## Chapter 11

## **Employee Information**

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## CTAS User Manual Employees: Accessing the Employee Module

To select the Employee Module, click on Payroll tab in the Task Bar and then select the Employee icon.

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### **Employees: Entering Employee Information**

### **To Enter New Employees**

Click the Add Employees tab on the Employees screen (above) to enter new employees to the system.

The Add Employee tab will open (see next page). The screen has six tabs, allowing you to enter the information for a new employee. The Demographics and Job (F3), Tax and Insurance (F4), Acct. Dist (F6), and Official Role (F8) tabs must be completed before clicking the Save button to record the new employee. Other and Employer (F5) and Sick and Vacation (F7) tabs are optional, depending on the benefits offered by each entity.

Instructions for entering a new employee begin on the next page.

#### **Entering Information into the Demographics & Job (F3) Tab**

The Add Employees tab opens on the Demographics and Job (F3) tab:

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Tabs +→	Demographics and Job (F	F3) Tax and Insurance (F4)	V Other and Employer (F5) Acct.	Dist (F6) Sick and Vacatio	on (F7) Official Role (F8)		
	*First Name		Middle	Name		*Last Name	
	Address Line1		Addres	s Line2		City	
	State	ZIP	•	Email		*Phone () -	Title
	Employee Number			*SSN		PERA#	
	BirthDate			Gender 🔘 Male 🛛 🔘 Fe	emale	Effective Date	
	Job Information						
	Date Employed			Pay Type	Rate	e Overtime	
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	Department	-					
	Employee Type	🗇 Full Time 💿 Part Time					
	*Pay Frequency						
				Delete			
	Pay Type	🔘 Hourly 💮 Salary		Deiete			
	Save Cancel						
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- Fields in blue are required and must be completed to save an employee's information.
- Enter the employee's name, address, and Social Security number. The name must be entered as it reads on the employee's Social Security card. This information will be printed on the W-2.
- Assign and enter an employee number using a method of your choosing.
- Enter the Effective Date. This is the date the Pay Rates became effective.
- In the Job Information box, enter the Department (Supervisor, Clerk, Street, etc.).
- Enter the Employee Type by clicking either the Full-Time or Part-Time button. <u>Note</u>: Town board members are part-time employees.
- Enter Pay Type, Pay Rate, and check the Overtime check box if this is an overtime pay rate. For example, a board member/councilperson could have Regular Rate 1 as the meeting rate, Regular Rate 2 as an hourly rate, and Regular Rate 3 as a salary rate. If overtime rates are not calculated as time and a half, the overtime rate needs to be calculated and then entered.
- To select Pay Frequency, click on the down arrow and highlight your choice.
- Click the Hourly or Salary radio button in the Pay Type box.
- When this screen is completed, click on the Tax and Insurance (F4) tab at the top of the screen to continue.

### Entering Information in to the Tax and Insurance (F4) Tab

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Employees List Add Employees		
Employee Number Name	Active	
Demographics and Job (F3) Tax and Insurance (F4) Other and Employer (F5) Acct. Dist (F	6) Sick and Vacation (F7) Official Role (F8)	
Tax and Pretax Benefit Information Calculate Tax Withhold FICA Withhold Medicare Tax Satus Federal Deductions Additional Federal Tax Withheld State Deductions Additional State Tax S0 00	Dependent Amount <u>s0</u> Dental Plan Payrol Period Employee Amount <u>s</u>	
Deduction Name Payroll Period Amount	/ Life Insurance Plan	
Deferred Income Cafeteria	Payroll Period	-
*	Employee Amount \$(	0.00
	Dependent Amount S(	0.00
Delete Save Cancel		

- In the Tax and Pretax Benefit Information column, click the Calculate Tax box to calculate the Federal and State Income Tax Withholding amount.
- If applicable, click the Withhold FICA and/or the Withhold Medicare Box.
- Select the Tax Status by either clicking the Single or Married button.
- Enter the number of federal exemptions claimed on the W-4 in the Federal Deduction field.
- Enter the Tax State. For Minnesota, enter MN.
- Enter the number of state exemptions claimed on the W-4 in the State Deductions field.
- Deferred Income, Cafeteria Plan, any other deductions, and Insurance Information (in adjacent column) are amounts to be withheld from the employee's pay. The Deduction amounts are deducted before Federal and State income taxes are calculated.
- The Payroll Period fields allow you to indicate from which paychecks a deduction should be withheld. The 1st through the 14th of the month is the first pay period; the 15th through the 28th of the month is the second pay period; the 29th through the 31st of the month is the third pay period.
- Click on the Other and Employer (F5) tab at the top of the screen to continue.

#### **Entering Information in to the Other and Employer (F5) Tab**

This tab is for Employee's Other Deductions and the Employer's Share of deductions.

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nployee Number		Name					Active			
	ob (F3) Tax and	Insurance (F4) C	ther and Employer (F	5) Acct. Dist	(F6) Sick	and Vacation				
her Deductions etirement Type	-						Employer's Share			
Percentage	0	.0000 ≑					Health Insurance		\$0.00	
		( Contraction of the Contraction					Payroll Period		•	
nion Dues Amour Payroll Perio		s_	0.00				Dental Insurance		\$ <u>0.00</u>	
	29.5		•	_			Payroll Period		•	
ther Deductions	Туре						Life Insurance Amoun	t	\$0.00	
	Amount		s0.0	0			Payroll Period		<b>T</b>	
	Payroll Period		•	•			Retirement Regular %	0.000 🚔 Additiona		0.000 ÷
2)	Type Amount						Filed W5 for Earned In	ncome Credit 🔲 Empl	oyee 🔲 Spouse	
	Payroll Period		\$ <u>0</u> 0.0	•			Deduction Name		Payroll Period	/ Amount
	Туре						Deferred Income			
3)	Amount		\$ <u>0</u> .0	20			Cafeteria			
	Payroll Period			-			*			
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							Delete			
Save Ca	ancel									

- If an employee is paying into PERA, enter a type of plan in the Retirement Type field. Use this field to indicate which PERA plan the employee participates in (DCP, Coordinated, etc.).
- Enter the percentage to be withheld. This should be entered as a decimal. For example, to withhold 5%, enter 0.05 in the Percentage field.
- Enter the Union Dues or any Other Deductions required to be withheld from an employee's pay in the appropriate fields.
- In the right column, enter the Employer's Share of any benefits. If the employee is paying into PERA, enter the percentage for the employer's share of the retirement.
- When this tab is completed, click on the Acct Dist (F6) tab at the top of the screen to continue.

#### **Entering Information into the Acct Dist (F6) Tab**

The fourth tab is for the Account Distribution (Acct Dist):

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	ayroll <u>I</u> nvestments I <u>n</u> debtedne	ss <u>R</u> eports Ad <u>m</u> in	<u>H</u> elp <u>E</u> xit			
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Employee						3:42 PM
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Employee Number	Name		V	Active		
Demographics and Job (F3)	Tax and Insurance (F4) 🔨 Other and Emplo	ver (F5) Acct. Dist (F6) Sic	k and Vacation (F7) 📉 Official	Role (F8)		
					Remaining Percer	tage to Distribute 1.000
*Account Distribution						
Funds	☆ Account Numbers		<b>☆</b> → Object Codes	Y	Percent	/ <b>7</b> -P
*						
Delete						
Save Cancel						

All employee distribution records must equal 100%. On this screen, 1.00 is equivalent to 100%. This allows an employee's wages to be split among several categories. The percentages should be entered as a decimal. Also, the breakdown that is likely to occur the most often should be entered. The account distribution breakdown can be adjusted when entering the employee hours for the payroll period.

<u>Note</u>: At least one Fund Number, Account Number, Object Code, and percentage must be entered for each employee.

When this tab has been completed, you can click on the Sick and Vacation (F7) tab at the top of the screen or click on the Official Role (F8) tab.

Users are not required to complete the Sick and Vacation tab. This tab is provided as an option for the cities or towns that provide these benefits. The following page provides details on entering Sick and Vacation Leave.

#### **Entering Information into the Sick and Vacation Tab (F7)**

This tab is for Employees who earn Sick and/or Vacation leave:

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Accounting	Payroll Investments	Indebtedness	Reports Ad	<u>min H</u> elp <u>E</u> xit		
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Employee Payroll Tax Table	85					
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Employees List V Add Emp	loves					
Employee Number	Name				Active	
Employee Number Demographics and Job (F3)		Other and Employer (EE)	Apat Dist (EC)	Sick and Vacation (E7)	Official Role (F8)	
Sick Accrual	Tax and insurance (14)	Coner and Employer (1.5)	Acci Dist (1 0)	Sick and vacation (17)		
Current Balance	0.00					
Accrual Amount	0.00					
Payroll Period						
Vacation Accrual						
Vacation Accrual Enable Vacation Accrual						
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Enable Vacation Accrual Current Balance Accrual Amount	0.00	•				

To enter the information on Sick and Vacation leave, complete the following steps:

- For sick leave, click the Enable Sick Accrual check box.
- If there is a current sick leave balance, enter the amount in the Current Balance field of the Sick Accrual box. Enter the Accrual Amount.
- Select the Payroll Period from the list by clicking the down arrow at the end of the Payroll Period box.
- For vacation leave, click the Enable Vacation Accrual check box.
- If there is a current vacation leave balance, enter the amount in the Current Balance field of the Vacation Leave box. Enter the Accrual Amount.
- Select the Payroll Period from the list by clicking the down arrow at the end of the Payroll Period box.

<u>Note</u>: The Payroll Period field is to indicate when the employee earns the sick and vacation leave. The 1st through the 14th of the month is the first pay period; the 15th through the 28th of the month is the second pay period; and the 29th through the 31st of the month is the third pay period.

When this tab has been completed, click on the Official Role (F8) tab at the top of the screen.

#### **Entering Information into the Official Role Tab (F8)**

This tab is to enter the official role of the employee:

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<u>Accounting</u>	2ayroll Investments	I <u>n</u> debtedness	<u>R</u> eports Ad <u>m</u> in	<u>H</u> elp <u>E</u> xi		
Employee Payroll Tax						
Table	5					
Employee						3:44 PM
Employees List Add Empl	oyees					
Employee Number	Name				Active	
Demographics and Job (F3) *Current Roles	Tax and Insurance (F4)	Other and Employer (F5)	Acct. Dist (F6) Sick	and Vacation (F7)	Official Role (F8)	
Primary Contact Adoministrator/Administ Adtorney City Council/Town Boa Chair Clerk Elected Official Finance Form Preparer Internal Auditor Mayor Town Supervisor Public Safety Treasurer Other (TBD)						
Save Cancel						

To enter the information on Official Role, complete the following steps:

- Each employee must have a role selected to save their employee information.
- Click on the roles that this employee has with the entity. You can choose multiple roles for an employee.
- Each entity must have one employee selected as the Primary Contact.
- Each entity must have one employee selected as a Supervisor, Council, or Board member.
- If a description for an employee is not listed, select the Other box.

When this screen has been completed, click the Save button to store the information.

## **CTAS User Manual Employees: Changing the Employee Information**

To change the information for an employee, highlight the employee's name and information and click the View/Edit Button on the Employees' List tab in the Payroll Module.



## CTAS User Manual11-9Employees: Changing the Employee Information (continued)

After the Edit option is selected, the employee's individual tab will open:

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Employee Payroll	Tax			1								
	Tables		1									
Employee	_											3:51 PM
Employees List Add	Employees	Johnson, Mike J	×									
	1	Name		J Johnson		V A	ctive					
Demographics and Job	(F3) Tax ar	nd Insurance (F4)	Other and Employ	er (F5) 📉 Acct. Dist (F6)	Sick and Vacation	(F7) V Official Ro	ole (F8)					
*First Name	Mike			Middle Name	J			*Last Name	Johnson			
Address Line1	240th Ave.			Address Line2				City	Newtown			
State	MN	ZIP 55	414-	Email				*Phone	() -		Title	
Employee Number	1			*SSN	555-88-9999			PERA#				
BirthDate	08/14/1990	-		Gender	Male  Fem	ale		Effective Date	01/01/2014			
Job Information												
Date Employed	01/01/2014	•			Рау Туре		Rate	\$50	Overtime	^		
Separation Date					Meeting     Ext. Meetings			\$75		E		
	Town Board								.00			
Employee Type	Full Time	Part Time							.00 00.			
*Pay Frequency	Monthly	•						\$0	.00	•		
Pay Type	Hourly	Salary			Delete							
Save Canc	el											

In this tab, you can change any field by clicking on the appropriate tab. The Active box indicates whether that employee is currently employed. By unchecking the box, the employee's information will not be displayed when selecting the employees to be paid. <u>Note</u>: Any changes made to an employee's information will be effective for payrolls created after the changes were made.



### **CTAS User Manual Employees: Deleting an Employee**

The need to delete an employee's information could result from a decision that there isn't a need for the person to be entered into the payroll system. You can only delete an employee's information if they are not included in any payroll period.

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## CTAS User Manual Employees: Printing an Employee's Information Report

To print an Employee Information Report, click on the Reports tab in the Task Bar, then select the Payroll (Year to Date) icon.

<u></u>				CTAS	5		
<u>Accounting</u>	roll <u>Investments</u>	I <u>n</u> debtedness	Reports Admin	ı <u>H</u> elp	<u>E</u> xit		
						-	
Receipts Claims Disburser	nents Budget Cash	Chart of Vendors Accounts	Financial Tax Reports Filing	Payroll (Year to Date)	Investments	Indebtedness	
	Accounting			mployee	Investments	Indebtedness	
Payroll (Year to Date)							3:53 PM
Report Name							
Cafeteria Plan Account Dist Deferred Income AccountD Employee's Earnings Reco Employee's Information Employee's Sick Leave/Va Federal Taxes AccountDis Other Deductions Account D PERA Annual Exclusion PERA Distribution State Withholding Account D	stribution d ration Leave Report ribution ribution istribution						

A Reports screen will appear listing the reports available to assist you in filing your withholding tax information.

## CTAS User Manual11-12Employees: Printing an Employee's Information Report (continued)

To run the Employee's Information Report, highlight it from the list and click the Run button.



# CTAS User Manual11-13Employees: Printing an Employee's Information Report (continued)

After clicking the Run button, the Employee's Information Report screen will appear:

Employee's Information Available Employees ANDREVS MARCUS	Selected Employees	
APPEL HAROLD BAERENWALD JENNY A BAUERMEISTER NEIL BLOCK PAT BRAMSTEDT MONTE ADAM BRANSTEDT MONTE ADAM BRATZMAN DANA J BURDICK DEAN J BURNS MIKE J BURNS MIKE J BURNS MIKE J BURNS MIKE J BURNS RITA BURNS RITA BURNS RITA BURZLAFF RYAN E CAIN SHAIN A	<ul> <li>►</li> <li>&gt;&gt;</li> <li></li> <li></li> </ul>	
CHRISTOFFER DONNA CLAUSEN ZEKE CLAUSEN BURT COTTER SAMANTHA L CRANSTON NANCY B CRANSTON BUCE CROCKER BEN J CROCKER JUDY D		
	✓ Force new page for each employee	
	Run <u>Cancel</u>	

On the Employee's Information screen:

- Select the names of the employees whose information is to be printed by moving the names from the Available Employees box to the Selected Employees box. The ">>" button will move all the names and the ">" button will move the individually-highlighted name(s). You can also select an individual employee by double-clicking on the employee's name. The "<" and "<<" buttons move names back to the Available Employees box.
- Select how you would like the employee information displayed. The default is a separate page for each employee. By unchecking the Force new page for each employee box, multiple employees will be printed on each page.
- Click the Run button and the print preview (Report Viewer screen) will appear, as shown on the next page.

# CTAS User Manual11-14Employees: Printing an Employee's Information Report (continued)

• After reviewing the preview, click on the Printer icon to begin the printing of the report. You can close the Report-Viewer screen by clicking the red "X".

e ta 🕜 🗄	H 4	▶ >   1	1	1 🕅 🔍 -				SAP CRYSTAL	RE
t									
HERE TOWNSHIP				Employee's Info	mation Report			7/14/2014	
Date Of Report: 7/14/20 Employee Information	)14								
Name : MAX G ANDE RR 5 BOX 55 WILDER, MN,		So	ployee Number: cial Security #: x Status:	20 555-55-5555 Single	Effective Date: Employement Date: Separation Date:		Retirement Plan: PERA Number:		
Tax Information	55555								
Number of Exemptions:	- Federal - State		Additional With	holdings: - Federal - State	\$0.00 \$0.00				
Deductions									
nsurance	- Health - Dental - Life	\$0.00 \$0.00 \$0.00	Other	- Misc 1 - Misc 2 - Misc 3	\$0.00 Union I \$0.00 Retirem \$0.00		\$0.00 0.00%		
Account Information									
Fund		Account			Object C	ode		Percent	
Municipal Liquor Store(#	609)	Liquor Store - M	ferchandise Pure	chases - On-Sale(#497	770) Wages a	nd Salaries:Par	t-time employe	1.00%	
							Percent Total	1.00%	
Date Of Report: 7/14/20 Employee Information	)14					K			
Name : MARCUS AN 555 W MENAG LAKEFIELD, N	GE AVE	So	ployee Number: cial Security #: x Status:	130 555-55-5555 Single	Effective Date: Employement Date: Separation Date:	12/07/2006	Retirement Plan: PERA Number:		
Number of Exemptions:	- Federal	1	Additional With	holdings: - Federal	\$0.00				
	- State	1		- State	\$0.00				
Deductions									
Insurance	- Health - Dental - Life	\$0.00 \$0.00 \$0.00	Other	- Misc 1 - Misc 2 - Misc 3	\$0.00 Union I \$0.00 Retirem \$0.00		\$0.00 e 0.00%		
Account Information									
		Carl Carl Control Cont			Object C	ada		Percent	8 I.
Fund		Account			Object	JUC		1 Croon	



# CTAS User Manual11-15Employees: Printing an Employee's Information Report (continued)

• After clicking on the Printer icon, the Print screen appears:

Select Printer					
	rJet 4250 PCL6 ft XPS Document W		nd To OneNote 2	010	
PDF Cor					
•		III			
Status:	Ready	Prin	t to file Preferen	nces	
Location:					
Comment:			Fin <u>d</u> Prin	ter	
Page Range					
Al		Number	of <u>c</u> opies: 1		
Selection	⊚ C <u>u</u> rrent Pa		₩		
Pages:	1-14			53	
-	single page number or		123 1	23	
Enter either a page range.	or exemple, 512				

The Pages radio button allows you to print only certain pages of the report. The Number of copies box allows you to print the number of copies you choose. After selecting the printer details, click on the Print button to begin printing the report. The following page has a sample of the report.

To close the printing of the report:

- Click the red "X" icon on the Report Viewer screen.
- Click the Close button on the Employee's Information.

## CTAS User Manual

**Employees:** Printing an Employee's Information Report (continued)



#### **Sample Employee's Information Report**