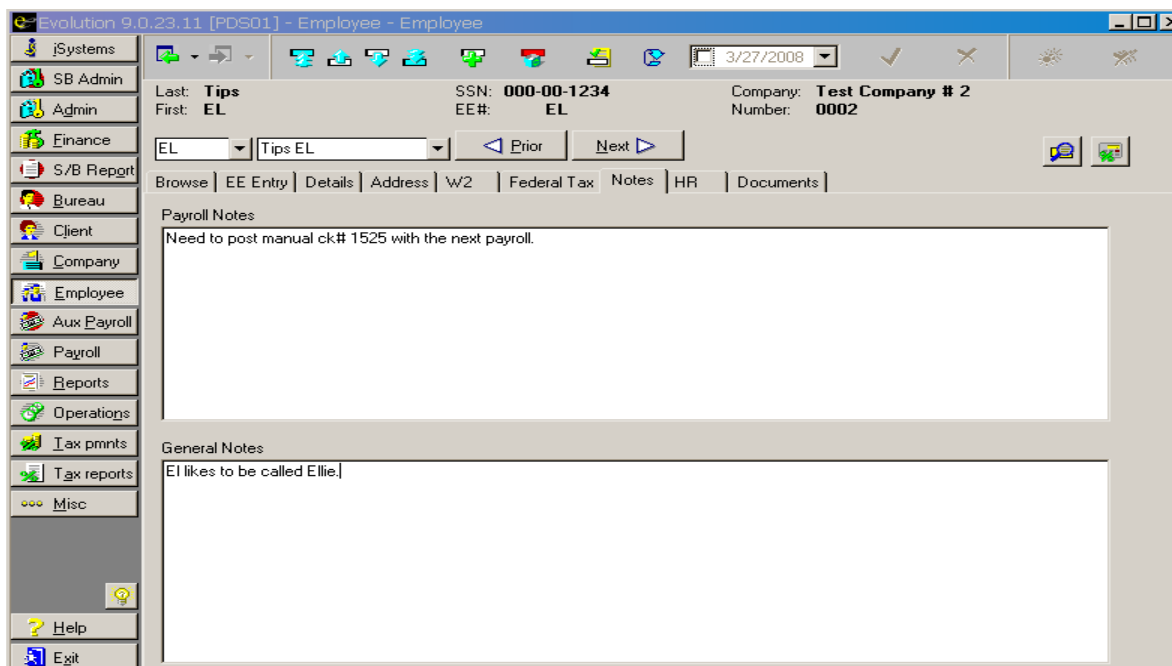
A **Payroll Note** is viewable from the Payroll – Check screens as well as the Employee – Employee screen. A **General Note** is only viewable from the Employee – Employee screen.



The **Payroll Note** field should be used for reminders of something that needs to happen in payroll entry: take a one-time deduction, pay out a retro pay, etc.

The **General Note** field is typically used to log data that the employer might want to view in the future: Notes about an employee's termination, dates of pay increases, etc.

To enter either **Payroll Notes** or **General Notes** on an employee, go to **Employee-Employee**.

1. Select the employee to which you are adding the notes.
2. Click on the Notes tab.
3. Determine if you are entering Payroll Notes or General Notes and enter the data in the appropriate area.





4. Once you have entered all the necessary data, click the Green Check mark  to save and the Yellow Sun to Commit.  These are located in the top right hand corner of your screen.

Adding Additional Taxes to an Employee

Additional Federal Taxes

To add additional Federal tax to an employee, go to **Employee-Employee**.

1. Select the employee you are working on.
2. Click on the Federal Tax tab.
3. **Override Fed Tax Type** – Select the option you would like.
 - **Regular Amount** – Will take only what is in the Override Fed Tax Value and not look at what the employee is claiming for Status and Dependents
 - **Regular Percent** – Will take only the percentage in the Override Fed Tax Value and not look at what the employee is claiming for Status and Dependents
 - **Additional Amount** – Will take the amount in the Override Fed Tax Value on top of what is already being calculated based on what the employee is claiming for Status and Dependents.
 - **Additional Percent** – Will take the percentage in the Override Fed Tax Value on top of what is already being calculated based on what the employee is claiming for Status and Dependents.
 - **None** – You want the system to only look at what the employee is claiming for Status and Dependents and not do any types of overrides.
4. **Override Fed Tax Value** – Enter in the amount or percent you want. Percentages should be put in as whole numbers, i.e. 10% should be entered as 10.
5. **EIC** – If your employee has provided you with a W5 form, select the appropriate option by clicking on the drop down arrow. Remember that a new W5 form must be filled out each year.

Once you have entered all the necessary data, click the Green Check mark  or F10 to save and the Yellow Sun to Commit.  These are located in the top right hand corner of your screen.

Additional State Taxes

To add additional State tax to an employee, go to **Employee-States**.



1. While on the **Browse** tab, select the employee in which you are adding additional state tax.
2. Click on the **Tax Override** Tab.
3. **Override State Tax Type** – Select the option you would like.
 - **Regular Amount** – Will take only what is in the Override State Tax Value and not look at what the employee is claiming for Status and Dependents
 - **Regular Percent** – Will take only the percentage in the Override State Tax Value and not look at what the employee is claiming for Status and Dependents

- **Additional Amount** – Will take the amount in the Override State Tax Value on top of what is already being calculated based on what the employee is claiming for Status and Dependents.
- **Additional Percent** – Will take the percentage in the Override State Tax Value on top of what is already being calculated based on What the employee is claiming for Status and Dependents.
- **None** – You want the system to only look at what the employee is claiming for Status and Dependents and not do any types of overrides.

4. **Override State Tax Value** – Enter in the amount or percent you want. Percentages should be put in as whole numbers, i.e. 10% should be entered as 10. Dollar amounts should be entered in dollar amounts, i.e. 10.00.

The screenshot shows a tax software interface with the following elements:

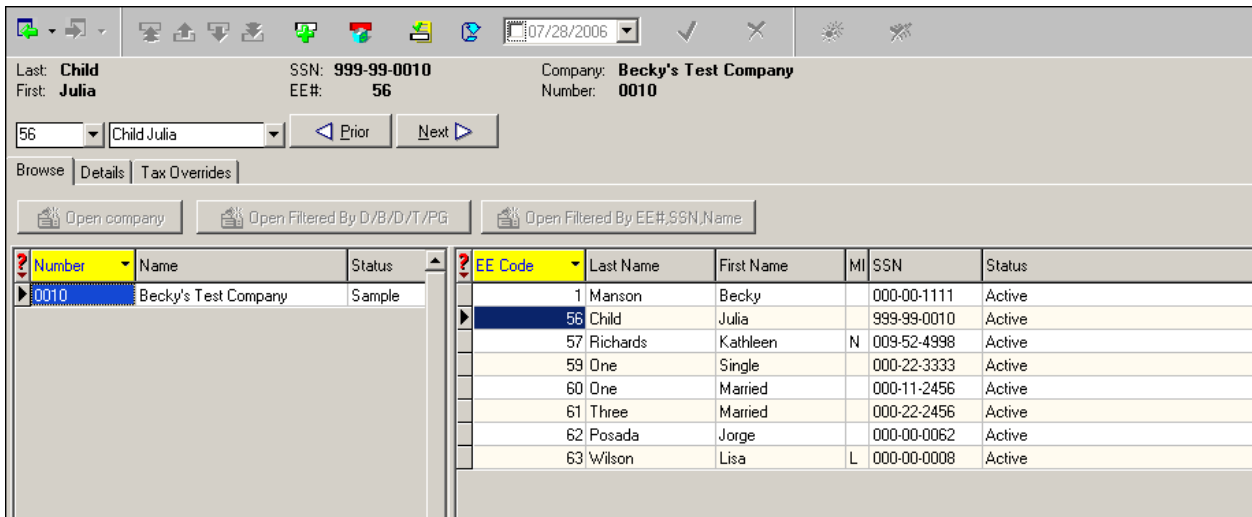
- Top Bar:** Contains navigation icons, a date dropdown set to 8/14/2006, and status icons (green checkmark, red X, yellow sun).
- Employee Information:**
 - Last: **Manson**, First: **Becky**
 - SSN: **000-00-1111**, EE#: **1**
 - Company: **Becky's Test Company**, Number: **0010**
- Navigation:** Buttons for "< Prior" and "Next >", and tabs for "Browse", "Details", and "Tax Overrides".
- Tax Overrides Section:**
 - Override State Tax Type:** A dropdown menu set to "Regular Amount".
 - Override State Tax Value:** A text input field containing "10.00".
 - Use Effective Dates to Change Tax Statuses:**
 - State Exempt or Block:** Radio buttons for Exempt, Block, and Include (selected).
 - 1099 Calculate SUI Taxable Wages:** Radio buttons for Yes and No (selected).
 - EE SDI:** Radio buttons for Exempt, Block, and Include (selected).
 - EE SUI:** Radio buttons for Exempt, Block, and Include (selected).
 - ER SDI:** Radio buttons for Exempt, Block, and Include (selected).
 - ER SUI:** Radio buttons for Exempt, Block, and Include (selected).

Once you have entered all the necessary data, click the Green Check mark  or F10 to save and the Yellow Sun to Commit.  These are located in the top right hand corner of your screen.

Adding a State to an Employee


To Add state to an employee you must start out under **Employee-States**.

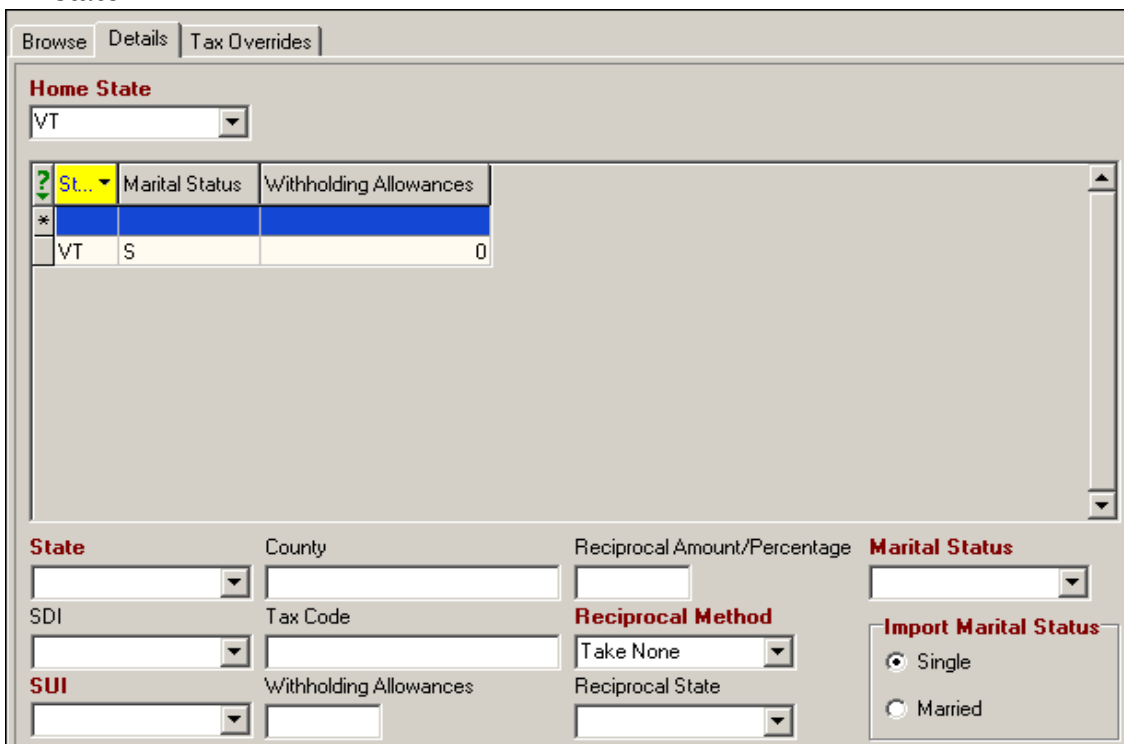
1. While on the **Browse** tab, select the employee.



Number	Name	Status
0010	Becky's Test Company	Sample




EE Code	Last Name	First Name	MI	SSN	Status
1	Manson	Becky		000-00-1111	Active
56	Child	Julia		999-99-0010	Active
57	Richards	Kathleen	N	009-52-4998	Active
59	One	Single		000-22-3333	Active
60	One	Married		000-11-2456	Active
61	Three	Married		000-22-2456	Active
62	Posada	Jorge		000-00-0062	Active
63	Wilson	Lisa	L	000-00-0008	Active

2. Either double click on their name or go to the **Details** tab at the top.
3. Once you are on the **Details** tab click on the green plus key  to add another state.



St...	Marital Status	Withholding Allowances
*	S	0

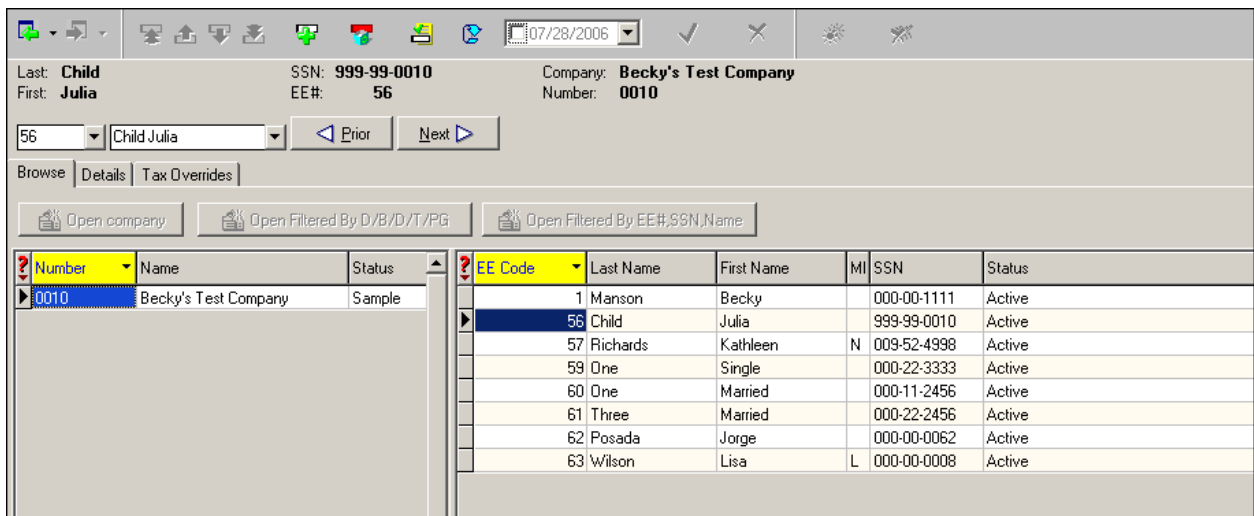
State **County** **Reciprocal Amount/Percentage** **Marital Status**
SDI **Tax Code** **Reciprocal Method** **Import Marital Status**
SUI **Withholding Allowances** **Reciprocal State** **Import Marital Status**

4. Go to the bottom of the screen to the **State**, **SDI** and **SUI** fields. Pull in the new state on all three fields. If this state is not available to pick, than you do not currently have an ID # established. Please contact the PayData Tax Department for assistance.
5. Enter the number of **Withholding Allowances** and choose the correct **Marital Status** for the employee. Remember, marital status options differ by state. If you are not sure what to choose, confirm with the employee and/or state.
6. Click the Green Check mark  to save. This is located in the top right hand corner of your screen.
7. Go back to the red field that says **Home State**. Change this to be the new state. Confirm that this is the state **where the employee's wages are earned NOT the employee's resident state**.
8. Once you have entered all the necessary data, click the Green Check mark  to save and the Yellow Sun to Commit.  These are located in the top right hand corner of your screen.

Setting up a Reciprocal State for an Employee


To set up a Reciprocal state for an employee you must start out under **Employee-States**.

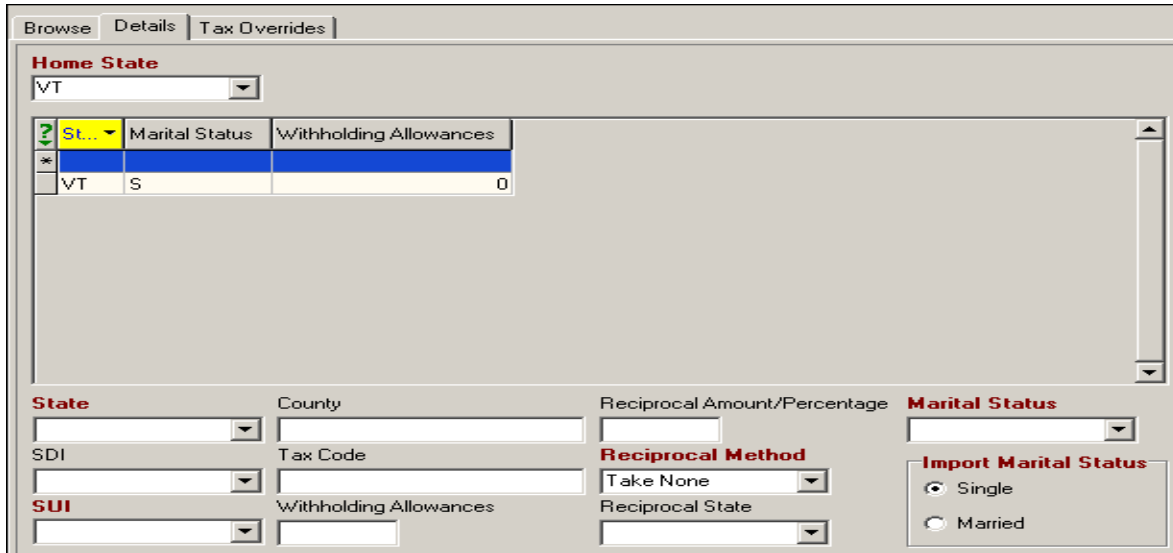
1. While on the **Browse** tab, select the employee.




Number	Name	Status	EE Code	Last Name	First Name	MI	SSN	Status
0010	Becky's Test Company	Sample						
1	Manson	Becky					000-00-1111	Active
56	Child	Julia					999-99-0010	Active
57	Richards	Kathleen	N				009-52-4998	Active
59	One	Single					000-22-3333	Active
60	One	Married					000-11-2456	Active
61	Three	Married					000-22-2456	Active
62	Posada	Jorge					000-00-0062	Active
63	Wilson	Lisa	L				000-00-0008	Active

2. Either double click on their name or go to the **Details** tab at the top.

- Once you are on the **Details** tab click on the green plus key  to add another state.



- Go to the bottom of the screen to the **State**, **SDI** and **SUI** fields. Pull in the new state on all three fields. If this state is not available to pick, than you do not currently have an ID # established. Please contact the PayData Tax Department for assistance.
 - Enter the number of **Withholding Allowances** and choose the correct **Marital Status** for the employee. Remember, marital status options differ by state. If you are not sure what to choose, confirm with the employee and/or state.
 - Click the Green Check mark  to save. This is located in the top right hand corner of your screen.
-
- Go back to the red field that says **Home State**. Confirm that this is the state **where the employee's wages are earned NOT the employee's resident state**.

Now you are ready to assign the reciprocation flags to each of the states.

- In the grid, click on the state which is the HOME, (state where wages are earned). In the Reciprocal Method pull in the desired option. In the Reciprocal State field, pull in the RESIDENT state.

5/29/2008

Last: **Tips** SSN: **000-00-4321** Company: **Test Company # 2**
 First: **E1** EE#: **E1** Number: **0002**

E1 Tips E1 < Prior Next >

Browse Details Tax Overrides

Home State

VT

St...	Marital Status	Withholding Allowances
NY	S	0
VT	S	0

State VT **County** **Reciprocal Amount/Percentage** **Marital Status** S

SDI VT **Tax Code** **Reciprocal Method** Take Difference Bety

SUI VT **Withholding Allowances** **Reciprocal State** NY

Import Marital Status

☒ Single

☐ Married

9. In the grid, click on the state which is the RESIDENT state, (state where EE lives). The Reciprocal Method should always remain "Take None" and the Reciprocal State should always be blank.

5/29/2008

Last: **Tips** SSN: **000-00-4321** Company: **Test Company # 2**
 First: **E1** EE#: **E1** Number: **0002**

E1 Tips E1 < Prior Next >

Browse Details Tax Overrides

Home State

VT

St...	Marital Status	Withholding Allowances
NY	S	0
VT	S	0

State NY **County** **Reciprocal Amount/Percentage** **Marital Status** S



SDI NY **Tax Code** **Reciprocal Method** Take None

SUI NY **Withholding Allowances** **Reciprocal State**

Import Marital Status


☒ Single

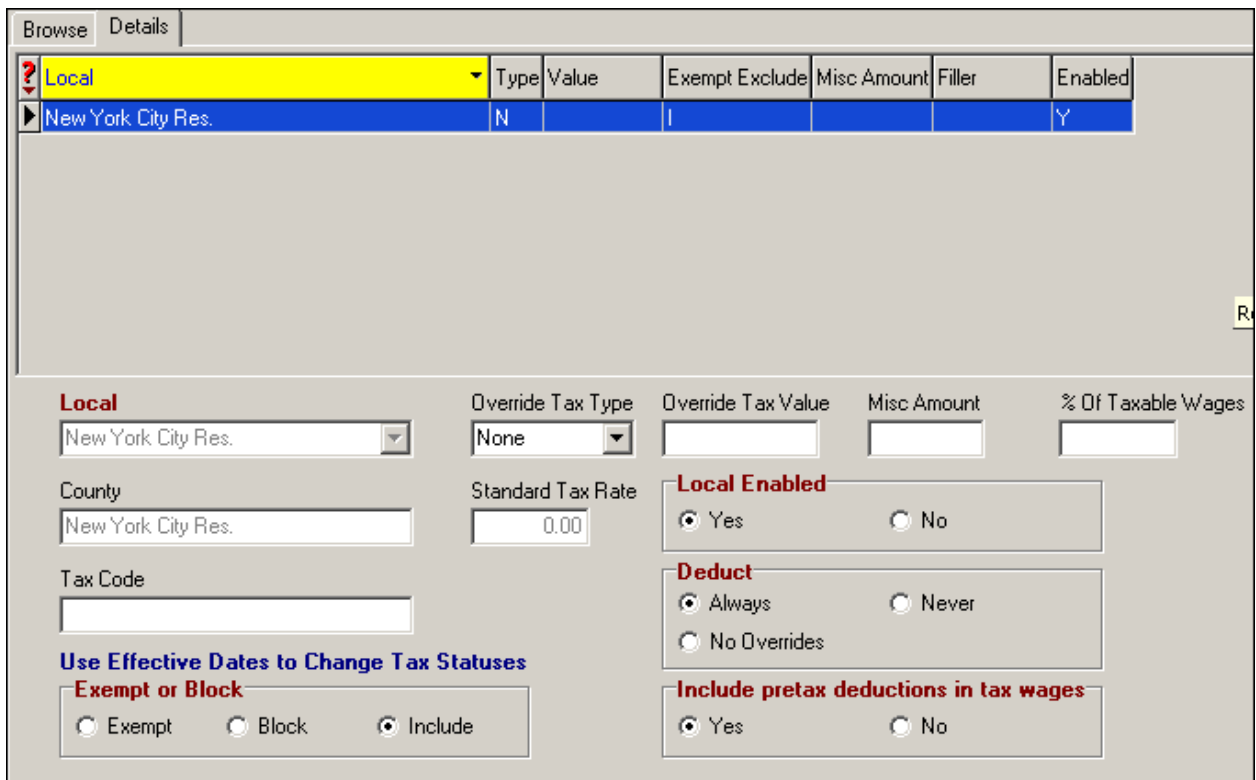
☐ Married

10. Once you have entered all the necessary data, click the Green Check mark  to save and the Yellow Sun to Commit.  These are located in the top right hand corner of your screen.

Adding Local Taxes to an Employee

To add a local tax to an employee you must start out under **Employee-Locals**.

1. While on the **Browse** tab, select the employee.
2. Either double click on the employee name or go to the **Details** tab at the top.
3. Once you are on the **Details** tab click on the green plus key  to add a local tax.



Local	Type	Value	Exempt Exclude	Misc Amount	Filler	Enabled
New York City Res.	N	I				Y

Local
New York City Res.

County
New York City Res.

Tax Code

Override Tax Type
None

Standard Tax Rate
0.00

Override Tax Value

Misc Amount

% Of Taxable Wages

Local Enabled
☒ Yes ☐ No



Deduct
☒ Always ☐ Never
☐ No Overrides

Include pretax deductions in tax wages
☒ Yes ☐ No

Use Effective Dates to Change Tax Statuses
Exempt or Block
☐ Exempt ☐ Block ☒ Include

4. Find the red field called Local and click in the drop down box. Select the locality that you would like to add to this employee.
5. You now have the option to override the default set ups on this employee. If applicable, go through the fields and pull in the override tax amounts and taxation.

If you are unsure what you should be pulling into these fields, contact the PayData Tax Department for assistance.

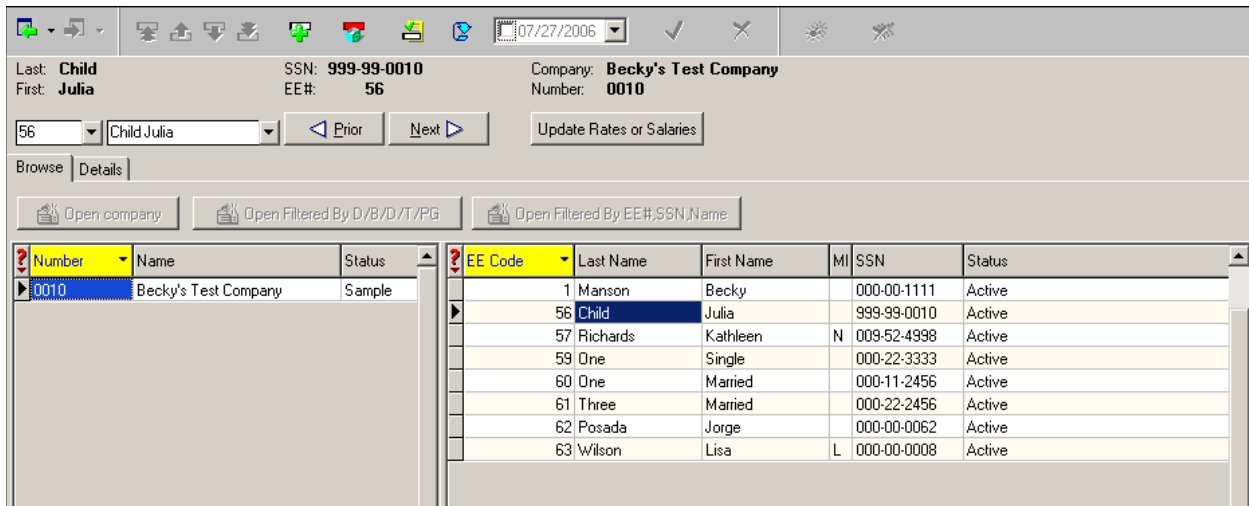
6. **Local Enabled** - means that the local will be active on the employee.
7. **Deduct** – means you want the local deduction to happen every time, never, or have no overrides taken.
8. **Include pretax deductions in tax wages** – means if you want to include the pretax deductions in your calculations. You should always go with the system defaults.
9. Once you have entered all the necessary data, click the Green Check mark  to save and the Yellow Sun to Commit.  These are located in the top right hand corner of your screen.

****You need to be extremely cautious concerning overriding of taxes. Some local taxes are based on a percentage of earnings and, if overridden, will require corrections to be done to fix incorrect tax withholdings. Any questions concerning local taxes should be immediately directed to the PayData Tax Department for assistance.****


Adding an Additional Rate of Pay to an Employee

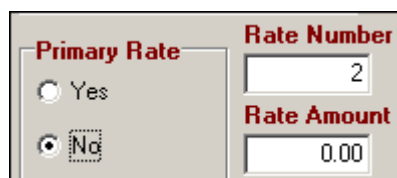
To add an additional rate of pay to an employee you must start out under **Employee-Pay rate info.**



1. While on the **Browse** tab, select the employee.



Number	Name	Status	EE Code	Last Name	First Name	MI	SSN	Status
0010	Becky's Test Company	Sample						
1	Manson	Becky					000-00-1111	Active
56	Child	Julia					999-99-0010	Active
57	Richards	Kathleen				N	009-52-4998	Active
59	One	Single					000-22-3333	Active
60	One	Married					000-11-2456	Active
61	Three	Married					000-22-2456	Active
62	Posada	Jorge					000-00-0062	Active
63	Wilson	Lisa				L	000-00-0008	Active

2. Either double click on their name or go to the **Details** tab at the top.
3. Once you are on the **Details** tab click on the green plus key  to add another rate.

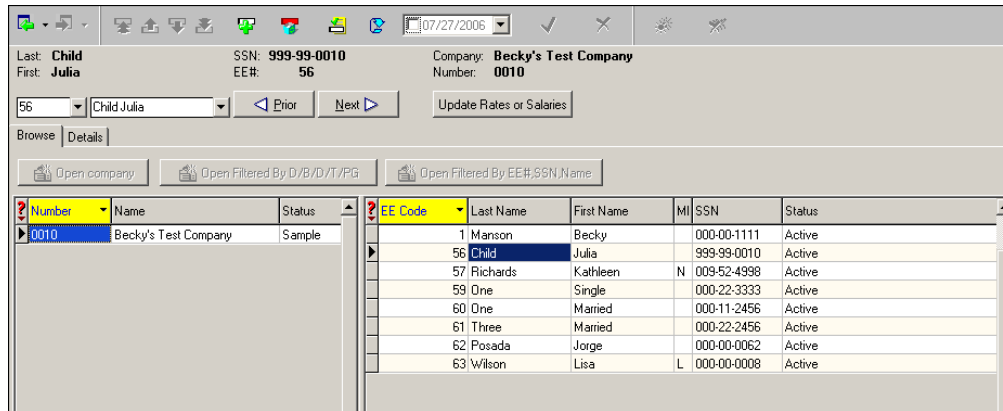


4. The system will default the Primary Rate to NO and the Rate Number to the next available number for this employee.
5. Enter the rate for this employee in the Rate Amount field.
6. Once you have entered all the necessary data, click the Green Check mark  to save and the Yellow Sun to Commit.  These are located in the top right hand corner of your screen.

Adding an Override Department to an Additional Rate of Pay

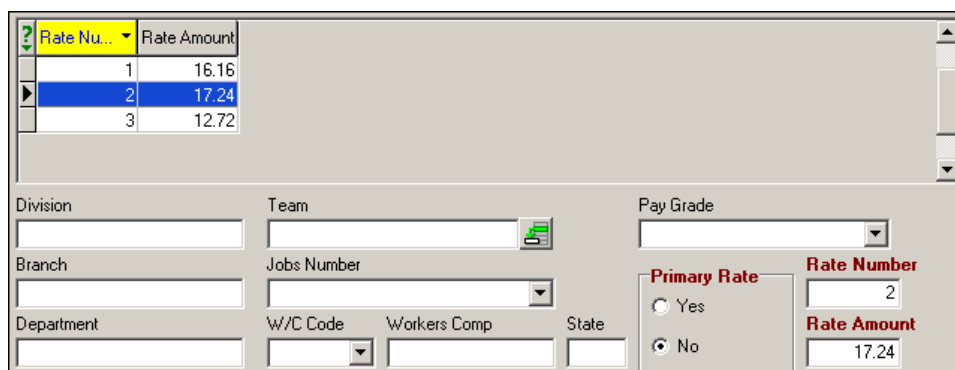
To add an additional rate of pay to an employee you must start out under **Employee-Pay rate info**.

- ** Please be aware that any department assigned to a specific rate on this screen, can not be overridden in payroll check lines. ****
- While on the **Browse** tab, select the employee.



Number	Name	Status	EE Code	Last Name	First Name	MI	SSN	Status
0010	Becky's Test Company	Sample						
1	Manson, Becky	Active					000-00-1111	Active
56	Child, Julia	Active					999-99-0010	Active
57	Richards, Kathleen	Active				N	009-52-4398	Active
59	One, Single	Active					000-22-3333	Active
60	One, Married	Active					000-11-2456	Active
61	Three, Married	Active					000-22-2456	Active
62	Posada, Jorge	Active					000-00-0062	Active
63	Wilson, Lisa	Active				L	000-00-0008	Active




- Either double click on the employee's name or go to the **Details** tab at the top.
- You will see a grid in the middle of your screen. Highlight the rate to which you want to add an override department.



Rate Nu...	Rate Amount
1	16.16
2	17.24
3	12.72

Division: Team: Pay Grade:
 Branch: Jobs Number:
 Department: W/C Code: Workers Comp: State:

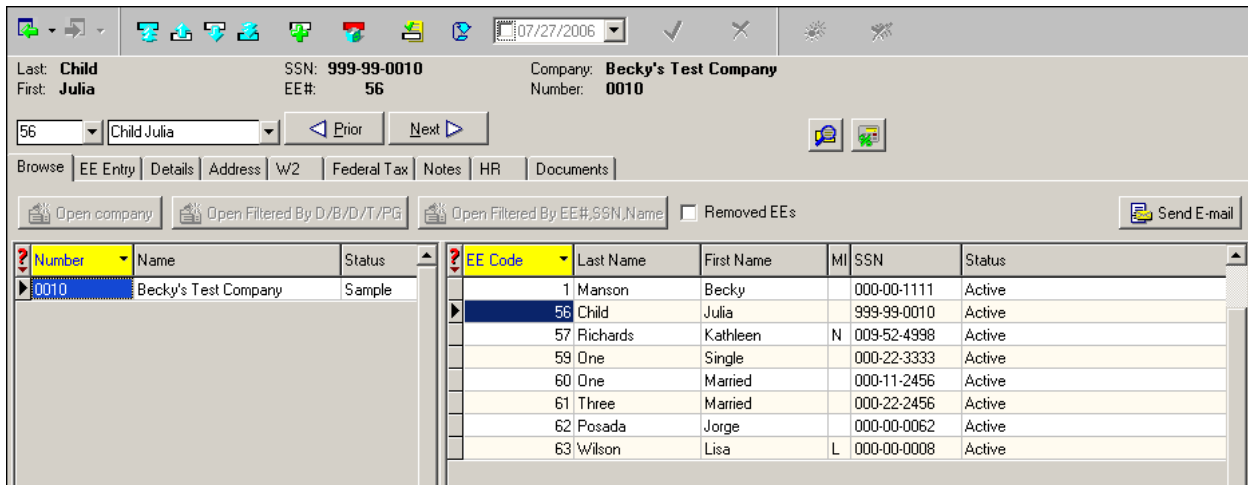
Primary Rate: ☐ Yes ☒ No
 Rate Number:
 Rate Amount:

- Underneath the grid, next to the field Team, you will see the DBDT Picker.  Click on this button or hit the F4 key and it will bring up your Department Listing. Highlight the one you want and click Select to pull this onto the rate.
- Once you have entered all the necessary data, click the Green Check mark  to save and the Yellow Sun to Commit.  These are located in the top right hand corner of your screen.

Terminating an Employee

To terminate an employee, go to **Employee-Employee**.

1. While on the **Browse** tab, select the employee you want to terminate.





Number	Name	Status	EE Code	Last Name	First Name	MI	SSN	Status
0010	Becky's Test Company	Sample						
1	Manson	Becky					000-00-1111	Active
56	Child	Julia					999-99-0010	Active
57	Richards	Kathleen	N				009-52-4998	Active
59	One	Single					000-22-3333	Active
60	One	Married					000-11-2456	Active
61	Three	Married					000-22-2456	Active
62	Posada	Jorge					000-00-0062	Active
63	Wilson	Lisa	L				000-00-0008	Active

2. Either double click on their name or go to the **EE Entry** tab at the top.
3. Once you are on the **EE Entry** tab, look in the second column and find the field **Current Status Code**. This should currently be **ACTIVE**.




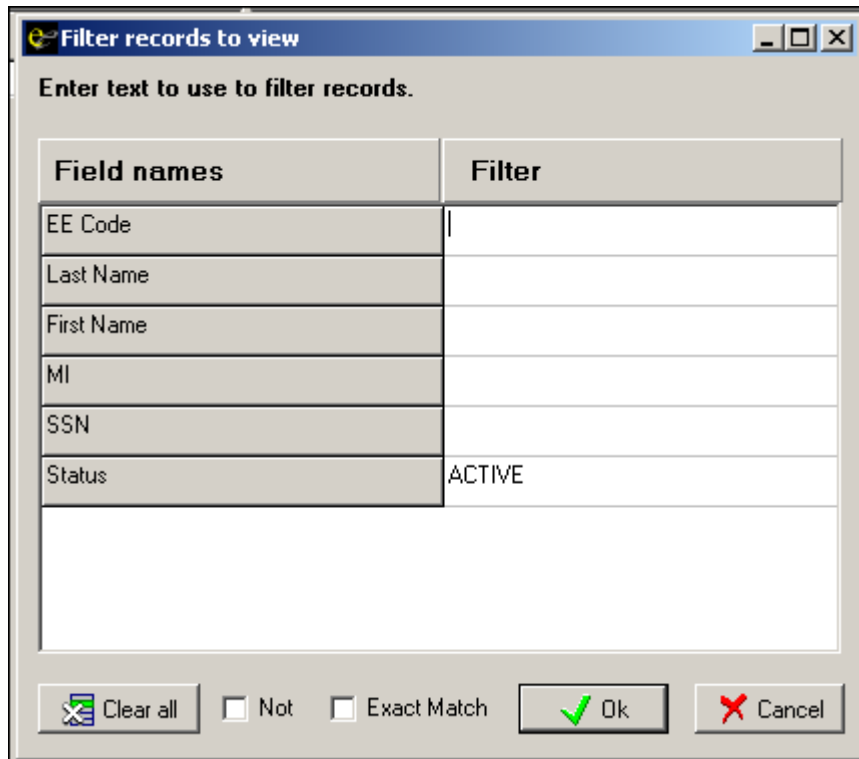
Current Hire Date 1/31/2003 **Original Hire Date** 1/31/2003
Current Termination Date 6/27/2006 **Rehire OK**
☒ Yes ☐ No
Current Status Code Terminated

4. In the drop down box select the new status for that employee.
5. Above the **Current Status Code** field is the **Current Termination Date**. Fill in the applicable leave date for this employee.
6. Once you have entered all the necessary data, click the Green Check mark  to save or F10 and the Yellow Sun to Commit.  These are located in the top right hand corner of your screen.

Reactivating a Terminated Employee

To reactivate a terminated employee, go to **Employee-Employee**.

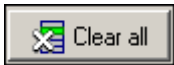

1. While on the **Browse** tab, click on the  button that is located next to the EE Code Heading. This will open the Employee Filter Box.



The dialog box is titled "Filter records to view". It contains a text input field with the placeholder "Enter text to use to filter records." Below this is a table with two columns: "Field names" and "Filter".

Field names	Filter
EE Code	
Last Name	
First Name	
MI	
SSN	
Status	ACTIVE

At the bottom of the dialog box, there are several controls: a "Clear all" button with a trash icon, two checkboxes labeled "Not" and "Exact Match", an "Ok" button with a green checkmark, and a "Cancel" button with a red X.

2. You will see in the field marked Status, the word ACTIVE is listed in the filter.
Click on the  button at the bottom and it will remove the ACTIVE from the Status box.
3. Click the  button at the bottom and you will be back on the Browse tab. You will now be able to see all employees regardless of their status.
4. Find the employee in the list and either double click on their name or go to the **EE Entry** tab at the top.
5. Once you are on the **EE Entry** tab, look in the second column and find the field **Current Hire Date**. Enter the employee's Re-Hire date in the Current Hire Date field. You can keep the Original Hire Date their original date of hire.
6. Then move down to the **Current Termination Date** and remove the date for this employee.



7. Now you are ready to change the **Current Status Code**. Using the drop down box, select the new status for the employee.

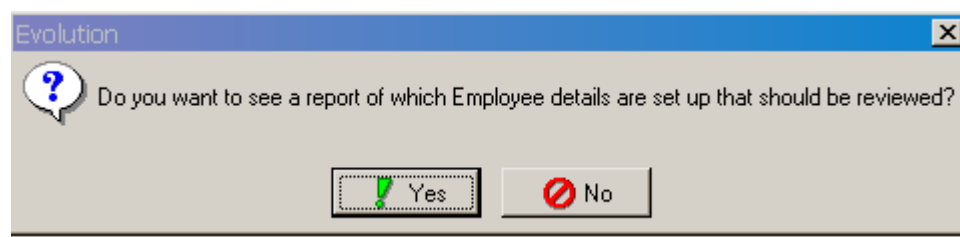
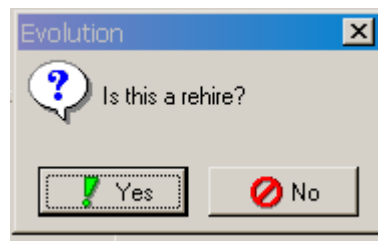


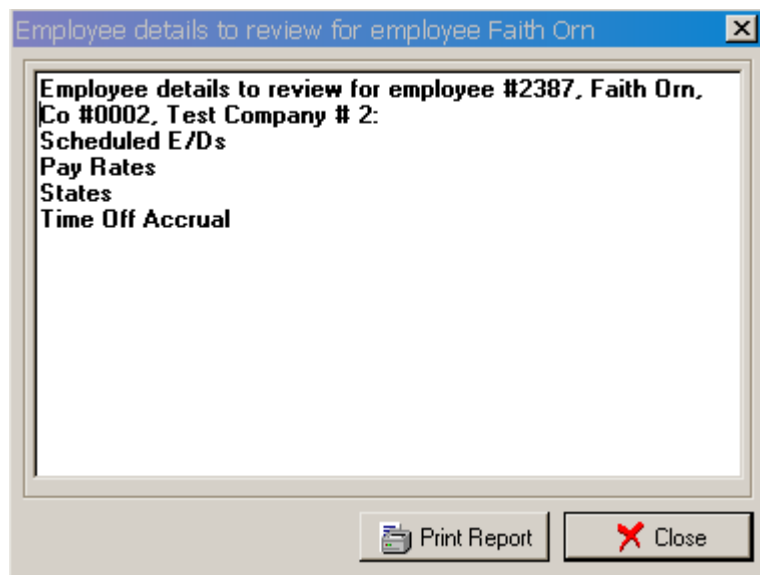
The screenshot shows a form with the following fields and options:

- Current Hire Date**: 1/31/2003 (dropdown)
- Original Hire Date**: 1/31/2003 (dropdown)
- Current Termination Date**: 6/27/2006 (dropdown)
- Rehire OK**: ☒ Yes, ☐ No
- Current Status Code**: Terminated (dropdown)

****Be aware that if you are having the Evolution software calculate Time Off Accruals, changing the Current Hire Date may affect the rate at which the employee accrues. Please refer to the section on Time Off Accruals for details.**

8. **New Hire Report** - Go to the Details Tab and change the New Hire Report Sent field to Pending.
9. Once you have entered all the necessary data, click the Green Check mark  or F10 to save, and the Yellow Sun to Commit.  These are located in the top right hand corner of your screen.
10. You will now be asked by the system if this employee is a rehire. Click Yes and you will be prompted to review specific employee data that was previously setup for this employee.



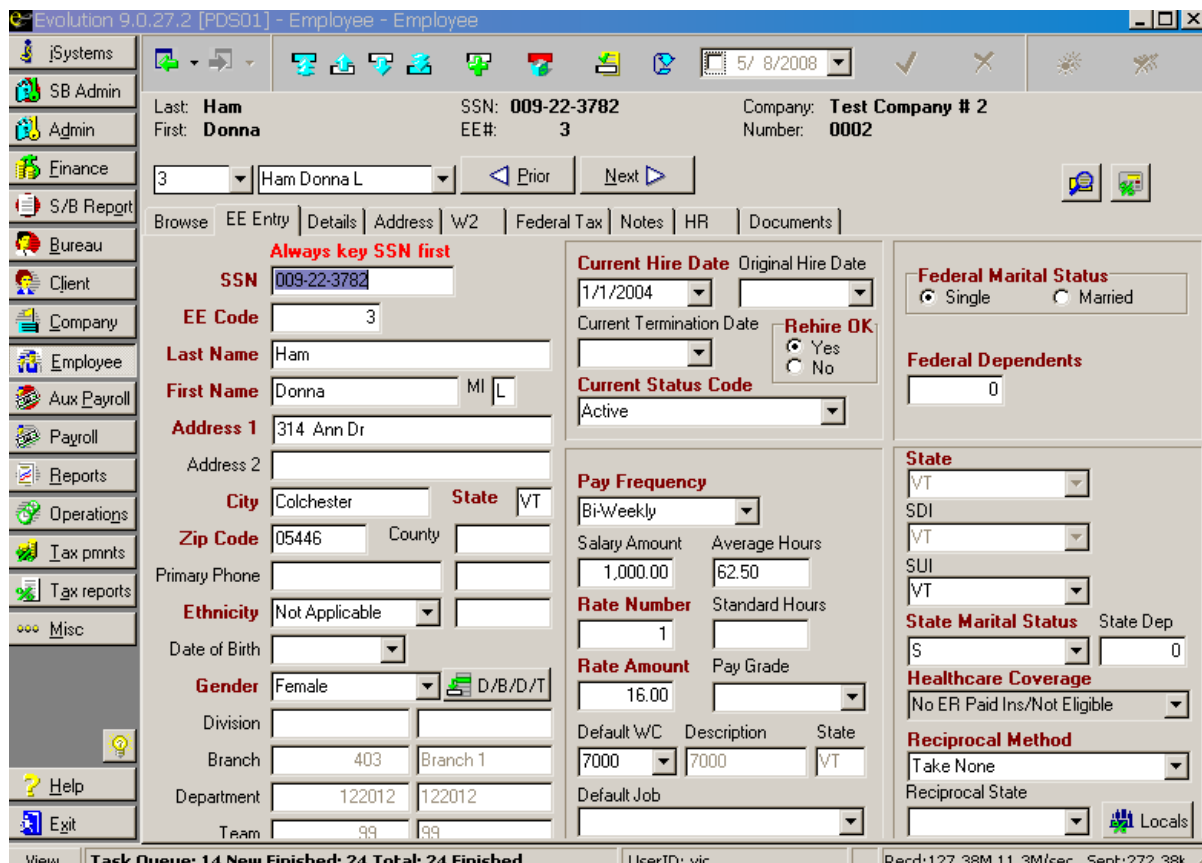




****When reactivating a terminated employee all of their previous settings will also be reactivated. This includes any Scheduled Earnings or Deductions, Direct Deposits, Time Off Accrual, etc. Make sure you completely review the entire employee set up to make sure that the system is current.**

Adding Workers Comp to an Employee

To add Workers Comp to an employee, go to **Employee-Employee**

1. From the Browse tab, select the employee.
2. Click on the **EE Entry** tab.



3. Once you are in the **EE Entry** tab, look toward the bottom of the second column. You will find a field called **Default WC**.
4. From the pull down menu, select the appropriate Workers Comp code for that employee.
5. Once you have entered all the necessary data, click the Green Check mark  or F10 to save, and the Yellow Sun to Commit.  These are located in the top right hand corner of your screen.

**** If an employee has a Workers Comp code that you do not see in the drop down box, please call your Client Service Representative for further assistance.**

Adding Workers Comp to Multiple Rates

****Before utilizing this option please remember that Workers Comp codes that are assigned to specific rates will always override the workers comp code setup on the employee. And these workers comp codes can not be overridden on the payroll check lines. ****

To add Workers Comp to multiple rates go to **Employee-Pay Rate Info**

1. While on the **Browse** tab, choose the employee you want to add the Workers Comp code to.
2. Click on the **Details** Tab at the top of the screen.

Employee Information: Last: **Manson**, First: **Becky**, SSN: **000-00-1111**, EE#: **1**, Company: **Becky's Test Company**, Number: **0010**

Navigation: 1 | Manson Becky | < Prior | Next > | Update Rates or Salaries

Tabs: Browse | **Details**

Salary Amount: 1,000.00 | Standard Hours: | Future Raise Date: | Future Raise Rate: | Auto update rates: ☐ Yes ☒ No

Annualized Salary: | **Pay Frequency**: Weekly | Future Raise Amount: | Future Pay Frequency: Weekly

Average Hours: 0.00 | Calculated Annual Salary: 52,000.00 | Future Raise %: | Workers Comp Wage Limit: |

Rate Nu...	Rate Amount
1	0.00
2	10.00
3	12.00

Division: | Team: | Pay Grade: |

Branch: | Jobs Number: |



Department: | W/C Code: 7231 | Workers Comp: Trucking | State: VT

Primary Rate: ☐ Yes ☒ No

Rate Number: 2

Rate Amount: 10.00

3. On the rate grid in the center of the screen you will see the different rates of pay for that employee.

4. Choose the rate amount you want to attach the Workers Comp code to.
5. Toward the bottom of the screen you will see a field called **W/C Code**.
6. In the pull down menu choose the appropriate Workers Comp Code.
7. Click the Green Check mark  or F10 to save, and the Yellow Sun to Commit.  These are located in the top right hand corner of your screen.
8. To attach another Workers Comp code to a different rate of pay for this employee, repeat steps 3 through 7.

**** If an employee has a Workers Comp code that you don't see in the drop down box, please call your Client Service Representative to set it up for you.**


Scheduled E/Ds

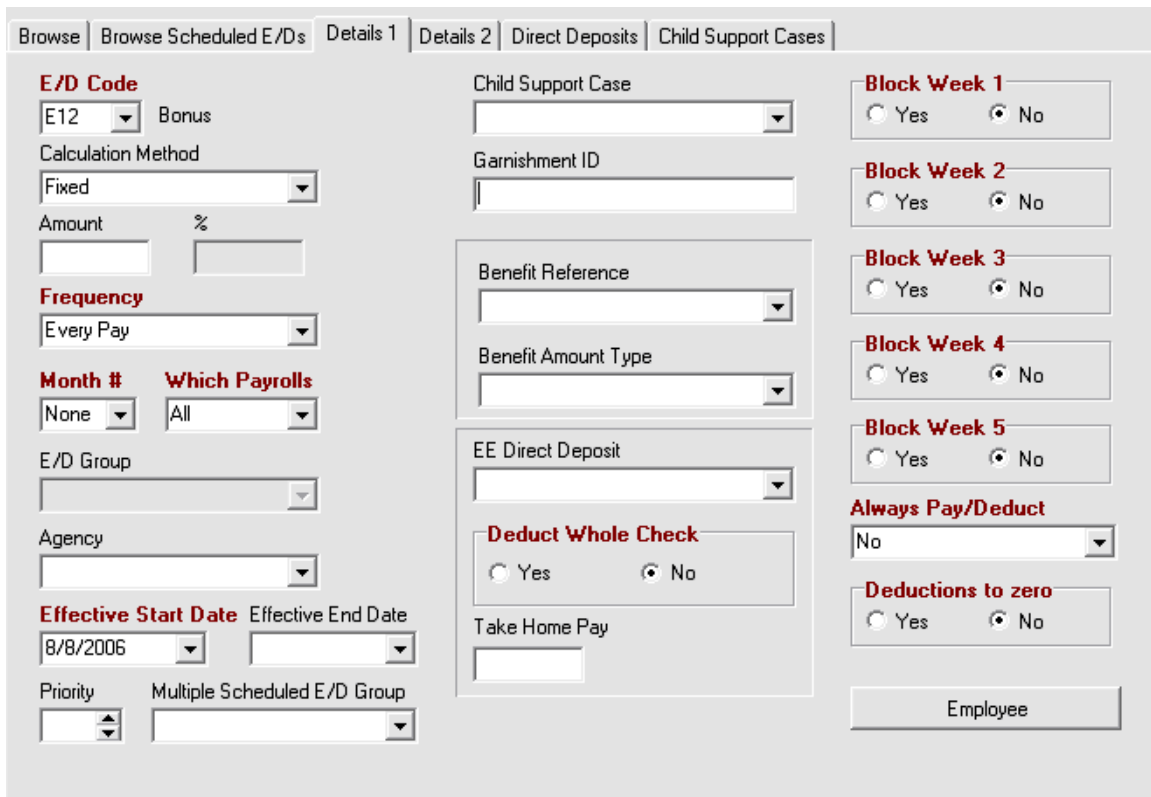
Setting up a new Recurring Earning

To set up a new recurring earning start in **Employee – Scheduled E/Ds**.

1. From either the Browse Tab or by using the employee drop down boxes at the top, select the employee you are working with.
2. Click on the Browse Scheduled E/Ds tab and verify that the code you are using is not already set up on that employee.

****If the code is already set up, go directly to step #11. Do not set up the same code twice as this will result in an error and possible loss of newly added data that has not yet been committed.**

3. Click the  key or Alt-Insert to add the new E/D Code.







The screenshot shows the 'Browse Scheduled E/Ds' form in the PAYDATA system. The form is organized into several sections with tabs at the top: 'Browse', 'Browse Scheduled E/Ds' (selected), 'Details 1', 'Details 2', 'Direct Deposits', and 'Child Support Cases'. The 'Browse Scheduled E/Ds' section contains the following fields and options:

- E/D Code:** A dropdown menu showing 'E12' and a 'Bonus' checkbox.
- Calculation Method:** A dropdown menu showing 'Fixed'.
- Amount:** Two input fields for 'Amount' and '%', with a '%' symbol between them.
- Frequency:** A dropdown menu showing 'Every Pay'.
- Month #:** A dropdown menu showing 'None'.
- Which Payrolls:** A dropdown menu showing 'All'.
- E/D Group:** A dropdown menu.
- Agency:** A dropdown menu.
- Effective Start Date:** A date picker showing '8/8/2006'.
- Effective End Date:** A date picker.
- Priority:** A dropdown menu.
- Multiple Scheduled E/D Group:** A dropdown menu.
- Child Support Case:** A dropdown menu.
- Garnishment ID:** An input field.
- Benefit Reference:** A dropdown menu.
- Benefit Amount Type:** A dropdown menu.
- EE Direct Deposit:** A dropdown menu.
- Deduct Whole Check:** Radio buttons for 'Yes' and 'No'.
- Take Home Pay:** An input field.
- Block Week 1-5:** Radio buttons for 'Yes' and 'No' for each week.
- Always Pay/Deduct:** A dropdown menu showing 'No'.
- Deductions to zero:** Radio buttons for 'Yes' and 'No'.
- Employee:** A button at the bottom right.

4. Under E/D Code, select the earning you would like to setup.
5. Under calculation method select the appropriate method for this code. In most cases, this will be Fixed.
6. Under either Amount or %, depending on the calculation method chosen, enter the amount or % that you would like the employee to receive.
7. Under frequency, select how often you would like the employee to receive this earning. If you are using Quarterly, Semi-Annual, Annual or User Entered, you will need to fill in the Month # and Which Payrolls field so the system is able to pay these earnings in the appropriate payroll(s).
8. Enter a valid Effective Start Date on this code, as it is a required red field. If you are setting this up for a future date, please make sure you change your Effective Start Date to the date you want this earning to start.

****When deciding what date to enter, remember that the system is based on Check Date, not Pay Period Dates. For example if you put the Effective Start Date as 08/22/2007 and the payroll has a pay date of 08/24/2007 with pay period dates from 08/12/2007 to 08/18/2007, the code will be brought into that payroll even though the pay period does not cover that date.**

9. Toward the bottom of the third column, in the Always Pay/Deduct field, you will want to choose either None or Current Payrolls.
 - **None** – By choosing this option, it will only pay the employee this recurring earning if they are also receiving other income.
 - **Current Payrolls** – This option will force the payment to be made to the employee regardless of whether or not they are receiving any additional compensation.
10. Click the green check  or F10 to save and the yellow sun  to commit these changes.
11. If the code is already set up, go directly to the Details 1 tab and review the data on this screen for accuracy. If changes are necessary, click on the field that you want to change and enter in the new data.
12. If the code was used at one point and stopped, you will see that the Effective End Date is filled in with a date. To remove this date, click in the field so that the date is highlighted and click the Delete key on your key board. This will remove the date.
13. Go to the Details 2 tab to verify the data on this screen. Again, if the data needs to be removed, click on the field and click the Delete key on your keyboard.

14. Click the green check  or F10 to save and the yellow sun  to commit these changes.

Setting up a new recurring Deduction

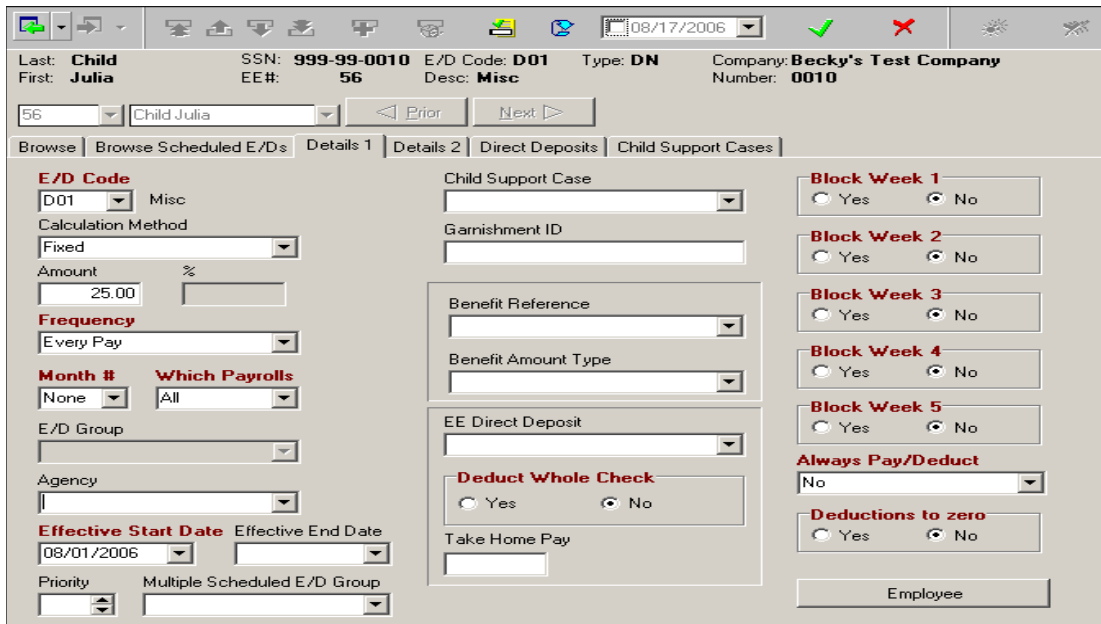
If you are setting up a pension, child support, direct deposit, or insurance deduction using the Benefit Tables, please refer to the sections that deal with those codes specifically.

To set up a new recurring deduction, start in **Employee – Scheduled E/Ds**.

1. From either the Browse Tab or by using the employee drop down boxes at the top, select the employee you are working with.
2. Click on the Browse Scheduled E/Ds tab and verify that the code you are using is not already set up on that employee.

****If the code is already set up, go directly to step #13. Do not set up the same code twice as this will result in an error and possible loss of newly added data that has not yet been committed.**

3. Click the  key or Alt-Insert to add the new E/D Code.



4. Under E/D Code, select the deduction you would like to setup.
5. Under calculation method select the appropriate method for this code.

6. Under either Amount or %, depending on the calculation method chosen, enter the amount or % that you would like to deduct from the employee.
7. The Frequency should default for you, but always make sure you verify that it is correct. If you are using Quarterly, Semi-Annual, Annual or User Entered, you will need to fill in the Month # and Which Payrolls field so the system is able to deduct these earnings in the appropriate payroll(s).

****The two most common frequencies are Every Pay and Every Scheduled Pay. It is important that you understand how the difference between these two options will affect how you create your payrolls.**

- **Every Pay** – This code will pull into every payroll that you create, regardless of whether it is your normally scheduled payroll or a special payroll run.
- **Every Scheduled Pay** – This code will only pull into your normally scheduled payrolls. For example, if you run payroll bi-weekly, it will only pull into the standard 26 payrolls in a year.

8. If you are setting up a code that is a calculation on other earnings and/or deductions, i.e. Pensions, you will most likely need to attach an E/D Group for the code to look at.





****In most cases, these groups will default on the deduction code so you will not be required to pull this in manually. Feel free to contact your Client Service Representative if you are unsure if you need to be using an E/D Group.**

9. In some cases the money you deduct from an employee needs to be paid to a third party organization, i.e. Child Support, Garnishment, Insurance, etc. In the Agency field, select the third party that this money needs to go to. If you do not see an option for the specific third party that you are looking for, contact your Client Service Representative for assistance.
10. Enter a valid Effective Start Date on this code, as it is a required red field. If you are setting this up for a future date, please make sure you change your Effective Start Date to the date you want this earning to start.

****When deciding what date to enter, remember that the system is based on Check Dates, not Pay Period Dates. For example if you put the Effective Start Date as 08/22/2007 and the payroll has a pay date of 08/24/2007 and pay period dates from 08/12/2007 to 08/18/2007, the code will be brought into that payroll even though the pay period does not cover that date.**

11. If you run payroll on a weekly or bi-weekly basis please be aware that there are some months in the year that you will run an extra payroll. This payroll will always occur in the 5th calendar week of a month. If you have done calculations so the

deductions come out only 4 times a month for weekly payrolls or 2 times a month for bi-weekly payrolls, you will need to **mark Block Week 5** as Yes.















12. If the set up is correct, click the green check  or F10 to save and the yellow sun  to commit these changes.
13. If the code is already set up, go directly to the Details 1 tab and review the data on this screen for accuracy. If changes are necessary, click on the field that you want to change and enter in the new data.
14. If the code was used at one point and then stopped, you will see that the Effective End Date is filled in with a date. To remove this date, click in the field so that the date is highlighted and click the Delete key on your keyboard. This will remove the date.
15. Go to the Details 2 tab to verify the data on this screen. Again, if the data needs to be removed, click on the field and click the Delete key on your keyboard.
16. Click the green check  or F10 to save and the yellow sun  to commit these changes.

Stopping a recurring Earning or Deduction

Regardless of whether you need to stop a recurring earning, child support deductions, pension, insurance, direct deposit, or a miscellaneous deduction, the steps are exactly the same.

To stop a recurring deduction, etc., start in **Employee – Scheduled E/Ds**.

1. From either the Browse Tab or by using the employee drop down boxes at the top, select the employee you are working with.
2. Click on the Browse Scheduled E/Ds tab and highlight the code you need to stop.
3. Click on the Details 1 Tab

Last: **Child** SSN: **999-99-0010** E/D Code: **D01** Type: **DN** Company: **Becky's Test Company**
 First: **Julia** EE#: **56** Desc: **Misc** Number: **0010**

56 Child Julia < Prior Next > Remove E/D

Browse Browse Scheduled E/Ds Details 1 Details 2 Direct Deposits Child Support Cases

E/D Code
 D01 Misc
 Calculation Method
 Fixed
 Amount %
 25.00
Frequency
 Every Pay
Month # **Which Payrolls**
 None All
 E/D Group

 Agency

Effective Start Date **Effective End Date**
 08/01/2006 08/15/2006
 Priority Multiple Scheduled E/D Group

Child Support Case

 Garnishment ID

 Benefit Reference

 Benefit Amount Type



 EE Direct Deposit

Deduct Whole Check
 Yes No
 Take Home Pay

Block Week 1
 Yes No
Block Week 2
 Yes No
Block Week 3
 Yes No
Block Week 4
 Yes No
Block Week 5
 Yes No
Always Pay/Deduct
 No
Deductions to zero
 Yes No
 Employee

- At the bottom of the first column you will see the field Effective End Date. Enter the Effective End Date for this code. The system will compare this date to the payroll's period dates to determine when this code needs to stop.

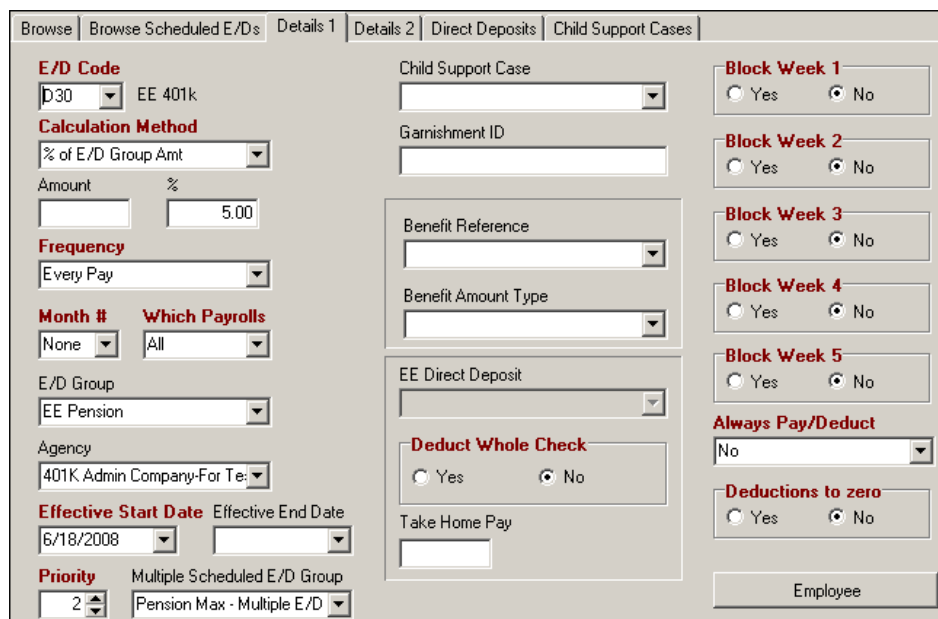
****When deciding what date to enter, remember that the system is based on Check Date, not Pay Period Dates. For example if you put the Effective End Date as 08/22/2007 and the payroll has a pay date of 08/24/2007 with pay period dates from 08/12/2007 to 08/18/2007, the code will be brought into that payroll even though the pay period does not cover that date.**

- Click the green check  or F10 to save and the yellow sun  to commit these changes.

Setting up a Pension E/D on the employee

The Evolution system has been programmed to know what the Federal Limits are for the various Pension Plan types. If you have an employee who is electing to contribute to the Catch Up you must set up the additional code. Please review the procedure on setting up pension catch up codes on an employee if they have elected to defer an additional amounts.

1. Go to Employee - Scheduled E/Ds and from the Browse Tab or the employee drop down box at the top select the employee you would like to work with.
2. Click on the browse Scheduled E/Ds tab.
3. Click the green plus or use your ALT & INSERT keys to add a new deduction code.
4. Under the E/D Code, select the code for the employee pension. Depending on the type of Pension Plan you have this code may be called EE 401k, EE 403b etc.
5. Pull in the employee deduction. All of the defaults will pull in automatically based on your company's standardized setup.
6. If the employee is contributing based on a percentage, your Calculation Method should most likely be % of E/D Group Amount.
7. Enter the applicable percent in the % field.



8. If the employee is contributing a fixed amount, change the Calculation Method to fixed. Enter the amount in the "Amount" field.

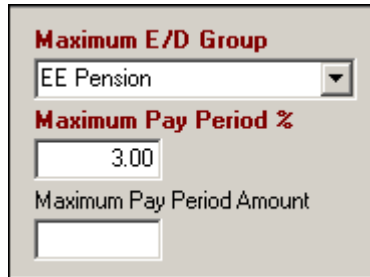
9. If your employee is contribution based on a fixed amount and the company is matching the contribution you also need to enter the employer's matching percent in the "%" field. (If the match is 100% of 3% put a 3 in the % space of the employee code.) This must be done or you will get an error when creating the payroll.

10. If the employee will also be contributing to a Catch Up code, you must go to the Multiple Scheduled E/D Group field in the bottom left portion of the screen and pull in the Pension Max – Multiple E/D Group. If you do not see any Pension Group with these names, please call your Client Service Representative so that one may be setup for you. Make sure that the Priority is set at 2.
11. Go to the Details 2 screen and pull in the Employee Pension Group in the 'Max E/D Group' field and enter the % of the employee's deferral in the 'Maximum Per Period %' fields.
12. For fixed amount contributions the 'Maximum Pay Period Amount' needs to be populated. The maximum pay period amount is equal to the employee's deferral amount. For fixed contributions, the 'Maximum E/D Group' and 'Maximum Pay Period %' will be blank.

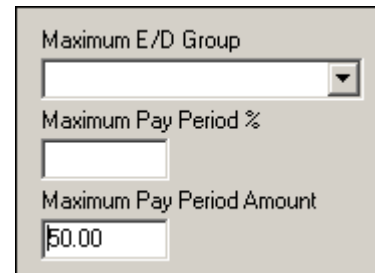
13. Save your changes (F10).
14. If the employee is also contributing to the Catch Up, go to Employee - Scheduled E/Ds. Make sure you are on the correct employee.
15. Click on the browse Scheduled E/Ds tab.
16. Click the green plus or use your ALT & INSERT keys to add a new deduction code.
17. Select the Catch Up code that is scheduled to start when the pension code reaches the designated amount. Be careful of the date that you enter for an Effective Start Date. Once the Threshold has been met, Evolution will look at the Scheduled E/D setup, including the Effective Start Date to determine when to start the Catch Up. Please note that the Employee date of birth needs to be populated.
18. Enter in the Amount or % that the employee is contributing, making sure the Calculation method is either "Fixed" if they are contributing a fixed amount or "% of ED Group Amt" if they are contributing a percentage.
19. If the employee is contributing a fixed amount and the company is matching that contribution, you also need to enter the employer's matching percent in the "%" field. (If the match is 100% of 3% put a 3 in the % space of the employee code.) This must be done or you will get an error when creating the payroll. If the employee is contributing a fixed dollar amount, and the employer does not match the Catch Up contributions, you must enter a 0 in the % field on the EE Catch Up Code.
20. In the Multiple Scheduled E/D Group field at the bottom left portion of the screen pull in the Pension Max – Multiple E/D Group. Make sure that the priority is set at 3.

Browse	Browse Scheduled E/Ds	Details 1	Details 2	Direct Deposits	Child Support Cases
E/D Code D31 EE 401k Catch up		Child Support Case <input type="text"/>		Block Week 1 <input type="radio"/> Yes <input checked="" type="radio"/> No	
Calculation Method % of E/D Group Amt		Garnishment ID <input type="text"/>		Block Week 2 <input type="radio"/> Yes <input checked="" type="radio"/> No	
Amount % <input type="text"/> 5.00		Benefit Reference <input type="text"/>		Block Week 3 <input type="radio"/> Yes <input checked="" type="radio"/> No	
Frequency Every Pay		Benefit Amount Type <input type="text"/>		Block Week 4 <input type="radio"/> Yes <input checked="" type="radio"/> No	
Month # Which Payrolls None All		EE Direct Deposit <input type="text"/>		Block Week 5 <input type="radio"/> Yes <input checked="" type="radio"/> No	
E/D Group EE Pension		Deduct Whole Check <input type="radio"/> Yes <input checked="" type="radio"/> No		Always Pay/Deduct No	
Agency 401K Admin Company-For Te		Take Home Pay <input type="text"/>		Deductions to zero <input type="radio"/> Yes <input checked="" type="radio"/> No	
Effective Start Date Effective End Date 1/1/2012		<input type="text"/>			
Priority 3		Multiple Scheduled E/D Group Pension Max - Multiple E/D			
<input type="button" value="Employee"/>					

21. If the contribution is based on an E/D Group %, on the Details 2 screen the Employee Pension Group should be pulled in under the 'Maximum E/D Group' and the employee pension contribution % should be pulled in under the 'Maximum Pay Period %' fields.
22. For fixed amount contributions the 'Maximum Pay Period Amount' needs to be populated. The maximum pay period amount is equal to the employee's deferral amount. For fixed contributions, the 'Maximum E/D Group' or 'Maximum Pay Period %' will be blank.



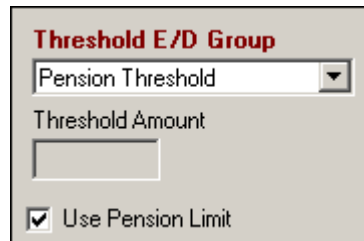
Maximum E/D Group
EE Pension
Maximum Pay Period %
3.00
Maximum Pay Period Amount



Maximum E/D Group
Maximum Pay Period %
Maximum Pay Period Amount
50.00

23. In the Threshold E/D Group field, enter the E/D Group 'Pension Threshold'. Leave the Threshold Amount field blank and check the 'Use Pension Limit'.

** The Threshold E/D Group is ONLY pulled in on the Employees Pension Catch Up code, never the regular Employee Pension Code.



Threshold E/D Group
Pension Threshold
Threshold Amount
☒ Use Pension Limit

24. Save your changes (F10)
25. Go to Employee-Employee and verify that the employee has a Date of Birth loaded. The system will verify the age of the employee when doing the calculation.

Employer Code-

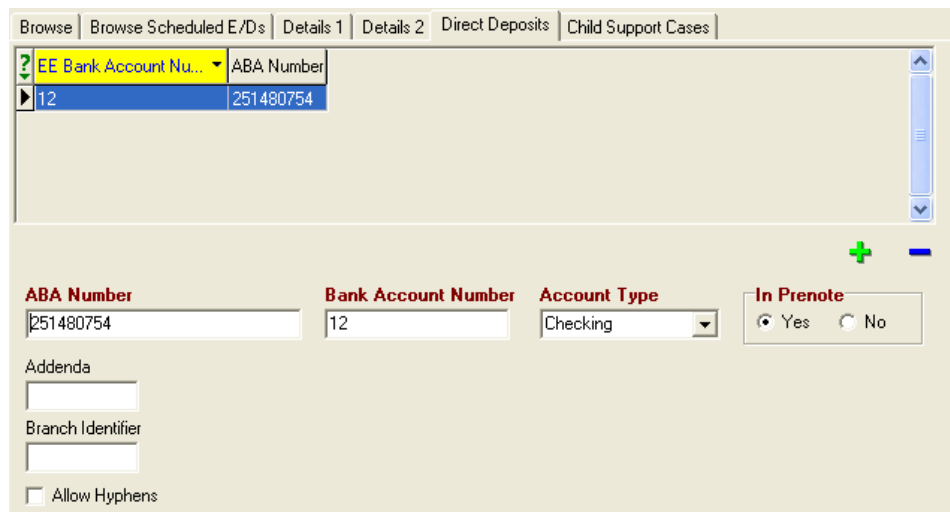
1. Once you add the employee pension code, the system will ask you if you want to set up the match. Say yes.
2. It will ask you for an effective date. Enter in a date or allow it to default to today.

3. The system will save automatically.
4. The Calculation Method should default to Pension Match, the E/D Group should default to the ER Pension Group and the Priority should be set at 4.
5. You do not need to enter any information in the Amount or % fields, as the employer matching information is stored at the Client E/D Code level. You also do not need to enter anything in the Multiple Scheduled E/D Group field.
6. No information is needed on the Details 2 tab.

Browse	Browse Scheduled E/Ds	Details 1	Details 2	Direct Deposits	Child Support Cases
E/D Code D32 ER 401K					
Calculation Method Pension Match					
Amount % <input type="text"/> <input type="text"/>					
Frequency Every Pay					
Month # Which Payrolls None All					
E/D Group ER Pension					
Agency 401K Admin Company-For Te					
Effective Start Date Effective End Date 6/18/2008 <input type="text"/>					
Priority Multiple Scheduled E/D Group 4 <input type="text"/>					
Child Support Case <input type="text"/>			Block Week 1 <input type="radio"/> Yes <input checked="" type="radio"/> No		
Garnishment ID <input type="text"/>			Block Week 2 <input type="radio"/> Yes <input checked="" type="radio"/> No		
Benefit Reference <input type="text"/>			Block Week 3 <input type="radio"/> Yes <input checked="" type="radio"/> No		
Benefit Amount Type <input type="text"/>			Block Week 4 <input type="radio"/> Yes <input checked="" type="radio"/> No		
EE Direct Deposit <input type="text"/>			Block Week 5 <input type="radio"/> Yes <input checked="" type="radio"/> No		
Deduct Whole Check <input type="radio"/> Yes <input checked="" type="radio"/> No			Always Pay/Deduct No		
Take Home Pay <input type="text"/>			Deductions to zero <input type="radio"/> Yes <input checked="" type="radio"/> No		
Employee					


Direct Deposits

Setting up a new Direct Deposit



This is a two step process, if both steps are not done; the direct deposit will not work.

STEP 1

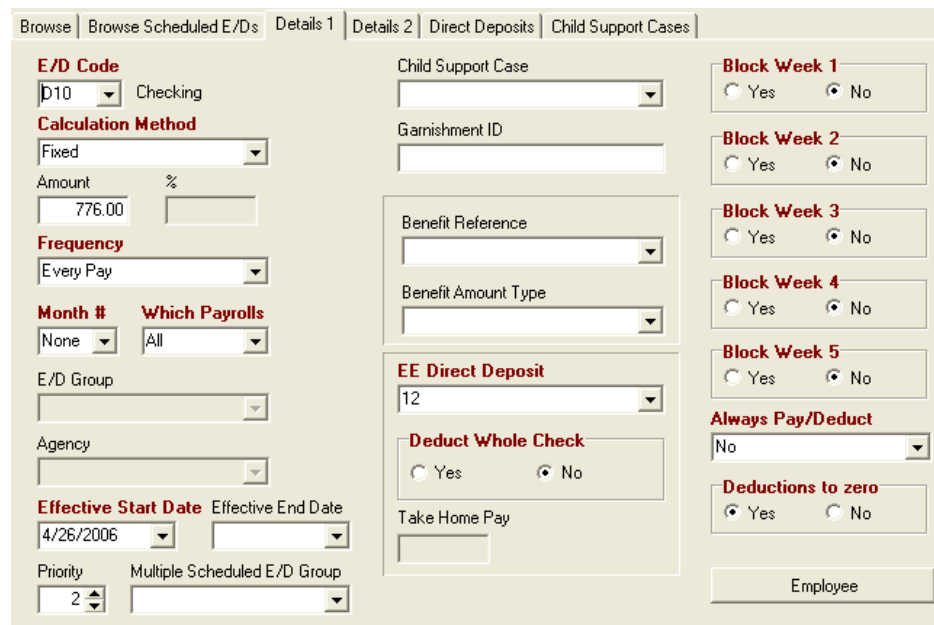
1. Go to Employee – Scheduled E/Ds and Click on the Direct Deposit tab.
2. Click the green  key or alt-insert to add a new direct deposit.
3. **ABA Number** - Load the ABA Number. The system will not let you load an incorrect ABA number. (The ABA number is always 9 digits long and should be pulled from a voided check as deposit slips do not always reflect the correct numbers.
4. **Bank Account Number** - Load the bank account number
5. **Account Type** - Choose checking or savings for the Account Type
6. **Prenote** - Choose yes (this will automatically change to no after the prenote has taken place).

**** PayData highly encourages that remote users allow the pre-noting to occur. The ONLY times when you should say Pre-note NO is if you are setting up a Direct Deposit account that will be used with an HSA. In this case if you say Yes, the deduction will be taken in payroll, but the money will not be sent to the HSA account while it is pre-noting.****


7. Click the green  or F10 to save.

Note: Remember when pre-noting in payroll, it will take between 1-2 weeks before direct deposits take effect. Weekly Payroll clients could wait 2

STEP 2




8. Click on the Details 1 tab.


9. Click on the green  key or Alt-Insert to add the deduction

10. Choose the correct code. Example: If there are 2 checking accounts and the codes are D01-Checking 1 and D02-Checking 2, each checking account needs to have its own Deduction code.


11. If the Direct Deposit is for the net check- calculation method should be NONE

- o Go to EE direct deposit and pull in the account number.
- o Choose yes for Deduct Whole Check.
- o Click the Green  or F10 to save.

12. If the Direct Deposit is for the net check less a specific amount of take home pay - the calculation method should be NONE.


- Go to EE Direct Deposit and pull in the account number.
- Choose no for Deduct Whole Check .
- Enter the amount that the employee wants as a live check in the Take Home Pay Field.
- Click the Green  or F10 to save.

13. If the Direct Deposit is for a fixed amount- calculation method should be fixed

- Put in the amount that should be deducted in the amount field.
- Go to EE direct Deposit and pull in the account number.
- Choose no for Deduct Whole Check .
- Click the Green  or F10 to save.

Stopping a Direct Deposit

1. Go to Employee – Scheduled E/Ds. The Browse Scheduled E/Ds tab lists all of the scheduled Earning and Deductions that are setup on the employee.
2. Highlight the Direct Deposit that needs to be stopped on the **Browse Scheduled E/Ds tab**.

Browse	Browse Scheduled E/Ds	Details 1	Details 2	Direct Deposits	Child Support Cases			
 E/D Code ▾	Description	Calculation Type	Amount	Percentage	Frequency	Eff Start Date	Eff End Date	
	D01	2% Shareh...	F	35.00		D	7/7/2005	1/1/2006
	D02	Child Supp...			50.00	D	7/19/2004	
	D03	S125 Insur...	F	125.00		P	7/7/2004	9/24/2004
	D08	S125 Flex	F	100.00		D	7/19/2005	1/1/2006
▶	D10	Checking	F	776.00		D	4/26/2006	
	D12	United Way	P		0.90	D	7/7/2005	1/1/2006
	D16	Standard ...	N		100.00	U	5/28/2005	1/1/2006
	D18	Garnishment	N		100.00	D	5/24/2004	
	D19	Levy	D		100.00	D	4/27/2006	
	D20	EE401k	W			D	7/19/2004	6/30/2005
	D21	ER401K	S			D	7/19/2004	6/30/2005

3. Go to the **Details 1 tab**

Browse | Browse Scheduled E/Ds | Details 1 | Details 2 | Direct Deposits | Child Support Cases

E/D Code
D10 Checking

Calculation Method
Fixed
Amount 776.00 %
Frequency
Every Pay

Month # None **Which Payrolls** All

E/D Group
Agency

Effective Start Date 4/26/2006 **Effective End Date**
Priority 2 Multiple Scheduled E/D Group

Child Support Case
Garnishment ID
Benefit Reference
Benefit Amount Type

EE Direct Deposit
12
Deduct Whole Check
Yes No
Take Home Pay

Block Week 1
Yes No
Block Week 2
Yes No
Block Week 3
Yes No
Block Week 4
Yes No
Block Week 5
Yes No
Always Pay/Deduct
No
Deductions to zero
Yes No

Employee

- Put the date that it should be stopped in the **Effective End Date** in the bottom left hand corner of the screen.

Note: Never delete a code. You must always use an effective end date

To Change a Direct Deposit

Use this process if you have an employee that is stopping an existing bank account and adding a new bank account.


Browse | Browse Scheduled E/Ds | Details 1 | Details 2 | Direct Deposits | Child Support Cases

EE Bank Account Nu... ABA Number
12 251480754

ABA Number 251480754 **Bank Account Number** 12 **Account Type** Checking **In Prenote** Yes No

Addenda
Branch Identifier
Allow Hyphens

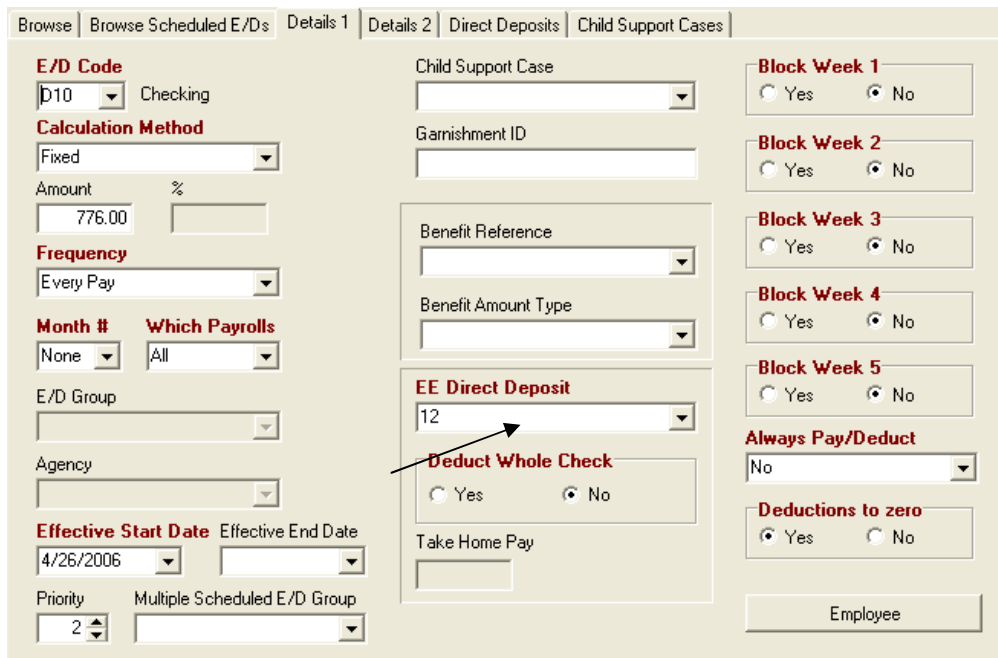
STEP 1


1. Go to Employee – Scheduled E/Ds and Click on the Direct Deposit tab. Click the Green  key or alt insert to add a new Direct Deposit.
2. **ABA Number** - Load the ABA Number.
3. **Bank Account Number** - Load the bank account number
4. **Account Type** - Choose checking or savings
5. **Prenote** - Choose yes

**** PayData highly encourages that remote users allow the pre-noting to occur. The ONLY times when you should say Pre-note NO is if you are setting up a Direct Deposit account that will be used with an HSA. In this case if you say Yes, the deduction will be taken in payroll, but the money will not be sent to the HSA account while it is pre-noting.****

6. Click Green  or F10 to save.

STEP 2



7. On the **Browse Scheduled E/Ds** tab. Choose the Direct Deposit code that you need to change.
8. On the **Details 1** tab. Choose the new bank account number from the **EE Direct Deposit** list.
9. Click the green  or F10 to save.

Setting up an H.S.A Scheduled E/D with Direct Deposit

If you are setting up a pension, child support, direct deposit, or insurance deduction using the Benefit Tables, please refer to the sections that deal with those codes specifically.

****Important – Please make sure that the H.S.A code that you are using has ‘DD’ or ‘Direct Deposit’ in the description. If it does not, then the code is not setup to send the money electronically. Call your Client Service Representative to confirm if you are not sure.**

You must also make sure to have the H.S.A Direct Deposit E/D setup on the employee as a scheduled E/D prior to pulling into check lines. The system will look at the timestamp of the payroll to determine whether or not to send the money via Direct Deposit. If you pull the E/D into the payroll check lines first, and then add as a scheduled E/D second, the system will see that the authorization to send via Deposit did not exist when the payroll was initially created.

If this happens, the money will be deducted from the employee’s check, but will NOT be credited to the employee’s H.S.A bank account. **


To set up a new H.S.A. recurring deduction with Direct Deposit, start in Employee – Scheduled E/Ds.

17. From either the Browse Tab or by using the employee drop down boxes at the top, select the employee you need to work with.
18. Click on the Browse Scheduled E/Ds tab and verify that the code you are using is not already set up on that employee.

****If the code is already set up, go directly to step #15. Do not set up the same code twice as this will result in an error and possible loss of newly added data that has not yet been committed**



****You will need to set up the direct deposit account number prior to creating the scheduled E/D.****

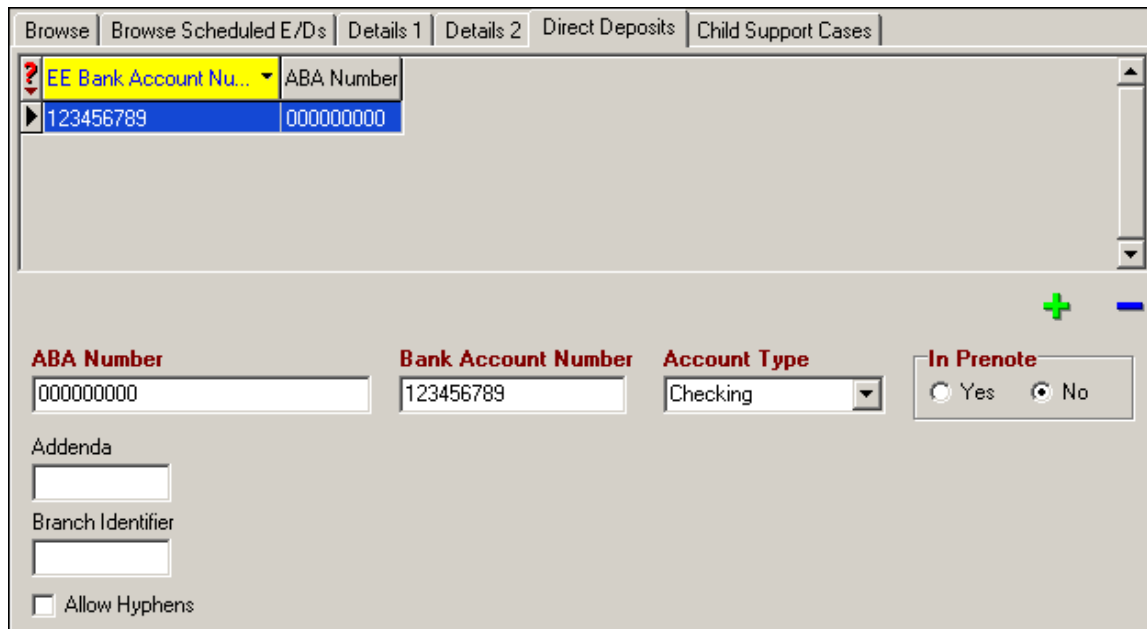
19. Click on the Direct Deposit tab.

20. Click the  key that is on the lower right-hand side of the screen to add the new account number.

Enter in the ABA (Bank Routing) Number, Bank Account Number and Account type. Select 'No' for In Prenote. This is contrary to normal direct deposit set ups

**** While PayData highly encourages remote users to allow pre-noting to occur for normal direct deposits, this is NOT the case for a H.S.A direct deposit. Direct deposit accounts that will be used for a H.S.A should always be set-up with the Pre-Note flag set to NO. If the flag is set to Yes, the amount will be deducted from the employee's check, but the money will not be credited to the employee's H.S. A. bank account as it is in pre-noting status.****

21. Click the green check  or F10 to save and the yellow sun  to commit theses changes.

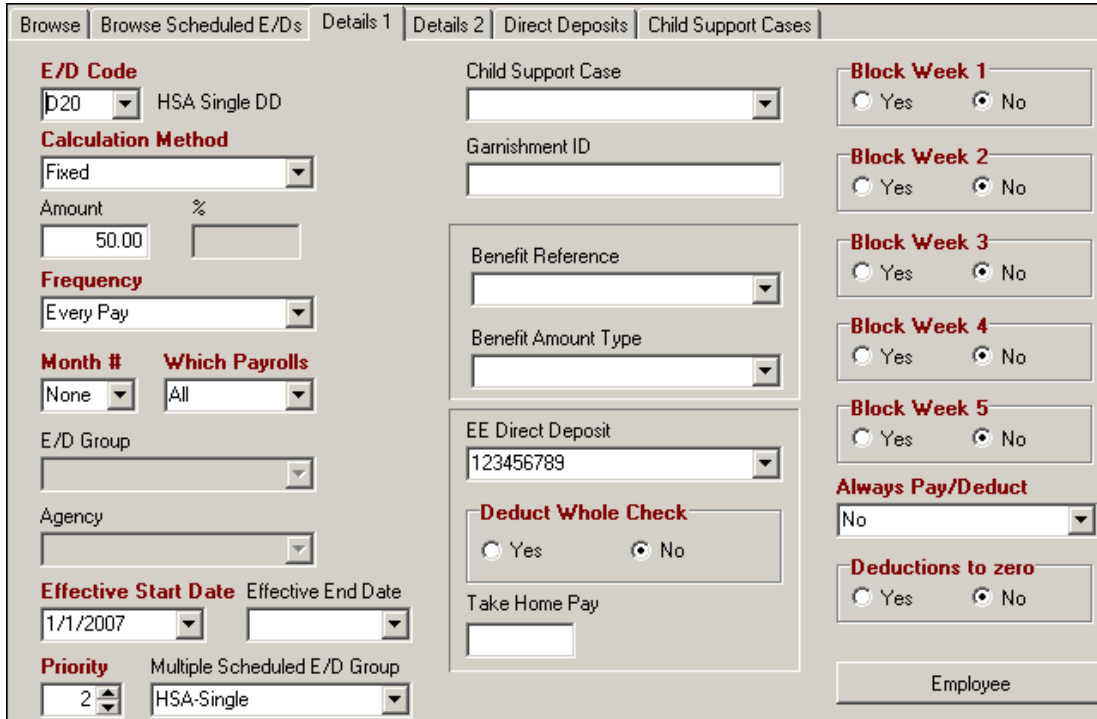


Bank Account Number	ABA Number
123456789	000000000

ABA Number: 000000000 Bank Account Number: 123456789 Account Type: Checking In Prenote: ☐ Yes ☒ No

Addenda:
Branch Identifier:
☐ Allow Hyphens

22. Click the  key at the top of the screen or click Alt-Insert to add the new E/D Code.



23. Under E/D Code, select the deduction code you would like to setup.
24. Under calculation method select the appropriate method for this code, in most cases this will be 'Fixed'.
25. Under either Amount or %, depending on the calculation method chosen, enter the amount or % that you would like to deduct from the employee. If selecting %, you may need to pull in the appropriate E/D Group.
26. The Frequency should default for you, but always make sure you verify that it is correct. If you are using Quarterly, Semi-Annual, Annual or User Entered, you will need to fill in the 'Month #' and 'Which Payrolls' field so the system is able to deduct these earnings in the appropriate payroll(s).

The two most common frequencies are Every Pay and Every Scheduled Pay. It is important that you understand how the difference between these two options will affect how you create your payrolls.



- **Every Pay** – This code will pull into every payroll that you create, regardless of whether it is your normally scheduled payroll or a special payroll run.
- **Every Scheduled Pay** – This code will only pull into your normally scheduled payrolls. For example, if you run payroll bi-weekly, it will only pull into the standard 26 payrolls in a year.

27. Enter a valid Effective Start Date on this code, as it is a required red field. If you are setting this up for a future date, please make sure you change your Effective Start Date to the date you want this earning to start.

****When deciding what date to enter, remember that the system is based on Check Date, not Pay Period Dates. For example if you put the Effective Start Date as 08/22/2007 and the payroll has a pay date of 08/24/2007 with pay period dates from 08/12/2007 to 08/18/2007, the code will be brought into that payroll even though the pay period does not cover that date.**

28. Go to the EE Direct Deposit field and bring in the bank account to deposit this money into.



29. If you run payroll on a weekly or bi-weekly basis please be aware that there are some months in the year that you will run an extra payroll. This payroll will always occur in the 5th calendar week of a month. If you have done calculations so the deductions come out only 4 times a month for weekly payrolls or 2 times a month for bi-weekly payrolls, you will need to **mark Block Week 5** as Yes.

30. If the set up is correct, click the green check  or F10 to save and the yellow sun  to commit these changes.

31. If the code is already set up, go directly to the Details 1 tab and review the data on this screen for accuracy. If changes are necessary, click on the field that you want to change and enter in the new data.

32. If the code was used at one point and then stopped, you will see that the Effective End Date is filled in with a date. To remove this date, click in the field so that the date is highlighted and click the Delete key on your keyboard. This will remove the date.

33. Go to the Details 2 tab to verify the data on this screen. Again, if the data needs to be removed, click on the field and click the Delete key on your keyboard.

34. Click the green check  or F10 to save and the yellow sun  to commit these changes.

****If you are setting up both Employee and Employer contributions follow steps 6 through 14 as shown above, making sure to select the employer code when going through the steps a second time.**

****In some cases the employee and employer codes need to be linked together so the total of both codes equals one number****

35. On the Details 1 tab, at the bottom of the first column, put in a priority of 2.

36. Under the 'Multiple Scheduled E/D Group' pull in the H.S.A group.

37. Under Details 2, in the Annual Limit field enter in the annual combined limit of both the employee and employer contributions.

Browse | Browse Scheduled E/Ds | Details 1 | Details 2 | Direct Deposits | Child Support Cases

Target Action
None

Number of Targets Remaining
[]

Target Amount
[]

Balance Taken
[]

Maximum Average Amount E/D Group
[]

Maximum Average Hours E/D Group
[]

Maximum Average Hourly Wage Rate
[]

Minimum Wage Multiplier
[]

Maximum Garnish %
[]

Minimum E/D Group
[]

Minimum Pay Period %
[]

Minimum Pay Period Amount
[]

Annual Maximum Amount
2,500.00

Client Annual Maximum Amount
[]

Maximum E/D Group
[]



Maximum Pay Period %
[]

Maximum Pay Period Amount
[]

Threshold E/D Group
[]

Threshold Amount
[]


☐ Use Pension Limit

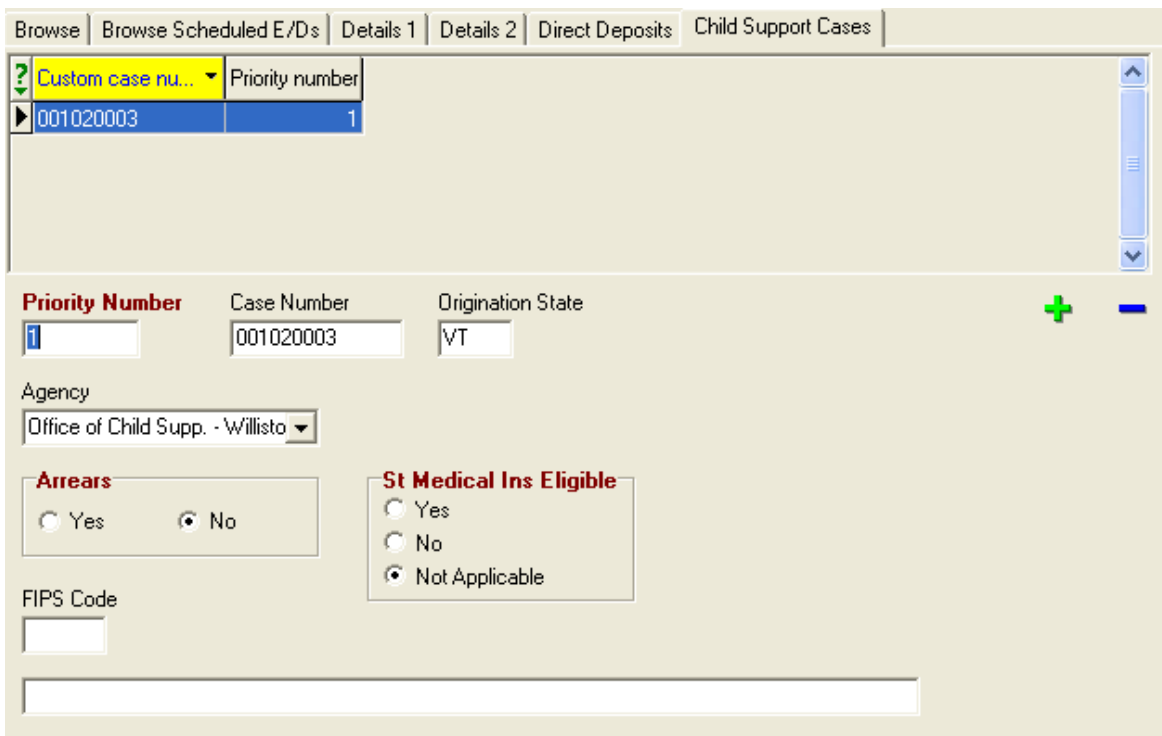
38. Click the green check  or F10 to save and the yellow sun  to commit these changes.

39. Repeat steps 19-22 on the employer code as well.

Setting up a child support

Child Support Case is located under the **Employee- Scheduled E/Ds**



1. Click on the Child Support Tab
2. Click the  key (located to the right of the custom case and origination state fields)



The screenshot shows the 'Child Support Cases' tab selected in the top navigation bar. Below the navigation bar, there is a table with two columns: 'Custom case nu...' and 'Priority number'. The first row contains the values '001020003' and '1'. Below the table, there are several input fields and checkboxes:

- Priority Number:** A text box containing the value '1'.
- Case Number:** A text box containing the value '001020003'.
- Origination State:** A text box containing the value 'VT'.
- Agency:** A dropdown menu with the selected value 'Office of Child Supp. - Willisto'.
- Arrears:** Two radio buttons, 'Yes' and 'No', with 'No' selected.
- St Medical Ins Eligible:** Three radio buttons, 'Yes', 'No', and 'Not Applicable', with 'Not Applicable' selected.
- FIPS Code:** A text box.

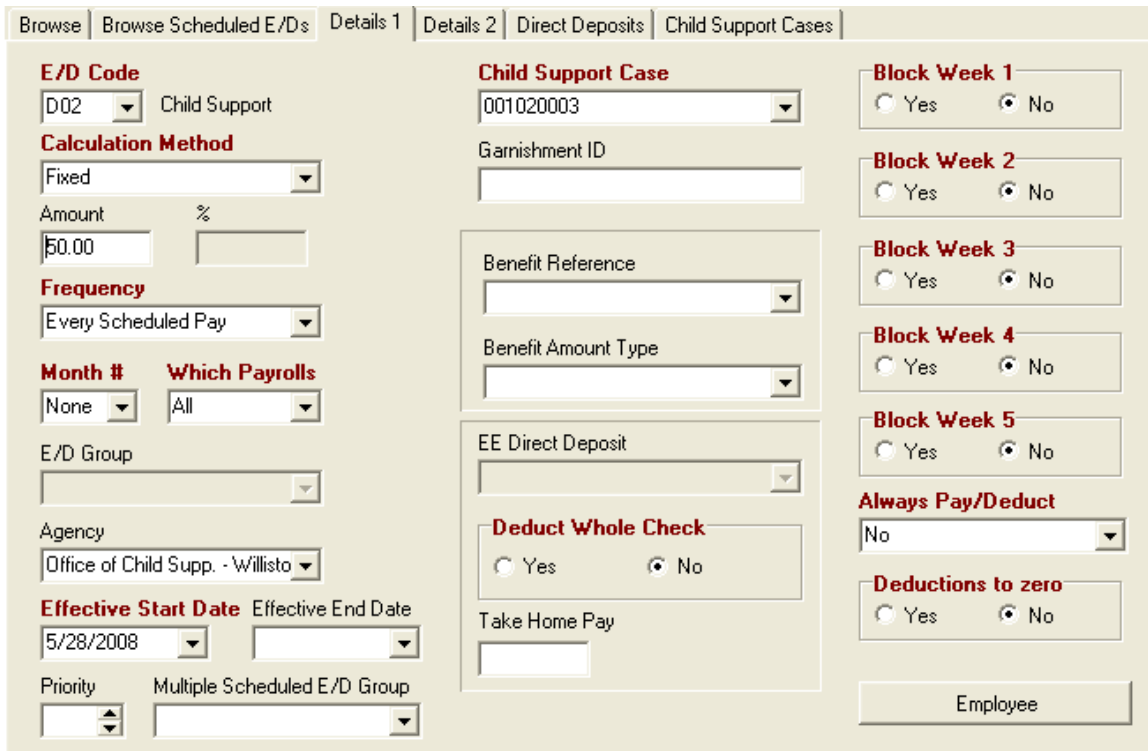
3. **Priority Number** - Enter the appropriate number, to assign priority order if there is more than 1 child support order. Use number 1 for only one child support order.
4. **Case Number** - Enter the case number assigned to the child support order. If there is not one indicated you can use the employees social security number, which is located at the top of the screen
5. **Agency** - If the company has agency checks, you can pull in the appropriate one. This is an information only field. You must pull the Agency in on the scheduled E/D to force the check to be created.


6. **Arrears** - You can indicate if the order is in arrears. Info only field.
7. Once the set up is correct, click the green  or F10 to save and the yellow sun  to commit the changes.

Under Employee – Scheduled E/Ds

The Browse Scheduled E/Ds tab lists all of the scheduled earning and deductions that are set up on the employee.

1. Go to the **Details 1 Tab**





2. Click the  (at the top of evolution) or Alt-Insert to add the deduction
3. Choose the correct E/D code.
4. If Child Support is for a fixed amount-
 - a. Calculation method should be fixed
 - b. Put in the amount that should be deducted in the amount field.
 - c. Pull in the Child Support Case number.

5. If the Child Support is for a %. The calculation method should be % of Disposable Earnings. If you do not have a Disposable Earnings Group please contact your Client Service Representative for assistance.
 - a. The % should equal the percentage given to you on the child support request from the specific state.
 - b. Pull in the child support case.
6. Click on the **Details 2 tab**.
7. Under the Maximum E/D Group pull in the Disposable Earnings Group and enter in either the Maximum Pay Period % or the Maximum Pay Period Amount based on the state child support order.

The screenshot shows the 'Details 2' tab of a software interface for 'Child Support Cases'. The interface is organized into several sections with input fields and dropdown menus:

- Target Action:** A dropdown menu currently set to 'None'.
- Number of Targets Remaining:** An input field.
- Target Amount:** An input field.
- Balance Taken:** An input field.
- Maximum Average Amount E/D Group:** A dropdown menu.
- Maximum Average Hours E/D Group:** A dropdown menu.
- Maximum Average Hourly Wage Rate:** An input field.
- Minimum Wage Multiplier:** An input field.
- Maximum Garnish %:** An input field.
- Minimum E/D Group:** A dropdown menu.
- Minimum Pay Period %:** An input field.
- Minimum Pay Period Amount:** An input field.
- Annual Maximum Amount:** An input field.
- Client Annual Maximum Amount:** An input field.
- Maximum E/D Group:** A dropdown menu set to 'Disposable Earnings'.
- Maximum Pay Period %:** An input field set to '50.00'.
- Maximum Pay Period Amount:** An input field.
- Threshold E/D Group:** A dropdown menu.
- Threshold Amount:** An input field.
- Use Pension Limit:** A checkbox that is currently unchecked.

8. Click the green  or F10 to save and the yellow sun  to commit the changes.

10. If the employee has more than one Child Support Order, repeat the above steps for each of the Child Support EDs. On each Child Support code make sure to pull in the 'Child Support' ED Group in the 'Multiple Scheduled ED Group' field. This will tell the system that it needs to look at all Child Support codes when it calculates the Maximums amounts per period. If you do not have a Child Support Group please contact your Client Service Representative for assistance.

Browse		Browse Scheduled E/Ds		Details 1		Details 2		Direct Deposits		Child Support Cases	
E/D Code D02 Child Support				Child Support Case 001020003				Block Week 1 <input type="radio"/> Yes <input checked="" type="radio"/> No			
Calculation Method Fixed				Garnishment ID 				Block Week 2 <input type="radio"/> Yes <input checked="" type="radio"/> No			
Amount 50.00		%		Benefit Reference 				Block Week 3 <input type="radio"/> Yes <input checked="" type="radio"/> No			
Frequency Every Scheduled Pay				Benefit Amount Type 				Block Week 4 <input type="radio"/> Yes <input checked="" type="radio"/> No			
Month # None		Which Payrolls All		EE Direct Deposit 				Block Week 5 <input type="radio"/> Yes <input checked="" type="radio"/> No			
E/D Group 				Deduct Whole Check <input type="radio"/> Yes <input checked="" type="radio"/> No				Always Pay/Deduct No			
Agency Office of Child Supp. - Willisto				Take Home Pay 				Deductions to zero <input type="radio"/> Yes <input checked="" type="radio"/> No			
Effective Start Date 5/28/2008		Effective End Date 		Employee							
Priority 1		Multiple Scheduled E/D Group Child Support									

**** Do NOT setup the same ED Code more than once on an employees or errors could occur. If you need more Child Support E/Ds set up, please contact your Client Service Representative. ****

Setting up Group Term Life

There are two ways to post the taxable amount of Group Term Life in the Evolution system.

1. Have the system calculate and tax the employee on a scheduled basis, such as with every payroll, monthly, or quarterly.
2. Do not have the system calculate the taxable amount to the employee and instead just post it at the end of the year as a one time entry within a live payroll.

To have the system calculate the taxable amount for Group Term Life you will need to start in **Employee – Employee**.

1. Once on the Browse Tab, select the employee with the GTL benefit.
2. Go to the EE Entry Tab and enter the employee's Date of Birth, which is located towards the bottom of the first column.

Date of Birth	03/24/1914	▼
---------------	------------	---

3. Go to the Details Tab and enter either the Group Term Policy Amount or the GTL Hours and GTL Rate.

Group Term Policy Amount	
75,000.00	
GTL Hours	GTL Rate


Group Term Policy Amount	
GTL Hours	GTL Rate
2080	2.0

****If you choose Group Term Policy Amount, you will need to enter the total amount of the policy. The system will then determine the taxable amount (amount over \$50,000) to calculate the taxable benefit.**

****If you choose the GTL Hours and GTL Rate, the system will then look at the employee's salary or rate to calculate the policy amount. In the GTL Hours field, load the number of hours that the employee will work in one year. In the GTL Rate field, load the rate from the IRS published information deduction chart. For example, if you have an hourly person making \$15.00 per hour, the system looks at the GTL hours and multiplies this by their rate of pay. It then takes that number and multiplies it by the GTL Rate. This is now what the system uses for the Group Term Policy Amount.**

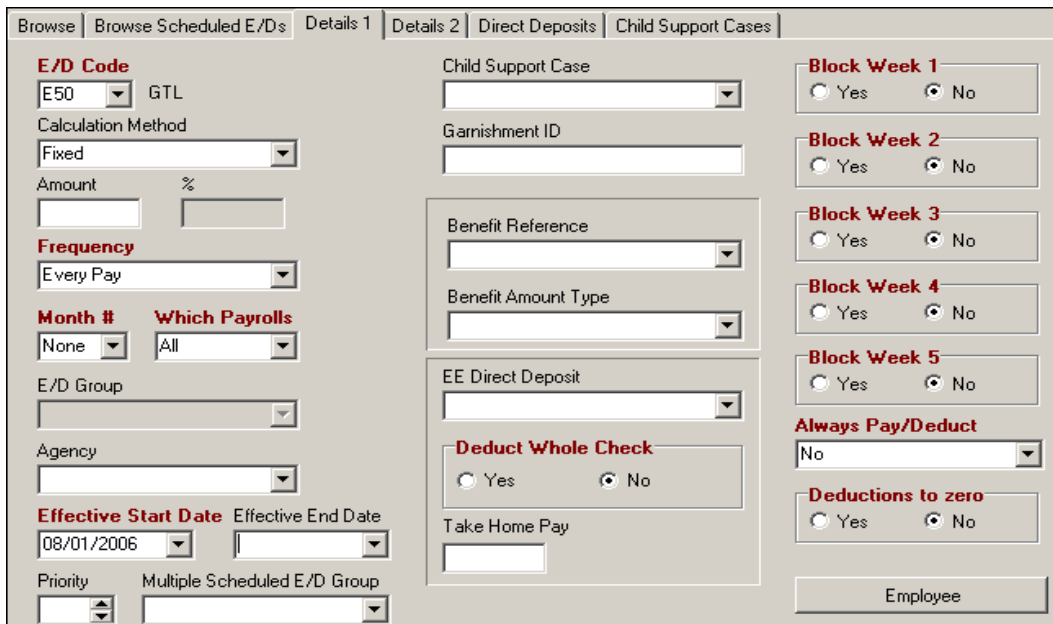
The system then will go through the steps of determining the taxable amount (amount over \$50,000) to calculate the taxable benefit.

Regardless of how the system gets to the taxable amount, it is necessary to tell the system how often you want to tax the employee for this benefit.



4. Go to Employee – Scheduled E/Ds.
5. Make sure you are still on the correct employee then go to the Browse Scheduled E/Ds tab.
6. Click the  key or Alt-Insert to add the new E/D Code.
7. Under E/D Code, select the code for GTL. This will always start with an E.

****If you do not see a code for GTL, please contact your Client Service Representative for assistance.**

8. Under Calculation Method, make sure it says Fixed.
9. Make sure the amount and % are left blank. Since we want the system to calculate the taxable amount, we do not want to override the amount here.
10. Choose the correct Frequency. If you want to tax the employee on their GTL benefit every payroll, select either Every Pay or Every Scheduled Pay. If you would prefer to tax this monthly, quarterly or annual, select the appropriate frequency. If you choose the option for quarterly or annual, enter the specific Month # and Payroll that you want to have the calculation included within.



Example: A frequency of quarterly, with ***month # 3*** and ***which payrolls*** set to ***last*** will result in the calculation occurring with the last payroll of the month in the third month of each quarter. A frequency of annual with ***month #*** of 12 and which payrolls set to ***closest to 15th*** will result in the calculation occurring in December with the payroll check date closest to the 15th of the month.

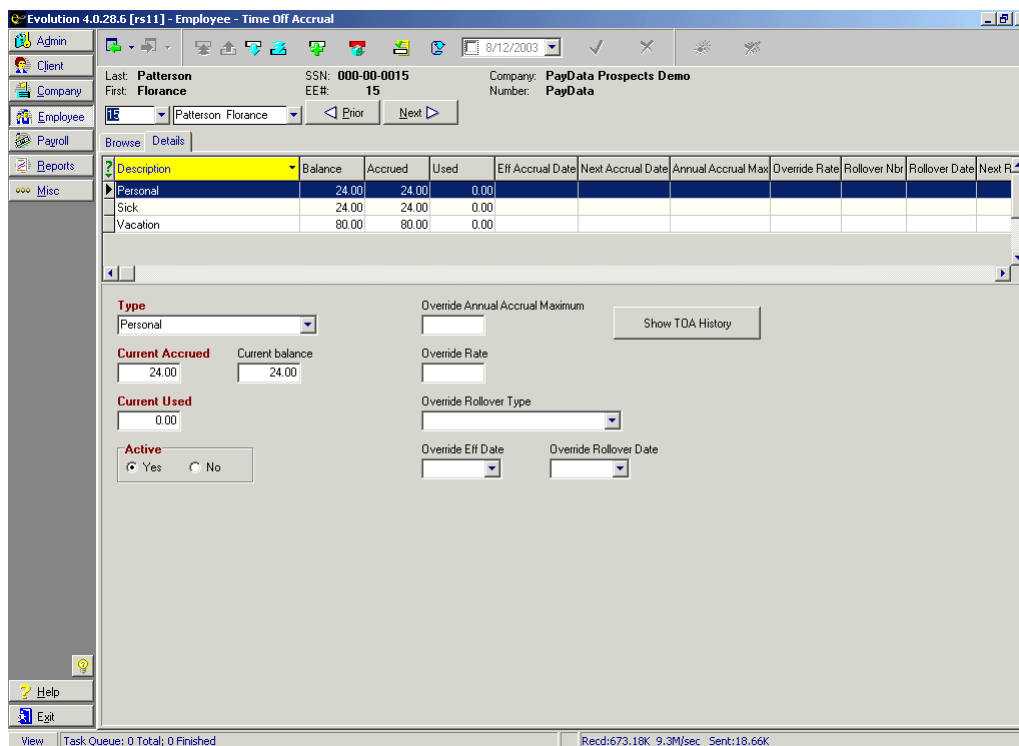
11. If the set up is correct, click the green check  or F10 to save and the yellow sun  to commit these changes.

****** For instructions on how to post GTL, please see the payroll entry section.

Time Off Accrual


Employee – Time off Accrual (Details Screen)

When talking about accrual dates, the system will look at pay period's not check dates.



Description	Balance	Accrued	Used	Eff Accrual Date	Next Accrual Date	Annual Accrual Max	Override Rate	Rollover Nbr	Rollover Date	Next R
Personal	24.00	24.00	0.00							
Sick	24.00	24.00	0.00							
Vacation	80.00	80.00	0.00							

Adding a New Time Off Accrual Type

1. Click on the  key or Alt Insert to add a new time off accrual type.
2. **Type** - Use the drop down box to see the selection of time off accrual types. Select the type that you would like to add.
3. **Current Accrued** - If the employee has a beginning balance load it under this field. If not, Save the info by using the green check mark at the top of the screen. As the employee accrues time, this field will be updated.
4. **Current Used**- This is updated when an employee uses time within payroll.
5. **Active** – If the employee should no longer accrue new time, but needs to use the existing balance, leave as active Yes.

6. **Override Annual Accrual Maximum-** If an employee can accrue to a different Annual Maximum than the company Time Off Accrual set up, add that Annual Maximum here.
7. **Override Rate-** If the employee can accrue at a different level than the company Time Off Accrual Rates, add the different rate. This rate will not change if there is a tier on the company level. This will have to be done manually.
8. If the employee is allowed to rollover time from one accrual type to another
 - A. Select the correct type in the grid. This should be the type that holds the existing balance.
 - B. In the override rollover type select the type that you want the balance to transfer to.
 - C. Override Rollover Date – select the date that you want the rollover to happen

Remember: Time off Accrual is always based on the pay period dates, not the check dates.

9. **Override Eff (effective) Date -** If the employee should be accruing at a different hire level than what the Employee Hire date is, change the Eff Date to be greater than what the Original Hire date is on the EE Entry tab in Employee. Example: From 13 months through 24 months the employee should receive 2.5 hours per pay period of Vacation time. If a new hire should be getting rate of 2.5 hours per pay period, load in a hire date of 12 months prior to the Original Hire date.

Manual Adjusting a Time Off Accrual Type

Evolution 4.0.31.6 [rs11] - Employee - Time Off Accrual

Last: Patterson
First: Florence
SSN: 000-00-0015
EE#: 15
Company: PayData Prospects Demo
PayData

15 | Patterson, Florence | < Prior | Next >

Reports | Browse | Details

Description	Balance	Accrued	Used	Eff Accrual Date	Next Accrual Date	Annual Accrual Max	Override Rate	Rollover Nbr	Rollover Date	Next R
Vacation	42.00	80.00	40.00							
Sick	24.00	24.00	0.00							
Personal	24.00	24.00	0.00							

Type: Vacation

Current Accrued: 80.00 | Current balance: 42.00

Current Used: 40.00

Active: ☒ Yes ☐ No

Reason: Amount loaded wrong in payroll

Override Annual Accrual Maximum:



Override Rate:

Override Rollover Type:

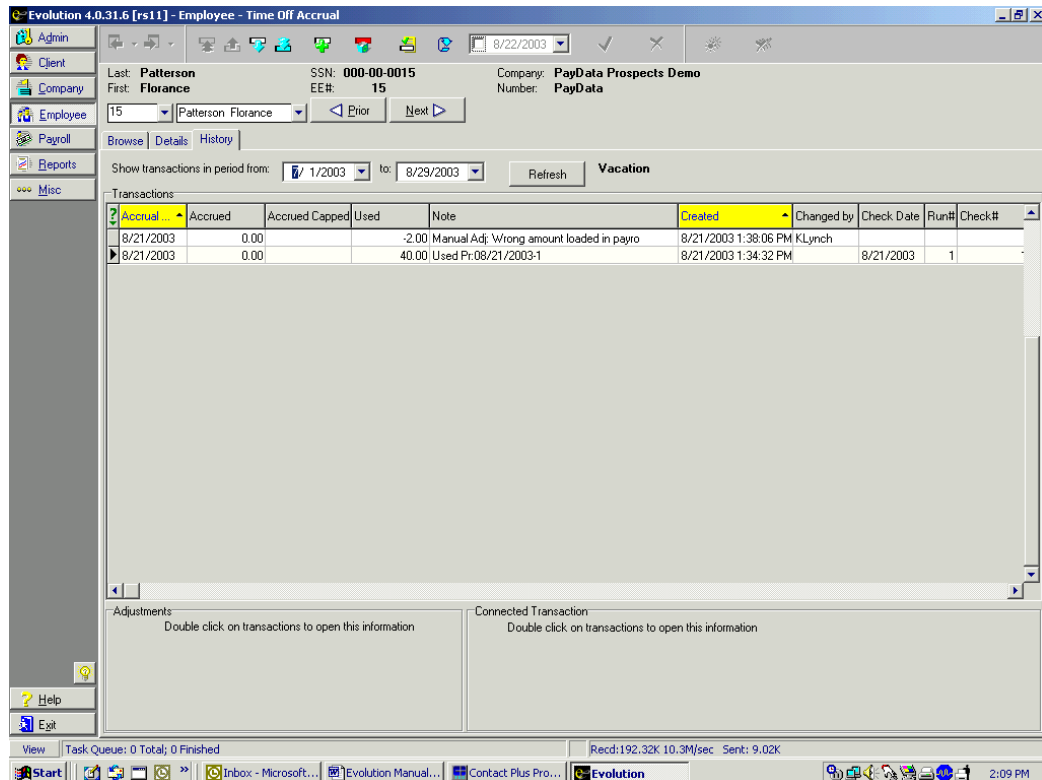
Override Eff Date: | Override Rollover Date:

Show TODA History

View | Task Queue: 0 Total; 0 Finished | Recd: 190.08K; 10.2M/sec | Sent: 8.79K | 2:06 PM

1. To adjust a time off accrual type, highlight the type in the grid and go to the field that needs to be adjusted in the bottom of the screen.
2. Highlight the entire field and type in what the new amount should be. This will bring up a **Reason box** at the bottom of the screen. Tab down to the reason and type in why you are adjusting that field.
8. Click the green  or F10 to save and the yellow sun  to commit the changes.

Using the Show TOA (Time off Accrual) History Button



Accrual	Accrued	Accrued Capped	Used	Note	Created	Changed by	Check Date	Run#	Check#
8/21/2003	0.00			-2.00 Manual Adj: Wrong amount loaded in payro	8/21/2003 1:38:06 PM	KLynch			
8/21/2003	0.00			40.00 Used Pr:08/21/2003-1	8/21/2003 1:34:32 PM		8/21/2003	1	

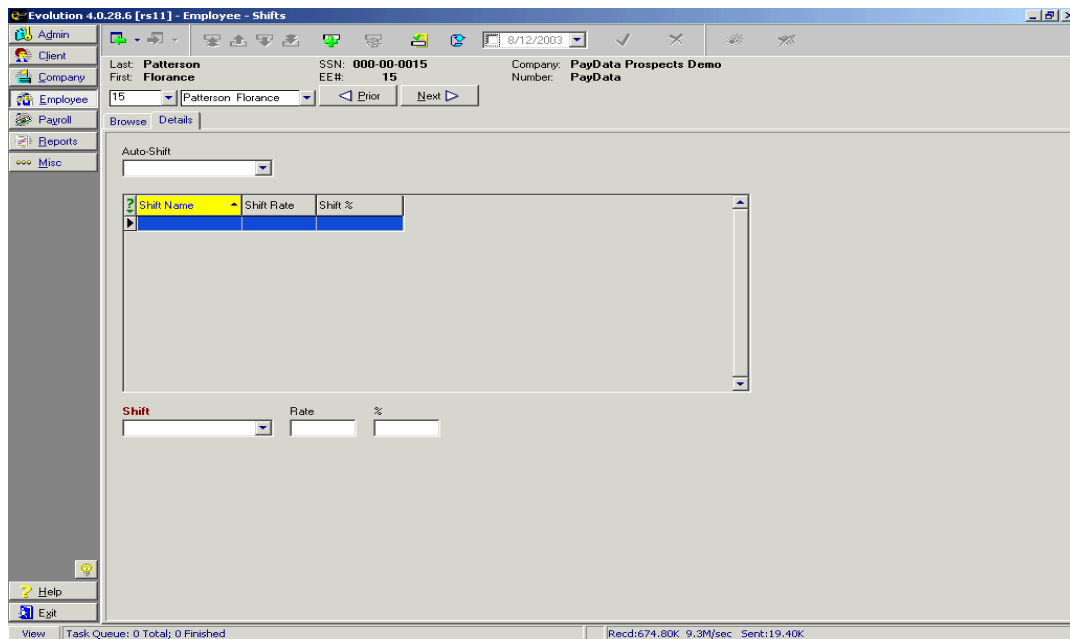
This is an information Tab only; used to show the history of each type of Time Off Accrual

1. Click on the Show **TOA History** button and this will add the History tab.
2. Use this field to tell if the change was a change made with payroll or a manual adjustment. This will also list who made the change according to the Evolution Log In it was made under.


Note: If you do not want the Employee's time off to begin accruing on hire date, do not set up the time off accrual until ready for the accrual to begin. If the Accrual begins at Hire Date but the employee is not allowed to use time off until a certain date, begin accrual on Hire Date but ask your Client Service Representative to block balance from showing on the check stub.

Employee Shifts

Employee – Shifts (Details Tab)



1. In Employee go to Shifts:

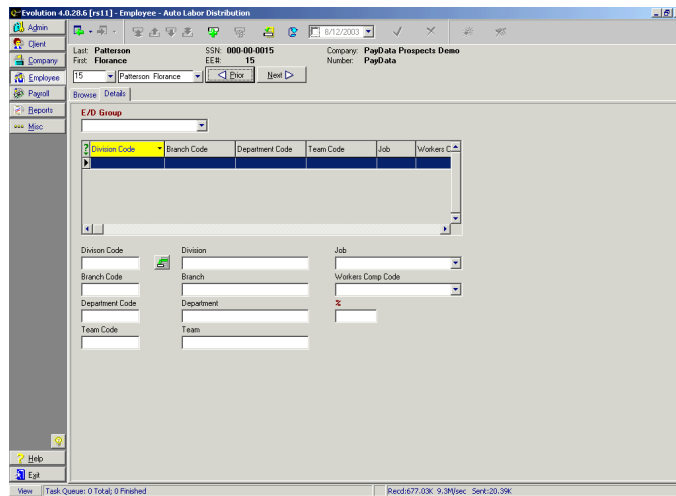
- Click on the  key
- Pull in the shift
- The amount will filter in, but can be overridden if needed.

2. If the Shift needs to be paid out automatically:



- In Employee Shifts, under Auto-Shifts, pull in the appropriate shift.

3. In Payroll check lines when keying in hours that need to be paid out in a shift, you will need to pull in the shift on each individual earning. If Auto-shifts have been set up, this will happen automatically.





Auto Labor Distribution



From the Employee / Employee screen

1. On the Details Tab- Labor Distribution Options should be Distribute Both
2. You can pull in the Auto Labor Distribution Group under Auto Labor Distribution E/D Group now or pull it in from the Auto Labor Distribution screen. If you do not have an Auto Labor Distribution E/D Group, please contact your Client Service Representative.
3. Click the green  or F10 to save and the yellow sun  to commit the changes.

From the Employee/ Auto Labor Distribution Screen

4. Click the  key to pull in the Auto Labor Distribution E/D Group if you did not add it on the employee Details Tab.
5. Click the  picker to the right of Division Code. Select the appropriate Division/Branch/ Department.
6. Go to the bottom right hand corner and put in the % that the employee works in that department.
7. Click the green  or F10 to save and the yellow sun  to commit the changes.
8. Continue with the above steps until the employee's labor is 100% distributed.

Scheduled Payrolls vs. UnScheduled Payrolls

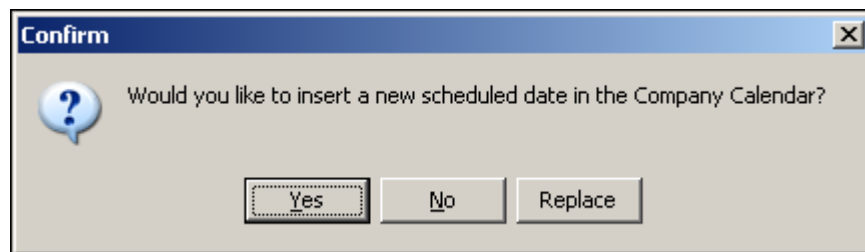
When creating a payroll it is important to understand the difference between a scheduled payroll and an unscheduled payroll.

A scheduled payroll is a payroll that has been set up in your company calendar according to your normal payroll cycle. If you pay your employees on a weekly basis, you will process 52 scheduled payrolls in a year. A bi-weekly pay cycle will result in 26 scheduled payrolls per year, a semi-monthly cycle pays 24 times etc. Any payroll that you run that is not considered one of your scheduled payrolls, such as, a special bonus payroll or a correction run to fix a check, is an unscheduled payroll.

Prior to creating the payroll you need to look to see how the Scheduled E/Ds are set up on your employees.

1. To look this up, go to **Employee – Scheduled E/Ds**.
2. On the Browse Scheduled E/Ds tab, highlight a code that you want to look at.
3. Click on the Details Tab.
4. In the field called Frequency, look to see if it says Every Pay or Every Scheduled Pay.
 - **Every Pay** means that every time you create a payroll, regardless of whether it is scheduled or not, this code will get brought into the employees' check lines
 - **Every Scheduled Pay** means that this code will only get brought into payrolls that are marked as scheduled.

When creating your payroll (see procedures on creating payroll), the system will automatically bring up your next scheduled check date according to your calendar. If that date is wrong for any reason and you change it, the following message will appear.



You will need to be cautious if you decide to proceed with changing your check date. Some examples of why you would change your check date are:

- Your normally scheduled check date falls on a holiday or a weekend.
- Due to ACH regulations you are required to process your payroll 2 business days prior to the check date.
- You are doing a correction run/supplemental run and when creating the run, the system brings up your next normally scheduled check date.

It is crucial that you understand what each of the above selections will do.

- **Yes** – you are creating another payroll that is **NOT** one of your normal 52, 26, etc. but:
 - You want to make sure that this payroll is marked as Scheduled so that **ALL** of the E/Ds set up on the employees as **‘Every Scheduled Pay’** are automatically brought into employee check lines.
 - You want the Time Off Accrual to accrue as normal.
- **No** – you are creating another payroll that is **NOT** one of your normal 52, 26, etc. but:
 - You want to make sure that this payroll is marked as Unscheduled so that **NONE** of the E/Ds set up on the employees as **‘Every Scheduled Pay’** are automatically brought into employee check lines.
 - You do not want the Time Off Accrual to accrue as normal.
- **Replace** – you are creating a payroll that **IS** one of your normal 52, 26, etc. but:
 - You are changing the check date due to a holiday, and want to make sure that all of the E/Ds set up on the employees as **“Every Scheduled Pay”** are automatically brought into employee check lines.
 - You want the Time Off Accrual to accrue as normal.

****If you are unsure which option you should choose or you chose the wrong option, please contact your Client Service Representative immediately for assistance.**

Creating Payroll

Prior to creating the payroll, it is important to understand the different parts of payroll and what information resides in each section.

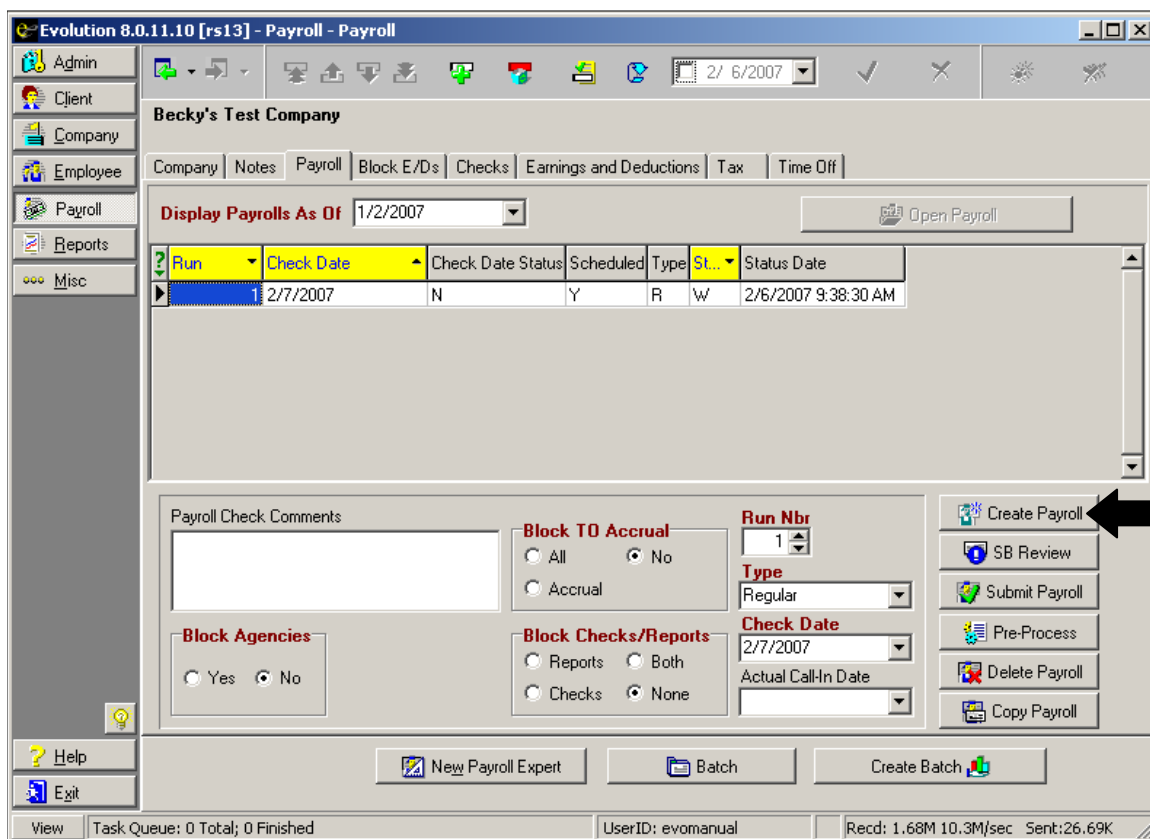
Payroll – This section is where you verify items that affect the entire payroll. Check date, type of payroll (Regular, Correction Run, Supplemental/Bonus Run, etc.) blocking of Time Off Accrual, etc.

Batch – In this section you are able to verify pay period dates as well as bring in check templates for specially taxed checks, bring in only certain groups of employees or quick add hours and/or dollars to your employees' paychecks.

Check – Through the Checks screen you are able to add hours and/or dollars to paychecks, override paycheck data like departments, rates of pay, job codes, etc. You are also able to change deductions and/or taxation on a check by check basis.

To create your payroll, go to Payroll and make sure you are on the Payroll Tab at the top.

1. To create the payroll click on the Create Payroll button to the right of the red fields.



Evolution 8.0.11.10 [rs13] - Payroll - Payroll

Becky's Test Company

Company | Notes | Payroll | Block E/Ds | Checks | Earnings and Deductions | Tax | Time Off

Display Payrolls As Of: 1/2/2007

Open Payroll

Run	Check Date	Check Date Status	Scheduled	Type	Status	Status Date
1	2/7/2007	N	Y	R	W	2/6/2007 9:38:30 AM

Payroll Check Comments

Block TO Accrual: ☐ All ☒ No

Block Agencies: ☐ Yes ☒ No

Block Checks/Reports: ☐ Reports ☐ Both ☒ Checks ☐ None

Run Nbr: 1

Type: Regular

Check Date: 2/7/2007

Actual Call-In Date:

Create Payroll

SB Review

Submit Payroll

Pre-Process

Delete Payroll

Copy Payroll

New Payroll Expert

Batch

Create Batch

View Task Queue: 0 Total; 0 Finished

UserID: evomanual

Recd: 1.68M 10.3M/sec Sent:26.69K

2. The system will pull in the next available scheduled check date based on your company's calendar. Review all of the red fields at the bottom of the screen and change any that are necessary.

Payroll Check Comments – Anything you put in the box will print on all of the check stubs.

Block Agencies – Normally you would always keep this no, but if you are running a special type of payroll, bonus run, correction, etc. and have agency checks (checks payable to a 3rd party: Office of Child Support, Pension Administrators, etc.) that you do not want to print you can select yes. It will only stop the check from printing from this payroll. Any amounts that are pulled from employees checks within this payroll will get added to the next agency check that gets produced.

Block TO Accrual – Normally you would always keep this no, but if you are running a special type of payroll, bonus run, correction, etc. and your Time Off Accrual is set to accrue with every payroll, you may want to block this so your employees do not accrue additional time.

Block Checks/Reports – You would always leave this None unless you are responsible for printing your own checks and reports at your location.

Run Nbr – Always leave this blank. The system will assign this number for you.

Type – This determines the type of payroll you are running. It will always default to Regular, which is your standard payroll. If you running an extra, unscheduled payroll, you may want to switch this to a Supplemental Run or a Client Correction.


****If you are running a payroll outside of your normal schedule, please contact your Client Service Representative****

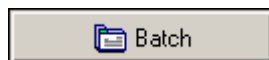
Check Date – This will be the date of the payroll. Always verify this date.

****Remember that all payrolls must be sent to PayData a minimum of 2 business days prior to the check date.****

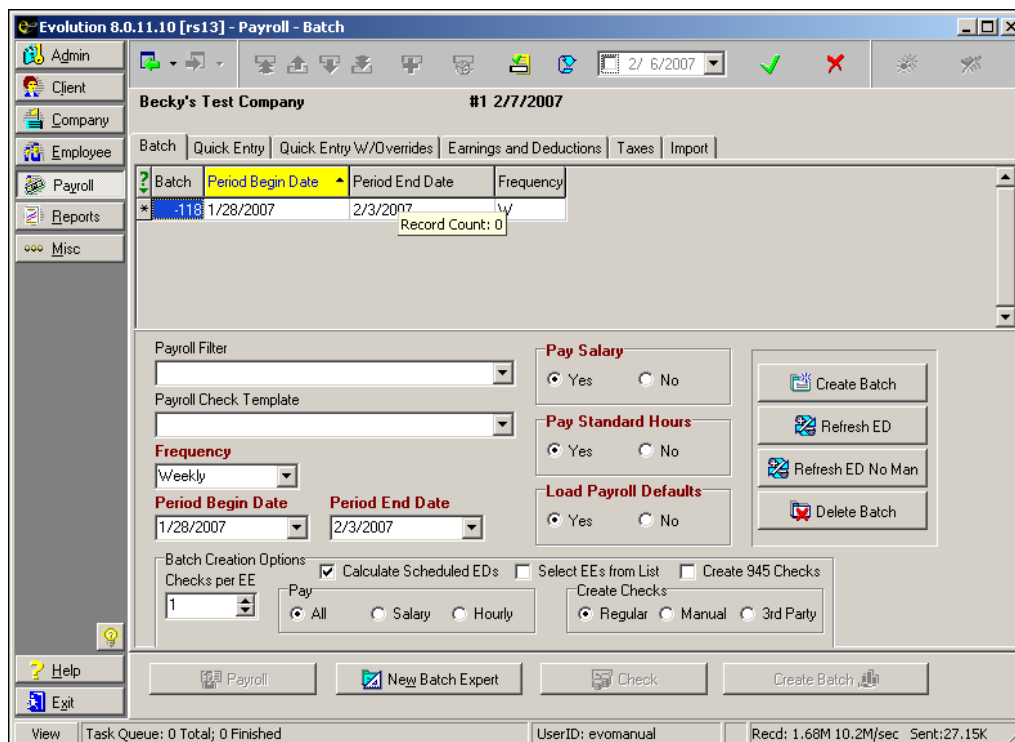
Actual Call-In Date – Ignore this field.

3. Once all of the fields have been filled in correctly, click the green check mark at the_top to

save.  You will now automatically be brought to the Batch screen. If for any reason it did not bring you to the Batch screen, click the Batch button at the bottom.



4. To create the batch, click the Create Batch button on the right of the red fields.



5. The system will pull in the batch or pay period dates that are associated with that payroll. If you are doing an unscheduled payroll, like a Client Correction or Supplemental, you most likely will need to override the Period Begin Date and Period End Date.
6. Review all the fields at the bottom of the screen and change as necessary

Payroll Filter – By setting up filters you are able to bring in predetermined groups of employees.

Payroll Check Template – Check Templates enable you to handle all the checks in a batch in a specific manner. For example, blocking all scheduled E/Ds, overriding the taxation of the paychecks, etc.

****If you are unsure if you should be using a Payroll Filter or a Payroll Check Template, please contact your Client Service Representative for assistance.****

Frequency – If you only have one payroll pay frequency, this will pull in automatically for you. If you are paying multiple pay frequencies, select the one you want for this batch.

Period Begin Date – This is this pay period begin date for payroll. This will default to the dates set up when your company payroll calendar was created.

Period End Date – This is the pay period end date for payroll. This will default to the dates set up when your company payroll calendar was created

Pay Salary – Select whether you want your salaried employees to automatically get paid the normal salary.

Pay Standard Hours – If you are utilizing the Standard Hours field on the EE Entry tab, determine whether you want those hours to be brought into the payroll.

Load Payroll Defaults – This controls the codes that automatically fill in the Check Lines screen.

Calculate Scheduled E/Ds – If checked, it will calculate the Scheduled E/Ds at the time the checks are created.


Select EEs from List – If you only want certain employees to come in, you can check that box and a listing of all of your employees will be displayed. You can then choose just the employees that you want.

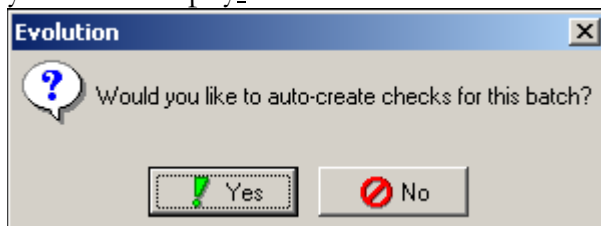
Create 945 Checks – This is only to be used when creating posting for 1099R pension payouts. ****NEVER CHECK THIS WHEN CREATING YOUR NORMAL PAYROLL****

Checks per EE - You can get the system to create multiple checks for each employee.

Pay – Select the employees you want to pay in this payroll.
****For your normal payroll, leave this ALL.**

Create Checks – Select the type of checks you are creating.
****For your normal payroll, leave this REGULAR.**

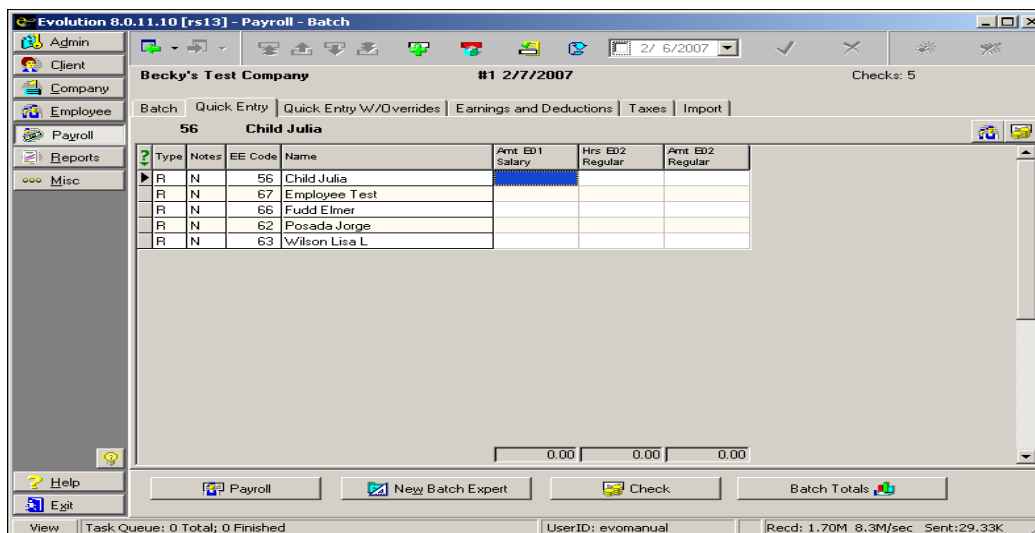
7. Once all of the fields have been filled in correctly, click the  mark at the top to save.
8. The system will now ask if you want to Auto Create your checks. If you are creating your normal payroll, say yes. If you are doing a special payroll run and you do not want all of your employees in the batch, say no, unless you have manually selected the employees that you want to pay.



Entering payroll using the Quick Entry Screen

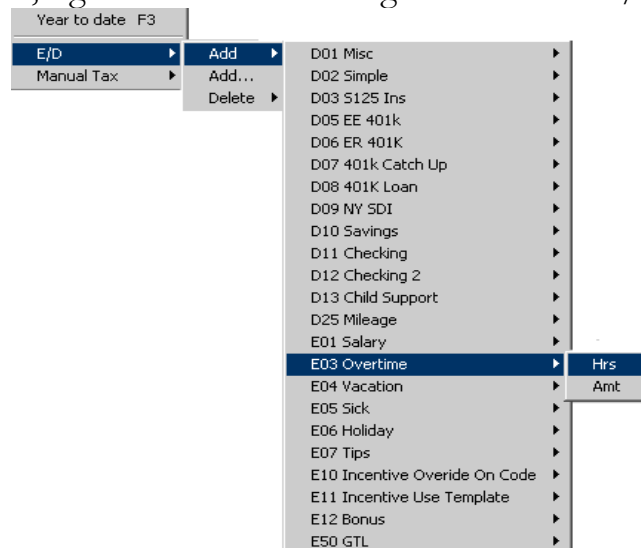
The purpose of the Quick Entry Screen is for basic payroll entry. Use this screen if entering your payroll consists of entering just hours and/or dollars for your employees. If you need to do overrides on your employees in the form of DBDT changes or rate of pay changes, please follow the procedures on keying your payroll in on the Check Lines screen.

1. From the Batch Screen, click on the Quick Entry tab at the top.







Type	Notes	EE Code	Name	Amt E01 Salary	Hrs E02 Regular	Amt E02 Regular
R	N	56	Child Julia			
R	N	67	Employee Test			
R	N	66	Fudd Elmer			
R	N	62	Posada Jorge			
R	N	63	Wilson Lisa L			

2. You will always want to customize this screen to the codes that you are using in payroll. To do this, right click in the white grid and select E/D.



3. If you need to add another column to the grid, select the first Add. You will then get a listing of all of your available codes.
4. Highlight the code you want to add and click on either Hrs or Amt.
5. Continue with steps 2-4 until you have added all of the necessary codes for payroll.
6. If you need to delete a column from the screen, in step 3 instead of choosing Add, choose Delete. You will then get a list of all of the codes that are currently on the screen.
7. Highlight the code you want to delete and click the Hrs or Amt that you want to delete.

****When deleting a column, you are only deleting that column from showing on the screen. Any hours and/or amounts that are in the column will stay in the payroll****

8. Once the screen has been adjusted to show the codes you are working with, start keying in the payroll data.
9. Use the Enter or the arrows keys on your keyboard to move around within the grid.
10. Make sure you are committing your changes often by clicking the yellow sun at the top. 
11. When you are done entering all of your payroll information, make sure you verify your totals either by reviewing the data at the bottom of each column or by going to the Earnings and Deductions tab at the top.
12. Once the data has been verified for accuracy you are able to go back to Payroll by clicking the Payroll button at the bottom left. 
13. You now have the options of Pre-Processing the payroll (see the instructions on pre-processing for details) or submitting the payroll.
14. To submit the payroll click either the submit payroll button  or the SB Review button .


Submit Payroll sends the payroll to PayData so we can process the pay checks. By choosing Submit, we will not do any verification of the payroll data that comes in.

SB Review sends the payroll to PayData so we can process the pay checks, but puts the payroll on hold. ****If choosing this option, you must contact your Client Service Representative so they are aware of why you put the payroll on hold.****

Adjusting Check Lines



Adding Check Lines

Check Lines is the term that is used to describe the individual Earnings and/or Deductions that make up a paycheck.


1. On the batch screen, go to the check lines by using the  Check button in the bottom right hand corner of the screen or double clicking on an employee's name.
2. Making sure you are on the Check Lines tab, click somewhere inside the grid. Using the arrow keys on your keyboard, arrow down until you get to a blank line.

Check Lines	Manual Tax	General	Tax Overrides	Preview	Employee Notes
E/D Code	E/D Description	Hours/Pieces	Rate of Pay	Amount	
E01	Salary		0.00	1,000.00	
D05	EE 401k			25.00	
D06	ER 401K			25.00	
E02	Regular		0.00		
*					

3. In the column labeled E/D Code select the Earning or Deduction that you would like to add.
4. Depress the Enter key or use the arrow keys until you get to the desired column then put in the necessary data.
5. Depress the Enter key or use the arrow keys until your cursor moves off of the line.
6. If you would like to add a column. Right click on the column header
7. Click Add or Delete.
8. Choose column title that you need.

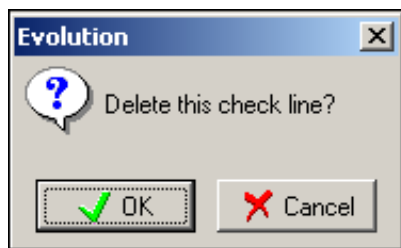
9. Make sure you Save and/or Commit your changes using the  and/or the  buttons.

Deleting Check Lines



10. On the batch screen, go to the check lines by using the  Check button in the bottom right hand corner of the screen or double clicking on an employee's name.
11. Make sure you are on the Check Lines tab, and then click on the check line that you want to delete.

Check Lines	Manual Tax	General	Tax Overrides	Preview	Employee Notes
E/D Code	E/D Description	Hours/Pieces	Rate of Pay	Amount	
E01	Salary		0.00	1,000.00	
D05	EE 401k			25.00	
D06	ER 401K			25.00	
E02	Regular		0.00		



12. On your keyboard press the Ctrl and Delete buttons at the same time. It will ask you if you want to delete this check line. Make sure you say OK.

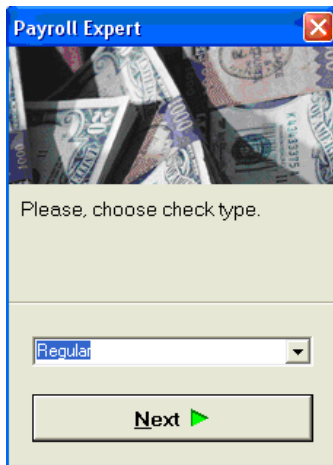


4. If the message says anything other than Delete this check line, you need to select Cancel and redo the steps.

13. Make sure you Save and Commit your changes using the  and the  buttons.

Adding a second regular check to a batch

1. On the batch screen, go to the check lines by using the  Check button located at the bottom right hand side of the screen or double clicking on an employee's name.
2. Find the employee that the check needs to be for by using the Employee listing drop down box at the top of the screen.
3. Click on the green plus key 



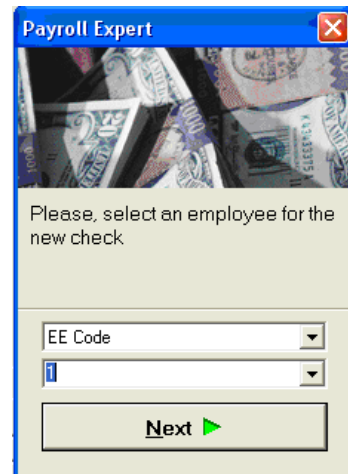
Payroll Expert

Please, choose check type.

Regular

Next ►

4. Select check type of **Regular**



Payroll Expert

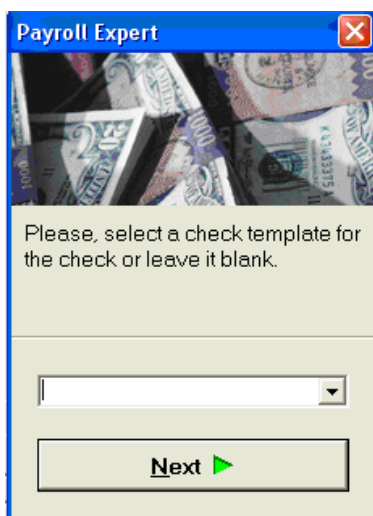
Please, select an employee for the new check

EE Code

1

Next ►

5. Verify the Employee number or name is correct



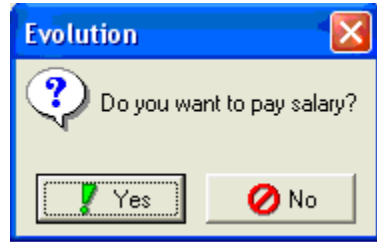
Payroll Expert

Please, select a check template for the check or leave it blank.

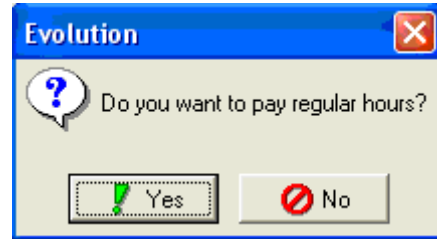
Next ►



6. If using a template, bring that in now or leave blank for a standard check.

7. If you would like to pay salary click yes. If you would not like to pay salary click no.



8. If you would like regular hours to be paid on this check select yes. If not, select no. This will only pull in regular hours if they have been set up in the Standard hours field on the Employee\EE Entry screen.



9. Enter the appropriate information into the second check by using the check lines screen.
10. Making sure you are on the Check Lines Tab, click somewhere inside the grid.
Using the arrow keys on your keyboard, arrow down until you get to a blank line.
11. In the column labeled E/D Code, select the Earning or Deduction that you would like to add.
12. Depress the Enter key until you get to the desired column, then put in the necessary data.
13. Depress the Enter key until your cursor moves off of the line.
14. Make sure you Save and /or Commit your changes using the  and/or the  buttons.