

Chapter 11

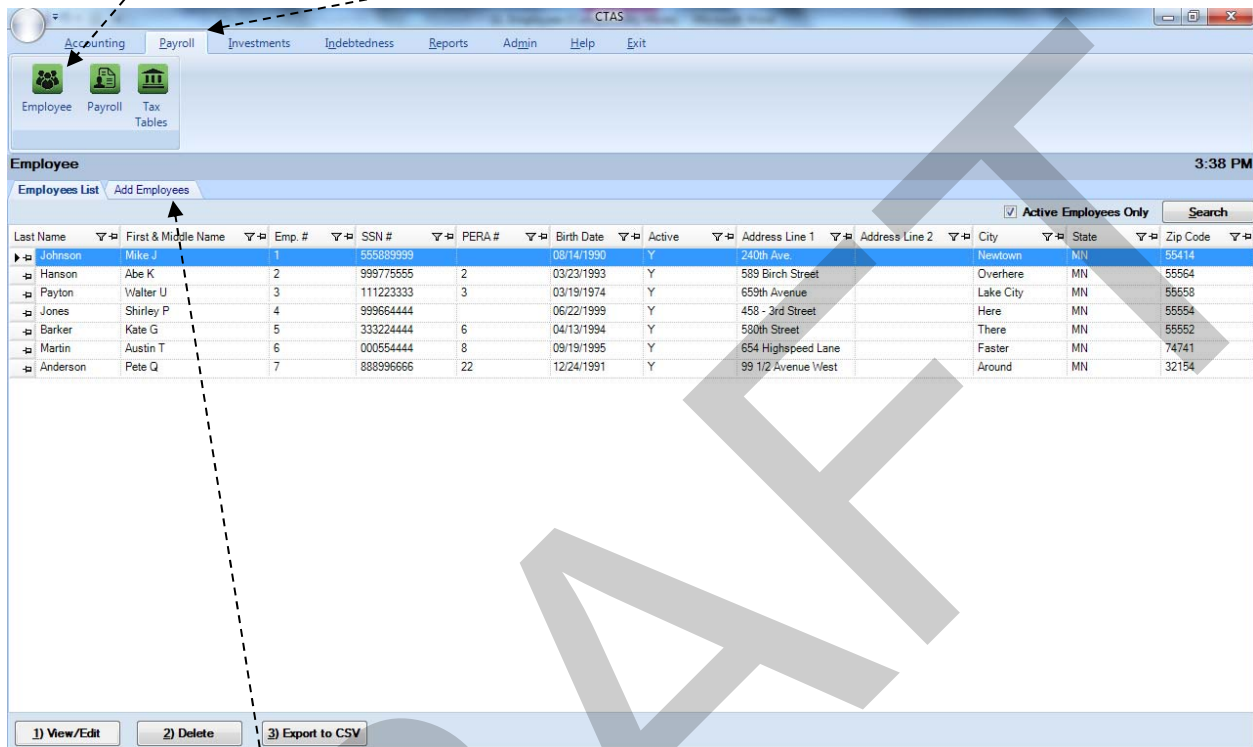
Employee Information

DRAFT

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Employees: Accessing the Employee Module

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



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.

Employees: Entering Employee Information (continued)

Entering Information into the Demographics & Job (F3) Tab

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

- 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. Note: 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.

Employees: Entering Employee Information (continued)

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

- 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.

Employees: Entering Employee Information (continued)

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.

- 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.

Employees: Entering Employee Information (continued)

Entering Information into the Acct Dist (F6) Tab

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

The screenshot shows the 'Employee' form in the CTAS application. The 'Acct. Dist (F6)' tab is active. The 'Remaining Percentage to Distribute' field is set to 1.000. Below this is a table for account distribution with the following columns: Funds, Account Numbers, Object Codes, and Percent. The table currently contains a single row with an asterisk (*) in the Funds column. At the bottom of the form are buttons for 'Delete', 'Save', and '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.

Note: 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.

Employees: Entering Employee Information (continued)

Entering Information into the Sick and Vacation Tab (F7)

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

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.

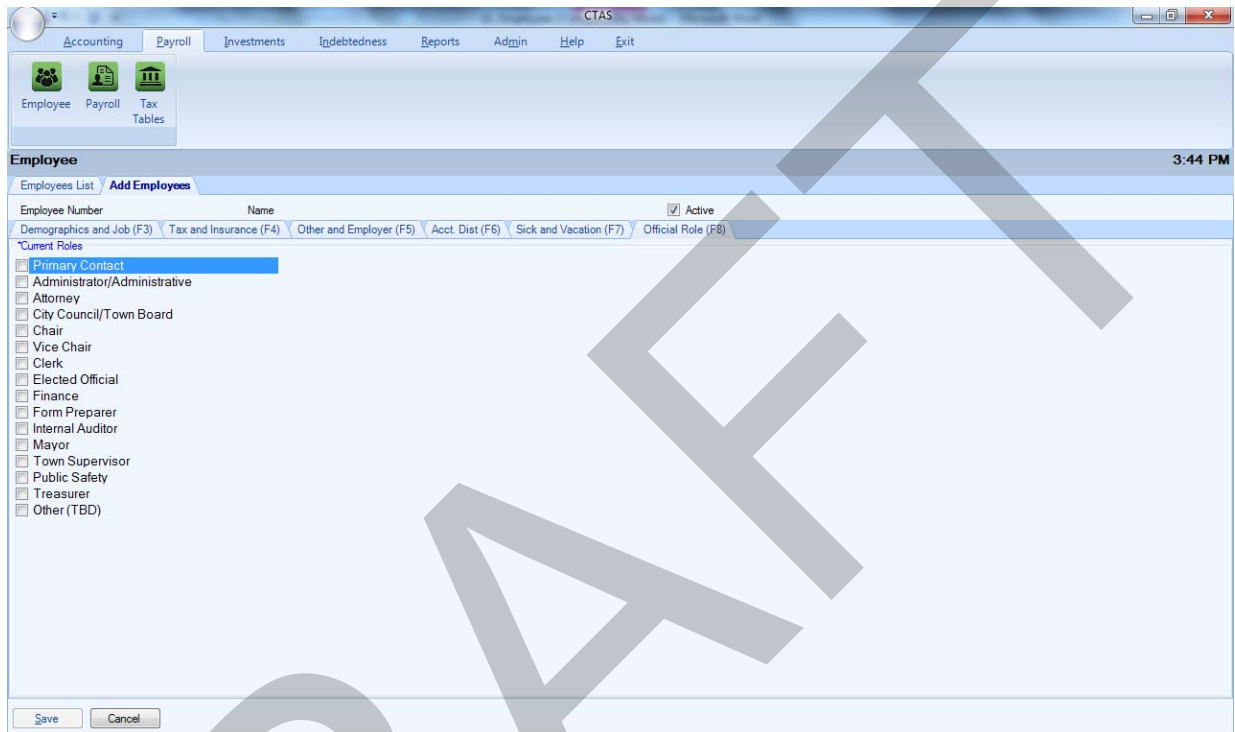
Note: The Payroll Period field is to indicate when the employee earns the sick and vacation leave. The 1st through the 14th of the month is the first pay period; the 15th through the 28th of the month is the second pay period; and the 29th through the 31st of the month is the third pay period.

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

Employees: Entering Employee Information (continued)

Entering Information into the Official Role Tab (F8)

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



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.

Employees: Changing the Employee Information

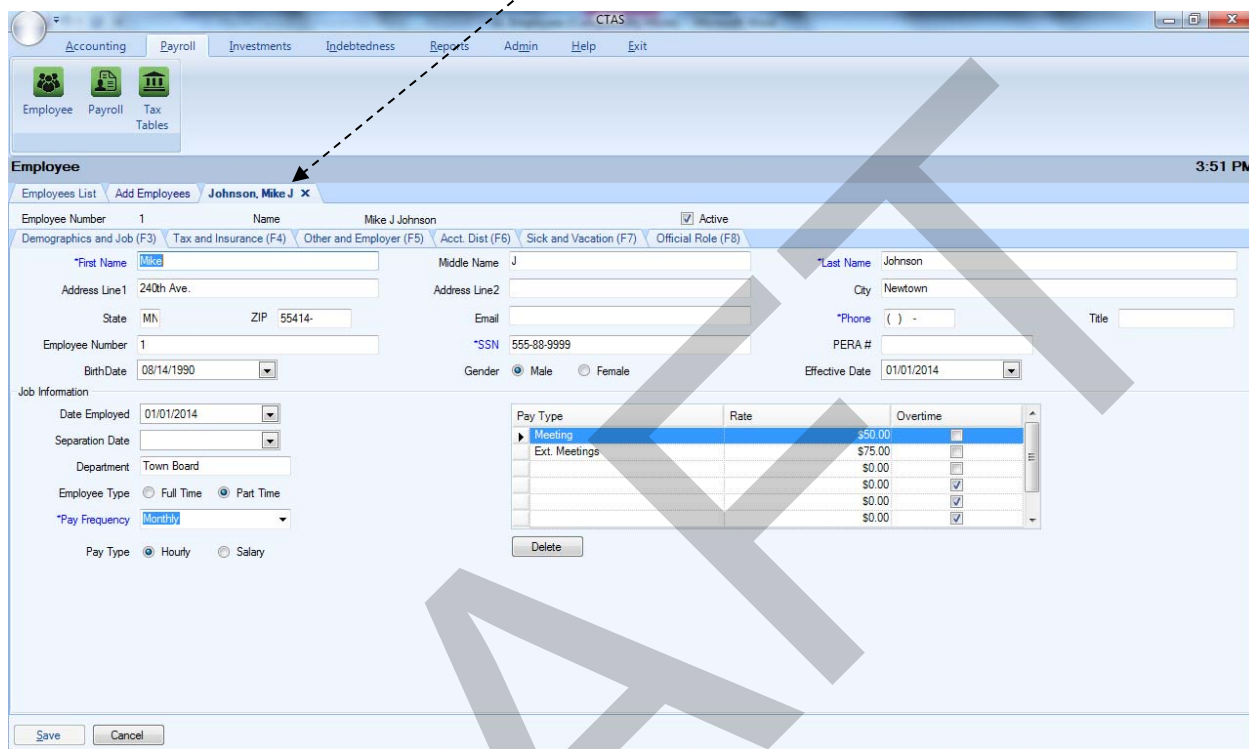
To change the information for an employee, highlight the employee's name and information and click the View/Edit Button on the Employees List tab in the Payroll Module.

Last Name	First & Middle Name	Emp. #	SSN #	PERA #	Birth Date	Active	Address Line 1	Address Line 2	City	State	Zip Code
Johnson	Mike J	1	555889999		08/14/1990	Y	240th Ave.		Newtown	MN	55414
Hanson	Abe K	2	999776555	2	03/23/1993	Y	589 Birch Street		Overhere	MN	55564
Payton	Walter U	3	111223333	3	03/19/1974	Y	659th Avenue		Lake City	MN	55558
Jones	Shirley P	4	999664444		06/22/1999	Y	458 - 3rd Street		Here	MN	55554
Barker	Kate G	5	333224444	6	04/13/1994	Y	580th Street		There	MN	55552
Martin	Austin T	6	000554444	8	09/19/1995	Y	654 Highspeed Lane		Faster	MN	74741
Anderson	Pete Q	7	888996666	22	12/24/1991	Y	99 1/2 Avenue West		Around	MN	32154

1) View/Edit 2) Delete 3) Export to CSV

Employees: Changing the Employee Information (continued)

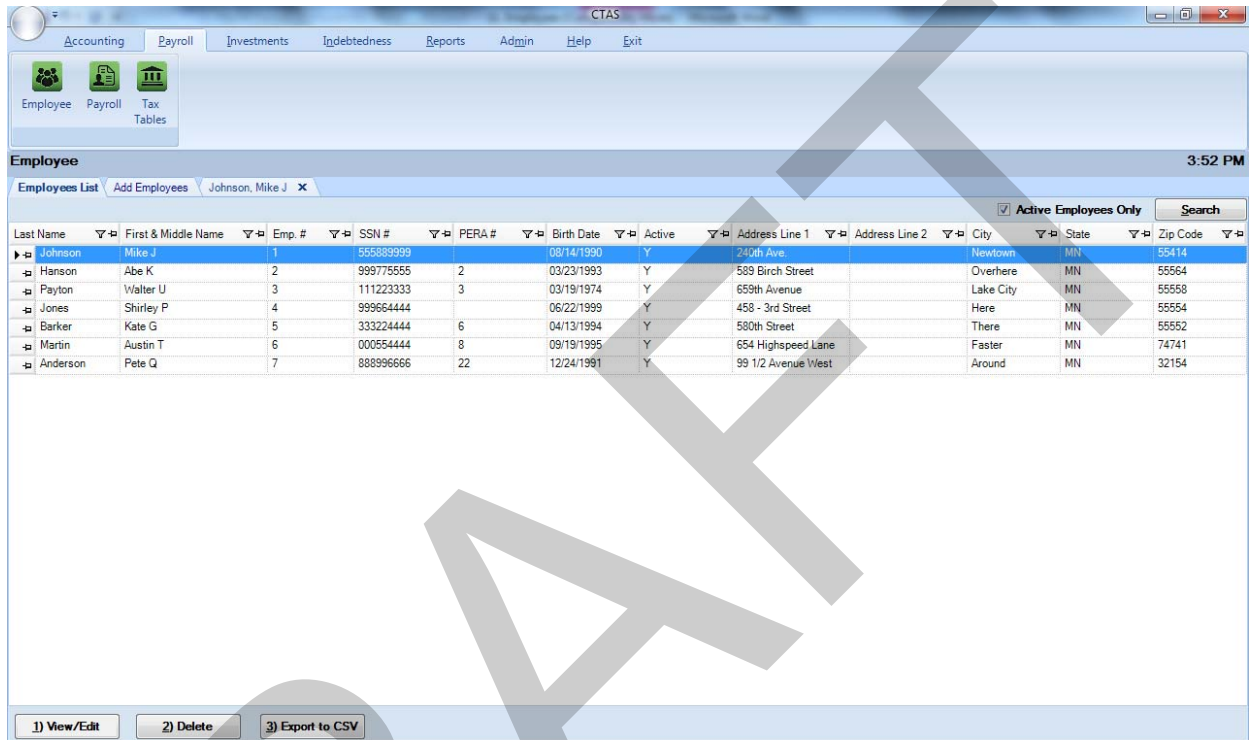
After the Edit option is selected, the employee's individual tab will open:



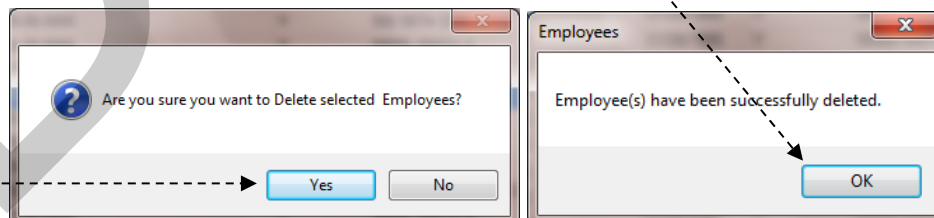
In this tab, you can change any field by clicking on the appropriate tab. The Active box indicates whether that employee is currently employed. By unchecking the box, the employee's information will not be displayed when selecting the employees to be paid. Note: Any changes made to an employee's information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

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.

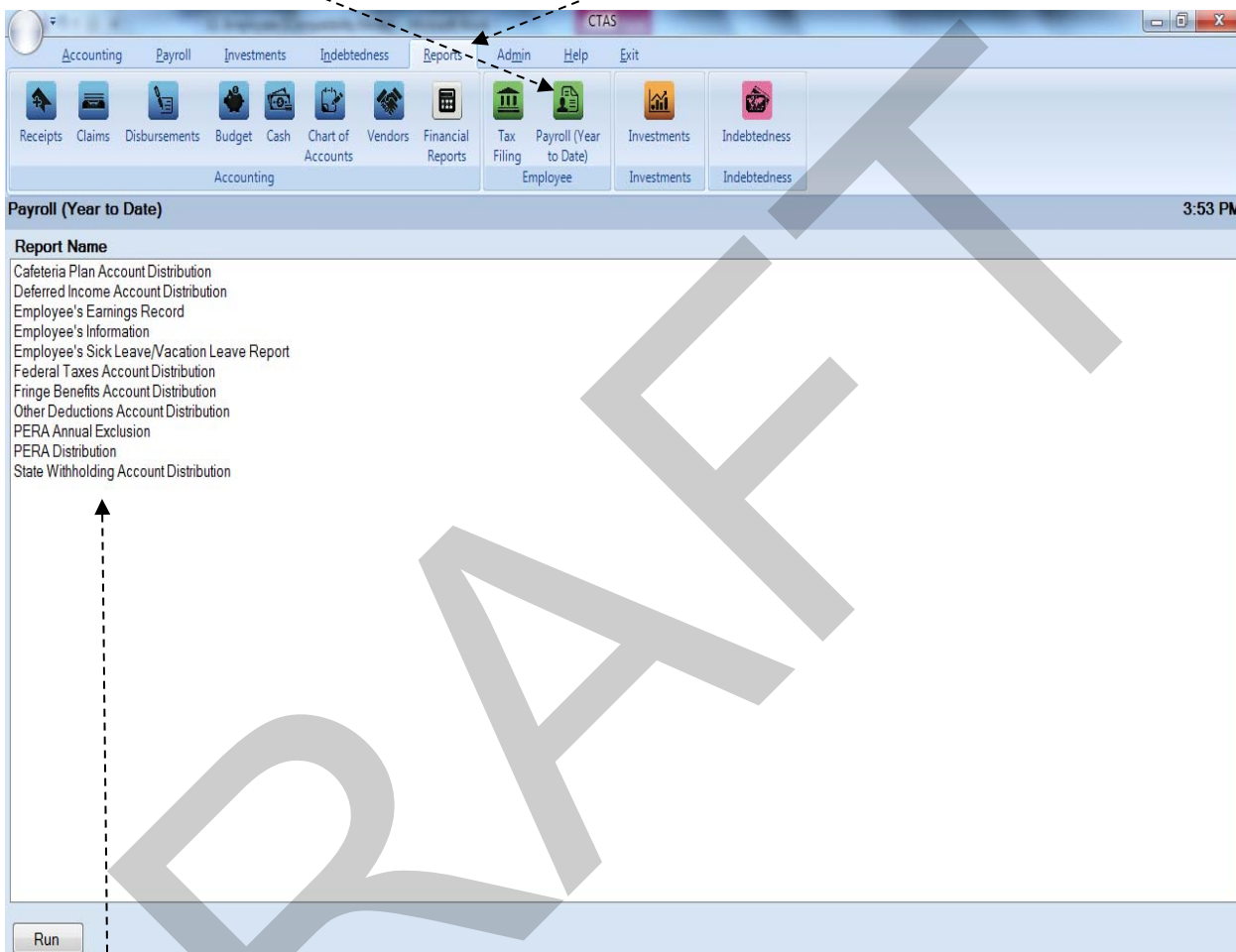


- To delete an employee, highlight the employee’s name on the Employees List tab and click the Delete button.
- After the delete option is selected, the Confirm Employee Delete screen will appear (see below, left).
- Click on the Yes button to delete the employee’s information.
- You will then receive a screen message that indicates the employee’s information was deleted (see below, right). Click the OK button to complete the process.



Employees: Printing an Employee's Information Report

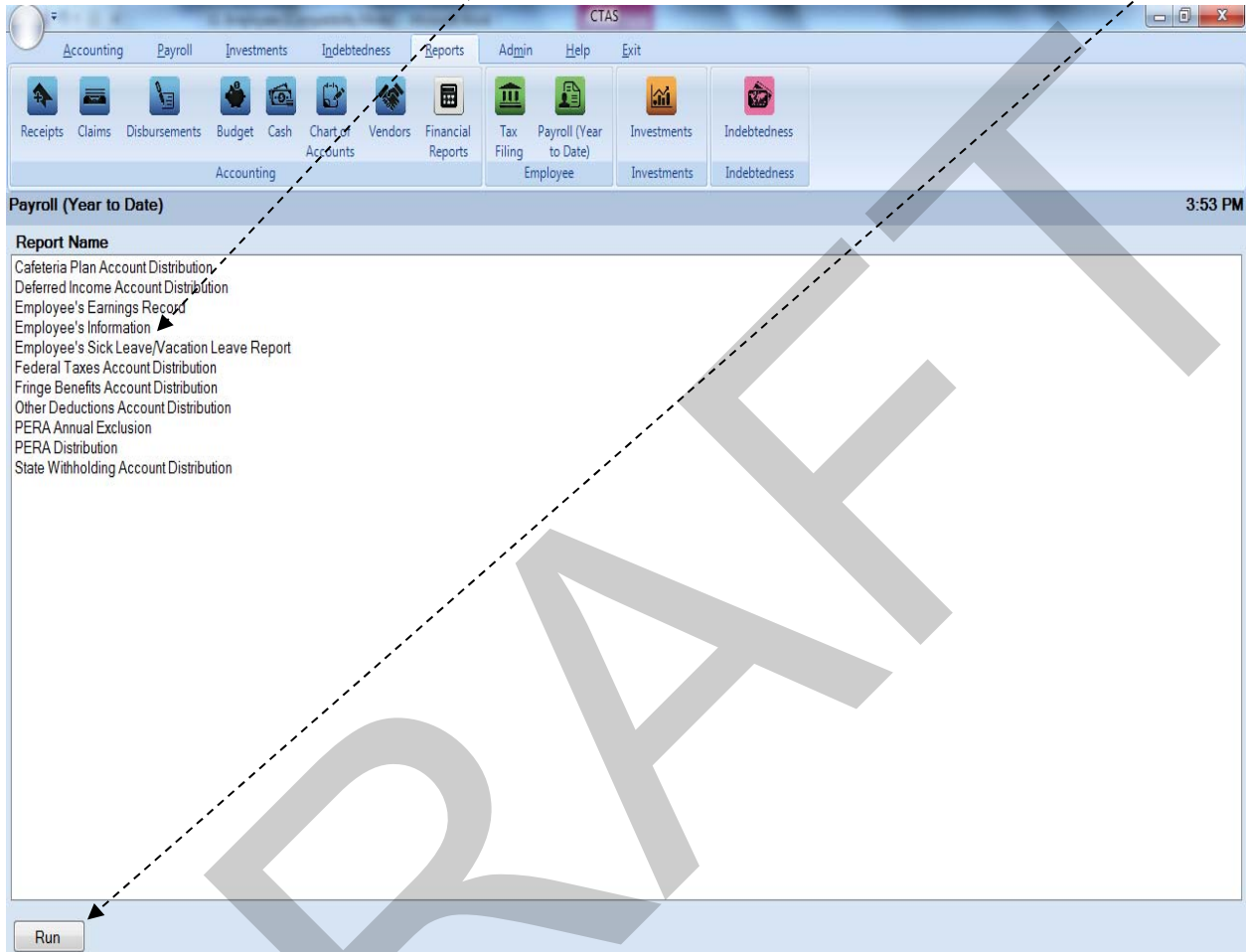
To print an Employee Information Report, click on the Reports tab in the Task Bar, then select the Payroll (Year to Date) icon.



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

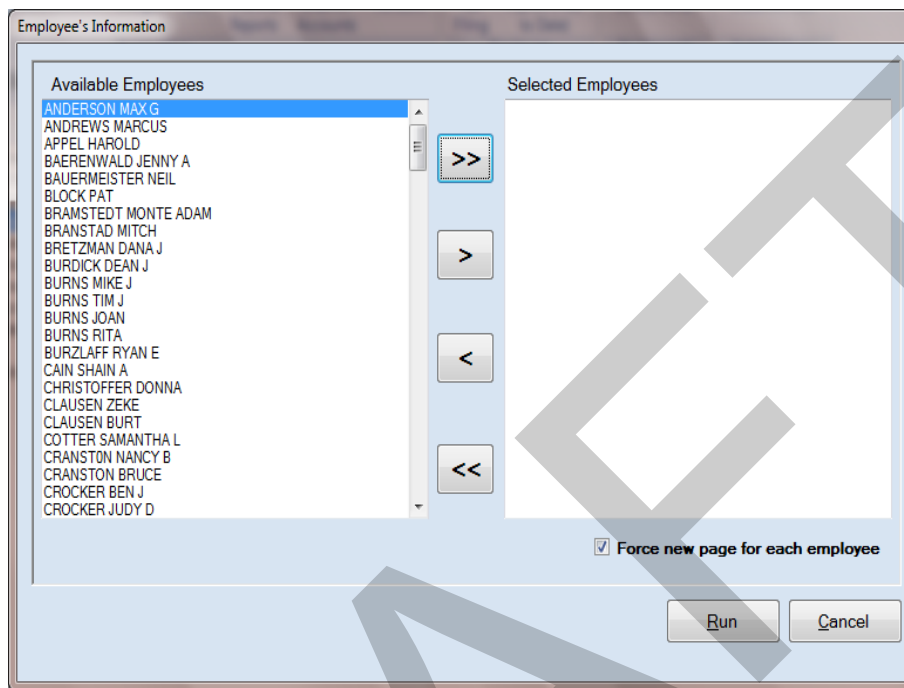
Employees: Printing an Employee's Information Report (continued)

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



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

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



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.

Employees: 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".

Report Viewer (SAP CRYSTAL REPORTS*)

Main Report

HERE TOWNSHIP Employee's Information Report 7/14/2014

Date Of Report: 7/14/2014

Employee Information

Name: MAX G ANDERSON Employee Number: 20 Effective Date: Retirement Plan:
RR 5 BOX 55 Social Security #: 555-55-5555 Employment Date: PERA Number:
Tax Status: Single Separation Date:

WILDER, MN, 55555

Tax Information

Number of Exemptions: - Federal 1 Additional Withholdings: - Federal \$0.00
- State 1 - State \$0.00

Deductions

Insurance - Health \$0.00 Other - Misc 1 \$0.00 Union Dues \$0.00
- Dental \$0.00 - Misc 2 \$0.00 Retirement Percentage 0.00%
- Life \$0.00 - Misc 3 \$0.00

Account Information

Fund	Account	Object Code	Percent
Municipal Liquor Store(#609)	Liquor Store - Merchandise Purchases - On-Sale(#49770)	Wages and Salaries,Part-time employe	1.00%
Percent Total			1.00%

Date Of Report: 7/14/2014

Employee Information

Name: MARCUS ANDREWS Employee Number: 130 Effective Date: Retirement Plan:
555 W MENAGE AVE Social Security #: 555-55-5555 Employment Date: 12/07/2006 PERA Number:
Tax Status: Single Separation Date:

LAKEFIELD, MN, 55555

Tax Information

Number of Exemptions: - Federal 1 Additional Withholdings: - Federal \$0.00
- State 1 - State \$0.00

Deductions

Insurance - Health \$0.00 Other - Misc 1 \$0.00 Union Dues \$0.00
- Dental \$0.00 - Misc 2 \$0.00 Retirement Percentage 0.00%
- Life \$0.00 - Misc 3 \$0.00

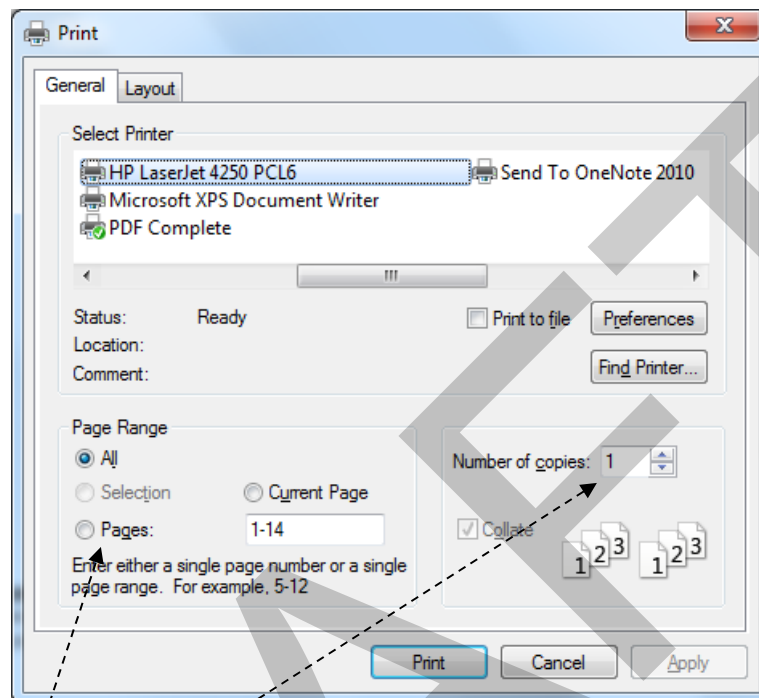
Account Information

Fund	Account	Object Code	Percent
General Fund(#100)	Fire(#42200)	Firemens Salary(#107)	1.00%

Current Page No.: 1 Total Page No.: 1 Zoom Factor: 85%

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

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



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.

Sample Employee's Information Report

New Township		Employee's Information Report				08/27/2014	
Date Of Report: 08/27/2014							
Employee Information							
Name : Pete Q.Anderson		Employee Number: 7		Effective Date: 02/24/2014		Retirement Plan: PERA	
99 1/2 Avenue West		Social Security #: 888996666		Employment Date: 02/24/2014		PERA Number: 22	
Around, MN, 32154		Tax Status: Single		Separation Date:			
Tax Information							
Number of Exemptions: - Federal 1		Additional Withholdings: - Federal \$10.00					
- State 1		- State \$10.00					
Deductions							
Insurance - Health \$15.00		Other - Misc 1 \$5.00		Union Dues \$ 20.00			
- Dental \$10.00		- Misc 2 \$5.00		Retirement Percentage 5.5%			
- Life \$10.00		- Misc 3 \$5.00					
Account Information							
Fund		Account		Object Code		Percent	
Road and Bridge(#201)		Paved Streets(#43121)		Wages and Salaries:Full-time Employees-Regular(#101)		50.00%	
Road and Bridge(#201)		Unpaved Streets(#43122)		Wages and Salaries:Full-time Employees-Regular(#101)		50.00%	
						Percent Total 100.00%	
Report Last Updated: 08/29/2014							
Page 1 of 7							