Asure Payroll - Web Client User Guide

Asure

CONTENTS

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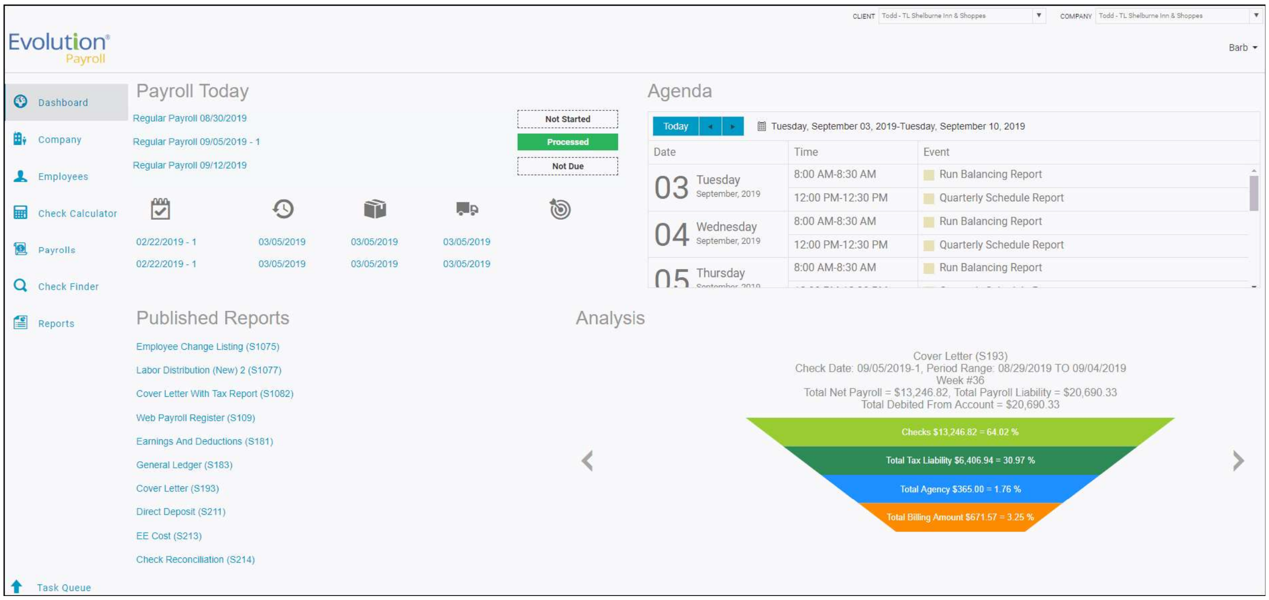
The Dashboard

Information on the Web Payroll Dashboard is laid out in sections, or tiles, from which users can navigate to the information selected. Dashboard functionality is covered in more detail later in this guide.



Header

In the Header at the top of the screen, far left, is the company's logo.

The clients and companies are selected from the dropdown lists in the upper right corner of the screen. When the Dashboard first opens, the default client shown is the one with the lowest Internal Client Number. The client and company fields are accessible in every screen within Web Payroll.

Note: When a different Client/Company is selected, regardless of the menu in which the user is working, the user is automatically returned to the Dashboard screen.

Menu Bar

Use the Menu Bar on the left-hand side of the screen to navigate within Web Payroll, similarly to the Menu Bar in Classic. Menu Items are selected from the main screens of each menu. Each menu is covered in more detail later in this Guide.

Payroll Today

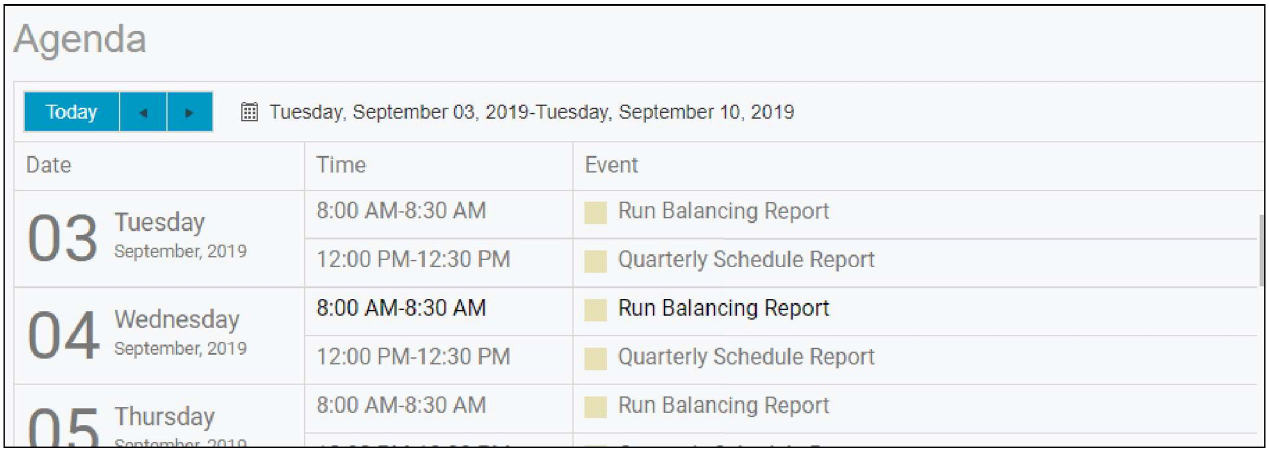
The Payroll Today tile offers a snapshot of payrolls scheduled around the time of the viewing. The payrolls listed are links that, when clicked, take you to the Batch Settings screen for the payroll selected. Normally the first payroll is the most recently run prior to current day. The next are payrolls scheduled to go out on the current day or in the very near future.

The symbols across the center of the tile are described in the table below and indicate delivery status of the payrolls listed below, currently a feature of VMR. To view this section on the Dashboard, the company must be set up with VMR.

Symbol	Description
	Check date of the payrolls listed below
	Processed date of the payrolls listed below
	Packaged date of the payrolls listed below
	In Transit date of the payrolls listed below
	Date Delivered of the payrolls listed below

Agenda

The agenda functions similarly to the User Scheduler in Classic and is available to the user only. It keeps a calendar of all scheduled tasks. Agenda users must have User Scheduler security rights established in Classic to access the Agenda in Web Payroll.



Published Reports

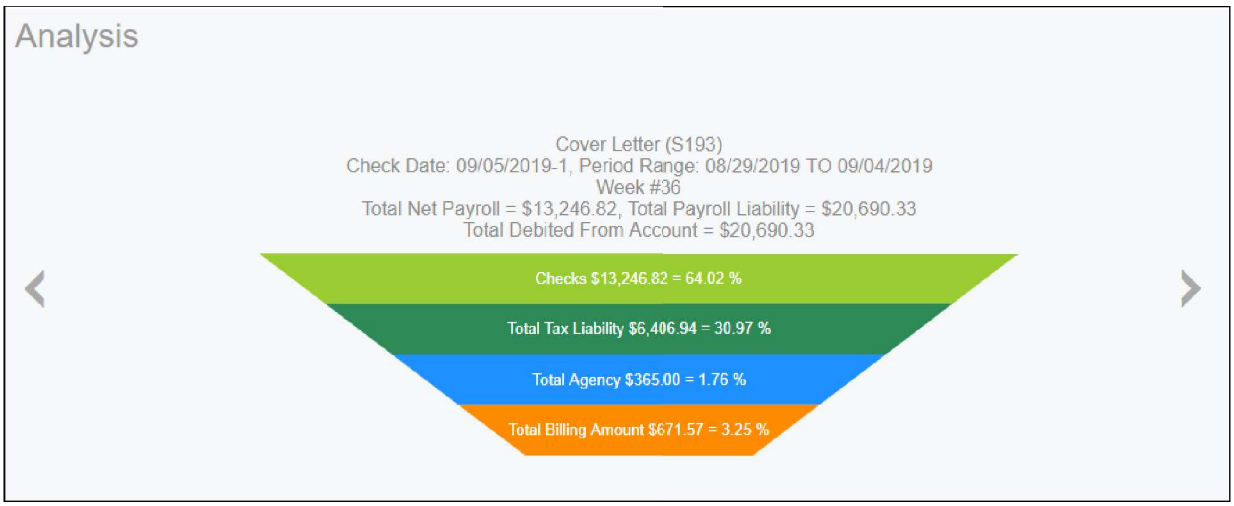
The Published Reports tile lists the 10 most recently run reports, published to the company through VMR in Classic. Each report link when clicked, brings the user to the “Published Reports” screen in the application, showing a preview of the report results.

Analysis

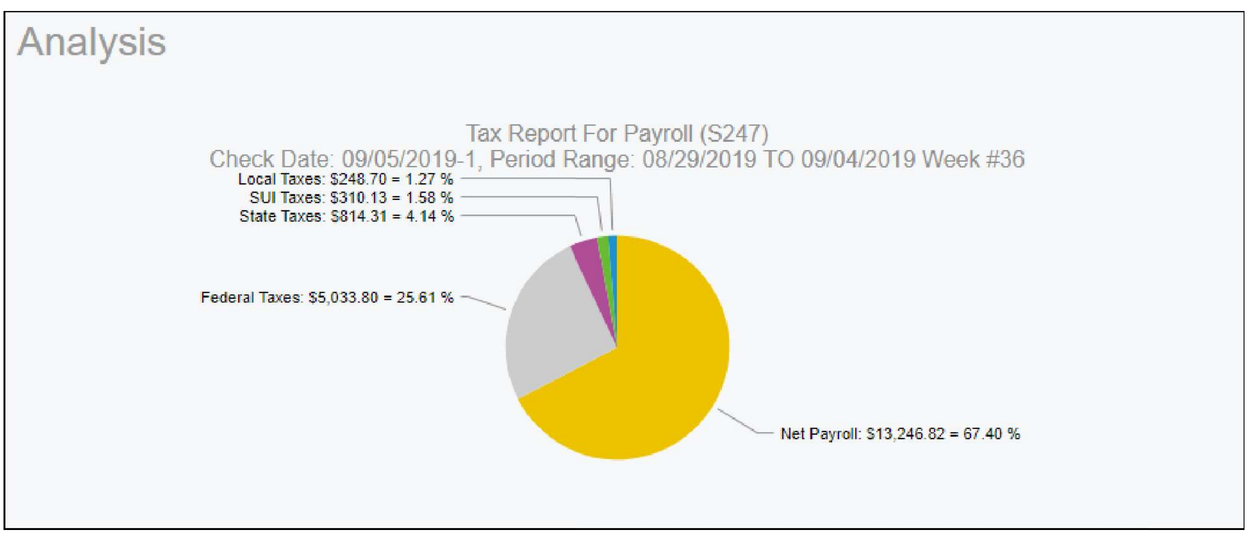
The tile on the bottom right of the Dashboard screen displays a graphical representation of the *Cover Letter Report* (*S193)* and *Tax Report for Payroll (S247)* reports. Users can click the left or right arrow to scroll to the next view.

The Analysis tile always shows data for the last processed payroll and is updated when next payroll is processed. For the graphs to be displayed, the reports must be properly configured to display on the dashboard.

The *Cover Letter (RW) (S193)* displays as an inverted pyramid showing the actual dollar amounts in the payroll. At the top of the chart is a breakdown of the payroll that the chart represents.



The *Tax Report for Payroll (S247)* displays as a Pie Chart showing the amounts of the taxes as well as the Net Payroll amount for the payroll for which the report was generated.



Navigating Web Payroll

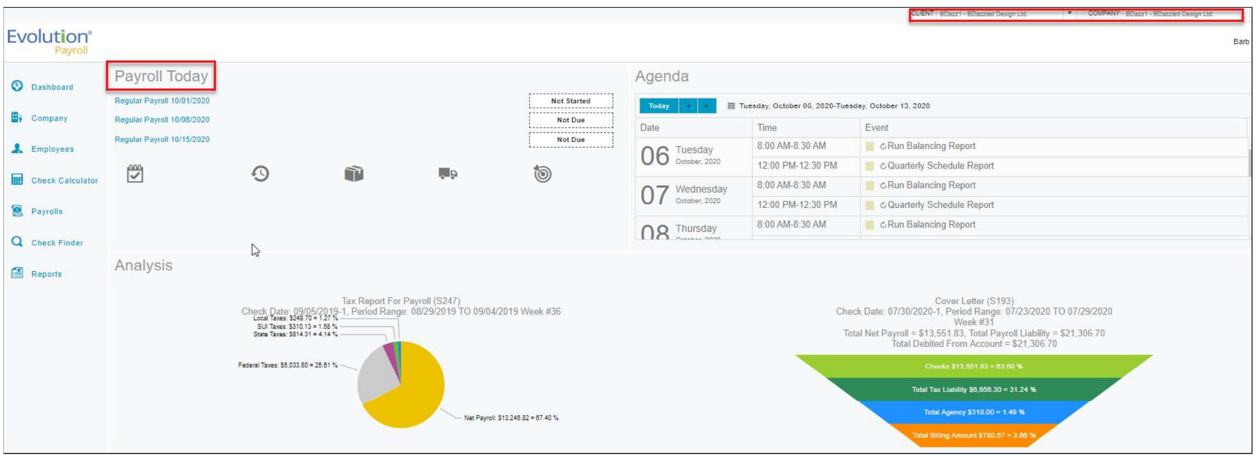
Navigate within Web Payroll using buttons, symbols, or by clicking within the fields themselves. When adding information, press the **TAB** key to advance to each of the applicable fields in the order in which they should be completed.

Client and Company Selector

Select the client and company from the dropdown menus in the upper right corner of the screen to view company-specific information.

To navigate to the topic and screens desired from the Dashboard, users can

1. Click the Menus in the Menu bar, or
2. Click the Tile titles

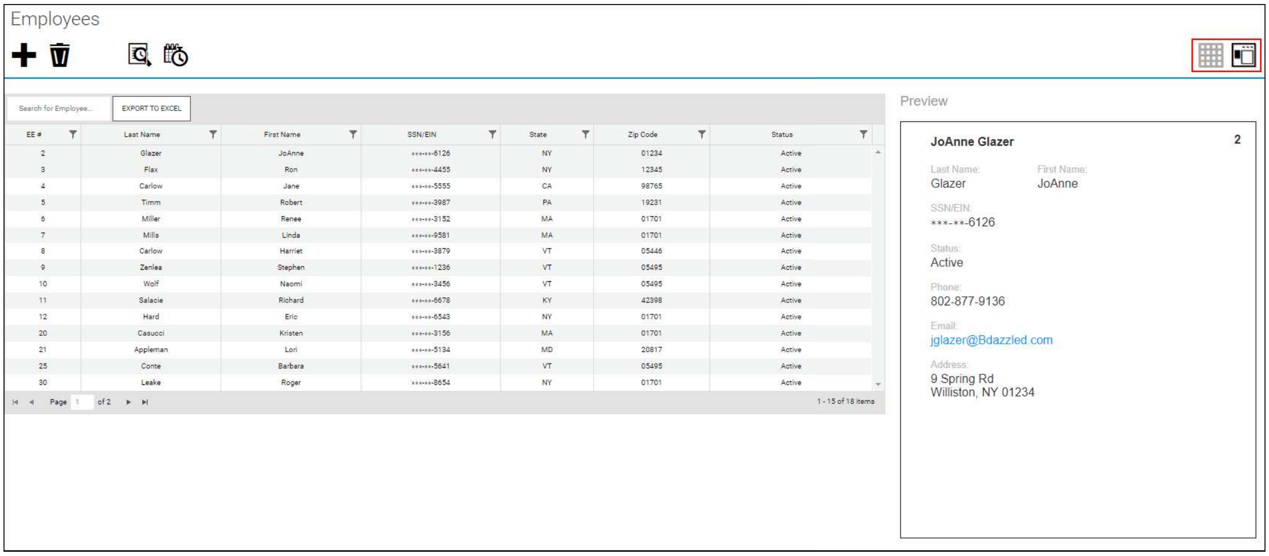


The Employee Menu

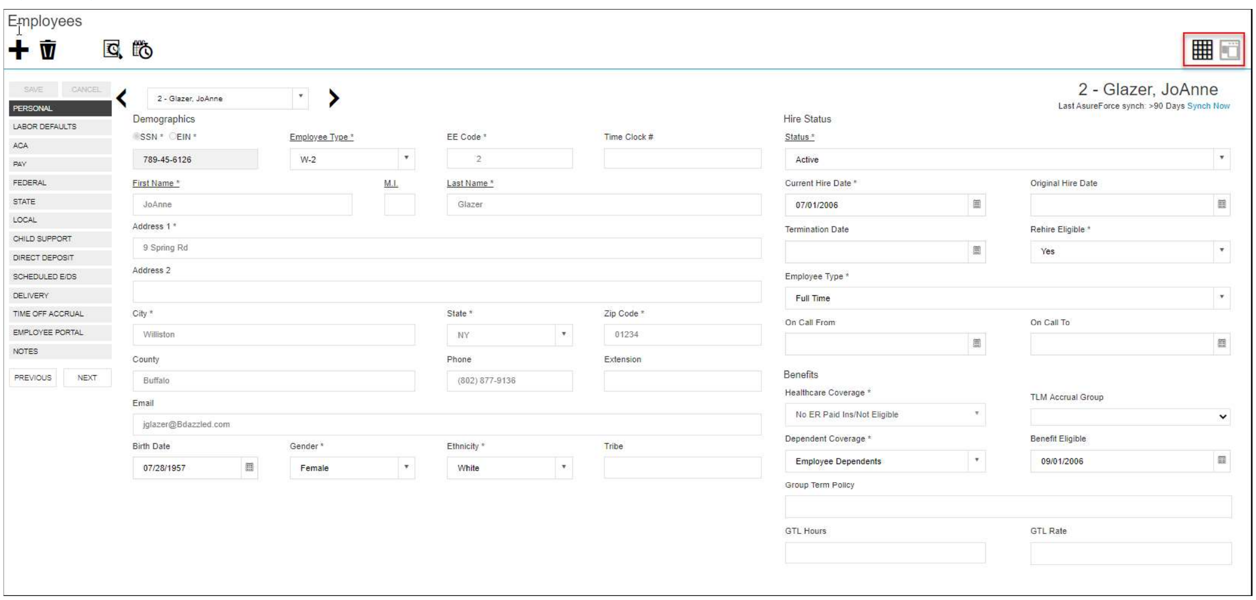
After clicking the Employee menu, click the active button (the button that is not greyed out) in the Header to access the additional menu items within the Employee menu.

Example: the following screen opens when the user clicks the Employees menu. This is the Table View. Click the active button to access the Form View, which lists the menu items within the Employee menu.

Table View



Form View



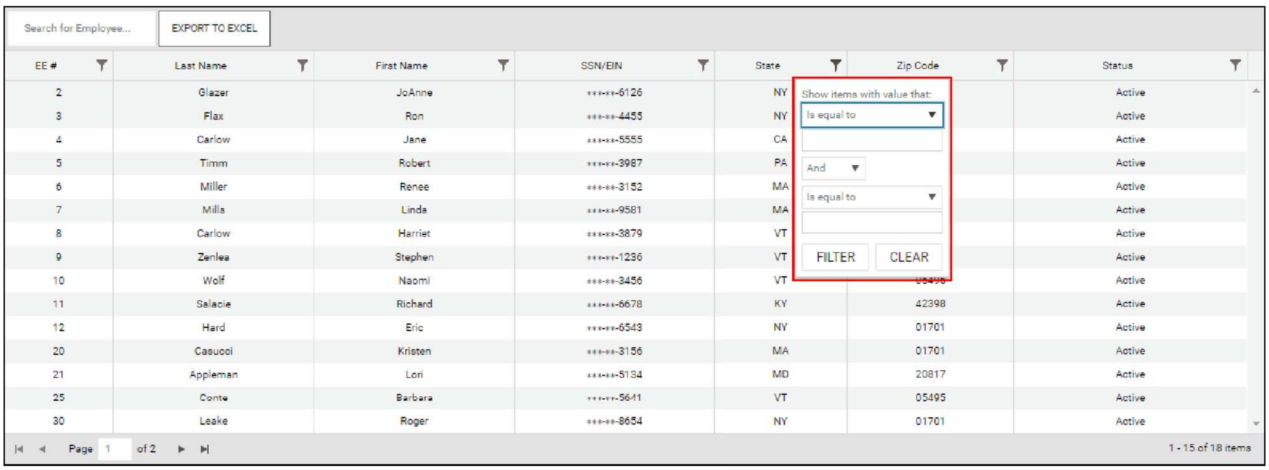
Tables

Several screens in Web Payroll are formatted as tables, which come with their own unique navigating functionality.

The first screen to open in the Employees menu is displayed in table format.

There are several additional tools that can be used when navigating with tables.

Filtering – if a column header has a filter symbol next to the name, click to open a filter box. Enter criteria to filter the results displayed on the screen when searching for specific data.


Search for Employee... EXPORT TO EXCEL

EE #	Last Name	First Name	SSN/EIN	State	Zip Code	Status
2	Glazer	JoAnne	***-**-6126	NY		Active
3	Flax	Ron	***-**-4455	NY		Active
4	Carlow	Jane	***-**-5555	CA		Active
5	Timm	Robert	***-**-3987	PA		Active
6	Miller	Renee	***-**-3152	MA		Active
7	Mills	Linda	***-**-9581	MA		Active
8	Carlow	Harriet	***-**-3879	VT		Active
9	Zenlea	Stephen	***-**-1236	VT		Active
10	Wolf	Naomi	***-**-3456	VT		Active
11	Salacie	Richard	***-**-6678	KY	42398	Active
12	Hard	Eric	***-**-6543	NY	01701	Active
20	Casucci	Kristen	***-**-3156	MA	01701	Active
21	Appleman	Lori	***-**-5134	MD	20817	Active
25	Conte	Barbara	***-**-5641	VT	05495	Active
30	Leake	Roger	***-**-8654	NY	01701	Active

Page 1 of 2 1 - 15 of 18 items

Show items with value that:
Is equal to
And
Is equal to
FILTER CLEAR

Sorting – as in Excel, data can be sorted from high-to-low or low-to-high by clicking the column header. This can be done with alpha as well as numerical data.

Column Re-ordering – click and drag the column heading to re-order the data **–** for example, click and drag the First Name column to view before the Last Name column.

Hot Keys

A series of **Hot Keys** have been developed to enable quicker navigation. There are several key combinations that perform the same function with different results, depending upon the menu the user is in. The table below identifies the Keyboard Hot Keys currently available.

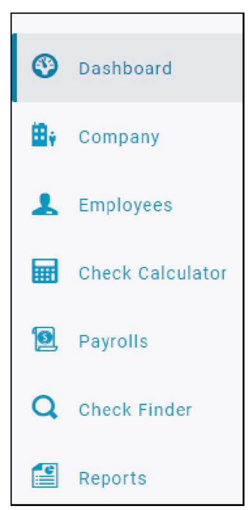
Keyboard Key/s	Description
Press the ALT key + N	Add new employee / Add new payroll
Press the CTRL key + S	Save employee / Save payroll
Press the CTRL key + E	Export grid to Excel (this only works in Grid view)
Press ALT + Insert	Insert / add a record (row) into a table (instead of clicking the Add button.)
Press ALT + Delete	Delete record (row) from a table (instead of clicking the Delete button.)
Press the ALT key + the Right Arrow key	Scroll right to next employee record or check line
Press the ALT key + the Left Arrow key	Scroll left to previous employee record or check line

Terminology

There are a few terms used in Web Payroll that warrant introduction. A few of the new terms you will see in this document as well as in the application are described below.

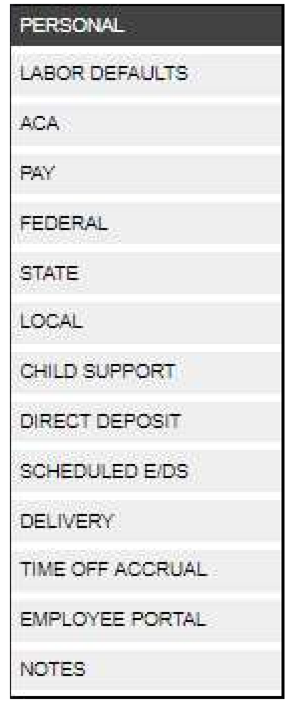
Menu Bar

List of Menus (links) on the left-hand side of the screens. Click the links to be brought to the main screen of the menu selected.



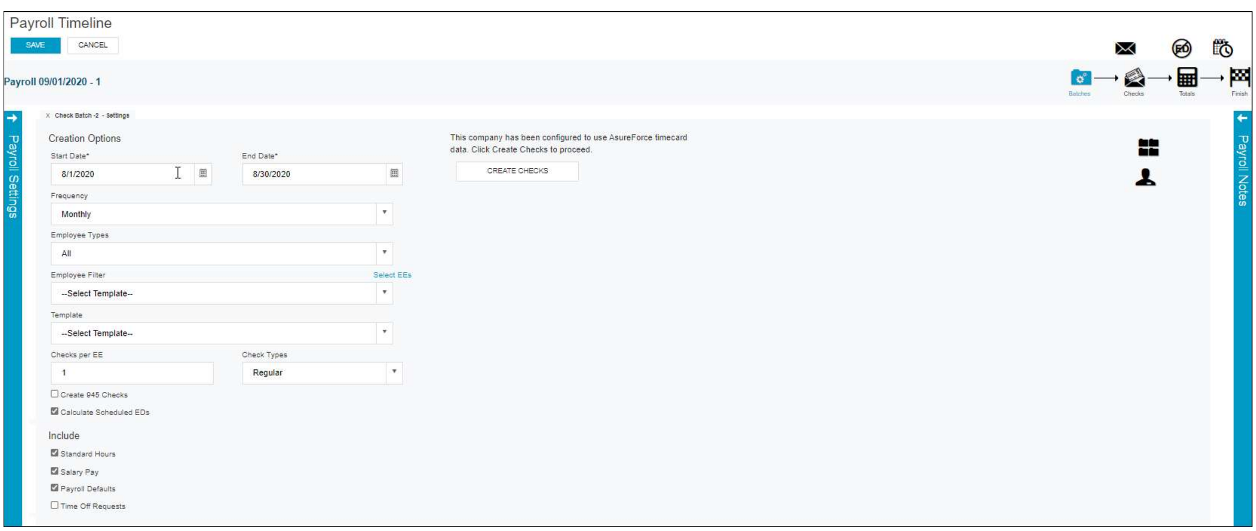
Menu Items

Within some of the menus (Company and Employee) there are sub-menus on the left side of the screen with menu items that pertain to the topics of those menu screens. Our example is from the Employees menu.



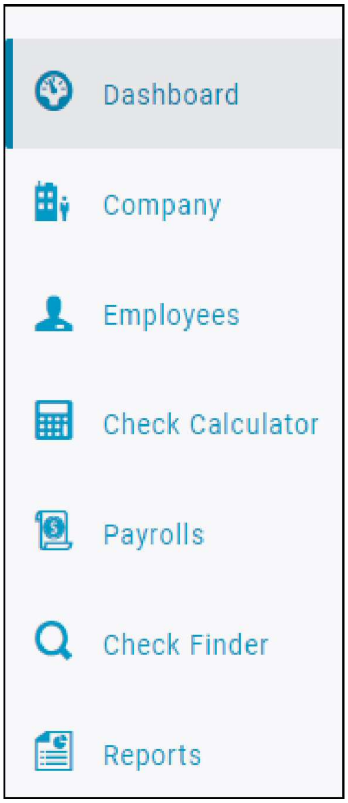
Fly-out tabs

There are tabs you will see in the application that open from the sides, called Fly-out tabs. These will be discussed in detail within the Web Payroll modules.



The Menu Bar

The Menu Bar contains many of the same menus as are in Classic, based on security rights the user has been given.



The Web Payroll Dashboard Information is laid out in sections, or tiles, from which users can navigate to the information selected.

Company information, including settings and rules established by the company can be viewed in the Company menu. The fields' values are taken from corresponding fields in Web Classic. The data in the Company menu is currently read-only however it can be edited in Classic.

Employee information can be added, viewed, and edited in the Employees menu.

Opens the Check Calculator screen on which non-payroll employee checks can be calculated from Gross-to-Net or Net-to-Gross.

Payrolls are processed quickly and easily through Web Payroll. The first screen in the Payrolls Menu is the Payroll Timeline, displaying coupon or card-like views of scheduled payrolls.

The Check Finder menu link opens a Check Finder screen on which parameters are entered to search for a specific check by check number or employee code / name within a particular date range, and status.

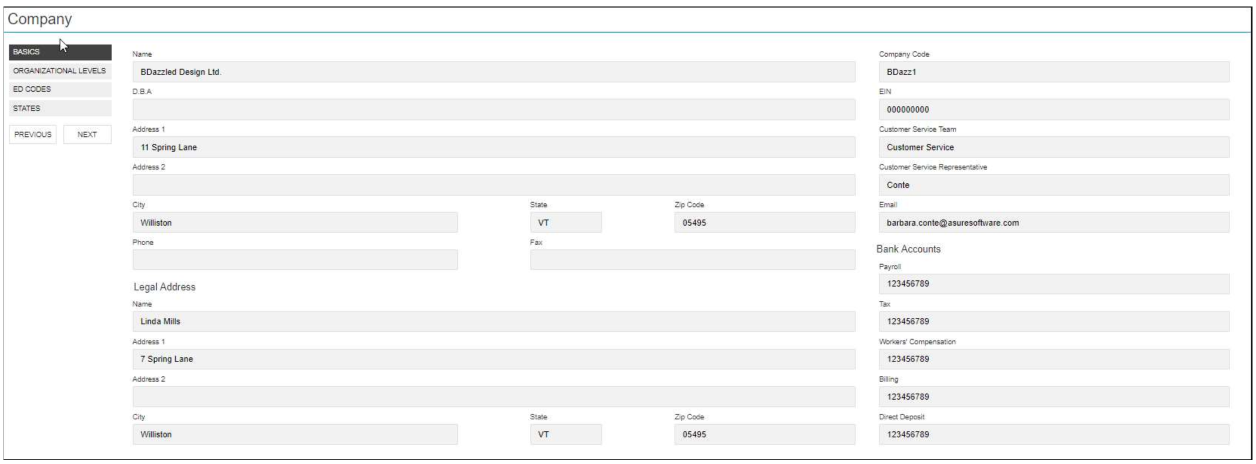
The Reports menu lets the user see reports that have been published to Web Payroll from VMR, as well as process additional reports as needed.

The Company Menu

Company information, including settings and rules established by the company can be viewed in the Company menu. The fields' values are taken from corresponding fields in Classic. The data in the Company menu is currently read-only, however it can be edited in Classic.

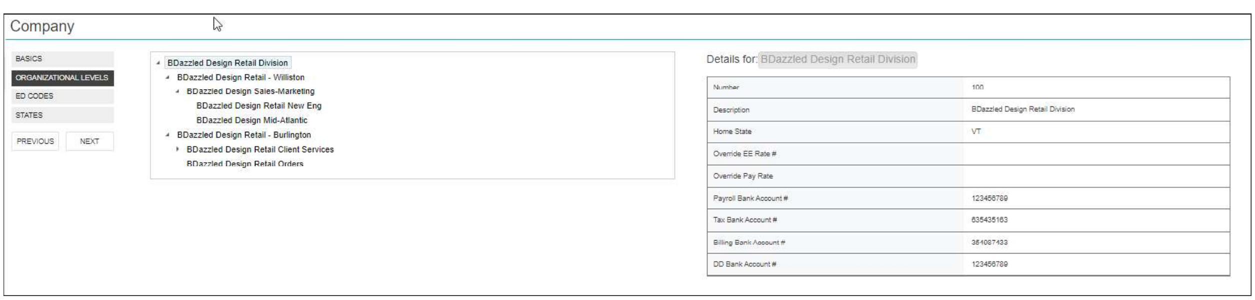
Company – Basics screen

The first screen that opens when the Company menu is accessed is the Company – Basics screen. Note the additional Company menu items on the left-hand side of the screen.



Company - Organization Levels screen

The Company - Organization Levels screen displays the Division, Branch, Department, and Team organization level-specific information, if applicable, for this company. Each company level (previously known as D/B/D/T in Classic) may have their own payroll bank accounts. When a level is selected on the left, a Payroll Bank Account number, Tax Bank Account number, Billing Bank Account number, and Direct Deposit Account number display on the right, if applicable.

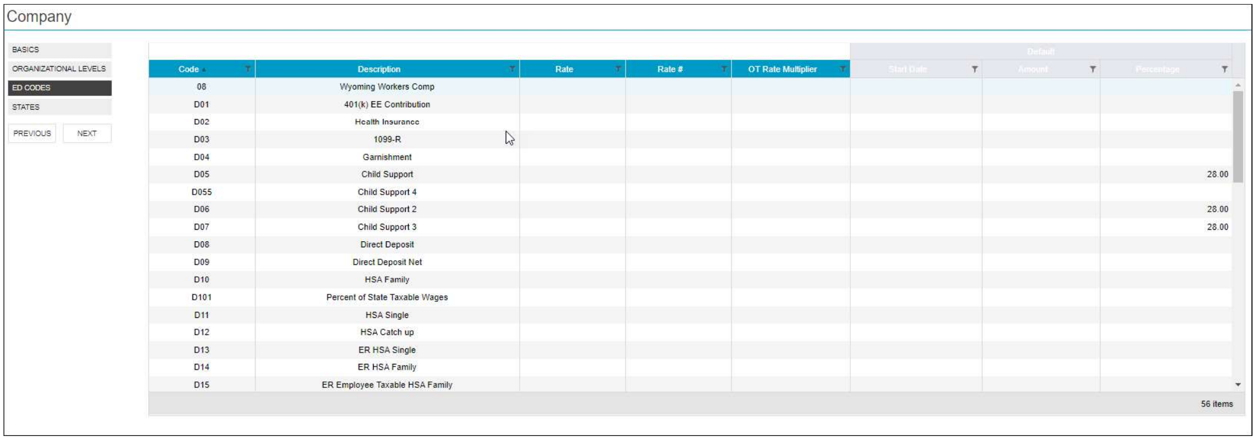


The section on the left-hand side of the screen displays the organization level setup (Division, Branch, Department, and Team).

- Click a level to view information specific to that organization level in the panel on the right.

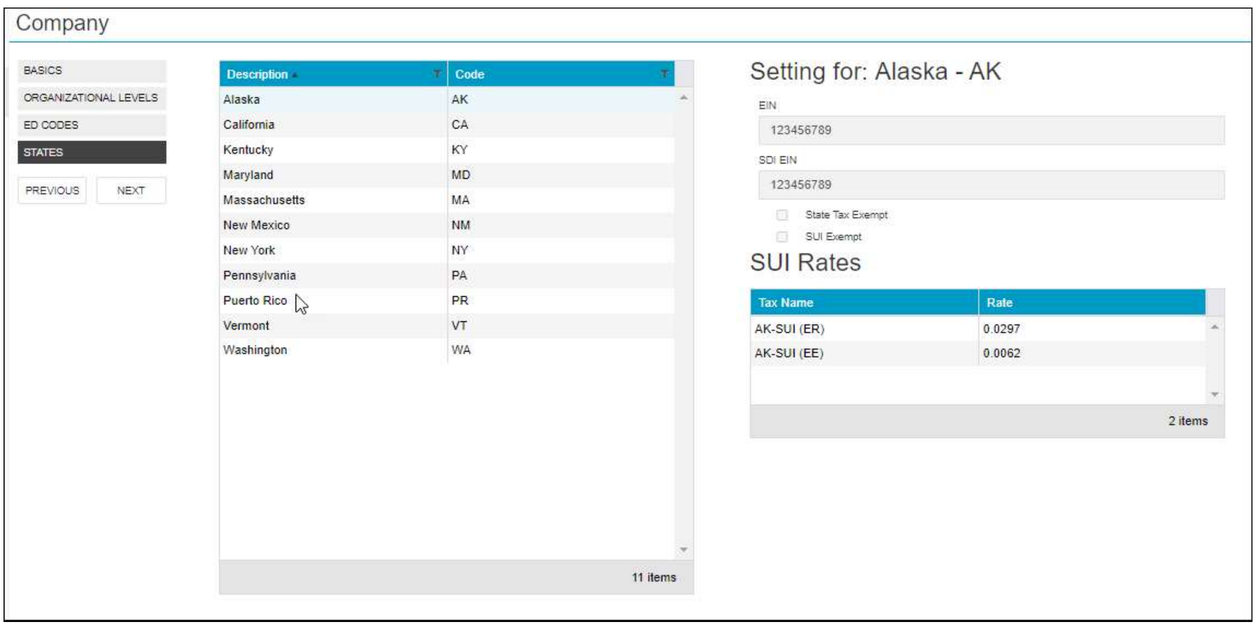
Company - E/D Codes Screen

The Company - E/D Codes screen displays a list of the E/D Codes created and used by the company.



Company – States screen

The Company – States screen shows the states in which the company is set up to do business.



Appendix – Company Menu

Company Basics screen

Field / Button	Description
Name	The company name.
DBA	Company name if the company is doing business as a name other than the name above.
Address 1	First address line of company address.
Address 2	Second address line of company address.
City	City name of company address.
State	Company state.
Zip Code	Company zip code.
Phone	Main phone number for company.
Fax	Main fax number for company.
Legal Address section	If the company has a legal name and address different from the address listed above, enter it in this section.
Name	Legal company name, if different.
Address 1	Legal address first line, if different.
Address 2	Legal address second line, if different.
City	Legal address city, if different
State	Legal state address, if different.
Zip Code	Legal zip code, if different.
Company Code	This must be alpha or numeric, up to 9 characters, and must be unique to this company.
EIN	The Employer Identification Number (EIN) for the company.
Customer Service Team	Name of the Customer Service Team.

Field / Button	Description
Customer Service Representative	Name of the Customer Service Representative.
Email	Email address of the Customer Service Representative.
Bank Accounts section	
Payroll	The payroll bank account number.
Tax	The tax bank account number.
Field / Button	Description
Workers' Compensation	The Workers' Compensation bank account number.
Billing	The billing bank account number.
Direct Deposit	The direct deposit bank account number.

Company - Organization Levels screen Company - States Screen

Field / Button	Description
Number	The number of the organization level displayed.
Description	The description of the organization level displayed.
Home State	The home state of the organization level displayed.
Override EE Rate #	The employee rate number override, if applicable.
Override Pay Rate	The pay rate amount if applicable.
Payroll Bank Account #	Payroll bank account number for the organization level displayed.
Tax Rate Account #	Tax rate account number for the organization level displayed.
Billing Bank Account #	Billing bank account number for the organization level displayed.
DD Bank Account #	Direct deposit account number for the organization level displayed.

Field / Button	Description
Code	Assigned at the System level, these are the E/D codes the company has selected to use.
Description	Description of the E/D code
Rate	Rate at which the earning or deduction is added or subtracted
Rate #	Rate Number for the rate that translates to the employees' rate number
OT Rate	Rate at which overtime is applied
Default section	
Start Date	Default Start Date for all company employees with this set up as a Scheduled E/D. Can be changed at the Employee level.
Amount	Default Amount for all company employees with this set up as a Scheduled E/D. Can be changed at the Employee level.
Rate	Default Rate for all company employees with this set up as a Scheduled E/D. Can be changed at the Employee level.

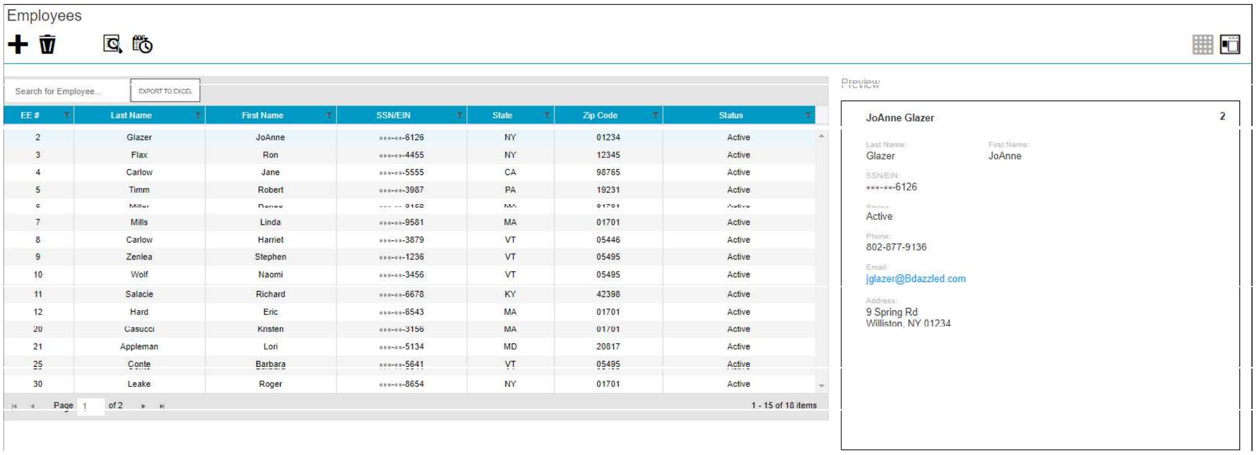
Company - States Screen

Field / Button	Description
Description	The state name.
Code	The state code.
EIN	The Employer Identification Number.
SDI EIN	Employer Identification number used when paying State Disability Insurance in the state
State Tax Exempt	Whether the company is exempt from paying state tax in this state.
SUI Exempt	Whether the company is exempt from paying SUI for this state.

Field / Button	Description
SUI Rates section	State Unemployment Insurance rates that the company pays based on the states in which it is set up to do business.
Tax Name	The SUI tax name.
Rate	The rate of the SUI tax.
Local Rates section	Local rates that the company pays based on the states in which it is set up to do business.
Tax Name	Name of the local tax
Rate	The local tax rate.

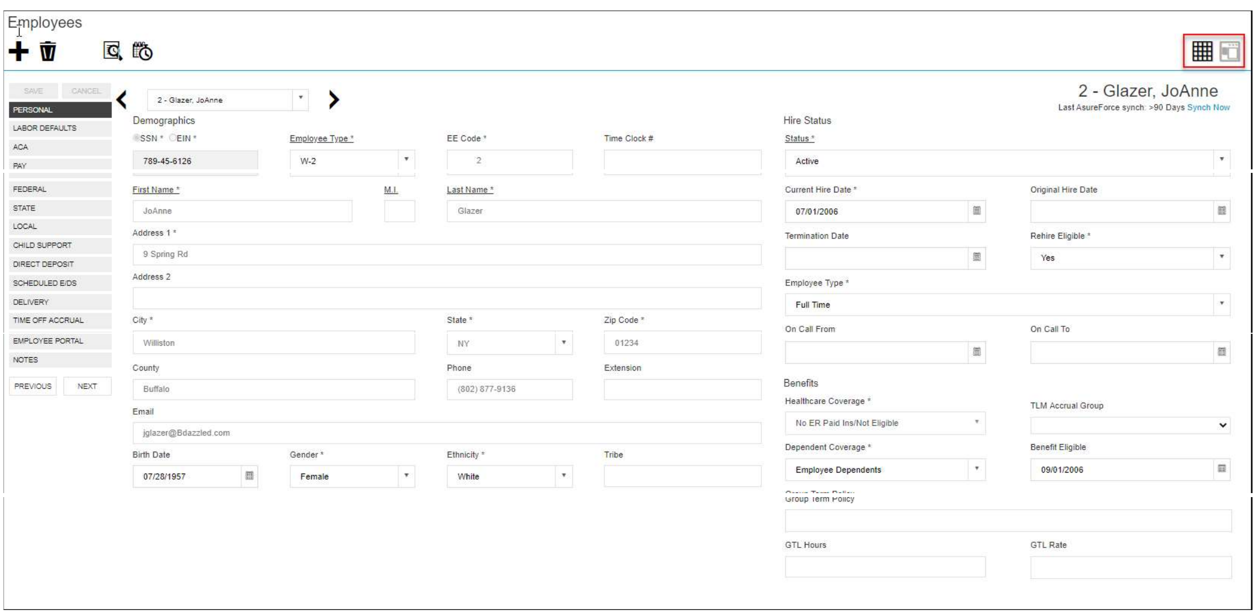
The Employees Menu

The buttons in the header, far right are used to toggle between the Table view (above) and the Employee view (below) in which information shows for one employee.



The buttons in the header, far left, are used to add a new employee, delete a new record, show audit history, and for single sign-on into SwipeClock.

Note: The SwipeClock SSO button is displayed on all screens in the Employees menu, as well as the screens in the Payroll menu.



Note: If the company has any payrolls with a status of C, H, I, Y, or B, an error message will be displayed, and the user will not be able to add new employees, or make edits to any employees of that company.

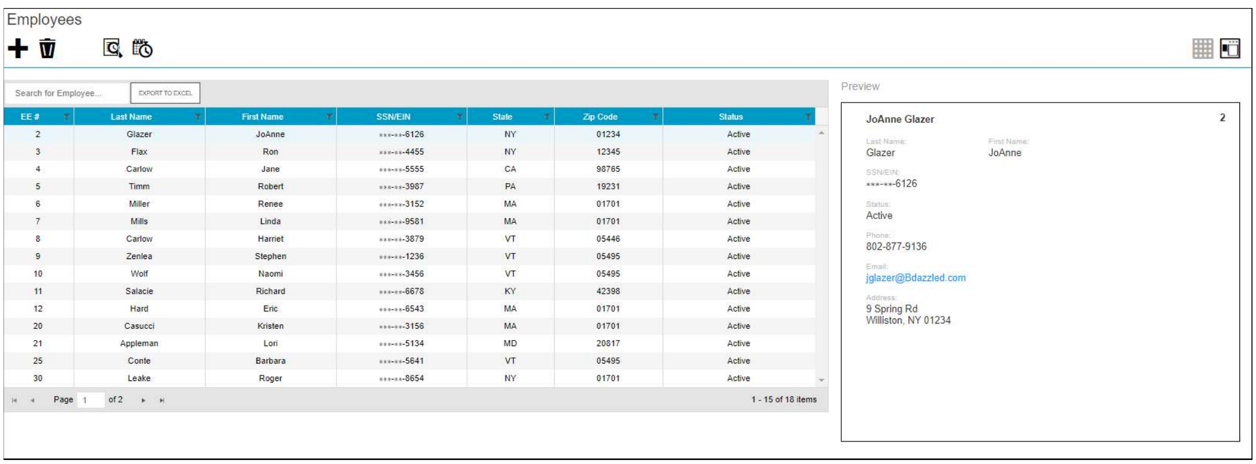
Adding New Employees

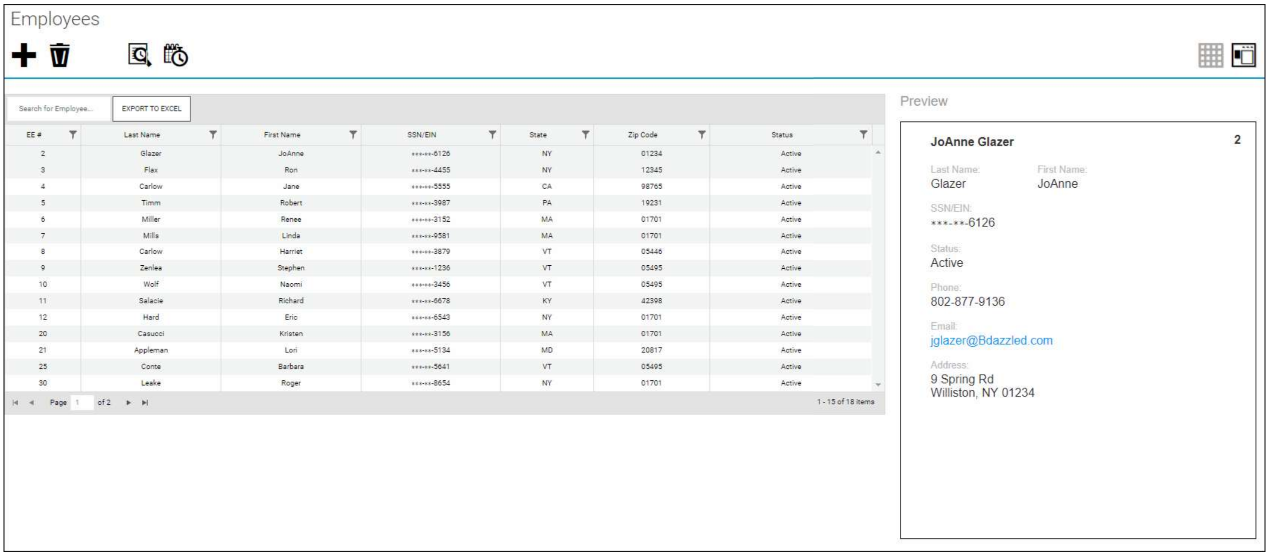
To add a new employee in Web Payroll,

1. Select and open the client and company from the dropdown list above the heading on the right-hand side of the screen.
2. Click the **Employees** Menu to open.

If there are employees already set up with this company, they appear in the list on the screen.

Note: Employee SSNs are masked in the Grid View except for the last four digits.





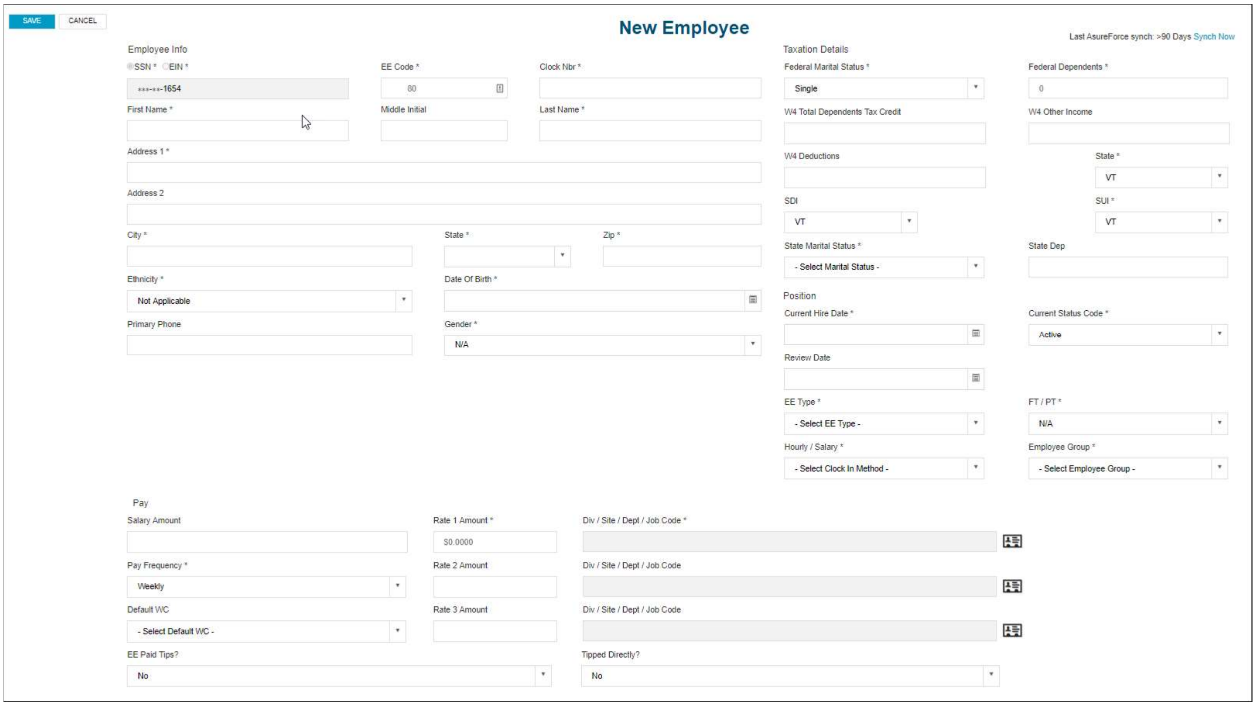
3. Click the large **plus** ➕ **sign** in the heading to create a new record
   Result: The Add Employee box opens.

4. Select whether the Tax ID is a **SSN** or **EIN** and enter that number.
5. Click **Check ID**.
   Result: If the Social Security Number or EIN is already in the system, the Employees – Basics screen opens with the existing demographic information already copied into the new employee fields.

Employees View screen

The Employees – View screen is displayed only when creating a new employee. Once the basic information is added and saved, additional Employees Menu items are available on the left-hand side of the screen if needed.

Note: Users must have the same security access as when using the Employee – Employee – EE Entry tab in Classic.



Note: Fields with names with an asterisk (*) are required.

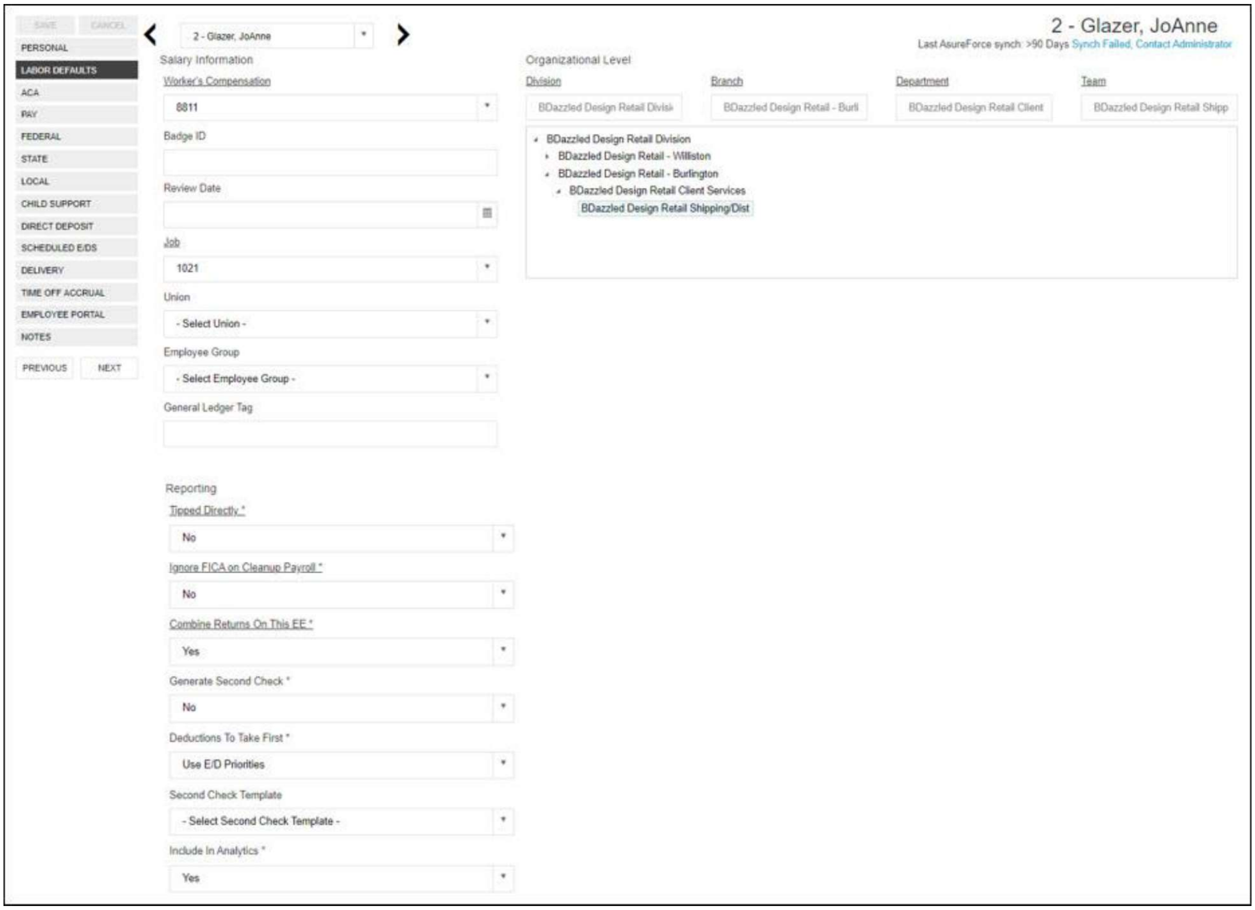
1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the Employees View screen in the Appendix at the end of this chapter.
2. Click the **Save** button when you complete entering information on this screen.
   Result: The Employees View screen opens with additional Employees Menu items available on the left-hand side of the screen.

Employees - Personal screen

Once the New Employee information is saved, the Employees Personal screen displays the information added in a different format. If there is information to be added, place the cursor within the field, click and add. For detailed information about the fields on this screen, refer to the Employees – Personal screen in the Appendix at the end of this chapter.

1. Click the **Next** button when you complete entering information on this screen.
   Result: The Employees – Labor Defaults screen opens.

Employees - Labor Defaults screen

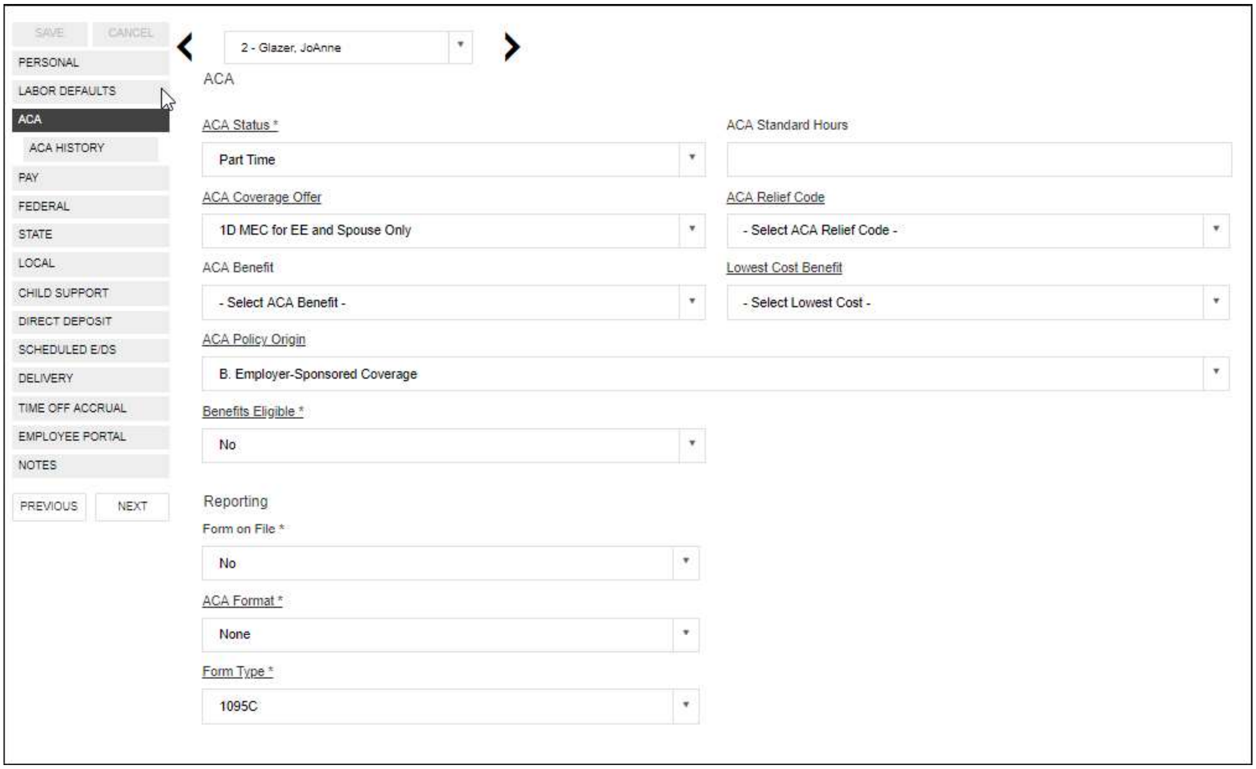


1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the Employees – Labor Defaults screen in the Appendix at the end of this chapter.
2. Click the **Next** button when you complete entering information on this screen.

   Result: The Employees – ACA screen opens.

Employees - ACA screen

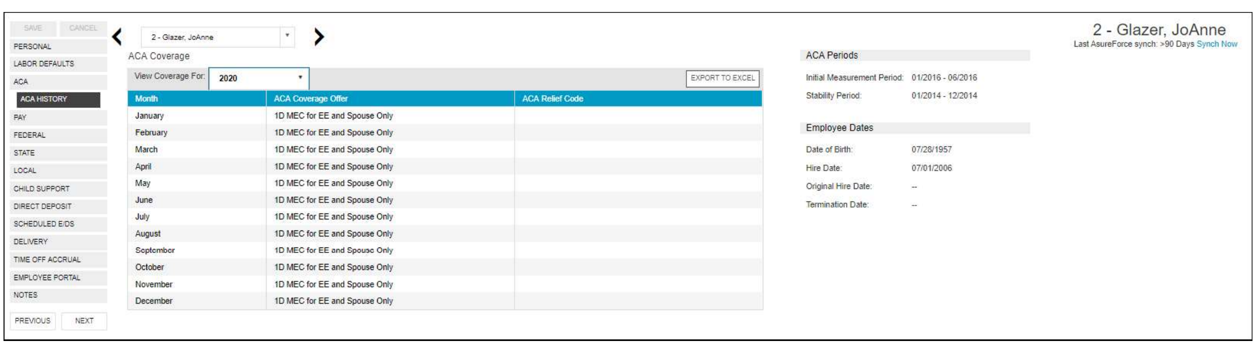
The ACA screen in Web Payroll contains the same fields as the ACA tab in Classic, located on the Employee – Employee – screen. If there is information to be added, place the cursor within the field and add



3. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the Employees – ACA screen section in the Appendix at the end of this chapter.
4. Click the **Next** button when you complete entering information on this screen
   Result: The Employees – ACA History screen opens.

Employees - ACA History screen

The Employees - ACA History screen lets the user view and update coverage information for employees.



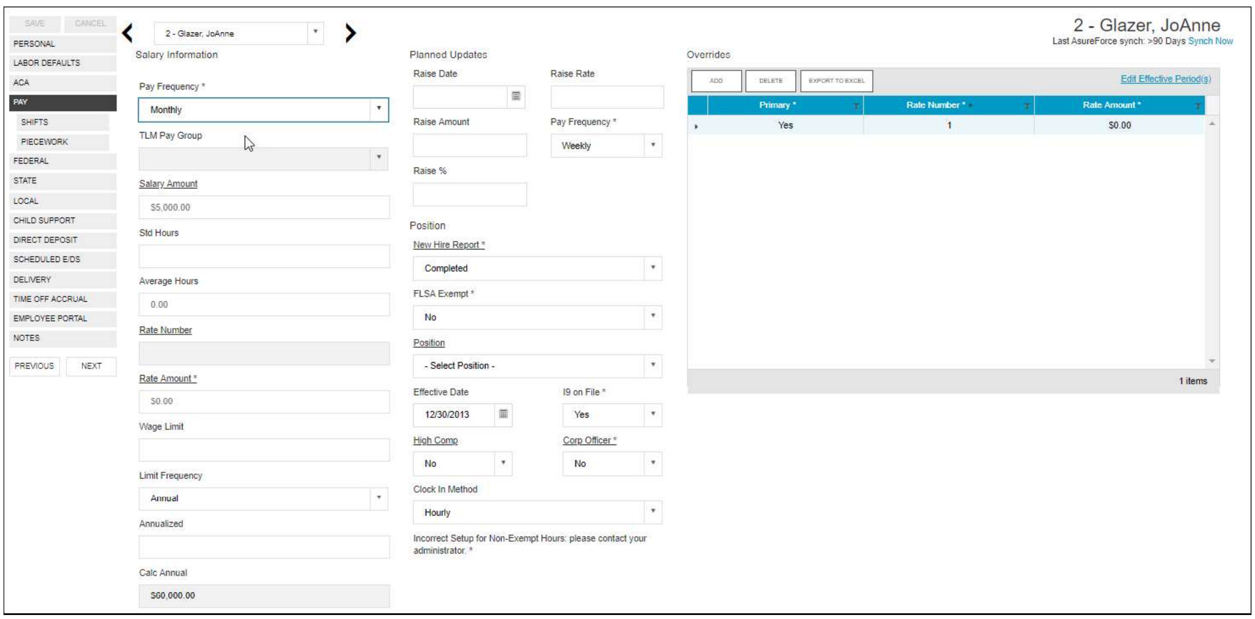
Select the year for which historical information is needed and click within the month line in the ACA **Coverage Offer** and/or ACA **Relief Code** column to select a value from the dropdown list that opens with the applicable codes. Once a code is selected, the subsequent months are changed to match the new code.

The screen also displays the Company default Initial Measurement Period and Stability Period, and Employee Hire Date and Date of Birth. That information cannot be edited here.

1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the Employees – ACA History screen in the Employee Menu Fields module.
2. Click the Next button when you complete entering information on this screen.
   Result: The Employees – Pay screen opens.

Employees - Pay screen

The Employees – Pay screen contains salary information, rate amounts for hourly employees, pay frequency, etc. There are also three sub-menus that are part of the Pay menu item. The information on these screens is read-only for employees.

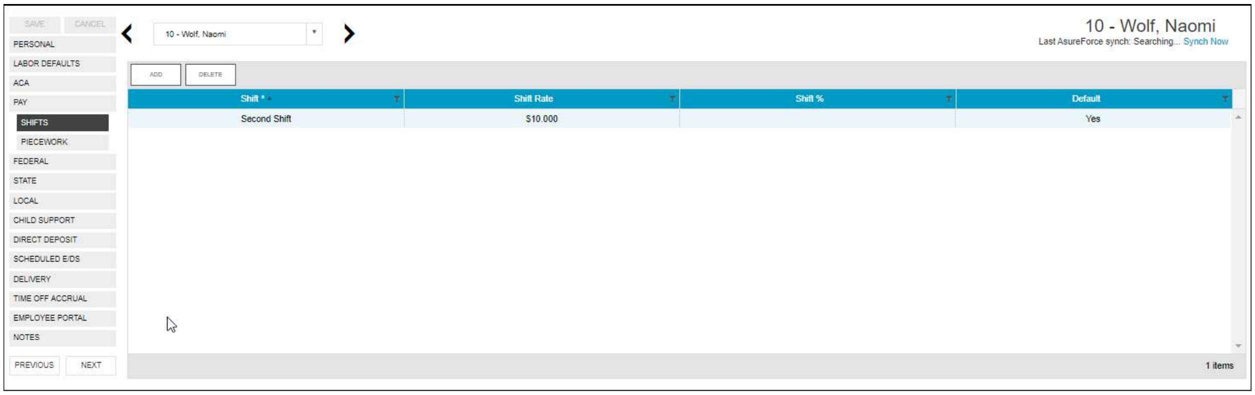


3. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the Employees – Pay screen in the Appendix at the end of this chapter.
4. If there are any overrides, click the **Add** button to add the required information.
5. Click the **Next** button when you complete entering information on this screen.
   Result: The Employees – Federal screen opens.

Shifts Sub-menu

Shifts must be already created in Classic, after which they can be applied to employees in Web Payroll. Some employees may be assigned multiple shifts.

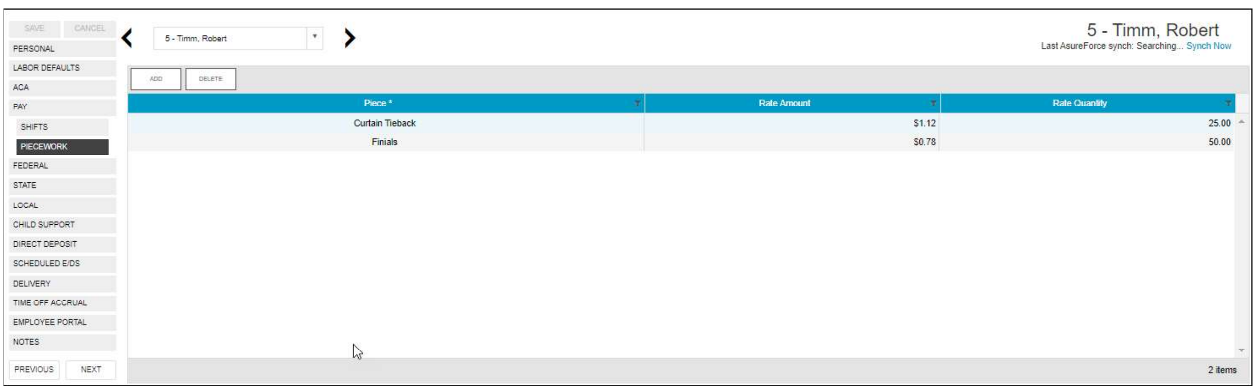
Note: Users must have Employee – Shifts menu security access set up in Classic to be able to create and apply shifts.



1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the Employees – Pay screen – Shifts in the Appendix at the end of this chapter.
2. Click the **Next** button when you complete entering information on this screen.
   Result: The Employees – Piecework screen opens.

Piecework Sub-menu

The Piecework screen is where piecework items are set up and to employees. Before these can be applied to employees, the piecework items must be set up in Classic at the client level.

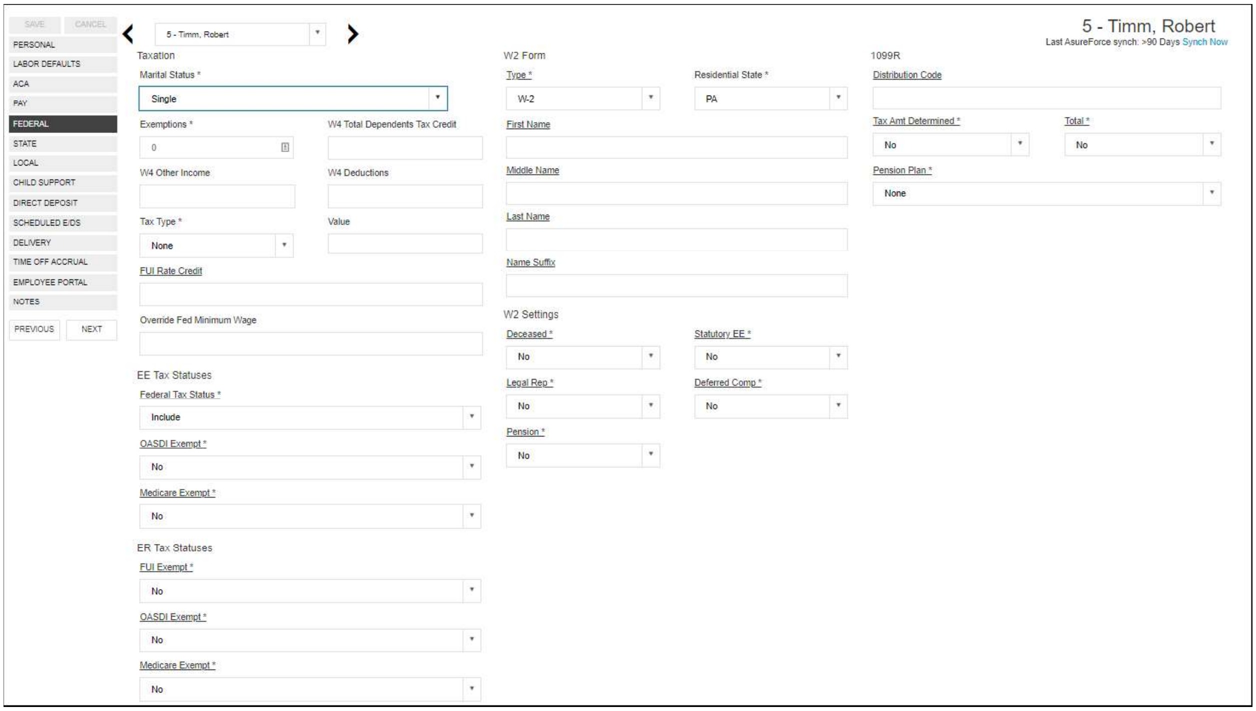


Note: Users must have Employee – Piecework menu access set up in Classic to be able to create and apply piecework.

1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the Employees - Pay Screen - Piecework in the Appendix at the end of this chapter.
2. Click the **Next** button when you complete entering information on this screen.
3. **Result:** The Employees - Federal screen opens.

Employees - Federal screen

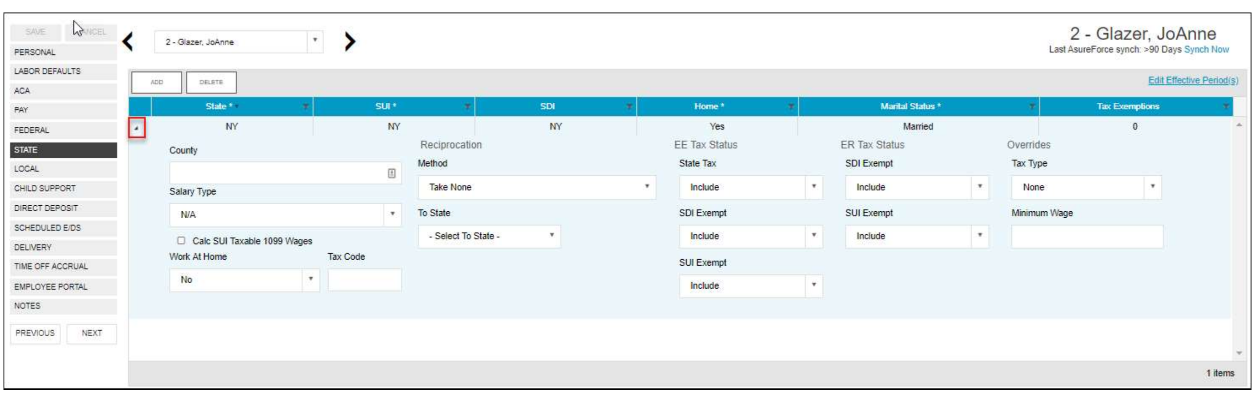
The Employees – Federal screen contains settings and statuses of federal tax information.



1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the Employees – Federal screen in the Appendix at the end of this chapter.
2. Click the **Next** button when you complete entering information on this screen.
   Result: The Employees – State screen opens.

Employees - State screen

The Employees – State screen is where state tax information can be added, deleted and viewed.



1. Click the small arrow(s) at the far left of the line on the information bar to minimize or maximize the state information. Users may also double-click the small arrow(s) to expand the information.
2. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the Employees – State screen in the Appendix at the end of this chapter.
3. Click the **Add** button to add another state as needed or click the **Delete** button to delete a state from the employee's record.
4. Click the **Next** button when you complete entering information on this screen.

   Result: The Employees – Local screen opens.

Employees - Local screen

When creating a new employee in Web Payroll, the local taxes will either be set up automatically, the user will be prompted to attach local taxes, or local taxes will have to be added as part of the employee setup.

On the Company - Taxes - Local Tax - Details tab in Classic,

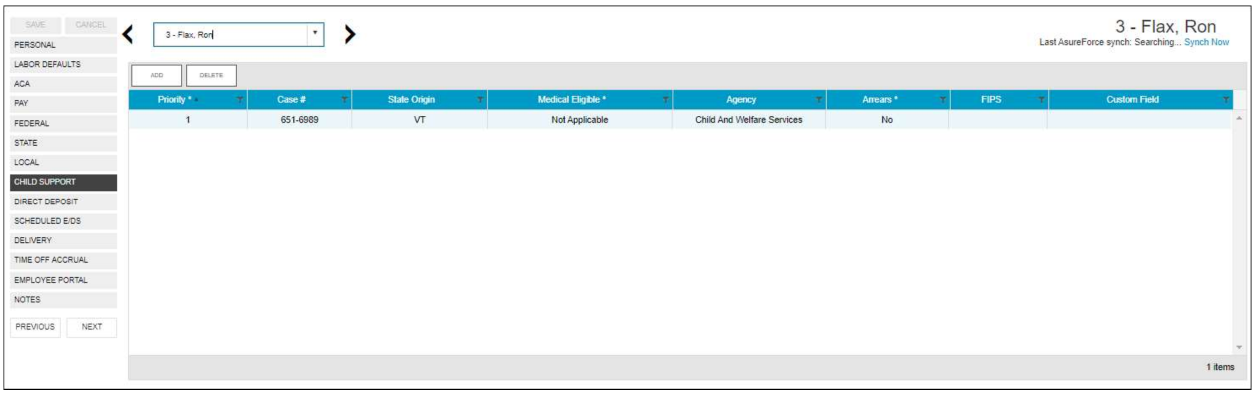
If…	Then…
The **Auto-create on New Hire** field is set to Yes…	…local taxes are automatically applied to new employees of that company. Note that it does not apply to existing employees or rehires.
The **Auto-create on New Hire** field is set to No…	…no local taxes will be attached to new employees of that company. Users must manually add the local taxes when creating new employees in Web Payroll.
The **Auto-create on New Hire** field is set to Ask…	…a screen opens in Web Payroll, prompting the user to apply that local tax.

1. Click the **Add** button to add another local as needed or click the **Delete** button to delete a local (if, for example, the employee moved) from the employee's record. For detailed information about the fields on this screen, refer to the Employees – Local screen in the Appendix at the end of this chapter.

2. Click **Save** at the top of the Menu bar on the left-hand side of the screen when you have completed entering information on this screen.
3. Click the **Next** button.
   Result: The Employees – Child Support screen opens.

Employees - Child Support screen

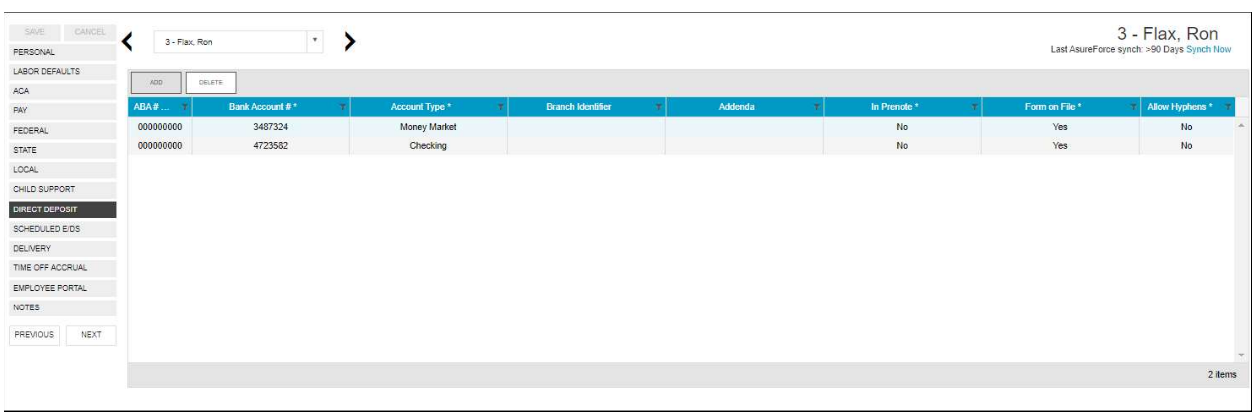
If the employee owes Child Support, the Child Support case information is displayed on this screen.



1. Click the **Add** button to add a Child Support case as needed or click the **Delete** button to delete a case. For detailed information about the fields on this screen, refer to the Employees – Child Support screen in the Appendix at the end of this chapter.
2. Click **Save** when you have completed entering information on this screen.
3. Click the **Next** button.
   Result: The Employees – Direct Deposit screen opens.

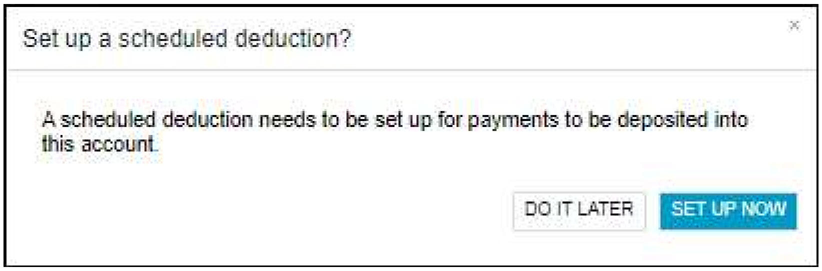
Employees - Direct Deposit screen

Users can add, delete, and view direct deposit information on this screen.



4. Click the **Add** button to add new direct deposit information as needed or click the **Delete** button to delete a direct deposit setup. For detailed information about the fields on this screen, refer to the Employees – Direct Deposit screen in the Appendix at the end of this chapter.
5. Click **Save** when you have completed entering information on this screen.

   Result: a popup box opens asking if a Scheduled E/D has already been set up for this direct deposit.



6. If the user clicks Set Up Now, the Employees – Scheduled E/Ds screen opens.
7. Click the **Next** button.
8. **Result:** The Employees – Scheduled E/Ds screen opens.

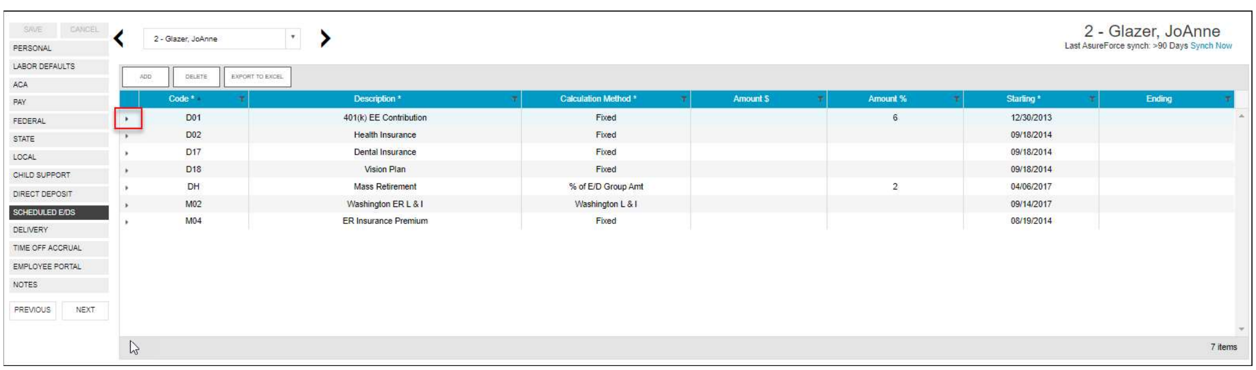
Employees - Scheduled E/Ds screen

Scheduled E/Ds are earnings and deductions that are scheduled to be processed automatically with every payroll. E/D codes are separated into three categories:

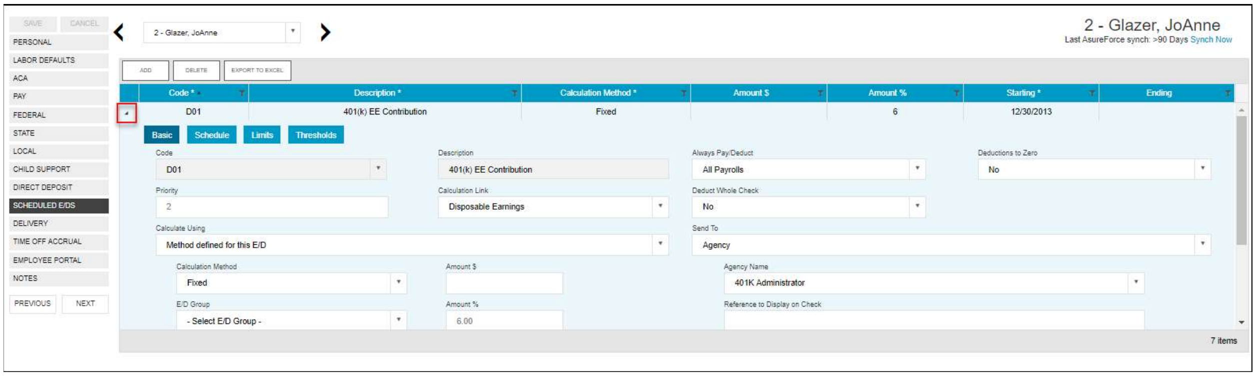
- Earning Codes
- Deduction Codes, and
- Memo Codes.

Scheduled E/Ds can be automatically set up for new employees if they are Auto Enlisted in Classic.

Users can add, delete, and view Scheduled E/Ds on the Employees – Scheduled E/Ds screen.



Click the small arrow(s) at the far left of the line on the information bar to minimize or maximize the Scheduled E/D information. Users may also double-click the small arrow(s) to expand the information.



The table below identifies some of the most common E/D codes that are and are not considered Scheduled E/Ds.

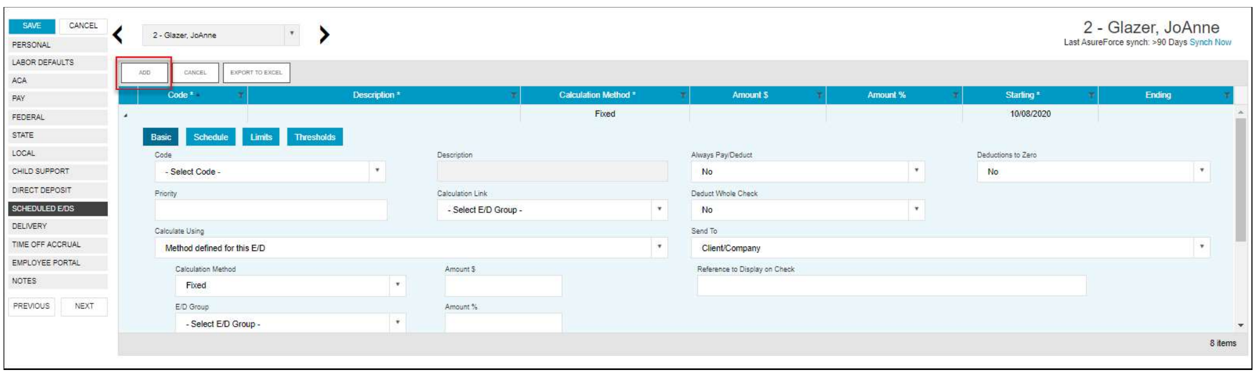
E/D Code Type	E/D Code Type	Scheduled E/Ds?
Benefits/Deductions	Health Insurance; Dental Insurance; EE 401(k) contributions, EE 401(k) catchup contributions, Flexible Spending Accounts, Dependent Care	Yes
Memo Codes (money that is set aside by the employer for the employee)	401(k) match, ER paid insurance contributions	Yes
Direct Deposits	Employee bank accounts	Yes
Agency-paid	Child support, garnishments, tax levies	Yes
Static Earnings	Auto allowance, severance pay	Yes
Loan Payments	401(k) loans, company loans	Yes
Salary	N	No
Hourly		No
Sick		No
Vacation		No

E/D Code Type	E/D Code Type	Scheduled E/Ds?
Paid Time Off		No
Bonuses		No

Setting up employee-level Scheduled E/Ds

To set up employee-level Scheduled E/Ds

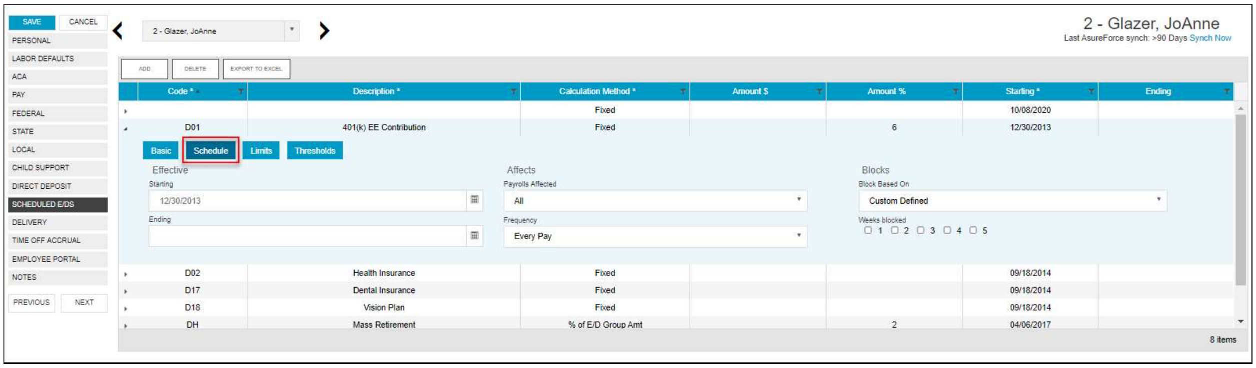
1. Click the **Add** button to add a Scheduled E/D or click the **Delete** button to delete a Scheduled E/D from the employee's record. For detailed information about the fields on this screen, refer to the Employees - Scheduled E/Ds screen in the Appendix at the end of this chapter.



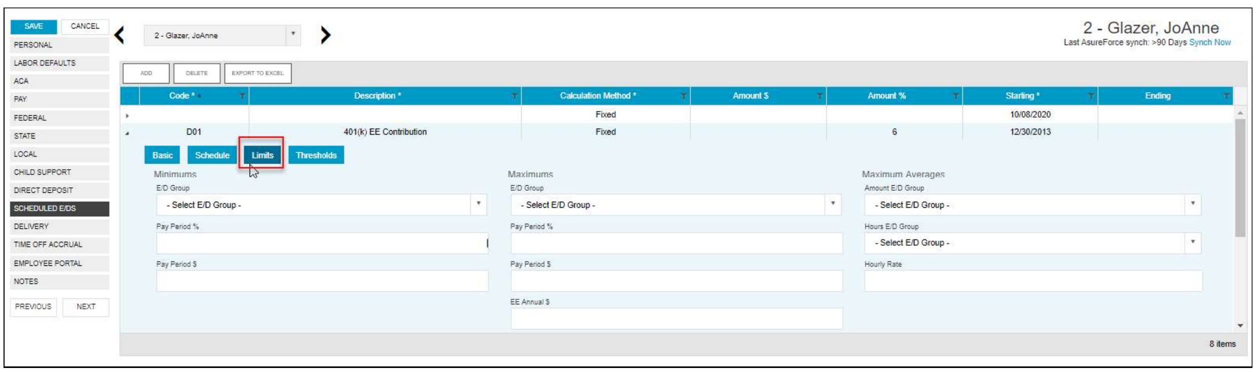
* After a selection is made in the **Send to** field, an additional field opens below, depending upon the selection:

- **Agency** - when Agency is selected in the **Send To** field, a dropdown field opens below, from which the user selects the Agency.
- **Client / Company –** When Client / Company is selected
- **Direct Deposit** - when Direct Deposit is selected in the **Send To** field, a dropdown field opens below, from which the user selects an account number, or clicks the plus sign to add a new account number.

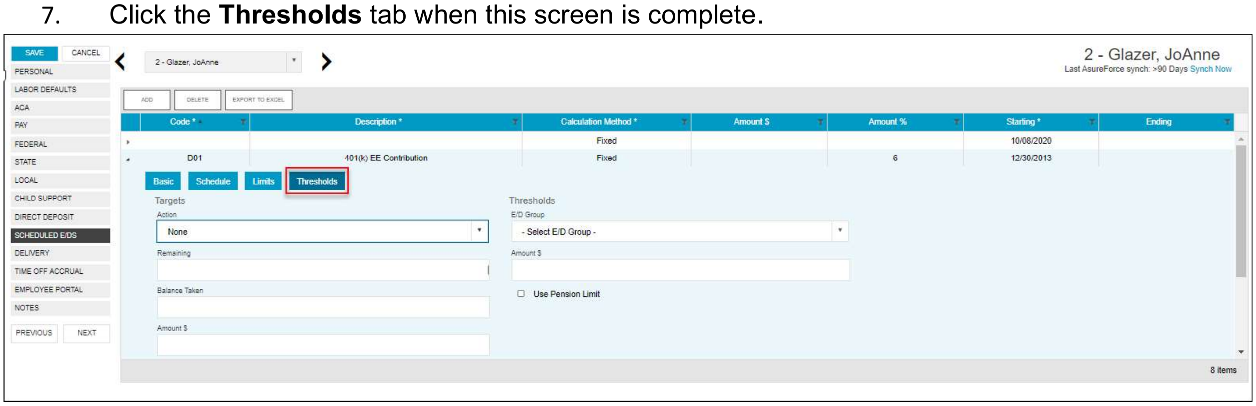
2. Complete all applicable fields.
3. Click the **Schedule** tab when this screen is complete.



4. Complete all applicable fields.
5. Click the **Limits** tab when this screen is complete.



6. Complete all applicable fields.
7. Click the **Thresholds** tab when this screen is complete.

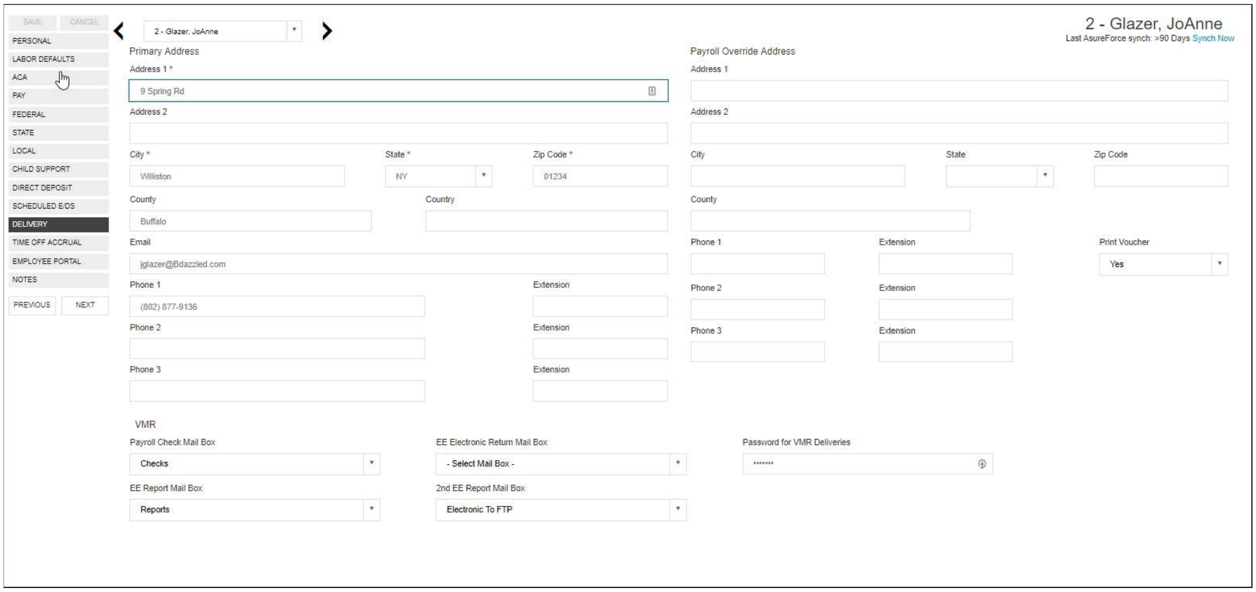


8. Click **Save** when you have completed entering information on this screen.
9. Click the **Next** button.

Result: The Employees **–** Delivery screen opens.

Employees - Delivery screen

Delivery information for all of the employees' payroll and tax forms is listed on the Delivery menu screen.



1. Click in the applicable fields to add new delivery information as needed. For detailed information about the fields on this screen, refer to the Employees – Delivery screen in the Appendix at the end of this chapter.
2. Verify that the Primary Address information is correct.
3. Enter VMR overrides if applicable.
4. Enter a Payroll Override Address if applicable.
5. Click **Save** when you have completed entering information on this screen.
6. Click the **Next** button.

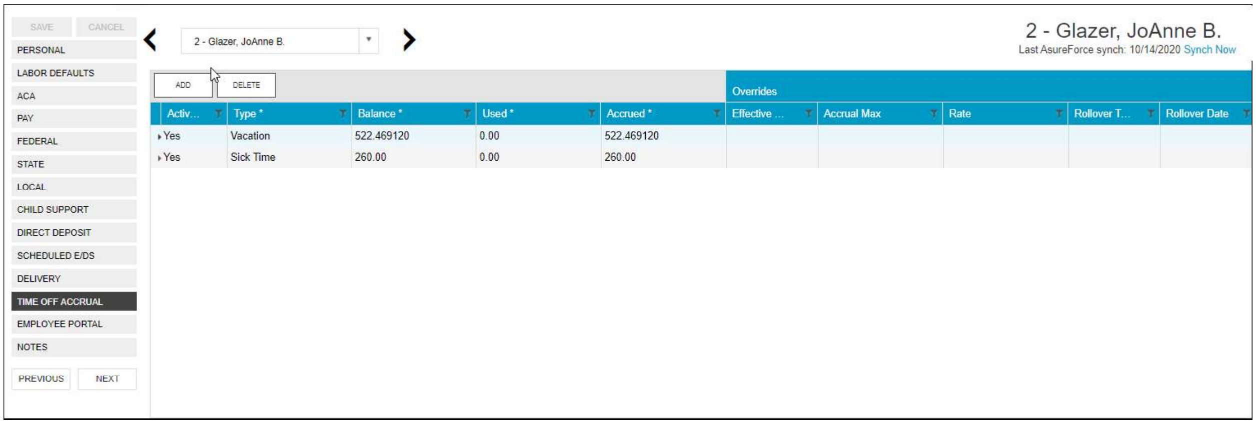
   Result: The Employees – Time off Accrual screen opens.

Employees - Time off Accrual screen

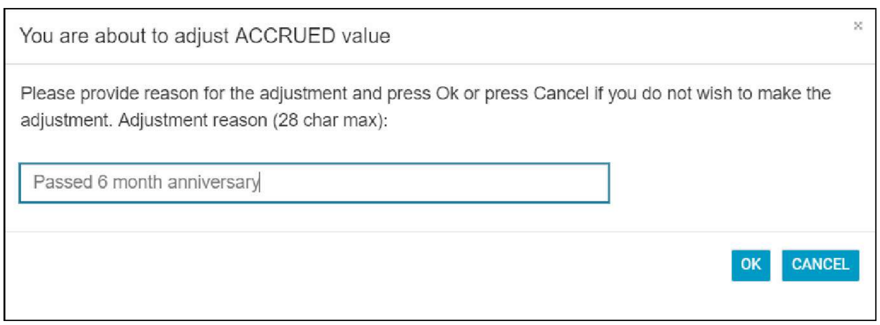
Depending upon your role / permissions, you may not see this menu-item.

The Time off Accrual screen displays a balance of unused paid time off, as well as used and accrued time off.

Note: The Time off Accrual menu item may not be displayed in the list, depending upon the company settings that determine whether or not to make TOA available to employees.



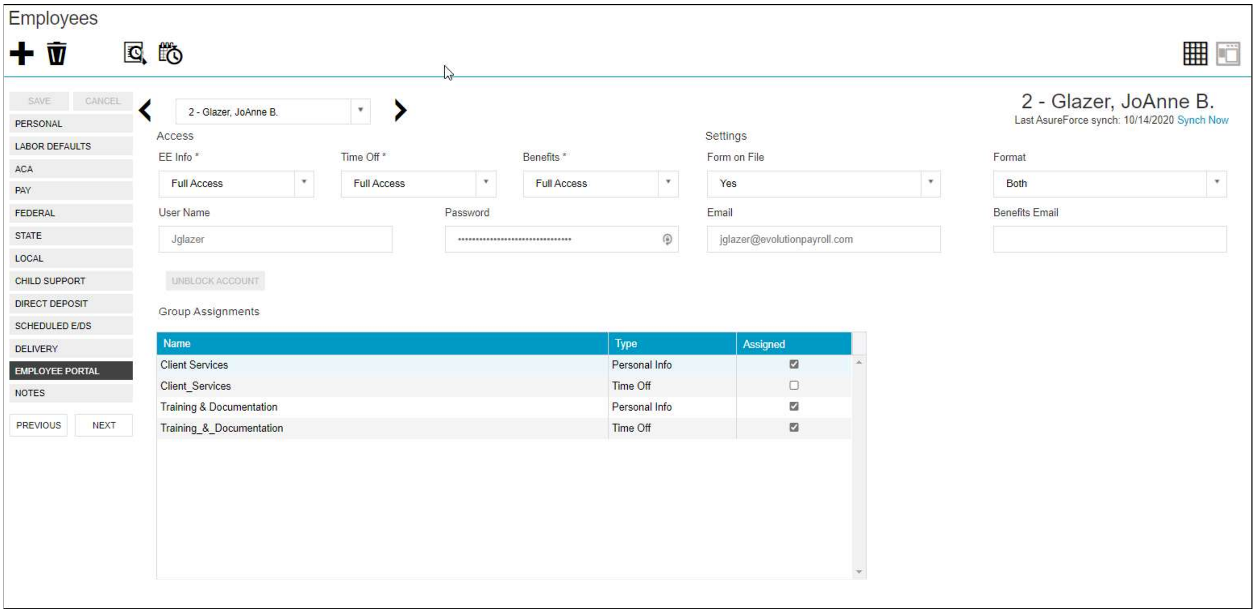
1. Click the **Add** button to add a new Time off Accrual plan as needed, or click the **Delete** button to delete a TOA. For detailed information about the fields on this screen, refer to the Employees – Time off Accrual screen in the Appendix at the end of this chapter.
2. Select the Type of TOA being added.
3. Tab over to the Accrued tab and enter the amount the employee has accrued. A box opens requesting a reason for the adjustment.



4. Enter a reason > click **OK**.
5. Enter a Used amount if applicable.
   Result: the Balance fills in.
6. Complete the following fields.
7. Click **Save** when you have completed entering information on this screen.
8. Press the **TAB** key or click the **Next** button.
   Result: The Employees – Employee Portal screen opens.

Employees - Employee Portal

The Employee Portal screen contains the same fields as are on the Employee – Employee – Self Serve tab in Classic. For detailed information about the fields on this screen, refer to the Employees – Employee Portal screen in the Appendix at the end of this chapter.



Unblock Account Button

If a user incorrectly answers their pre-defined validation questions in Web Payroll three times, their account is blocked. A user with access must unblock the account using this button. A pop-up box opens with a temporary password to be provided to the user. Once they log in using the temporary password, they are prompted to establish a new password and to select new validation questions and their answers.

Group Assignments section

Group Assignments are implemented at the Company level. Access Groups can be created and assigned ESS Managers in this section.

- Available Groups - ESS Groups with a Personal Info or Time off Group Type, these groups are created on the Company- Benefits - ESS Group Assignment - Group Assignment tab in Classic.
- Assigned Groups - groups to which this employee is assigned as a member. Select the corresponding checkbox to assign or remove employees to/from various groups.

Employees - Notes screen

Payroll Notes

Notes entered here can be viewed by the payroll processor, or other internal colleagues. The information does not appear “publicly” and cannot be viewed by the employees.

General Notes

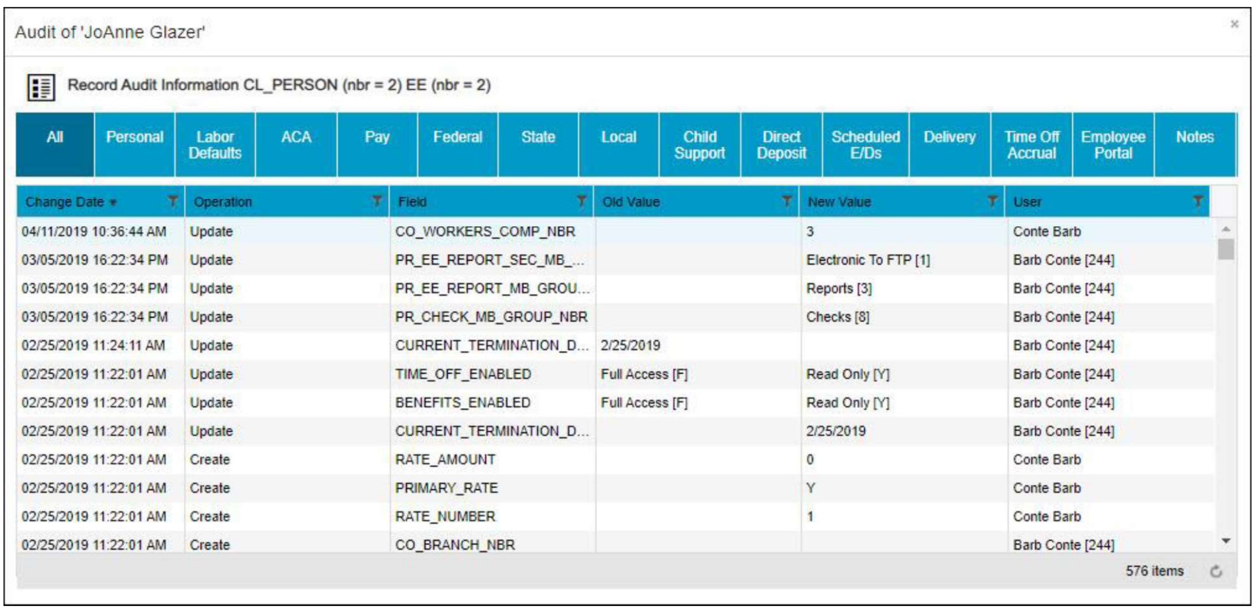
General notes about the employee and payrolls are stored with the employee data and can also be viewed in the Payroll menu in the Notes fly-out tab on the Employees – Payrolls - Payroll View screen.

Auditing Employee User History

To audit an employee's record in Web Payroll, click the **Show Audit History** button in the header.

Result: the highlighted employee's audit history is displayed listing

- Change Date - date/s any changes were made – this is the default sorting order.
- Operation performed
- Field changed
- Old Value
- New Value, and
- User who made the change.


Audit of 'JoAnne Glazer'

Record Audit Information CL_PERSON (nbr = 2) EE (nbr = 2)

All | Personal | Labor Defaults | ACA | Pay | Federal | State | Local | Child Support | Direct Deposit | Scheduled E/Ds | Delivery | Time Off Accrual | Employee Portal | Notes

Change Date	Operation	Field	Old Value	New Value	User
04/11/2019 10:36:44 AM	Update	CO_WORKERS_COMP_NBR		3	Conte Barb
03/05/2019 16:22:34 PM	Update	PR_EE_REPORT_SEC_MB_...		Electronic To FTP [1]	Barb Conte [244]
03/05/2019 16:22:34 PM	Update	PR_EE_REPORT_MB_GROU...		Reports [3]	Barb Conte [244]
03/05/2019 16:22:34 PM	Update	PR_CHECK_MB_GROUP_NBR		Checks [8]	Barb Conte [244]
02/25/2019 11:24:11 AM	Update	CURRENT_TERMINATION_D...	2/25/2019		Barb Conte [244]
02/25/2019 11:22:01 AM	Update	TIME_OFF_ENABLED	Full Access [F]	Read Only [Y]	Barb Conte [244]
02/25/2019 11:22:01 AM	Update	BENEFITS_ENABLED	Full Access [F]	Read Only [Y]	Barb Conte [244]
02/25/2019 11:22:01 AM	Update	CURRENT_TERMINATION_D...		2/25/2019	Barb Conte [244]
02/25/2019 11:22:01 AM	Create	RATE_AMOUNT		0	Conte Barb
02/25/2019 11:22:01 AM	Create	PRIMARY_RATE		Y	Conte Barb
02/25/2019 11:22:01 AM	Create	RATE_NUMBER		1	Conte Barb
02/25/2019 11:22:01 AM	Create	CO_BRANCH_NBR			Barb Conte [244]

576 items

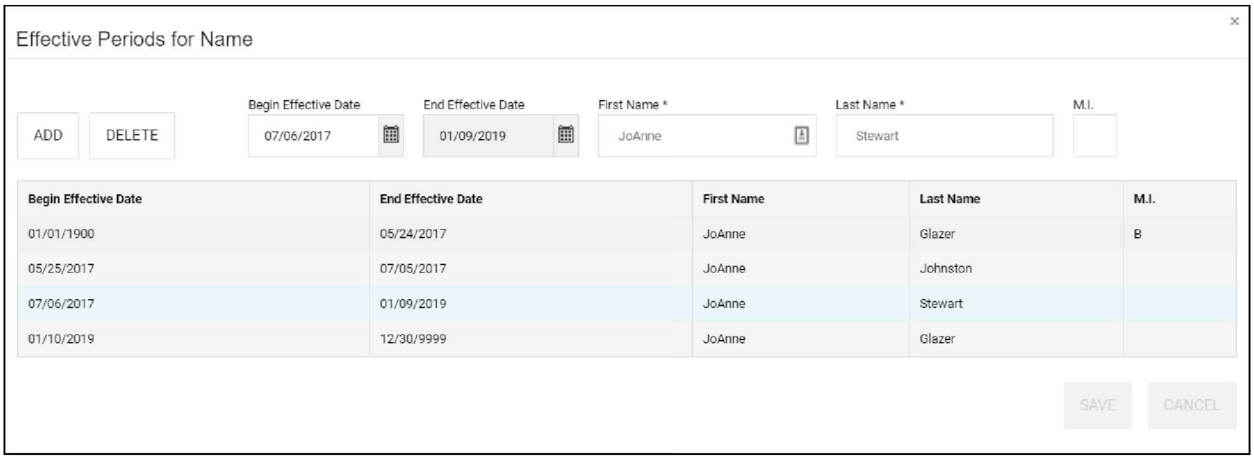
Note: The Security Function "Display Username in Audit" must be enabled for the user to see the name in the audit history of the user who made the change. If this function is not enabled, the UserID is displayed without the name.

Click the button on the far-right side of the header to export a CSV file to Excel, if applicable.

The information can be filtered by clicking the Filter symbol in the column header by which the user would like to sort/filter.

Fields that can be effective dated have labels displayed as a hyperlink. **Example:** Click First Name * to view the dates any changes to that field became effective.

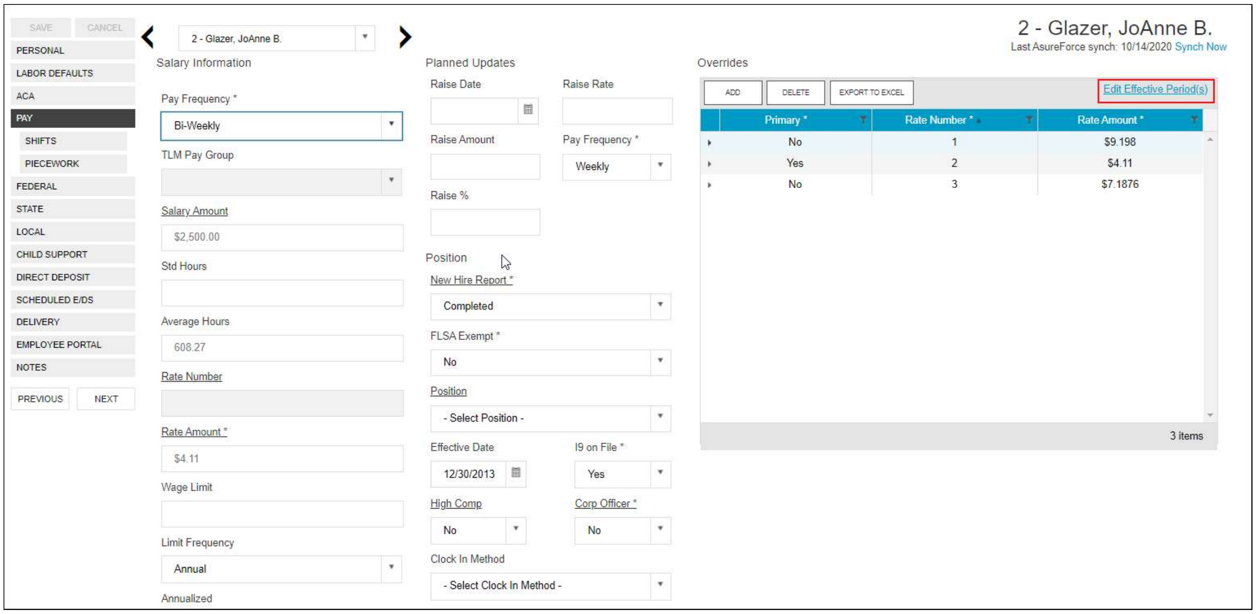
Click the name field label to view additional information about change effective dates.



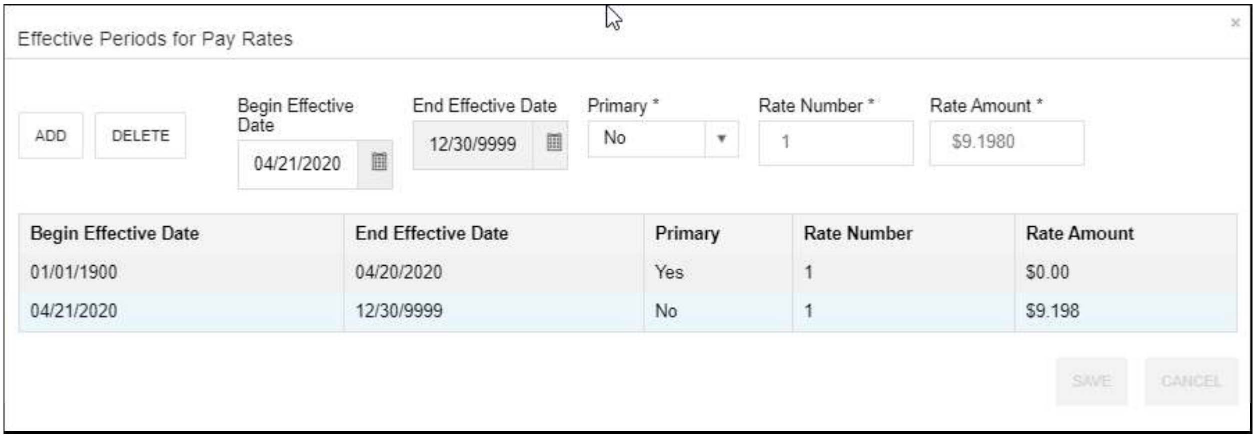
Begin Effective Date	End Effective Date	First Name	Last Name	M.I.
01/01/1900	05/24/2017	JoAnne	Glazer	B
05/25/2017	07/05/2017	JoAnne	Johnston	
07/06/2017	01/09/2019	JoAnne	Stewart	
01/10/2019	12/30/9999	JoAnne	Glazer	

Editing information

Some screens in Web Payroll that support dynamic fields have a link in the upper right-hand corner, "Edit Effective Period(s)."



1. Click the **Edit Effective Period(s)** link on the screen if applicable (available on screens that support dynamic fields.)
   Result: The Effective Periods screen opens.



2. Click the **Add** button.
3. The **Begin Effective Date** field changes automatically to today's date**.** Change that if it should be a different date.
4. Make other changes as applicable.
5. Click **Save**.

Deleting an Effective Date Record

1. Click the Field hyperlink to display the Effective Periods screen for the applicable field.
2. Highlight the row to be deleted.

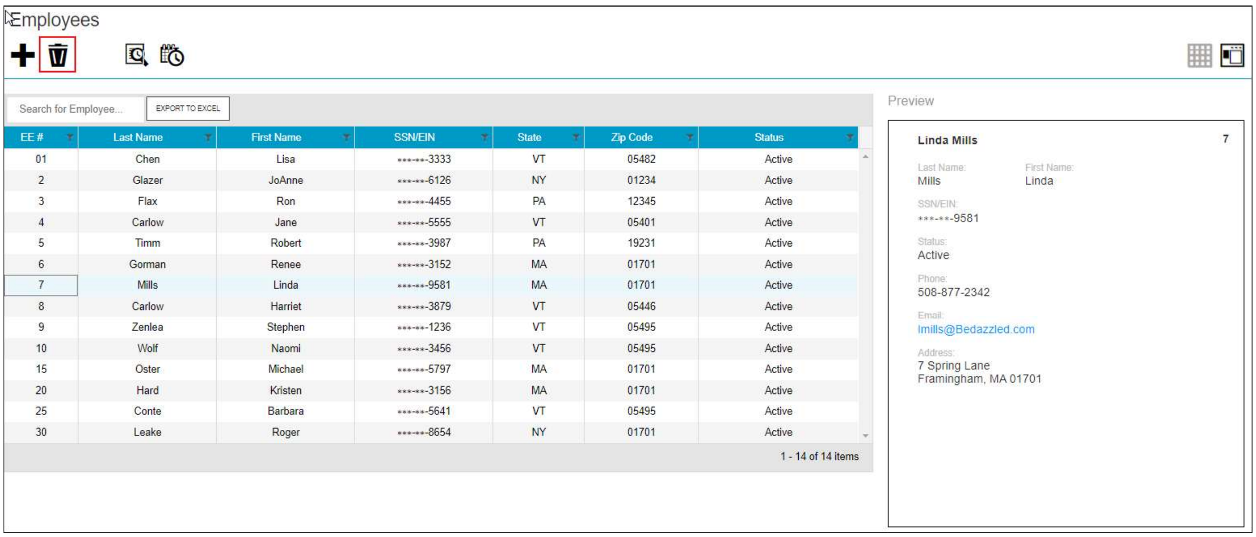
3. Click the **Delete** button.

Deleting an Employee

Employees can be deleted, if they do not have any payroll history and are not part of a pending payroll. If they have payroll history, the Delete button will not be available to click.

To delete an employee

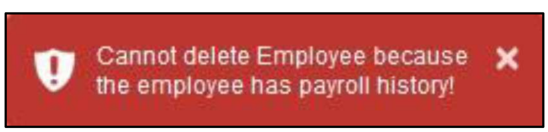
1. Highlight the applicable employee.
2. Click the **Delete** button.



EE #	Last Name	First Name	SSN/EIN	State	Zip Code	Status
01	Chen	Lisa	***-**-3333	VT	05482	Active
2	Glazer	JoAnne	***-**-6126	NY	01234	Active
3	Flax	Ron	***-**-4455	PA	12345	Active
4	Carlow	Jane	***-**-5555	VT	05401	Active
5	Timm	Robert	***-**-3987	PA	19231	Active
6	Gorman	Renee	***-**-3152	MA	01701	Active
7	Mills	Linda	***-**-9581	MA	01701	Active
8	Carlow	Harriet	***-**-3879	VT	05446	Active
9	Zenlea	Stephen	***-**-1236	VT	05495	Active
10	Wolf	Naomi	***-**-3456	VT	05495	Active
15	Oster	Michael	***-**-5797	MA	01701	Active
20	Hard	Kristen	***-**-3156	MA	01701	Active
25	Conte	Barbara	***-**-5641	VT	05495	Active
30	Leake	Roger	***-**-8654	NY	01701	Active

Result: A confirmation screen opens asking for confirmation of the deletion.

If the employee has any payroll history, the following error message will be displayed.



Employees Menu - Appendix

Employees - New Employee screen

Field / Button	Description
SSN	This is the employee's Social Security Number or Employee Identification Number.
EE Code	(EE Number) must be alpha or numeric, up to 9 characters, and unique to the employee.
Clock Number	Enter the employee's time clock number
First Name	The employee's first name
MI	The employee's middle initial
Last Name	The employee's last name
Address 1	The first line of the employee's address.
Address 2	The second line of the employee's address.
City	The city name of the employee's address
State	The state name of the employee's address
Zip Code	The employee's zip code
Ethnicity	Required
Date of Birth	Employee's birth date
Primary Phone	The employee's primary phone number
Gender	Gender
Pay Section	
Salary Amount	Salary earned per pay period
Pay Frequency	How often the employee's paycheck is processed.
Default WC	Workers' Comp Code assigned to the Job associated with a future potential claim if applicable.

Field / Button	Description
EE Paid Tips?	Relevant for restaurants and other service-related companies
Rate 1	The primary rate number
Rate 2	The second rate number if the employee has two positions with the company doing two different jobs.
Rate 3	The third rate number if the employee has three positions with the company doing three different jobs.
Div / Site / Dept / Job	Organization level at which the employee will be working if the company is set up using Divisions, Branches, Departments, and Teams.
Tipped Directly?	Relevant to restaurant employees.
Taxation Details section	
Fed Marital Status	Marital status for federal tax purposes
State	State employee pays state tax to
State Marital Status	Marital status for state tax purposes
Fed Dependents	Number of dependents the employee claims for federal tax filing
SDI	State to which the company pays disability insurance to, on behalf of the employee
SUI	State to which the company pays unemployment insurance to, on behalf of the employee
State Dependents	Number of state dependents the employee claims for state tax filing
Position section	
Current Hire Date	Date employee was hired (For this round of employment if the employee had worked there before.)
Review Date	Select the date for the employee’s review if known.

Field / Button	Description
EE Type	Select the employee's position type from the dropdown list.
Hourly / Salary	Select whether the employee is paid hourly or salary
Current Status Code	Select the employment status from the dropdown list.
FT/PT	Select whether the employee is full-time or part-time, a temp, 1099, etc.
Pay Group	Select whether the employee is part of EE Group A – L or EE Group M – Z.

Employees - Personal screen

Field / Button	Description
SSN	Employee's Social Security Number or Employer Identification Number.
EE Code	(EE Number) alpha or numeric, up to 9 characters, and unique to the employee.
Time Clock #	The time clock number assigned to the employee
First Name	The employee's first name
MI	The employee's middle initial
Last Name	The employee's last name
Address 1	The first line of the employee's address.
Address 2	The second line of the employee's address.
City	The city name of the employee's address
State	The state name of the employee's address
Zip Code	The employee's zip code
County	The county in which the employee lives
Phone	The employee's phone number

Field / Button	Description
Email Address	Employee's email contact information
Birth Date	Date of birth
Gender	Gender
Ethnicity	Required
Tribe	Required. If American Indian is selected, enter the Tribe name in the adjacent field.
Hire Status section	
Status	Select the employee's Status from the dropdown list.
Current Hire Date	Date employee was hired (For this round of employment if the employee had worked there before.)
Original Hire Date	This may be the same or different from the Current Hire Date if the employee is a rehire.
Termination Date	Date of termination if applicable.
Rehire Eligible	Is the employee eligible for rehire?
Employment Type	Select the Employment Type from the dropdown list
On Call From	Date from which the employee is on call, if applicable.
On Call To	Date until which the employee is on call, if applicable.
Benefits section	
Healthcare Coverage	The employee's coverage status – applicable in Vermont only.
TLM Accrual Group	This field only appears for companies that are using the AsureForce integration, and is a required field to sync payroll hours and employee information.
Dependent Coverage	If the employee is eligible, the coverage, if any, available for dependents

Field / Button	Description
Benefit Eligible	Date on which the employee becomes eligible to receive benefits.
Group Term Policy	Total amount of employees' Group Term Life (GTL) policy.
GTL Hours	Number of hours worked annually by hourly employees. GTL Policy amount is calculated by multiplying the entered number of hours by the employees' primary pay rate.
GTL Rate	Rate used to calculate the GTL amount for salaried employees. GTL amount is calculated by multiplying the employees' salary by the rate entered. Example, enter 2 as the rate; the GTL policy amount is calculated by multiplying 2 times the employees' salary.

Employees - Labor Defaults screen

Field / Button	Description
Workers' Compensation	Workers' Comp Code assigned to the Job associated with the claim.
Badge ID	Enter the employee's Badge ID number
Review Date	Date of the employee's annual review
Job	Job set up by the company.
Union	Select the union to which the employee belongs if applicable.
Pay Group	Select the pay group if not already populated
General Ledger Tag	Enter if the company is using General Ledger.
Reporting section	
Tipped Directly	Yes or No if not populated from the initial setup. If changing the value, click the link to establish the Effective Date.
Ignore FICA on Cleanup Payroll	If at any time, the FICA is to be ignored for an employee when running a cleanup payroll, click the link to establish an Effective Date, if applicable.
Combine Returns on this EE	If at any time, returns are to be combined for this employee, click the link to establish an effective date, if applicable.

Field / Button	Description
Generate Second Check	Default is No. Select Yes to generate a second check for the employee for reporting purposes.
Deductions to take First	Select the deductions to be taken first, if applicable.
Second Check Template	In the case of the generation of a second check, select the second check's template, if applicable.
Include in Analytics	Default is Yes. Change to No if the information for this employee is not to be included in the Analytics module, if applicable.
Organizational Level	The D/B/D/T level to which the employee is assigned if applicable.

Employees - ACA Screen

Field / Button	Description
ACA section	
ACA Status	Select the appropriate status of the employee based on average hours worked. • **New Hire -** Used before status is determined through initial measurement period. • **Full-Time -** A new employee who works an average of 30 hours or more per week or 130 hours per month. • **Part-Time -** A new employee who is reasonably expected at the employee's start date not to be a full-time employee (and who is not a variable hour employee or a seasonal employee). Works less than 30 hours a week or 130 hours per month, on average. • **Does Not Apply -** Employees to whom the ACA Status does not apply. • Volunteers • Student Workers • Members of Religious Orders • **Variable Hour -** A new employee who, at the start of employment, the employer cannot in good faith • Determine whether the individual is expected to average 30 hours of service per week or 130 hours per month during an initial measurement period. • **Seasonal -** A worker who performs labor or services on a seasonal basis, including (but not limited to) seasonal farm workers and retail workers employed exclusively during holiday seasons. • **Seasonal < 120 days -** A worker who performs labor or services on a seasonal basis, but does not exceed 120 days of service in a calendar year. • **Full-Time Ongoing -** An employee who works an average of 30 hours or more per week and has completed the initial measurement and stability periods. • **Part-Time Ongoing -** An employee who works less than 30 hours a week or 130 hours per month, on average and has already completed their initial measurement and stability periods. • **Seasonal Ongoing -** A worker who performs labor or services on a seasonal basis, including (but not limited to) seasonal farm workers and retail workers employed exclusively during holiday seasons. Has already

Field / Button	Description
	completed initial measurement and stability periods.
ACA Coverage Offer	This field defaults to what is set up on the Company ACA tab. If a change is made to the ACA Coverage Code in the grid below, it will display that code in the month that was selected until it is changed
ACA Benefit	Select the name of the benefit that will be used to determine the Lowest Cost Benefit for this employee.
ACA Policy Origin	Select the appropriate option for this employee for use on the 1095-B – Line 8.
Benefits Eligible	Yes or No. Is this employee eligible for benefits? If changing, click the link to establish an Effective Date, if applicable.
Reporting section	
Form on File	Yes or No. Is there a consent form on file for the employee to allow electronic reporting of the 1095 form(s)?
ACA Format	Select the form format that will be created for the employee. None, Both, or Paper
Form Type	New employees are assigned the default field that is assigned at the Company level. This can be overridden using this field. • Right-click and select **Copy to…** to copy to other employees.
ACA Standard Hours	This field is used for special Time off Accrual setups that use the normal **Standard Hours** field. Use the **ACA Standard Hours** field to override the hours that show on the ACA Reports.

Field / Button	Description
ACA Relief Code	This field defaults to what is set on the Company ACA tab. If a change is made to the **ACA Relief Code** in the grid below, it will display that code in the month that was selected until it is changed
Lowest Cost Benefit	Select the Lowest Cost Benefit to be used on the 1095-C.

Employees - ACA History Screen

Field / Button	Description
View Coverage For	Select the year for which information is being requested.
Month	Each month of the year selected
ACA Coverage Offer	Assigns a default Offer of Coverage Code identifying standard health care coverage offered to employees, when an employee is created in Classic.
ACA Relief Code	Relief Code, to describe transition relief as defined by the Affordable Care Act that may be applicable to the employer, when an employee is created in Classic. If a change is made to the ACA Coverage Code in the grid, it will display that code in the subsequent months
Initial Measurement Period	Default Initial Measurement Period assigned at the company level in Classic.
Stability Period	Default Stability Period assigned at the company level in Classic.
Date of Birth	Taken from the employee information when new employees are added to the company.
Hire Date	Taken from the employee information when new employees are added to the company.

Employees - Pay Screen

Field / Button	Description
Salary Information section	
Pay Frequency	How often the employee's paycheck is processed.

Field / Button	Description
Salary Amount	Salary earned per pay period (salaried employees only)
Standard Hours	Number of hours the employee is expected to work (this may be left blank for salaried employees working a 40-hour week.)
Average Hours	Average hours the employee works – this field is system-calculated and is not editable.
Rate Number	The rate number if not the primary rate – this is read only.
Rate Amount	The rate for the rate number above.
Wage Limit	Wage limit used for Workers' Comp billing and impounds
Limit Frequency	If there is a wage limit, to what period is the limit applied?
Annualized	If there is a wage limit for a period other than annual, what is the annualized total amount of the limit?
Calc Annual	The system automatically calculates the annualized salary or pay based on the value in Salary Amount times pay frequency or the value in Rate Amount times the pay frequency times standard hours.
Planned Updates section	The following fields are informational only, and do not affect pay amounts now or in the future.
Raise Date	The date a future raise takes effect.
Raise Amount	The potential amount of the future raise. Use this for salaried or hourly employees. If there is a value in this field, leave the Raise Rate field empty.
Raise %	The potential percentage of the future raise. Use this for salaried or hourly employees.
Raise Rate	The hourly rate of the potential raise.
Pay Frequency	The frequency the employee will be paid after the future raise.
Position section	These fields in this section used to be on the Positions screen.
New Hire Report	Required field Pending - select this option any time prior to the employee's first payroll, after which time it is automatically updated to

Field / Button	Description
	Complete. Completed - if the service bureau is using new hire reporting services, the employee has been reported as a new hire Completed by Predecessor - the employee was reported as a new hire by another service bureau If an employee's status has changed from another code back to active, when the changes are saved, a message asks if this is a rehire. No - system saves the employee record and doesn't ask any more questions Yes - system changes the New Hire flag to Pending and opens the Rehire Wizard. The Wizard includes a series of employee screens for the user to verify the employee's set-up for pay rate, states, locals, TOA, Scheduled E/D's, and direct deposits. The Wizard only displays screens applicable to the employee.
FLSA Exempt	Is the employee exempt from minimum wage and overtime pay under the Fair Labor Standards Act?
Position	Employee's work position at the company, set up on the Company – Benefits – HR Positions screen.
Effective Date	Date the employee's position became effective
High Comp	Is the employee highly compensated?
I-9 on File	The employee's form I-9 is on file
Corporate Officer	Is the employee a corporate officer?
Overrides section	
Add / Delete buttons	Click to add a pay rate or delete a pay rate that is no longer applicable.
Primary column heading	Select **NO**, if this is not the employee's primary wage at the company.
Rate Number column heading	If a standard wage, the new line should have a Rate Number of 2 or more.
Rate Amount column heading	Enter the amount of the new rate.

Piecework Sub-menu

Field / Button	Description
Add	Click to add a new item to the piecework.
Delete	Click to delete a piecework item.
Piece column heading	Click in the blank line created by clicking the **Add** button. The piece is listed in the dropdown list.
Rate Amt	Rate for the piece. The rate is listed in the dropdown list
Rate Qty	The rate quantity is pulled from Classic, where it was originally set up at the client level.

Auto Labor Distribution Sub-menu

Field / Button	Description
Labor Distribution Options	Defaults to **Distribute Both** - method used to distribute employee's labor for unions. They may be distributed for earnings, taxes, deductions, all, or none, and must be used in conjunction with the **Auto Labor Distribution E/D Group** field.
Auto Labor Distribution E/D Group	E/D Group used to distribute the employees' labor.
Allocation section	
Add	Click to create a new record
Delete	Click to delete an entry
Percentage	Percentage of the employee's pay attributed to that organizational level
Organizational Level	Name of the organizational level for which the employee works
Job	Title of the job worked in the level
WC Code	Workers' Comp code associated with that job

Employees - Federal screen

<table>
<tr><th>Field / Button</th><th>Description</th></tr>
<tr><td>Marital Status</td><td>Marital status for federal tax purposes. Six new marital statuses have been added in compliance with the redesigned Form W-4. Select the applicable marital status based on the information and instructions on the IRS Website.</td></tr>
<tr><td>Exemptions</td><td>Number of exemptions / federal dependents claimed.

Note: Because there is no longer a box for Federal Dependents on the new Form W-4, the Exemptions field on this screen is only used for information from the "old" W-4s. For new entries, based on the new tax regulations, enter a zero because it is a required field. The system does not consider a value other than 0 in the new calculations based on the new marital statuses.</td></tr>
<tr><td>W-4 Other Income</td><td rowspan="2">Information to be added here only if completing Steps 2-4 on the redesigned Form W-4. For more information, refer to the instructions on pages 2 and 3 of the .PDF on the IRS Website.

• Other Income – If tax should be withheld from other income expected this year that will not have withholding.
• Deductions – if deductions will be claimed other than the standard deduction, to reduce withholding.</td></tr>
<tr><td>W-4 Deductions</td></tr>
<tr><td>Tax Type</td><td>Additional or override tax amount. Select from Additional Amount, Additional Percent, Regular Amount, or Regular Percent.</td></tr>
<tr><td>Value</td><td>Based on the tax type, enter the corresponding value.</td></tr>
<tr><td>FUI Rate Credit</td><td>The amount by which to override a FUI Rate Credit, if applicable.</td></tr>
</table>

Field / Button	Description
Override Fed Minimum Wage	Value used to override the Federal Minimum Wage rate used in payroll for minimum wage makeup calculations. • If a value is entered, the amount is used as the rate for minimum wage makeup calculations. • The value may be overridden if a State Minimum Wage override is entered on the Employee - States - Overrides tab. In that case, Classic uses that rate in the calculation. • If both fields are populated, the Federal Override is used in the calculations for all states attached to the employee that do not have overrides set up. Otherwise, the state override rate is used. • If no overrides are entered, standard system logic is applied in the calculation (taking the higher of the Federal or State Minimum Wage rate at the system level). Right-click on the field and select 'Copy To...' to copy the information.
EE Tax Statuses section	The default values in this section are dependent upon whether the employee is W-2 or 1099.
Federal Tax Status	This is the employees' tax status. Select from the dropdown list whether the employee's tax is to be included, blocked or exempted.
OASDI Exempt	Whether or not the employee is exempt from paying OASDI
Medicare Exempt	Whether or not the employee is exempt from paying Medicare
ER Tax Statuses section	The default values in this section are dependent upon whether the employee is W-2 or 1099.
FUI Exempt	Whether or not the employer is exempt from paying FUI for this employee
OASDI Exempt	Whether or not the employer is exempt from paying OASDI for this employee
Medicare Exempt	Whether or not the employer is exempt from paying Medicare for this employee
W-2 Form section	
Type	Type of tax form being filed if not W-2; select from the dropdown list.

Field / Button	Description
Residential State	State for which tax forms are being filed as the employees' residence.
First Name	Legal name for whom all tax forms will be prepared – complete only if different from the information on the Basics tab.
Middle Name	
Last Name	
Name Suffix	
W-2 Settings section	
Deceased	Status is designated on the Form W-2 as deceased
Statutory Employee	Status is designated on the Form W-2 as statutory
Legal Rep	Is there a Legal Rep designated on the Form W-2?
Deferred Comp	Are these earnings designated as deferred compensation on the Form W-2?
Pension	Are these earnings from a Pension plan?
1099-R section	
Distribution Code	If a pension distribution was taken, this is the distribution code reported on the 1099-R.
Tax Amount Determined	Was there a tax amount determined and reported on the 1099-R?
Total	Was the distribution a total distribution of all assets in the pension plan?
Pension Plan	The type of pension plan reported on the 1099-R

Employees - State screen

Field / Button	Description
County	County within the state selected
Salary Type	Select the salary type for the employee, if applicable
Calc SUI Taxable 1099 Wages checkbox	If selected, the SUI taxable wages for this employee are calculated for the state.
Work at Home	For PA only.
Tax Code	This is a generic code and can be used to add details needed for returns.
Reciprocation section	
Method	Reciprocal method – select from the dropdown list.
State	Select the state with whom the residential state has the reciprocal agreement – the states listed are those the company sets up to do business with.
Amount / Percentage	Amount required to reciprocate; used based on Reciprocation Method.
EE Tax Status section	
Employees – State screen	Employees – State screen
State Tax	Employees' state tax status. Select from the dropdown list whether the employee's tax is to be included, blocked or exempted.
SDI Exempt	Whether or not the employee is exempt from SDI
SUI Exempt	Whether or not the employee is exempt from SUI
ER Tax Status section	
SDI Exempt	Whether or not the employer is exempt from paying SDI for this employee
SUI Exempt	Whether or not the employer is exempt from paying SUI for this employee

Field / Button	Description
Overrides section	
Tax Type	Tax type to be overridden
Amount / Percentage	Amount of the override
Minimum Wage	Does the override revert to minimum wage?

Employees - Local screen

Field / Button	Description
Column Headings	
Local	Local tax added at the Company level
State	State in which the local agency resides
County	County in which the local agency resides
Local Type	Employee or employer tax
Tax Rate	Tax rate entered at the system level for the local tax
Misc Amount	The amount used to adjust the percentage of state taxes when that calculation method is used.
Tax Code	Used only if an additional tax code is necessary
Active	Whether or not the local tax is currently active.
Tax Status	Should the local be included, blocked, or is it exempt?
Deduct Behavior	Should the tax be always deducted, never deducted, or are there no overrides?
Work Address Location	PA only.
Overrides section	
Pre-tax Deductions	Does the taxable wage base used to calculate local taxes include pre-tax deductions?
Tax Type	Tax type of the overridden tax, if any
% of Taxable Wages	The percentage of taxable wages used to calculate local taxes.
Tax Value	If an Override Tax Type is entered, this field is required.

Employees - Child Support screen

Field / Button	Description
Priority	Priority in order of all Scheduled E/Ds – Child Support usually has number 1 priority over all other E/Ds.
Case #	Case number assigned by the Child Support agency
State Origin	The state in which the Child Support Order originated.
Medical Eligible	This field is pre-filled from the **Healthcare Coverage** field value on the Employees – Basics screen.
Agency	Child Support Agency responsible for collecting the money for payment.
Arrears	Change to **Yes** if Child Support payments are in arrears on this case.
FIPS	Five-digit Federal Information Processing Standard (**FIPS**) code (**FIPS** 6-4) that identifies counties and county equivalents in the United States.
Custom Field	If the company has established a custom field to help with tracking.

Employees - Direct Deposit screen

Field / Button	Description
ABA#	Routing number identifying the financial institution
Bank Account#	Number of the account to which deposits are made
Account Type	Type of account to which deposits are made
Branch Identifier	Bank Identifier used when transferring money and wiring money
Addenda	Additional information (if any) to be added to the direct deposit instructions
In Pre-Note	Is the direct deposit within the period of validating the account credentials?
Form on File	Tracks whether or not there is a Direct Deposit Authorization form on file

Allow Hyphens	Yes means hyphens are allowable characters in the bank account number.

Employees - Scheduled E/Ds screen

Field / Button	Description
Code	E/D codes assigned at the system level – select from the dropdown list
Description	Entered automatically when the E/D code is selected.
Priority	Priority to process the Scheduled E/D (Child Support E/Ds are always Priority 1)
Calculation Link	Select an E/D Group that the Scheduled E/D belongs to (if applicable)
Calculate Using	Select which calculation method will be used to calculate payroll deductions for the Scheduled E/D. There are three options: 1. Use the calculation method that has been defined for the E/D 2. Use the calculation method defined at the Company Benefit level 3. Use the calculation method defined at the Employee Benefit level
Calculation Method	Method used to calculate deductions from payrolls. Select the method from the dropdown list. Amount $ - If the Calculation Method selected is a fixed dollar amount enter that amount. Amount % - If the Calculation Method selected is based on a percentage enter the percentage amount.
E/D Group	Select an E/D Group if the Scheduled E/D is included in an E/D Group.
Note: Earnings must be set up as a member of an E/D Group, which simplifies the calculation of earnings such as 401(k)s.	

Field / Button	Description
Always Pay / Deduct	Offers flexibility to override E/D, similar to Blocking Week 1 - 5 • All payrolls - earnings are paid whether or not there are earned wages for the employee; deductions are tracked to be taken from the next payroll. • Current Payrolls - the E/D is applied to the current the payroll whether or not there are earned wages for the employee. If deduction exceeds amount in check the amount is not tracked to be made up later. • If there are insufficient earnings for the deduction, the Scheduled E/D is processed based on the selection in the **Deductions to Zero field**. • No - if the employee has no wages in a payroll cycle, the system does not pay/deduct the E/D, nor is it tracked it to be made up later.
Important: to ensure that the remainder of the deduction is taken out of a subsequent pay cycle, the **Make Up Deducts Shortfall** field on the Client - E/Ds - Details tab must be set to Yes.	
Deduct Whole Check	Value selected defaults based on the setting applied on the Client - E/Ds - Scheduled Defaults tab Yes - deducts the net check (use for direct deposits) No - deducts a portion of the check
Send To*	Select Agency or Client, Company, or Direct Deposit
Reference to Display on Check	If being sent to Agency or Client/Company on behalf of the employee…
Deductions to Zero	Defaults to the Deductions to Zero Default field on the Client - E/Ds - Scheduled Defaults tab. It can be overridden here by E/D, by employee, and instructs how much of a deduction should be taken if there is not enough to take the entire amount. This does not turn Shortfall / Deduction not Taken makeup on or off. It only tells the system whether or not to take partial amounts for deductions. • Yes - the entire amount is deducted, until the check is zero. If there is shortfall it may be either a portion of or the total amount of the Scheduled E/D. • No - a deduction is taken only when there are sufficient funds to take the whole deduction. If there are insufficient wages, the created shortfall is always the total amount of the Scheduled E/D. If there is a pre-existing shortfall, it takes the shortfall amount only when there are sufficient wages to take the whole amount.

Field / Button	Description
	• When there is a deduction and a pre-existing shortfall, and there are sufficient wages to take the shortfall but not all of the deduction, Classic takes the shortfall, but not the deduction.

Employees - Scheduled E/Ds - Schedule tab

Field / Button	Description
Starting	Starting date for the scheduled deduction
Ending	Ending date for the scheduled deduction
Affects section	
Payrolls affected	Identify which payrolls are affected by the deduction
Frequency	How often the deduction of the Scheduled E/D occurs.
Blocks section	
Block Based On	If there are blocks on any of the payroll weeks identify whether it is custom defined or being blocked to keep the deduction at four weeks per month.
Weeks Blocked	Identify which, if any, week(s) is blocked from having the deduction taken

Employees - Scheduled E/Ds Limits tab

Field / Button	Description
Limits tab	
E/D Group	E/D Group to which the minimum Scheduled E/D belongs (same as **Minimum E/D Group** field on the Employee – Scheduled E/Ds – Advanced tab)
Pay Period %	Minimum percentage (if the deduction is quoted as a percentage) to be taken per pay period.

Field / Button	Description
Pay Period $	Minimum dollar amount (if the deduction is quoted as an amount) to be taken per pay period.
EE Annual $	Maximum dollar amount the employee is allowed to contribute per year
Client Annual $	Maximum dollar amount the client can contribute per year for the employee
Maximum Averages section	
Amount E/D Group	This information is used for special Union dues calculations.
Hours E/D Group	
Hourly Rate	
Balance Taken	
Amount $	

Employees - Scheduled E/Ds - Thresholds tab

Field / Button	Description
Action	These fields refer to the goal amounts at which deductions stop – the same information entered on the Employee – Scheduled E/Ds Advanced tab in Classic.
Remaining	
Balance Taken	
Amount $	
E/D Group	

Employees - Delivery screen

Field / Button	Description
Primary Address section	The information set up when the employee is first entered into the system is pre-filled in this section. This address is where W-2 Forms will be sent. Edits may be made on this screen by entering data over what is already there.
VMR section	Whenever an employee is set up with a VMR mailbox, select the VMR mailboxes of the employee if different than the company's default mailbox.
Payroll Check Mailbox	Whatever names the company has given their mailboxes are listed. To override the company setup for VMR, select the Mailbox
EE Report Mailbox	
EE Electronic Return Mailbox	
2nd EE Report Mailbox	
Password for VMR Deliveries	VMR Password
Payroll Override Address section	Address to send payroll checks for the employee if they are going to a different address than the W-2.

Employees - Time off Accrual screen

Field / Button	Description
Active	Whether or not the TOA plan is currently active for the employee
Type	What type of TOA plan it is – PTO, Sick, Vacation, etc…
Balance	Tab over to the **Accrued** field to enter first. The balance will fill in automatically, after which, enter time used and the balance will be adjusted.
Used	How much of the accrued time has been used
Accrued	Enter manually
Effective Date	Date the Accrued amount begins

Field / Button	Description
Accrual Max	Maximum set by the company that an employee can earn in a pre-defined period
Rate	Rate at which the time off accrues per pay period
Rollover Type	If the company plan allows for a rollover, on which type of accrual is rollover allowed?
Rollover Date	Date on which rollover occurs

Employees - Employee Portal screen

Depending upon your role / permissions set up in Classic, this menu-item may not be visible.

Field / Button	Description
Access Section	For access to the Employee Portal, the Access Level for EE Info must be Read Only or Full Access. The Time Off and Benefits Access Levels work independently.
EE Info	No - employees will not see any of their personal information in the Employee Portal Read-only - employees can view their payroll information but will not be able to request edits in the Employee Portal Full Access - employees can see and request edits to their payroll and W-4 information.
Time Off	No - employees do not see any of their time off information in the Employee Portal Read-only - employees can view their time off information but will not be able to request edits in the Employee Portal Full Access - employees can see and request edits to their time off information
Benefits	No - employees do not see any of their benefits information in the Employee Portal Read-only - employees can view their benefits information but will not be able to make elections in the Employee Portal Full Access - employees can see and request edits to their benefits elections in the Employee Portal (during Open Enrollment and/or a Qualifying Event Enrollment.)

Field / Button	Description
Username	The employees' username in the Employee Portal.
Password	The employees' password in the Employee Portal.
Unblock Account button	If a user's Web Payroll account is blocked because they incorrectly answered their security questions three times, a user with access can unblock the account using this button.
Group Assignments section	Pre-filled based on the setup in Classic on the Company - Benefits - ESS Group Assignment screen.
Name	Name of the group/s to which the employee has been assigned.
Type	Type of group/s to which the employee has been assigned. (Pre-filled based on the setup in Classic.
Assigned checkbox	Designates whether the employee is assigned to the group.
Settings section	
Forms on file	Are the annual return forms on file?
Email	Email address for account notifications
Format	Format of the returns; electronic, paper, or both
Benefits Email	Email address for benefits notifications

Employees - Notes screen

Field / Button	Description
Payroll Notes	Notes entered here can be viewed by the payroll processor, or other internal colleagues. The information does not appear "publicly" and cannot be viewed by the employees.
General Notes	General notes about the employee and payrolls are stored with the employee data and can also be viewed in the Payroll menu in the **Notes fly-out tab** on the Employees – Payrolls - Payroll View screen.

Employees - Check Calculator Shortcut Button

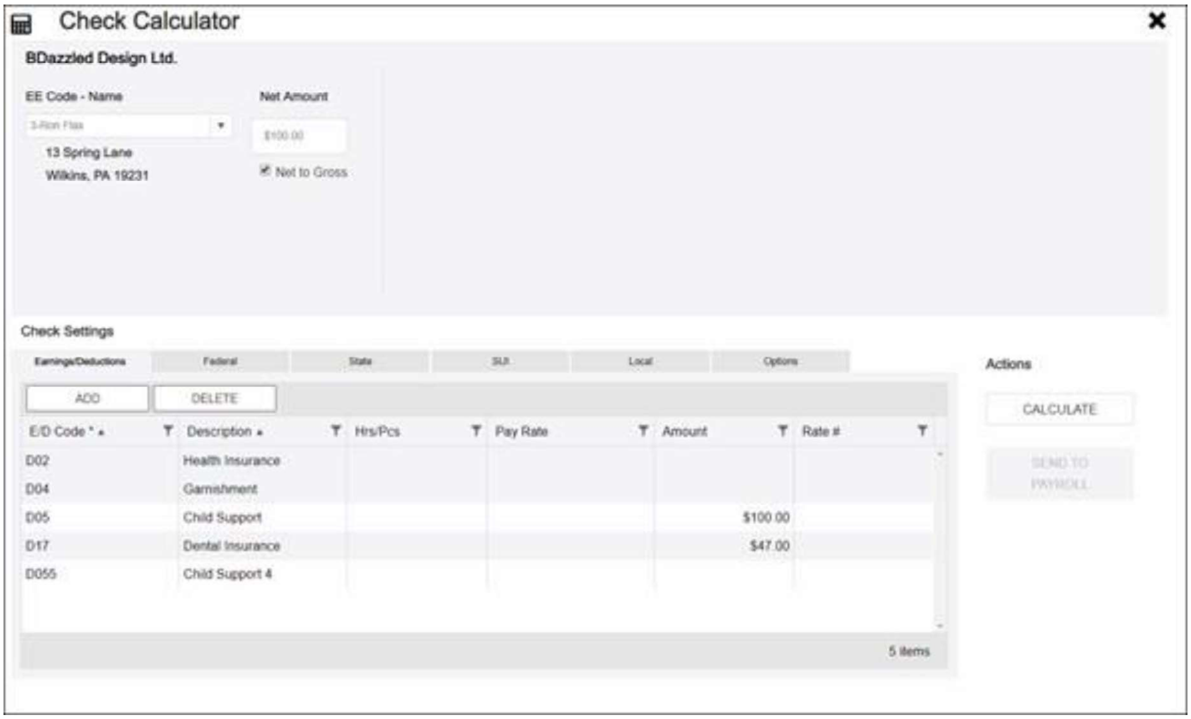
Field / Button	Description
EE Code/Name	Select the Employee Number or name from the dropdown list.
Net Amount checkbox	Select if calculating a Net Amount to Gross – user will be required to enter the Net Amount in a field that is displayed when selected.
Net Amount	Net amount of the check being calculated if **Net Amount** checkbox is selected.
Calculate button	Click to calculate the Net or Gross amount.
Send to Payroll button	Click to send the check to a payroll batch for processing.
Add / Delete buttons	Use to add or delete earnings or deductions to or from the check.
Federal tab	
Marital Status	This information is pre-filled using the settings established in Classic.
Exemptions	
Tax Frequency	
Tax at Supplemental Rate	Select if there are supplemental wages requiring the employee to be taxed at a supplemental rate.
Blocks section	
Federal Tax	Select to block Federal tax from being deducted from this check.
Employee Overrides	Select to block any employee overrides from being included in this check.
Additional Values	Select to block any additional values from being deducted from this check.
EE OASDI	Select to block the EE OASDI from being deducted from this check.
EE Medicare	Select to block the EE Medicare from being deducted from this check.
EE EIC	Select to block the EE EIC from being deducted from this check.

Field / Button	Description
Overrides section	
Fed Type	Complete if there are any overrides to add to this check.
OASDI	
Medicare	
EIC	
Backup Withholding	
State tab	
Marital Status	This information is pre-filled using the settings established in Classic.
Exemptions	
Tax at Supplemental Rate	Select if there are supplemental wages requiring the employee to be taxed at a supplemental rate.
Blocks section	
Regular tax	Select to block any of these from being deducted from the check.
Additional tax	
SUI	
SDI	
Overrides section	
State Type	Select if any type of state tax should be overridden.
SUI tab	
Amount	Enter an override amount if applicable for the state highlighted in the left (if more than one is listed)
Local tab	
Block this Local Tax	Select to block the selected local tax from being deducted from the check.

Field / Button	Description
Overrides section	
Amount	Enter an override amount if applicable for the local highlighted in the left.
Make this a Manual Check	Select to create a Manual check.
Enter Check #	This is a required field if Manual Check is selected.
Update Year to Date Totals (Disable YTD)	Select to keep YTD totals from appearing on the employees' check stubs.
Update Tax & Deduction Shortages (Disable Shortfalls)	Select to keep shortages from appearing on the employees' check stubs.
Lock Calculations for this Check	Select to use the reviewed information when the payroll processes. Results are available on the Manual Tax tab.

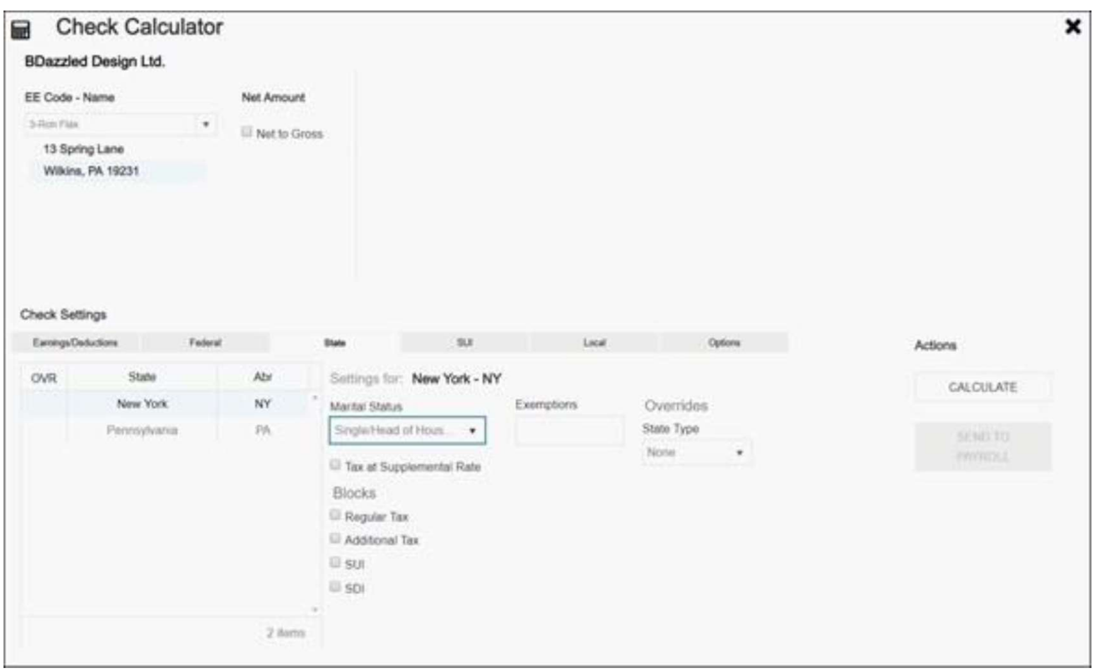
Check Calculator Menu

The **Check Calculator Menu** opens the Check Calculator screen on which **non-payroll** employee checks can be calculated from Gross-to-Net or Net-to-Gross. Once the check has been calculated, it can be sent to an existing payroll batch for processing, or a new payroll / batch can be created for processing the check.



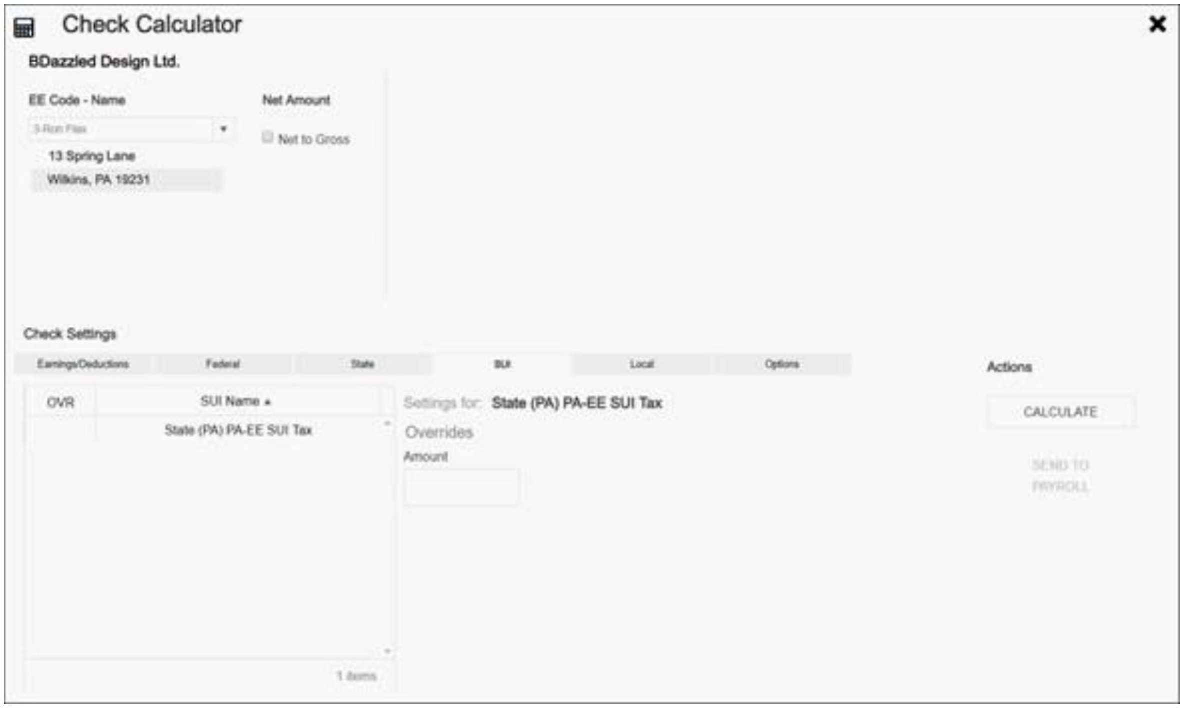
1. Select the Employee Number or name from the dropdown list.
2. Check the **Net Amount** checkbox if calculating a Net Amount to Gross.
3. Enter the **Net Amount** in the field that opens when selected.
4. Click the **Add** / **Delete** buttons to add or delete earnings or deductions to or from the check.
5. Click the **Calculate** button.
6. Click the **Federal** tab

7. Click in the applicable fields to make changes, blocks, or overrides. For detailed information about the fields on this screen, refer to the Employees – Check Calculator screen in the Appendix at the end of this chapter.
8. Click the **State** tab.

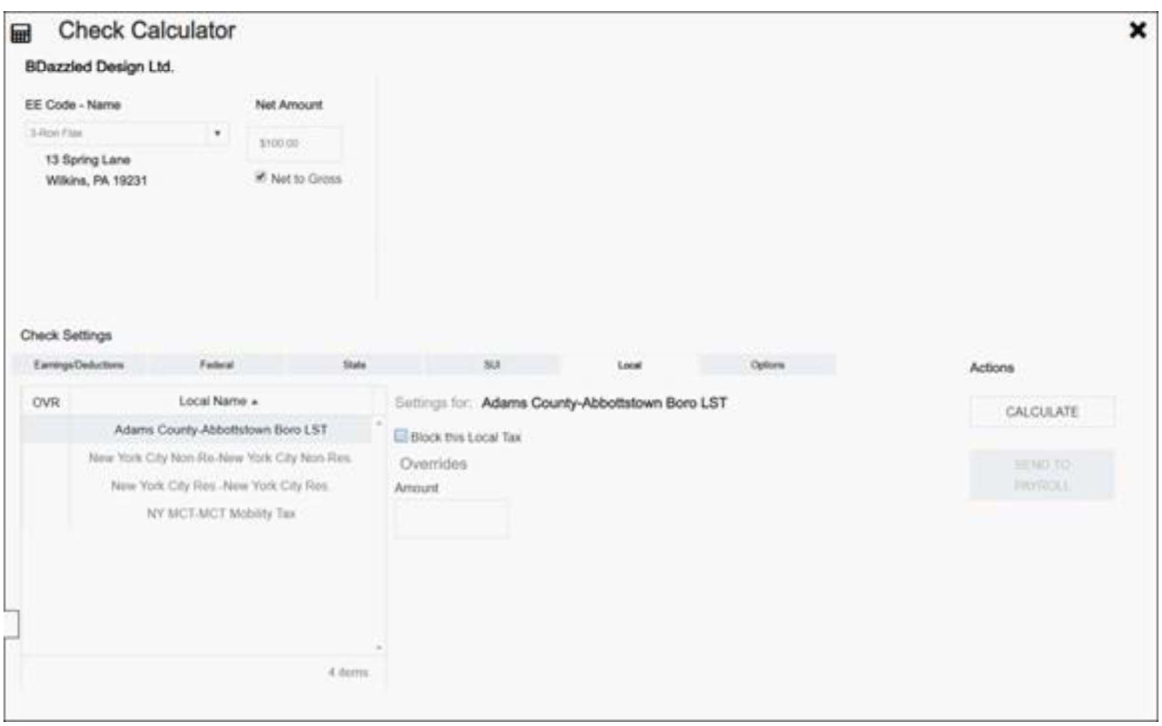


9. Click in the applicable fields to make changes, blocks, or to add an override.

10. Click the **SUI** tab.



11. Click in the applicable fields to make a change or to add an override.
12. Click the **Local** tab.



13. Click in the applicable fields to block a local tax, or to add an override.
14. Click the **Options** tab.

15. If this is to be a Manual check, a check number is required.
16. Select all applicable fields.
17. Click the **Send to Payroll** button to send the check to a payroll batch for processing.
18. Select the payroll in which to include the check for processing.

19. Click **Go to Payroll** or **Save Return**.

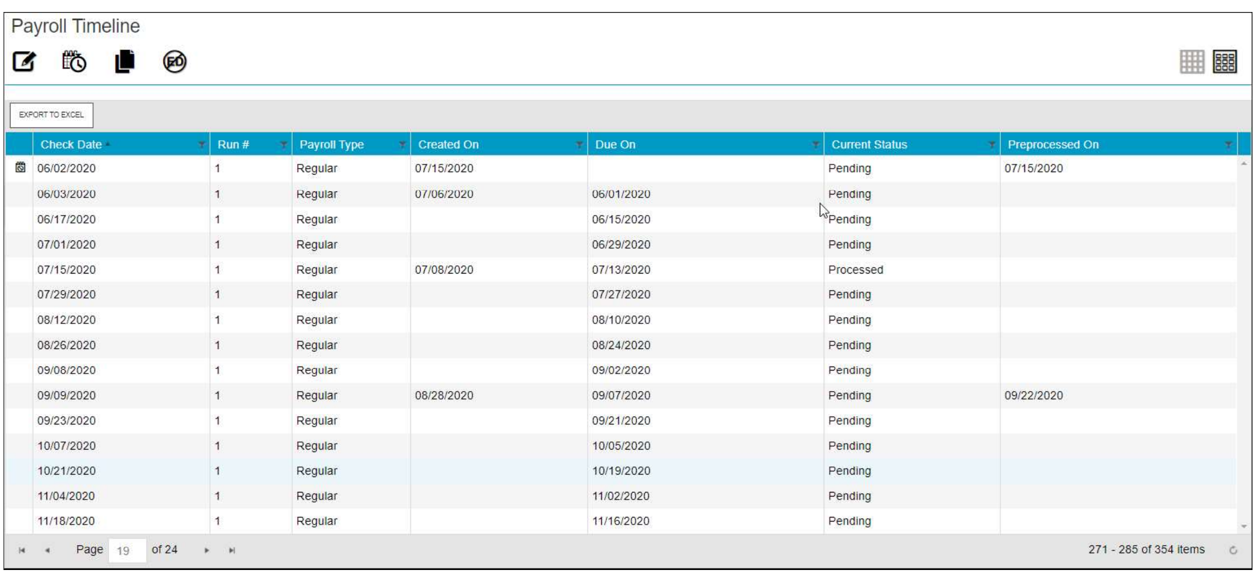
The Payrolls Menu

The first screen in the Payrolls Menu is the Payroll Timeline, displaying coupon- or card-like views of scheduled payrolls.

The table below describes eight statuses you may see on the Timeline screen.

Status	Description
Not Due	Scheduled payrolls that are not due to be processed yet.
Past Due	Scheduled payrolls that did not get processed as scheduled.
Pending	Payroll was started but not submitted
On Hold	Payroll was submitted to the service bureau for review.
Submitted	Payroll was submitted to the service bureau for processing.
Processed	Payroll has been processed.
Backdated	Payroll has been backdated
Requires Mgr Approval	Payroll requires manager approval prior to processing.

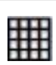
Click the symbol in the header to change to a Table view of recent payrolls.



Check Date	Run #	Payroll Type	Created On	Due On	Current Status	Preprocessed On
06/02/2020	1	Regular	07/15/2020		Pending	07/15/2020
06/03/2020	1	Regular	07/06/2020	06/01/2020	Pending	
06/17/2020	1	Regular		06/15/2020	Pending	
07/01/2020	1	Regular		06/29/2020	Pending	
07/15/2020	1	Regular	07/08/2020	07/13/2020	Processed	
07/29/2020	1	Regular		07/27/2020	Pending	
08/12/2020	1	Regular		08/10/2020	Pending	
08/26/2020	1	Regular		08/24/2020	Pending	
09/08/2020	1	Regular		09/02/2020	Pending	
09/09/2020	1	Regular	08/28/2020	09/07/2020	Pending	09/22/2020
09/23/2020	1	Regular		09/21/2020	Pending	
10/07/2020	1	Regular		10/05/2020	Pending	
10/21/2020	1	Regular		10/19/2020	Pending	
11/04/2020	1	Regular		11/02/2020	Pending	
11/18/2020	1	Regular		11/16/2020	Pending	

Page 19 of 24 — 271 - 285 of 354 items

Several symbols are visible on various screens in the Payrolls menu, described in the table that follows.

Symbol	Description
	View – visible only on processed payrolls, click to view details of the payroll including batches, check lines, etc.
	Copy – visible on processed payrolls only, enabling them to be copied for processing.
	Payroll Results – click to view details about payrolls with a status of Processed (P) and Void (V).
	Edit – visible on payrolls that have been started, but not processed. Click to make changes, add a new batch, filter the information differently, or add new checks.
	Add – click to add a new batch to scheduled payrolls, or to add a new payroll.
	Delete – click to delete previous changes. Also, to delete a batch.
	Cancel Changes – click to cancel changes made to a screen or payroll.
	On the Check Batches screen – clicking takes the user to the Check Batch Settings screen for the batch selected.
	On the Check Batch Settings screen – clicking takes the user back to the Check Batches screen.
	On the Check Batch Settings screen – clicking takes the user to the Check Batch Settings Table View screen listing the company employees.
	On the Payroll Timeline screen – changes the view to a Table view from the Card view.
	On the Payroll Timeline screen – changes the view to the Card view from the Table view.
	On the bottom right of the Batch checks screen – click to open a list of E/D codes to create additional columns on the checks list.

There are four symbols on the right-hand side of the Header that visually let the user know where they are in the Payroll process. These can also be clicked to go to specific screens in the process.

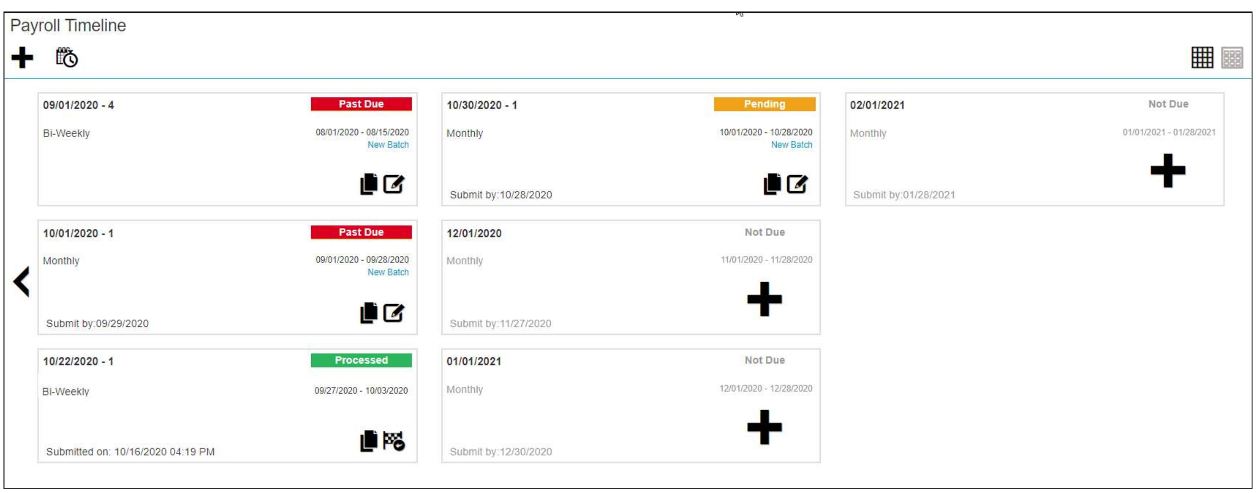
Symbol	Description
Batches	Batches – this button is active (green) while batches are being created. To view batch information after they have been created, click this button.
Checks	Checks - this button is active (green) while checks are being created. To view, add or edit checks after they have been created, click this button.
Totals	Payroll calculations - click a payroll to view or edit. Click to calculate totals when checks have been added or deleted from batches.
Finish	Process Payroll - this button is active (green) while payrolls are being finished and submitted for review or processing.

Creating a Scheduled Payroll

The Payrolls – Timeline screen is the first screen to open after clicking the Payroll menu.

To create a payroll in Web Payroll,

1. Click the **Payrolls** menu.



2. Click the large plus ✚ sign in the Payroll card to create a new payroll. (You can always click the plus sign in the payroll card for the payroll being created.)

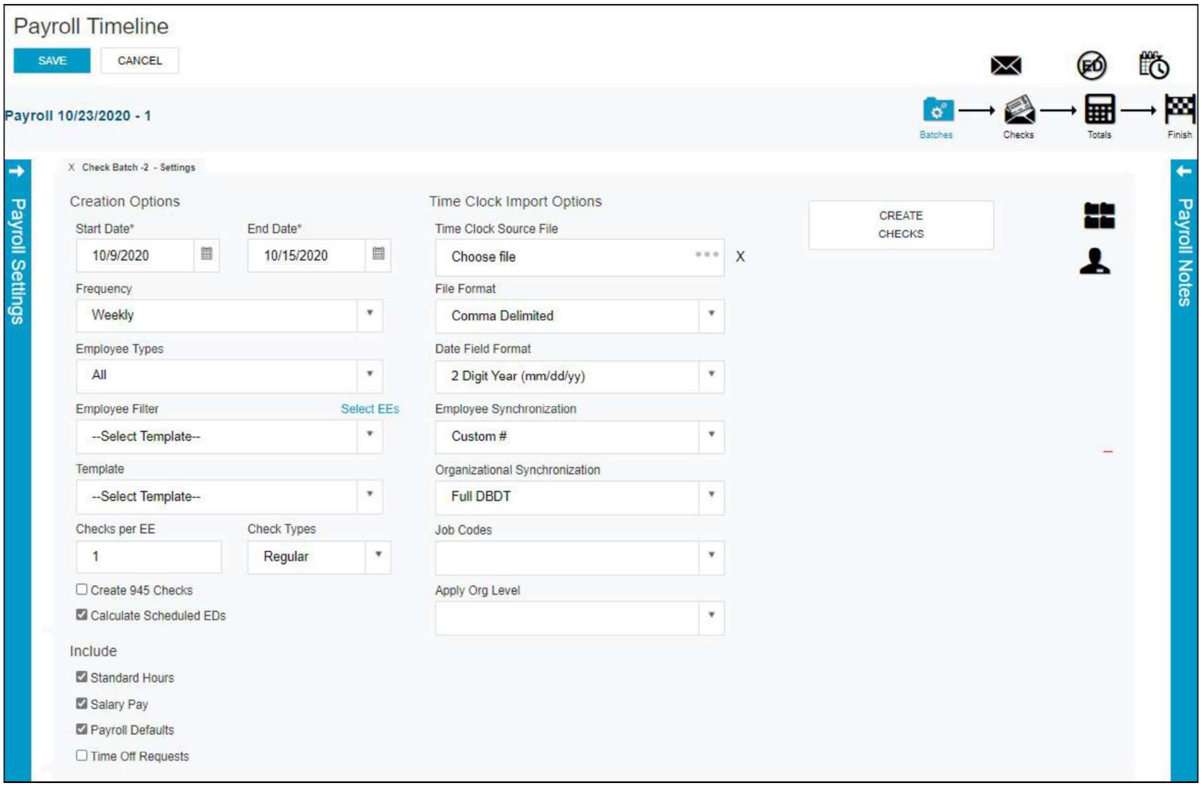
Result: The Create Payroll screen opens asking if you are creating a Payroll from the Calendar or a New Payroll (Unscheduled).

3. Click **Payroll from the Calendar**

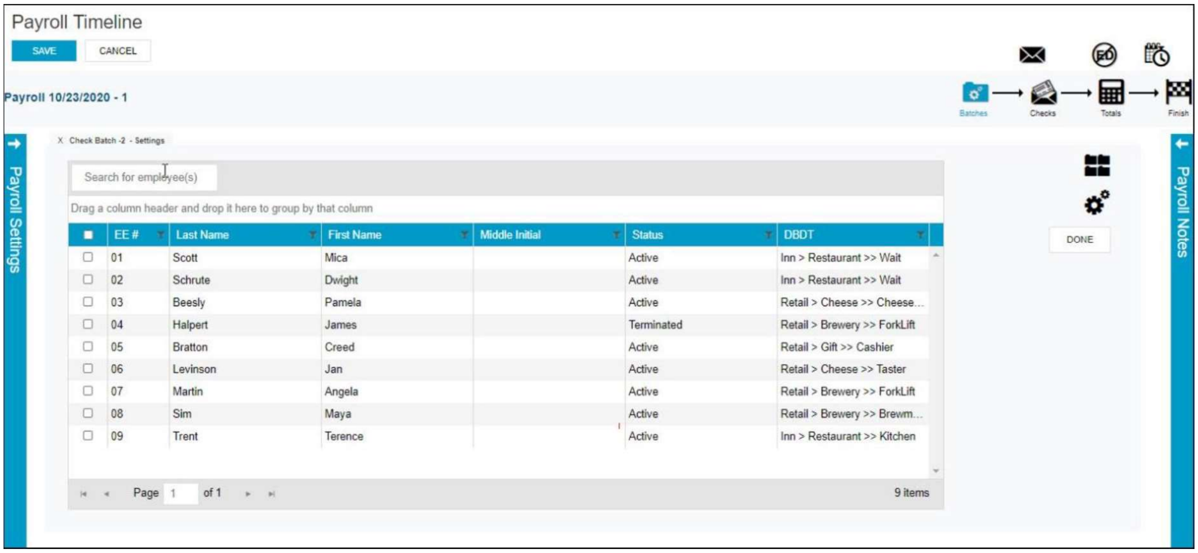
4. Select the date from the Payroll Calendar.
5. Click **OK**.

Note: Payroll notes and general notes created in the Employees menu can be viewed in the Payrolls menu by clicking the **Payroll Notes** fly-out tab on the far right-hand side of the screens. This fly-out tab is available on most screens within the Payroll menu.

Check Batch Settings Screen

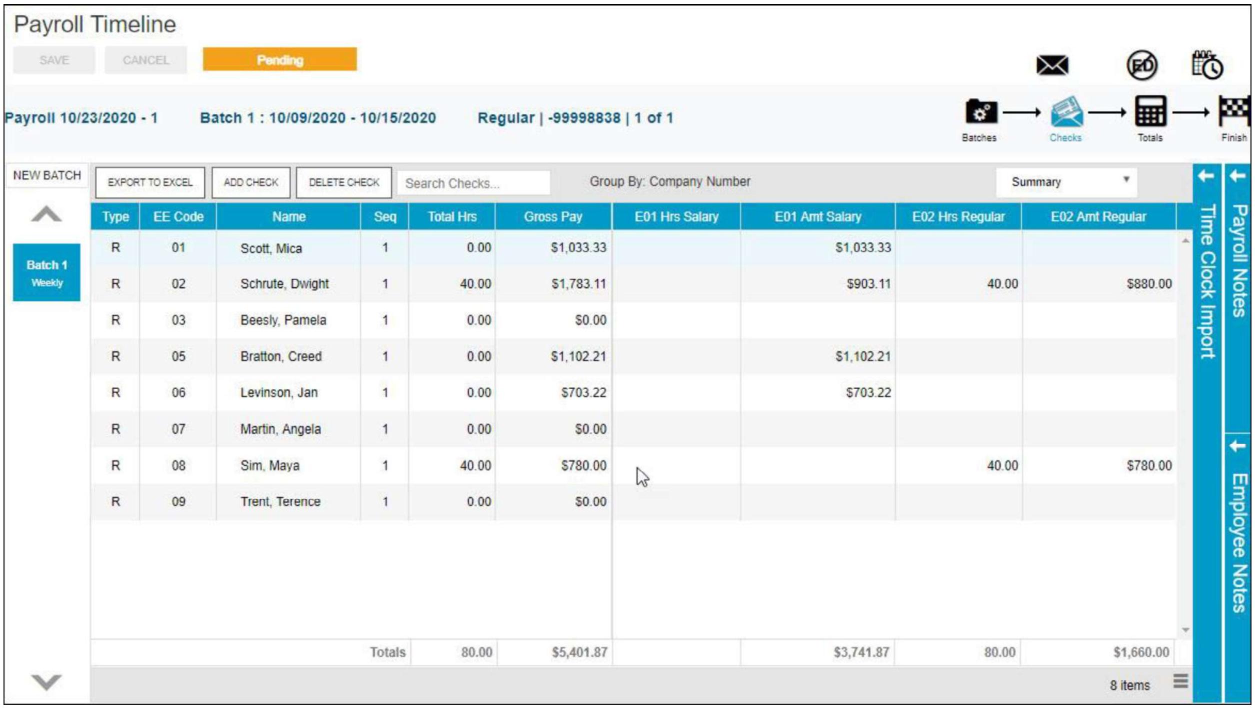


1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the Payrolls – Check Batch Settings Screen in the Appendix at the end of this chapter.
2. To select specific employees to include in the payroll, click **Select EEs** next to the **Employee Filter** field.



3. Click the checkbox (far left) at the top of the employees list to Select All, or select individual employees.
4. Click **Done**, which brings you back to the Check Batch Settings screen.
5. Click the **Create Checks** button.
   Result: A confirmation opens letting the user know that the checks were successfully created.
6. Click **OK**.
   Result: The Batch Checks Screen opens.

Batch Checks Screen



This screen offers three different viewing options, based upon the level of detail required by the user. The view is selected from the dropdown list in the far right of the Navigation Bar. For detailed information about the fields on this screen, refer to refer to the Payrolls - Batch Checks Screen in the Appendix at the end of this chapter.

Summary View

Default view, this is the check entry screen, on which the user can add checks and edit information for employee checks. The first five columns are read only. The columns that follow can be edited, as well as having columns added and subtracted.

- To add or edit a column

a. Click within the column to edit of the check being modified.

b. Once finished click **Save** in the Header.

- To add a check for employees

a. Click the **Add Check** button in the Navigation bar.

Result: The Add Checks screen opens.

b. Select the Check Type being created.

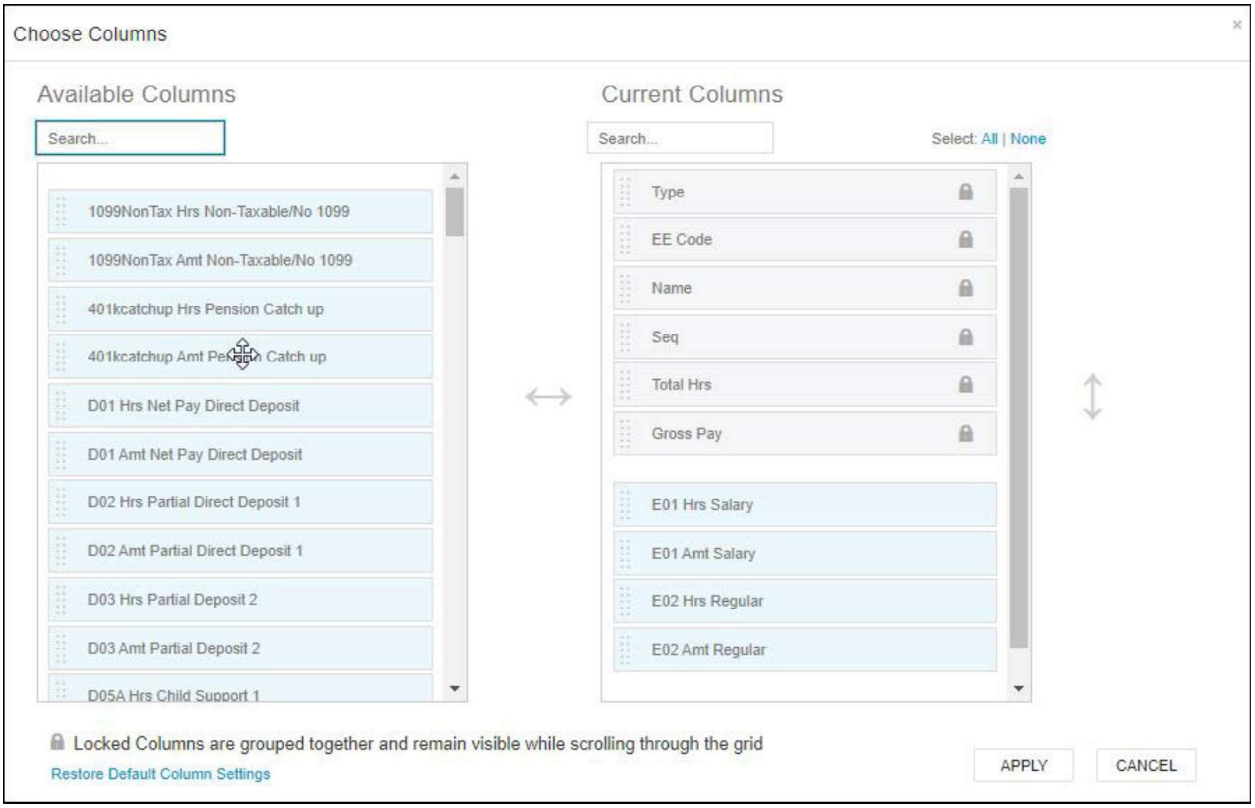
c. Select the employee(s) for whom to create a check.

d. Click the **Create Check**(s) for Selected EEs button.

Result: The Batch Checks screen reopens with the new check(s) listed.

- To add additional E/D codes to the grid as columns, click in the bottom right-hand corner of the Batch Checks Screen.

Result: The following screen opens listing Available Columns - E/Ds available to add to the grid, and a list of the Current Columns - the E/Ds currently listed as column headings in the grid.

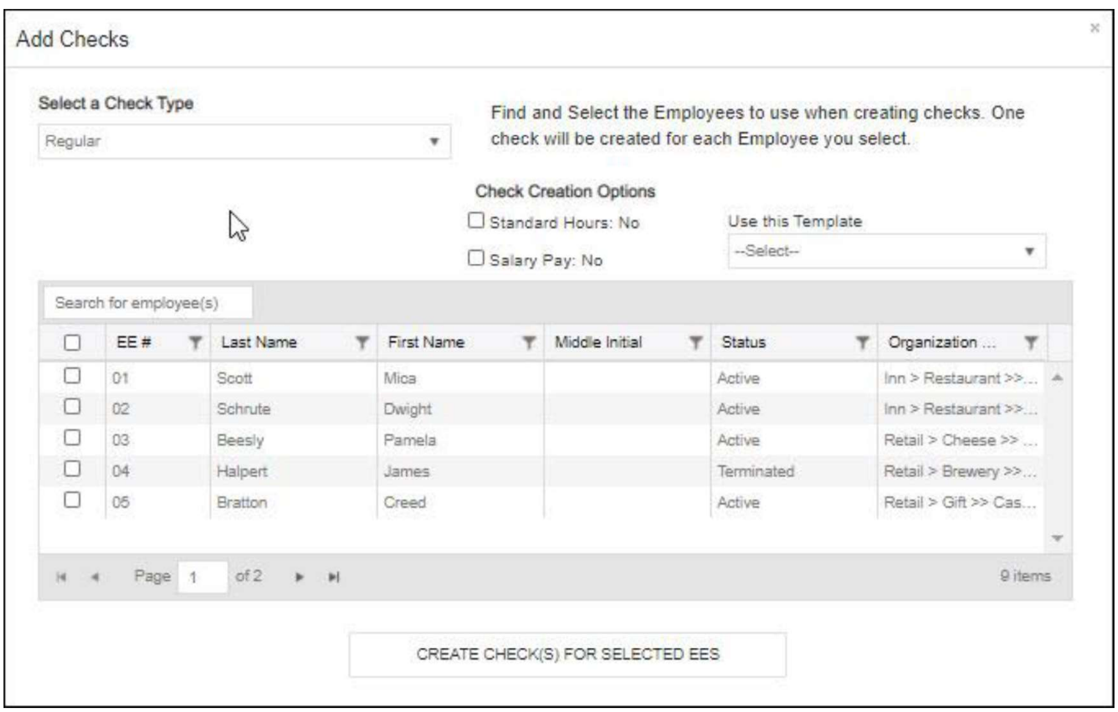


- To add E/Ds to the grid, select it/them in the **Available Columns** list on the left-hand side of the screen, and drag to the **Current Columns** list on the right.
- To remove columns from the grid, click the E/Ds in the Current Columns list and drag them to the Available Columns list on the left.
- Click **Apply**.

Summary Detail View

The Summary Detail View provides a more detailed view of the Summary screen, listing each check and its details.

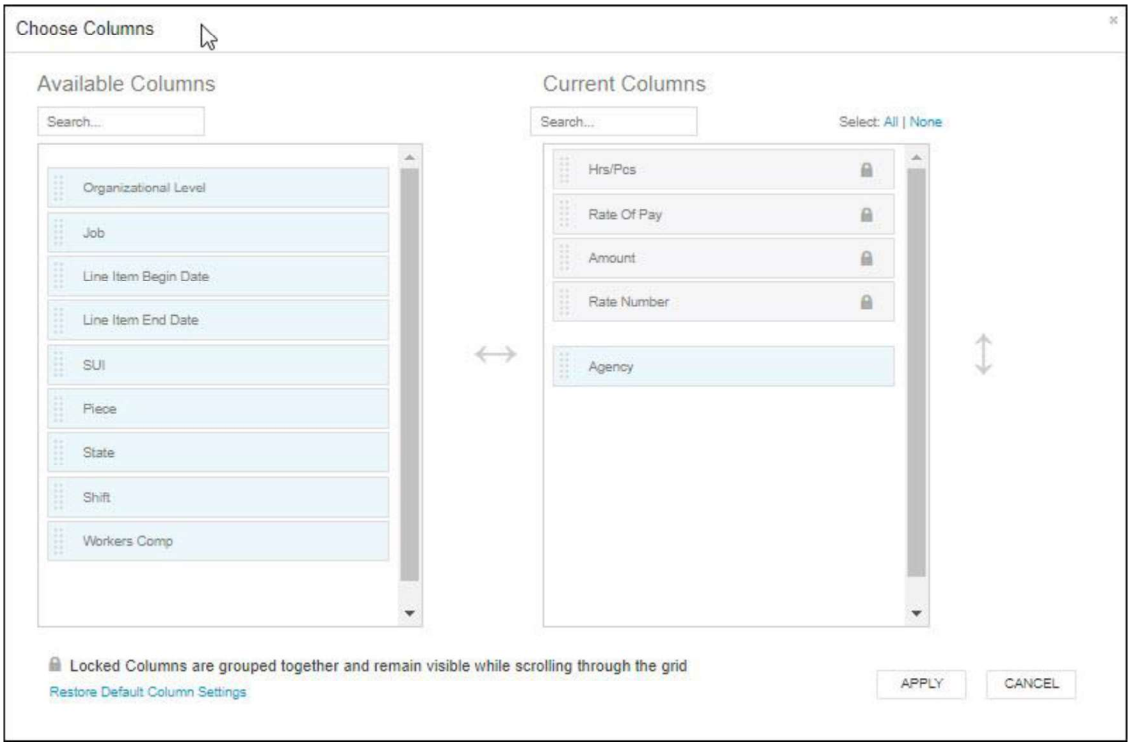
1. To add a check for employees, click the **Add Check** button in the Navigation bar.
   Result: The Add Checks screen opens.



2. Select the Check Type being created.
3. Select the employee(s) for whom to create a check.
4. Click the **Create Check(s) for Selected EEs** button.

- To add a Check Line, click the **Add Check Line** button.
- To add additional E/D codes to the grid as columns, click in the bottom right-hand corner of the Batch Checks Screen.

Result: The following screen opens listing Available Columns - E/Ds available to add to the grid, and a list of the Current Columns - the E/Ds currently listed as column headings in the grid.

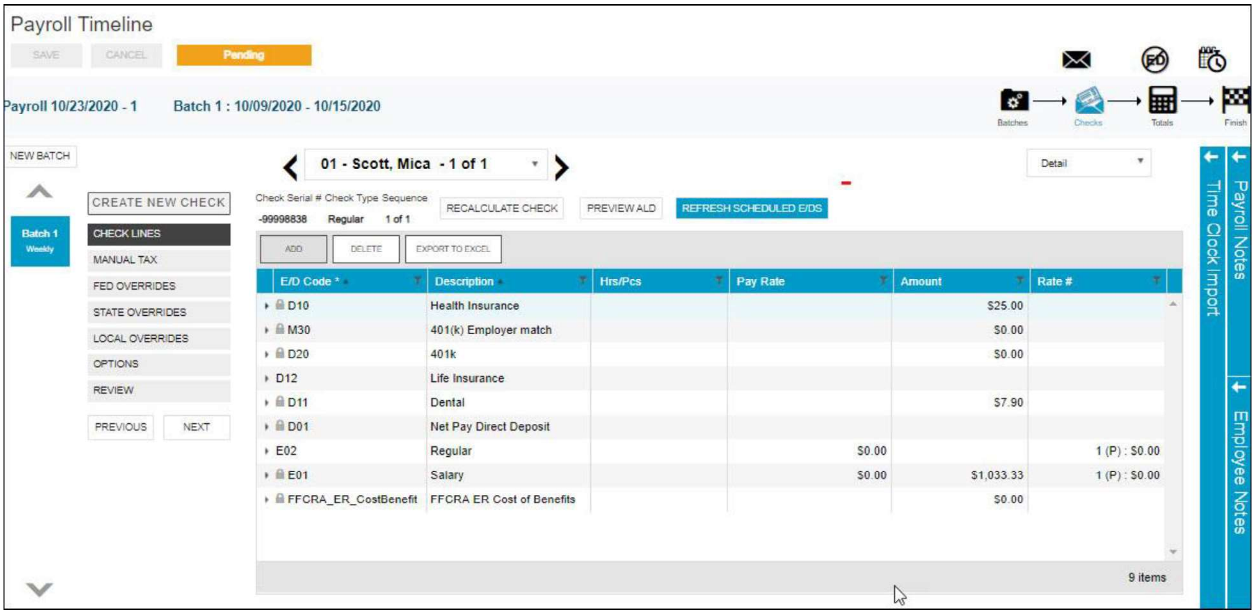


- To add E/Ds to the grid, select it/them in the **Available Columns** list on the left-hand side of the screen, and drag to the **Current Columns** list on the right.
- To remove columns from the grid, click the E/Ds in the Current Columns list and drag them to the Available Columns list on the left.

5. Click **Apply**.

Detail View

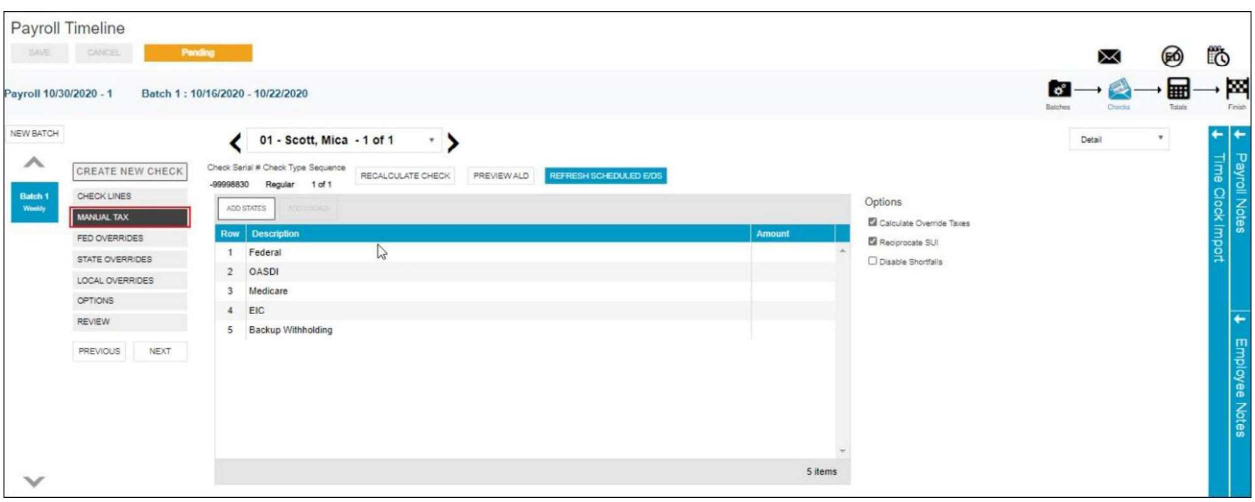
The Detail view provides the most detailed view of each check, and offers editing capabilities, as well as the ability to add (or delete) additional E/D codes to the checks.



1. Complete the required and applicable fields on this screen as well as on the Labor Defaults and Local Tax Overrides tabs. For detailed information about the fields on these screens, refer to refer to the Payrolls – Check Lines Screen in the Appendix at the end of this chapter.
2. Click the Payroll – Manual Tax menu item.
3. Press the **TAB** key or click the **Next** button when you complete entering information on this screen.

Manual Tax screen

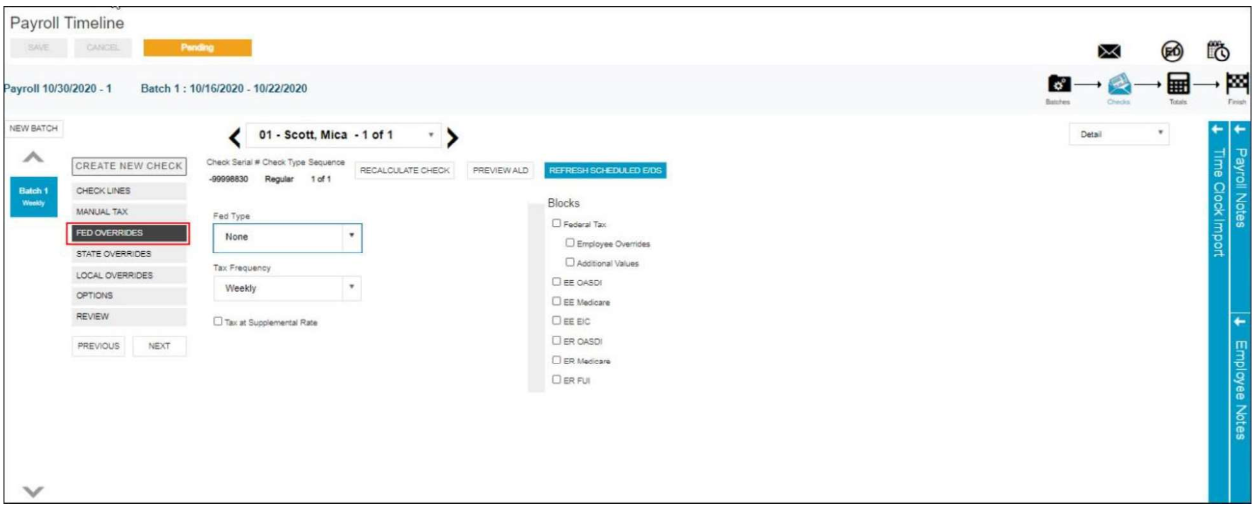
Click the **Manual Tax** tab to override a tax for the check if applicable. The info rmation on this screen is the same as is on the Payrolls - Check - Manual Tax screen in Classic. For detailed information about this screen, refer to the Payrolls – Manual Tax screen in the Appendix at the end of this chapter.



1. Complete the applicable fields
2. Click the **Payroll – Fed Overrides** tab.

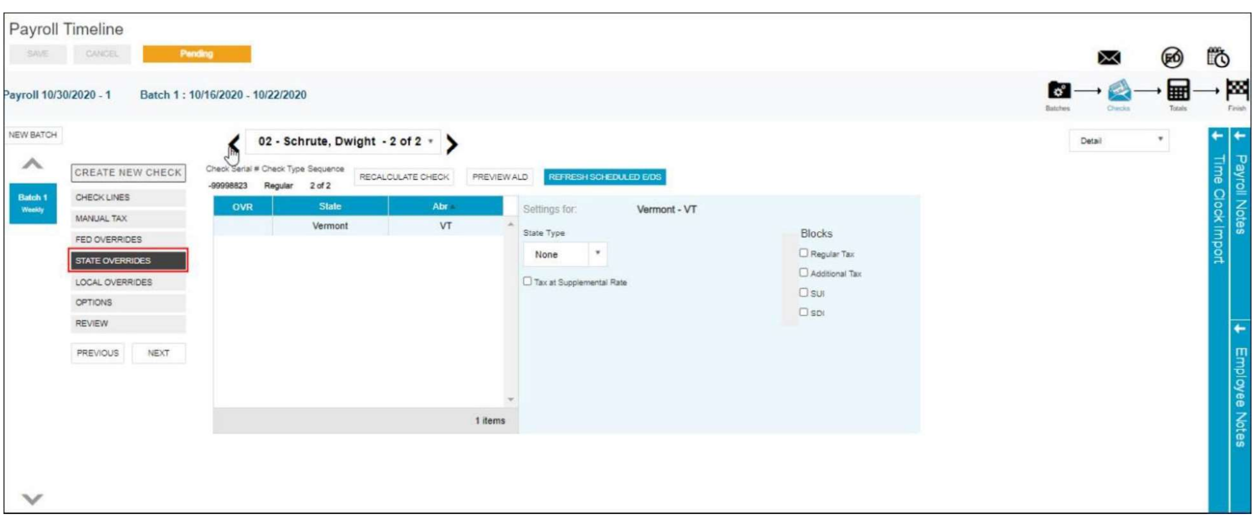
Fed Overrides screen

Click the **Fed Overrides** tab to block or override Federal taxes. Information on this screen is the same information as is found on the Payrolls – Check – Tax Overrides tab in Classic. The State and Local tabs require the same information, regarding the state or local taxes for the employee. For detailed information about this screen, refer to the Payrolls – Fed Overrides screen in the Appendix at the end of this chapter.



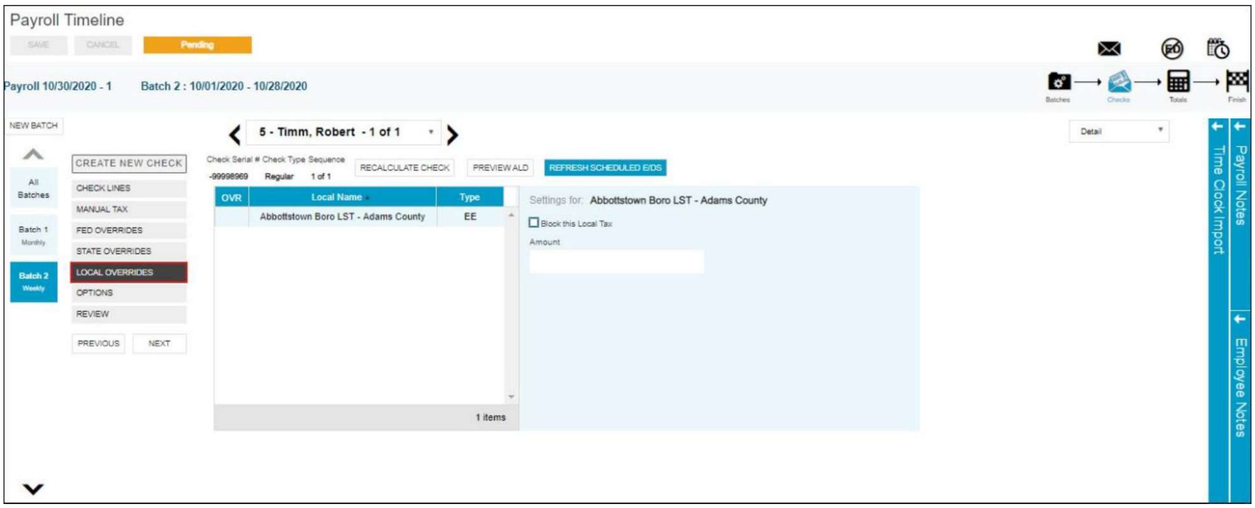
1. Complete the applicable fields.
2. Click the **Payroll – State Overrides** tab.

State Overrides screen



1. Complete the applicable fields. For detailed information about the fields on this screen, refer to the Payrolls – State Overrides screen in the Appendix at the end of this chapter.
2. Click the **Payroll – Local Overrides** tab.

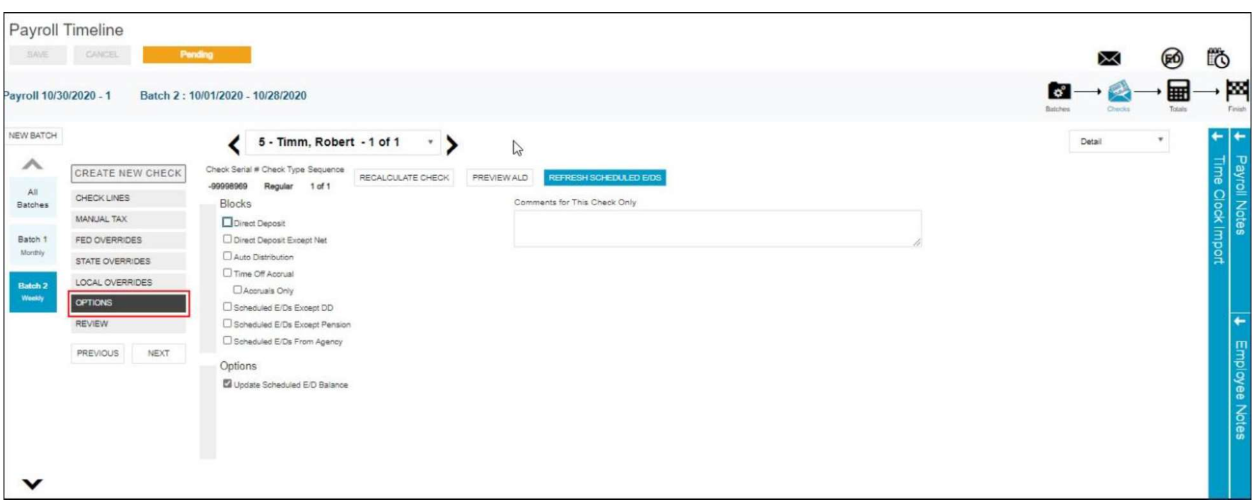
Local Overrides screen



1. Complete the applicable fields.
2. Click the **Payroll – Options** tab.

Payroll - Options screen

Click the **Payrolls –Options** tab to block scheduled earnings and deductions on employee checks. The information on this screen can be found mostly on the Payroll – Check – General tab.

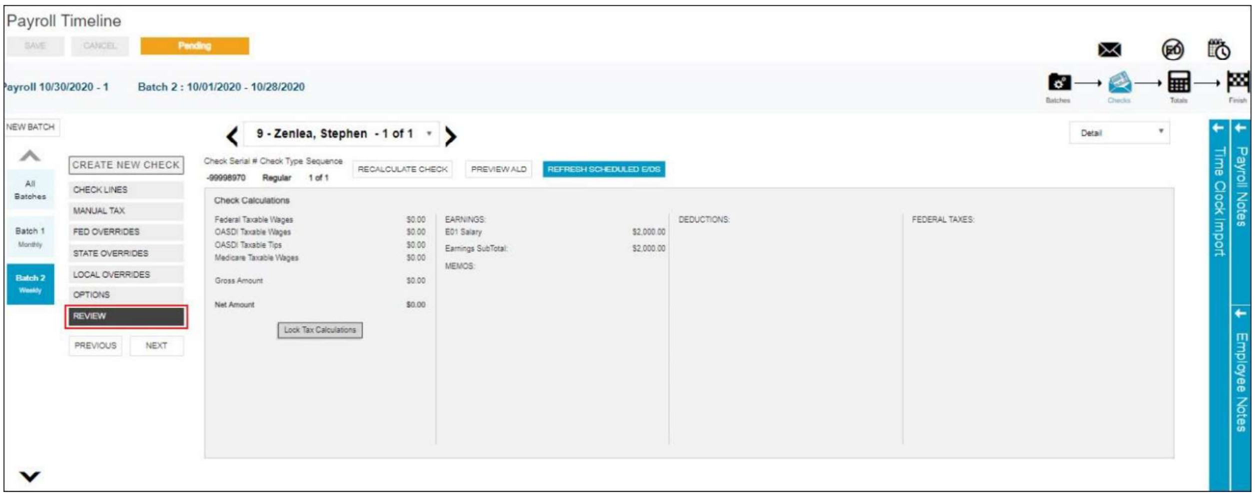


1. Complete the applicable fields. For detailed information about the fields on this screen, refer to the Payrolls – Options Screen in the Appendix at the end of this chapter.

2. Click the **Review** tab to review [unprocessed] payroll checks with overrides, to verify for accuracy before submitting to payroll.

Payroll - Review screen

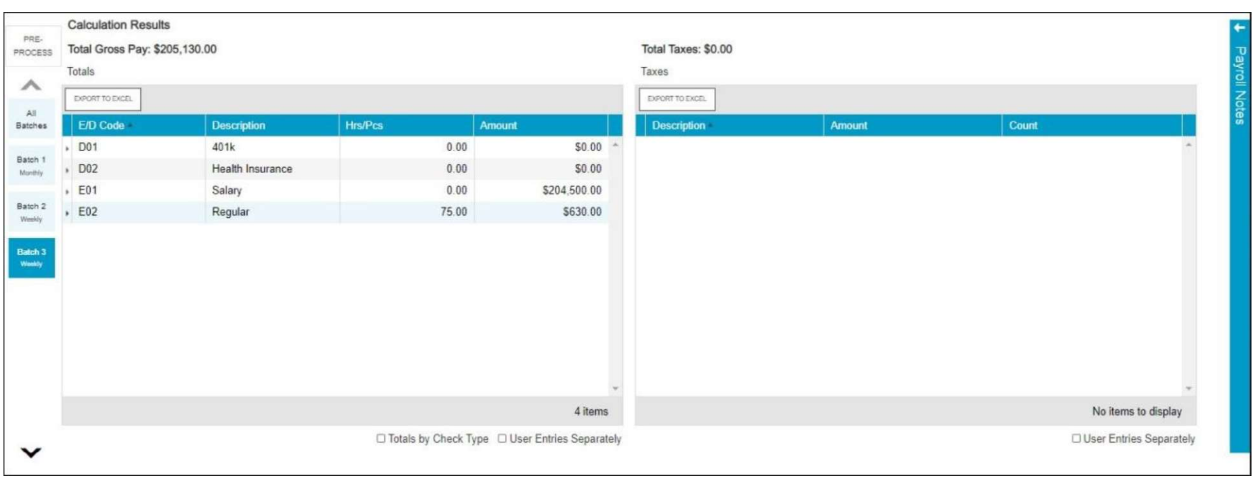
1. Click the **Review** tab to review [unprocessed] payroll checks with overrides, to verify for accuracy before submitting to payroll. For detailed information about these screens, refer to the Payrolls – Review Screen in the Appendix at the end of this chapter.



2. Once verified, click the **Lock Tax Calculations** button to save those figures.
3. Click the **Recalculate Taxes** button to recalculate any changes made.

Calculation Results screen

Click Totals in the header to access the Payroll – Calculation Results screen to review totals of earnings and deductions, and taxes. For detailed information about the fields on this screen, refer to the Payrolls – Calculation Results in the Appendix at the end of this chapter.

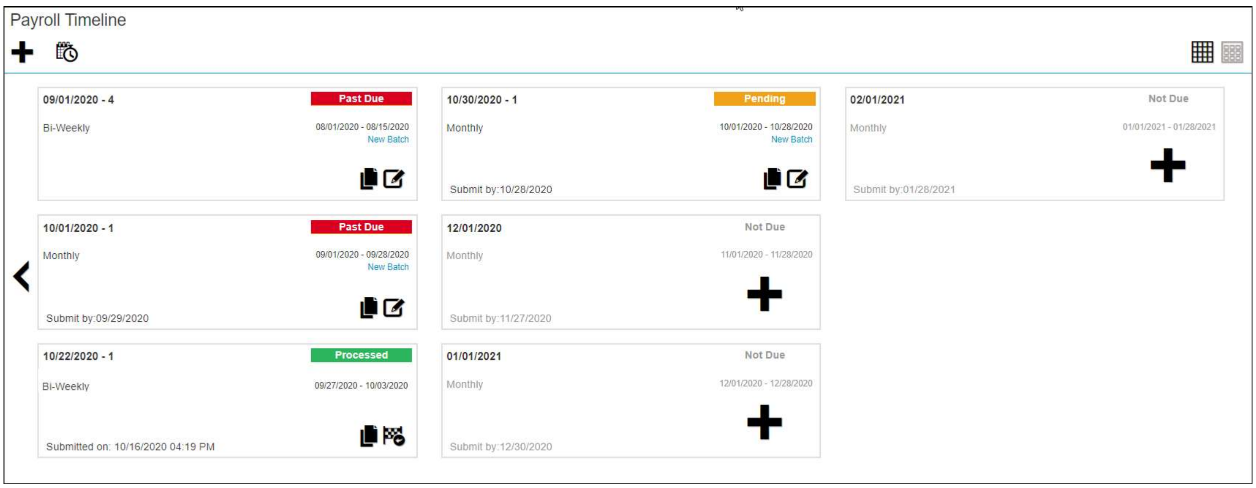


Note: if something needs to be edited, click the Batches symbol in the header which brings you back to the Batch screen.

Creating an Unscheduled Payroll

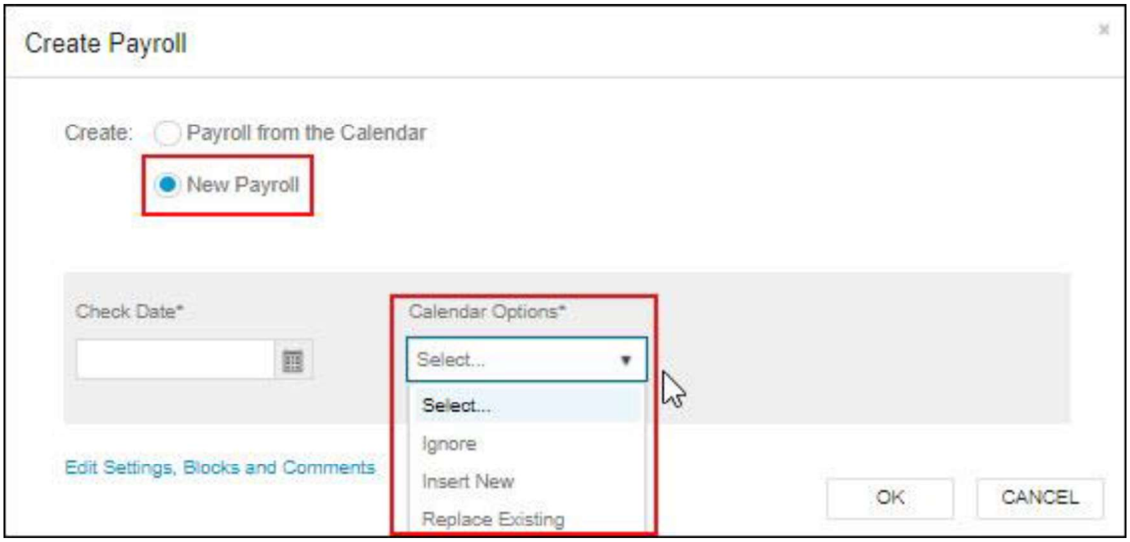
To create a payroll that is not scheduled based on the calendar settings,

1. Click the **Payrolls** menu, which brings you to the Payroll Timeline screen.

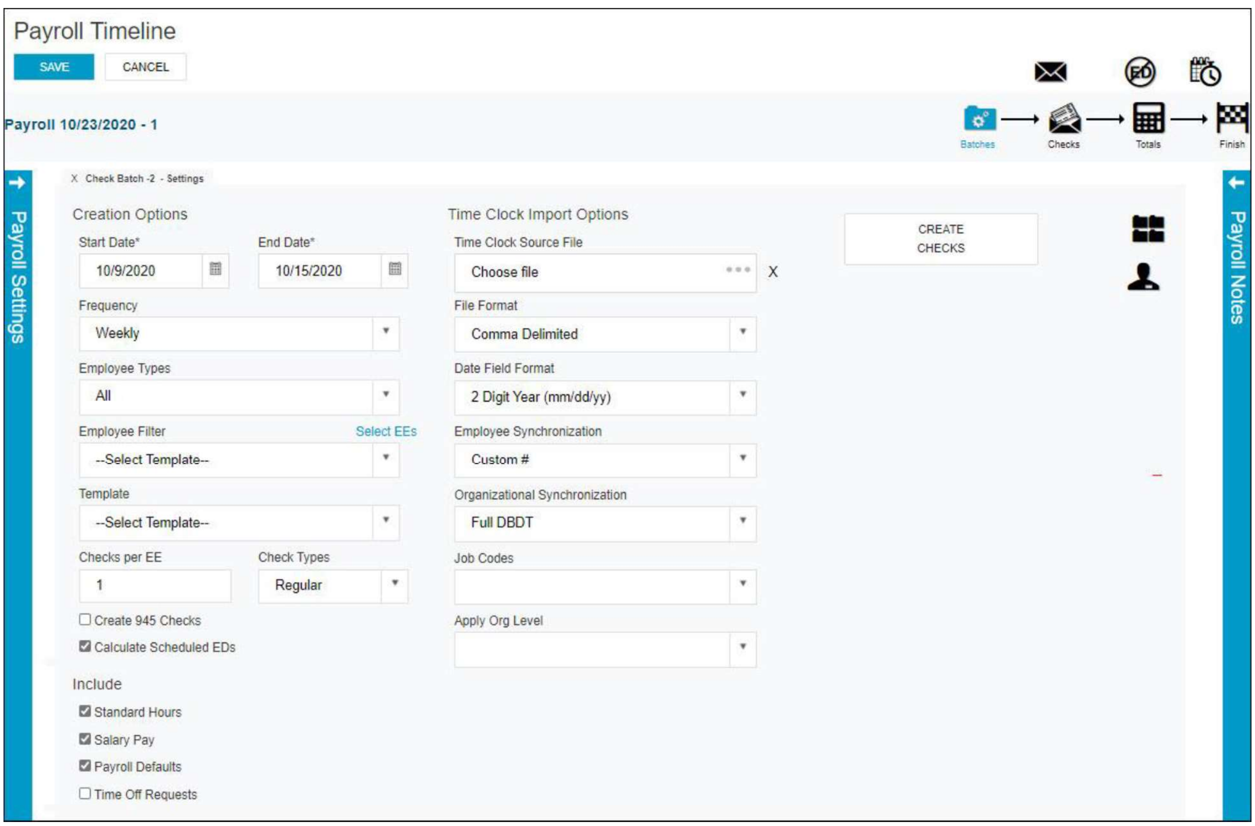


1. Click the large **plus sign** in the Header.
2. **Result:** The Create Payroll screen opens asking if you are creating a Payroll from the Calendar or a New Payroll (Unscheduled). Select the **Check Date** and select whether to
   - Ignore - do nothing to the calendar
   - Insert New - insert the new check date into the Calendar, or
   - Replace Existing - replace a check date already in the calendar.
3. Click **OK**.

   Result: The Check Batch Settings screen opens.
4. Click **New Payroll**



Check Batch Settings screen

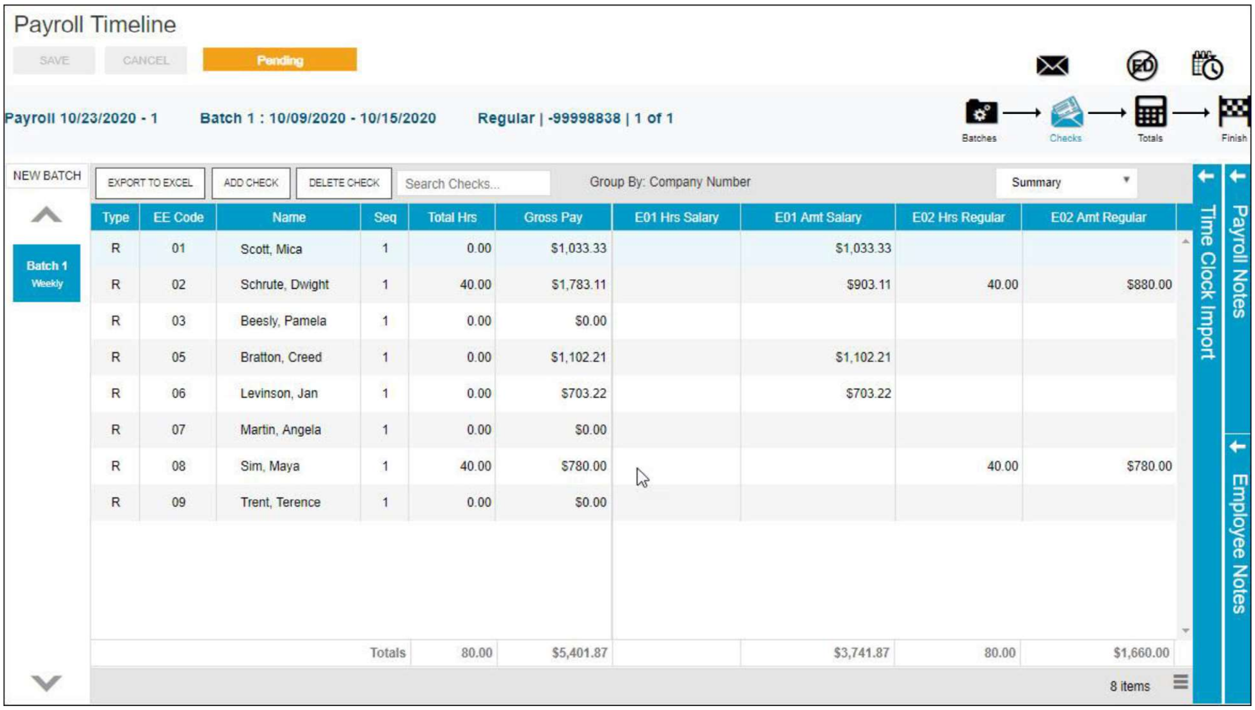


1. Select the items to include in the payroll in the Include section.
2. Complete required and applicable fields in the Time Clock Import Options section.
3. Click the **Create Checks** button.
4. Click **OK** in the window that confirms the checks have been created.

Result: The Batch Checks Screen opens.

Payrolls - Batch Checks Screen

This screen offers three different viewing options, based upon the level of detail required by the user. The view is selected from the dropdown list in the far right of the Navigation Bar. For detailed information about the fields on this screen, refer to the Payrolls – Batch Checks screen in the Appendix at the end of this chapter.



Summary View

Default view, this is the check entry screen, on which the user can add checks and edit information for employee checks. The first five columns are read only. The columns that follow can be edited, as well as having columns added and subtracted.

- To add or edit a column

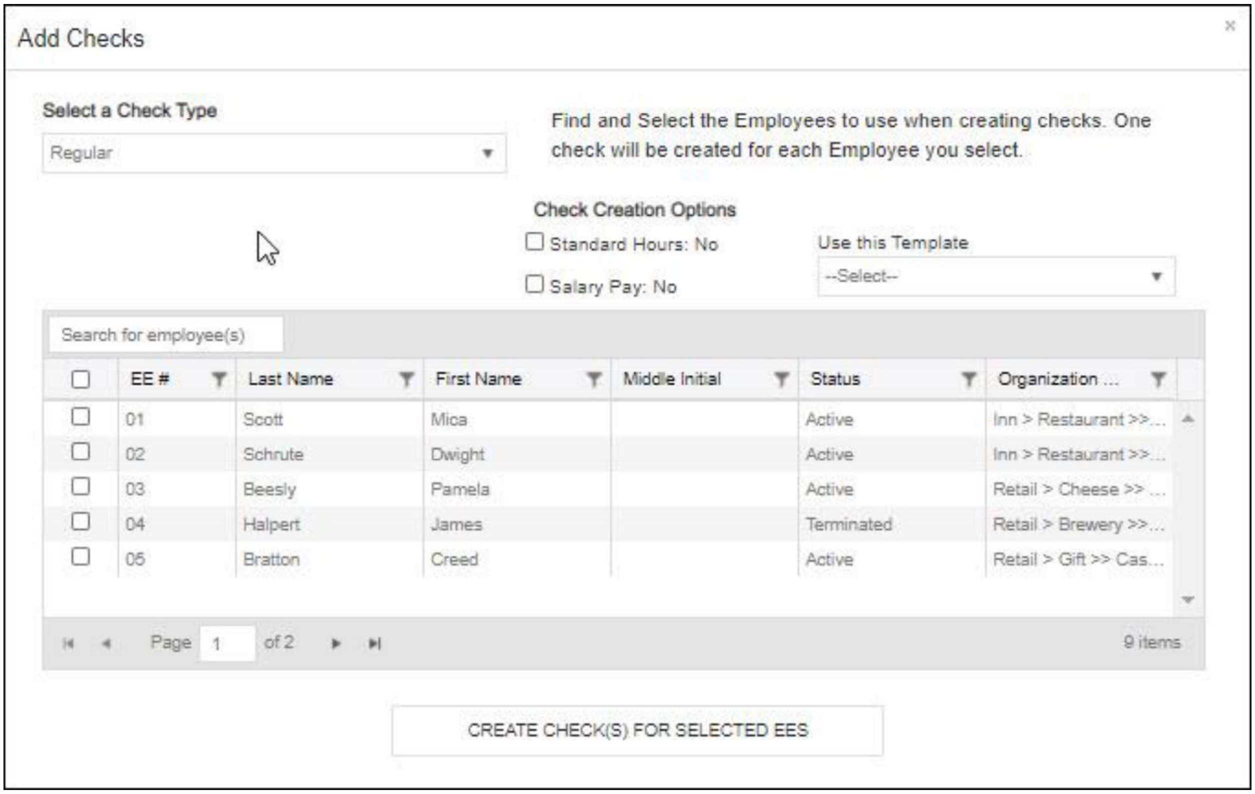
a. Click within the column to edit of the check being modified.

b. Once finished click **Save** in the Header.

- To add a check for employees

a. Click the **Add Check** button in the Navigation bar.

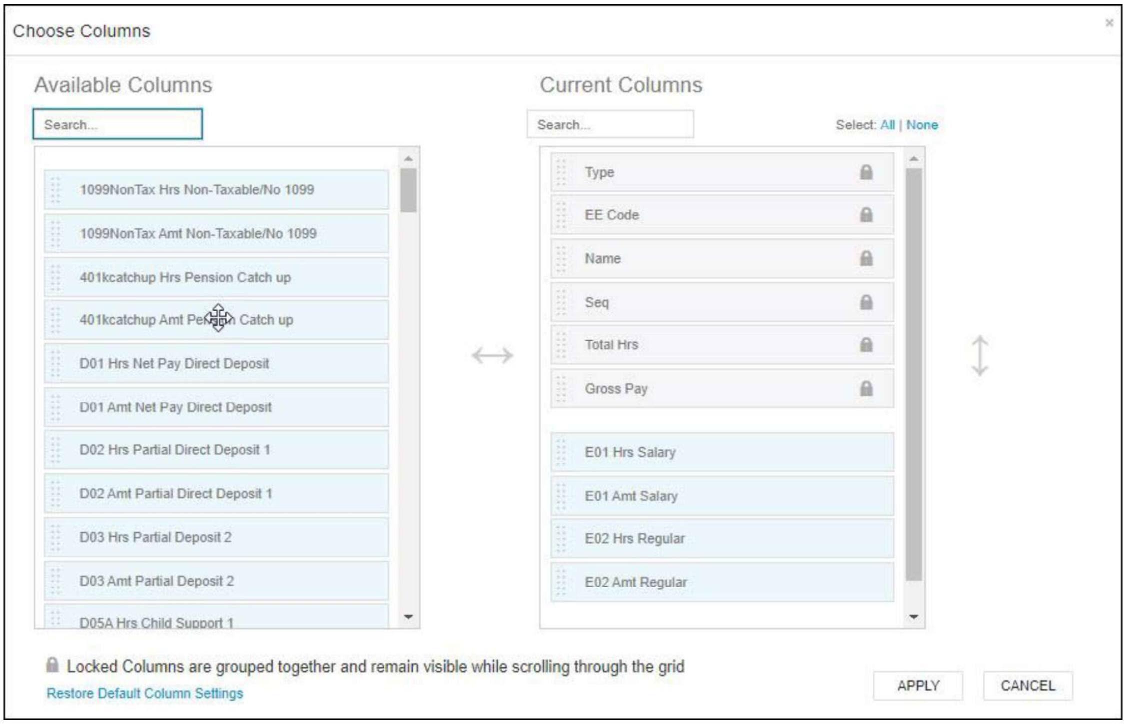
Result: The Add Checks screen opens.



1. Select the Check Type being created.
2. Select the employee(s) for whom to create a check.
3. Click the **Create Check(s) for Selected EEs** button.
   Result: The Batch Checks screen reopens with the new check(s) listed.

- To add additional E/D codes to the grid as columns, click in the bottom right-hand corner of the Batch Checks Screen.

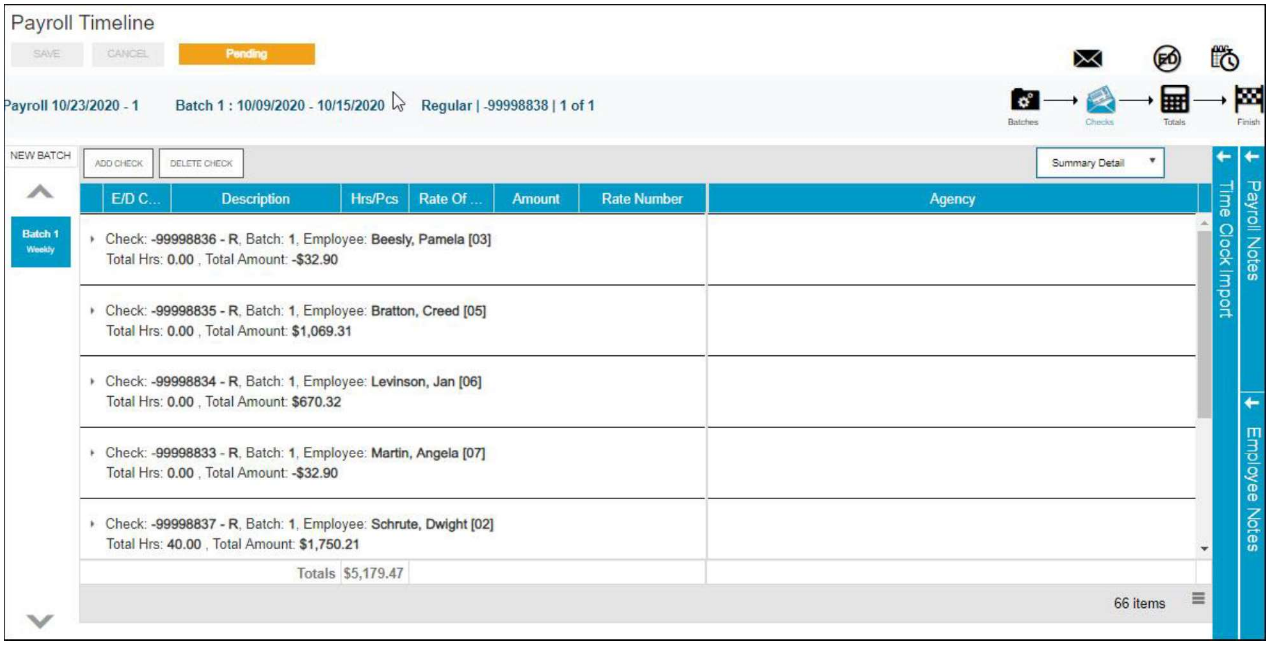
Result: The following screen opens listing Available Columns - E/Ds available to add to the grid, and a list of the Current Columns - the E/Ds currently listed as column headings in the grid.



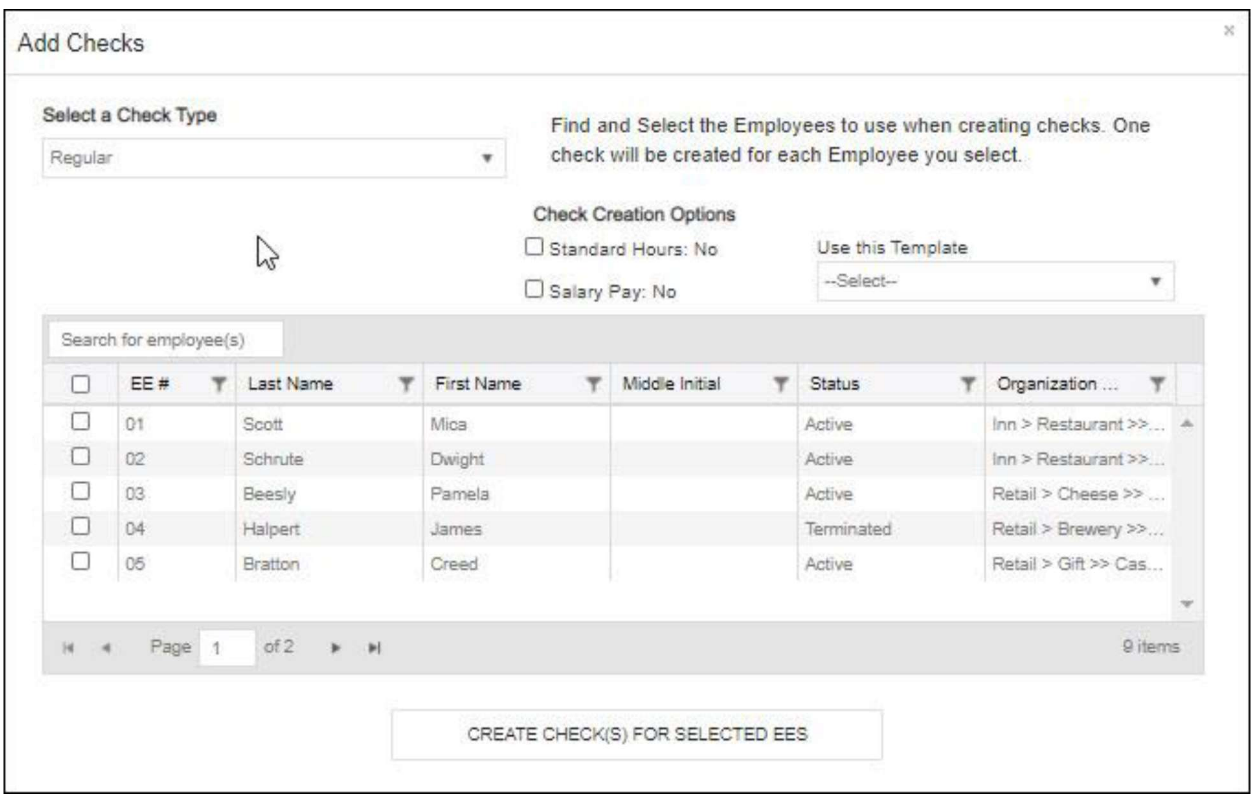
- To add E/Ds to the grid, select it/them in the Available Columns list on the left-hand side of the screen, and drag to the Current Columns list on the right.
- To remove columns from the grid, click the E/Ds in the Current Columns list and drag them to the Available Columns list on the left.
- Click **Apply**.

Summary Detail View

The Summary Detail View provides a more detailed view of the Summary screen, listing each check and its details.

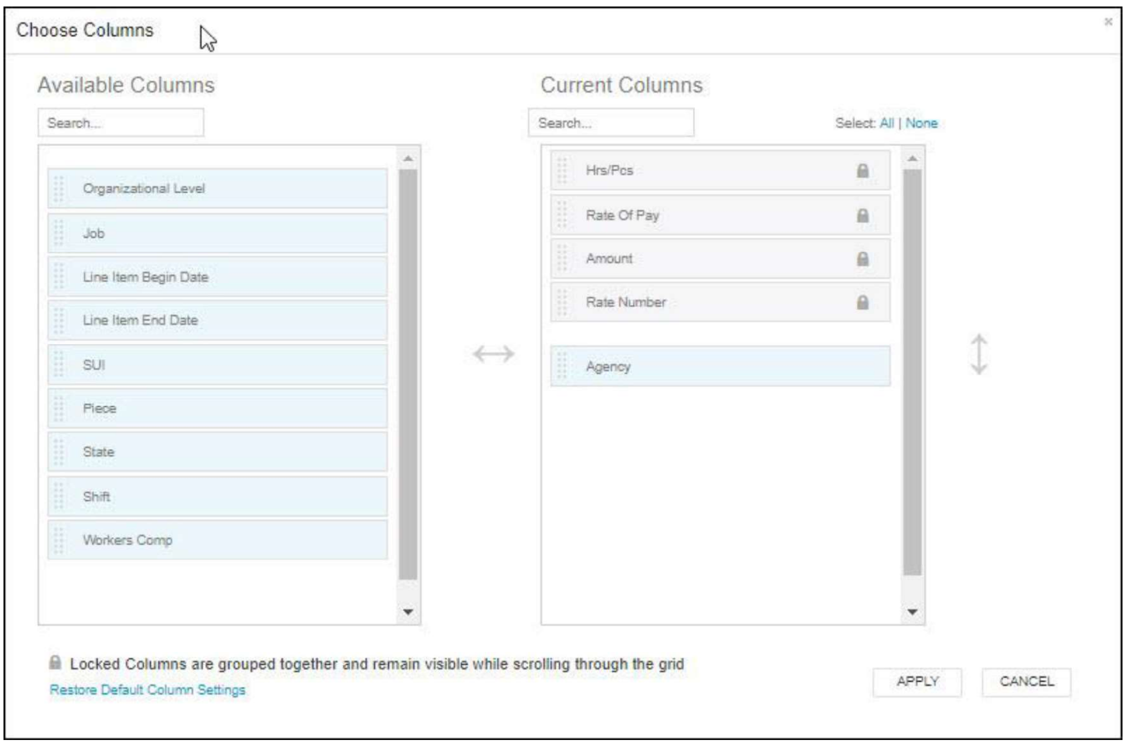


1. To add a check for employees, click the **Add Check** button in the Navigation bar.
   Result: The Add Checks screen opens.



2. Select the **Check Type** being created.
3. Select the employee(s) for whom to create a check.
4. Click the **Create Check(s) for Selected EEs** button.
   - To add a check line, select a check and click the **Add Check Line** button.
   - To add additional E/D Codes to the grid as columns, click in the bottom right-hand corner of the Batch Checks Screen.

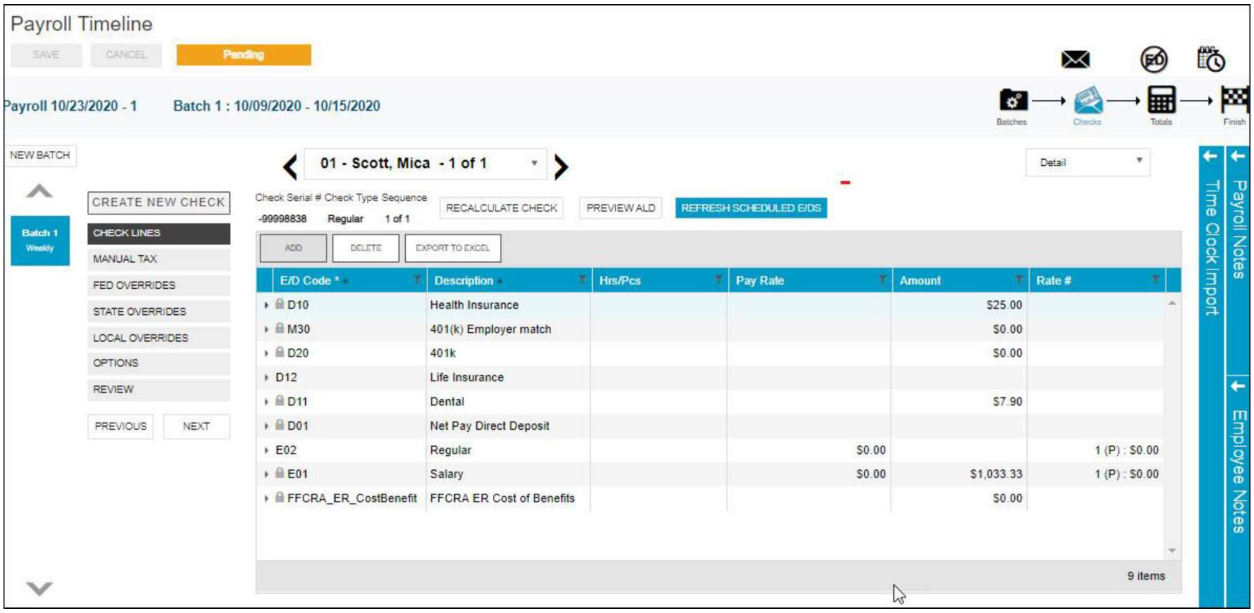
   Result: The following screen opens listing Available Columns - E/Ds available to add to the grid, and a list of the Current Columns - the E/Ds currently listed as column headings in the grid.



   - To add E/Ds to the grid, select it/them in the Available Columns list on the left-hand side of the screen, and drag to the Current Columns list on the right.
   - To remove columns from the grid, click the E/Ds in the Current Columns list and drag them to the Available Columns list on the left.
5. Click **Apply**.

Detail View

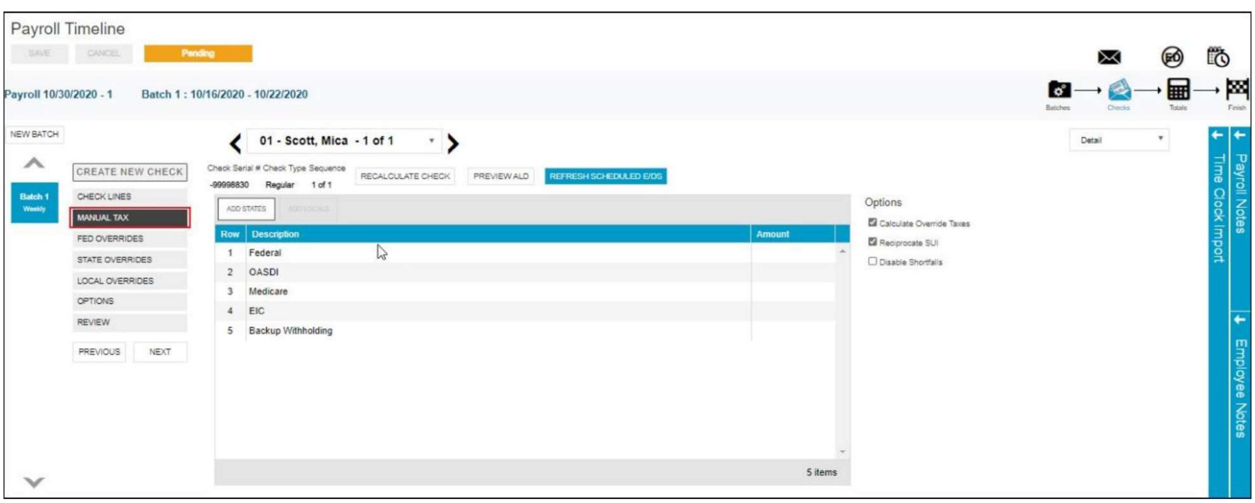
The Detail view provides the most detailed view of each check, and offers editing capabilities, as well as the ability to add (or delete) additional E/D codes to the checks.



1. Complete the required and applicable fields on this screen as well as on the Labor Defaults and
2. Local Tax Overrides tabs. For detailed information about the fields on this screen, refer to the pages beginning at the Payrolls – Batch Checks screen in the Appendix at the end of this chapter.
3. Click the Payroll – Manual Tax menu item.
4. Press the **TAB** key or click the **Next** button when you complete entering information on this screen.

Manual Tax screen

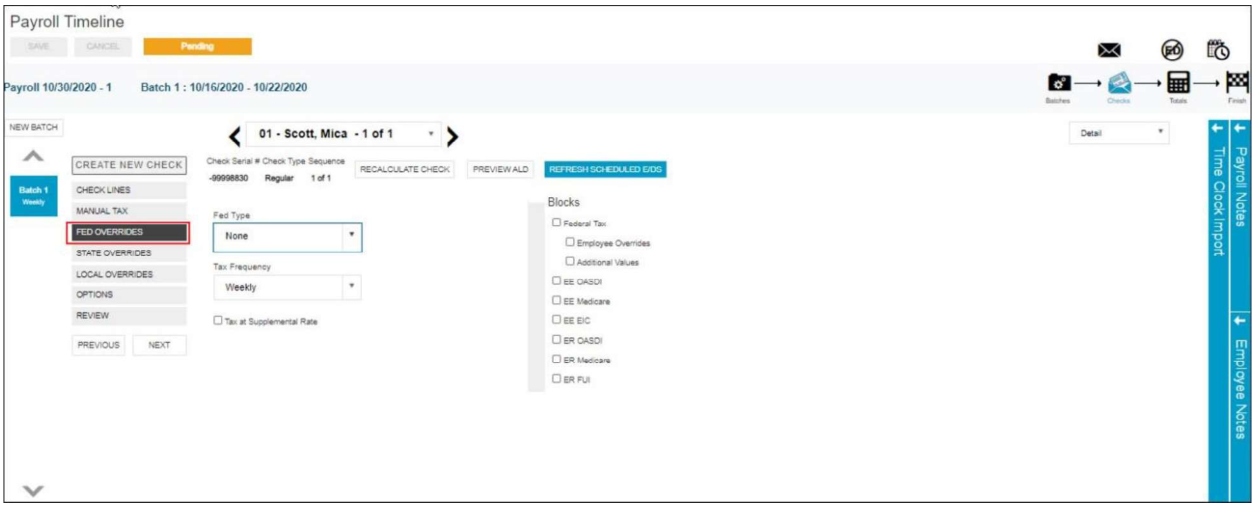
Click the **Manual Tax** tab to override a tax for the check if applicable. The information on this screen is the same as is on the Payrolls - Check - Manual Tax tab in Classic. For detailed information about this screen, refer to the Payrolls – Manual Tax screen in the Appendix at the end of this chapter.



1. Complete the applicable fields
2. Click the **Payroll – Fed Overrides** tab.

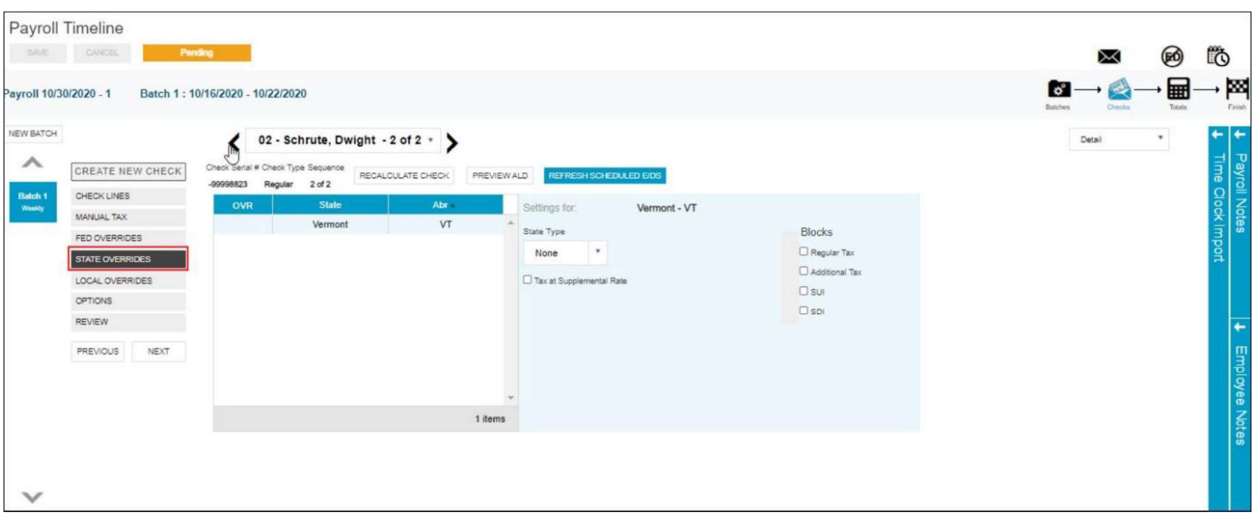
Fed Overrides screen

Click the **Fed Overrides** tab to block or override Federal taxes. Information on this screen is the same information as is found on the Payrolls – Check – Tax Overrides tab in Classic. The State and Local tabs require the same information, regarding the state or local taxes for the employee. For detailed information about this screen, refer to the Payrolls – Fed Overrides screen in the Appendix at the end of this chapter.



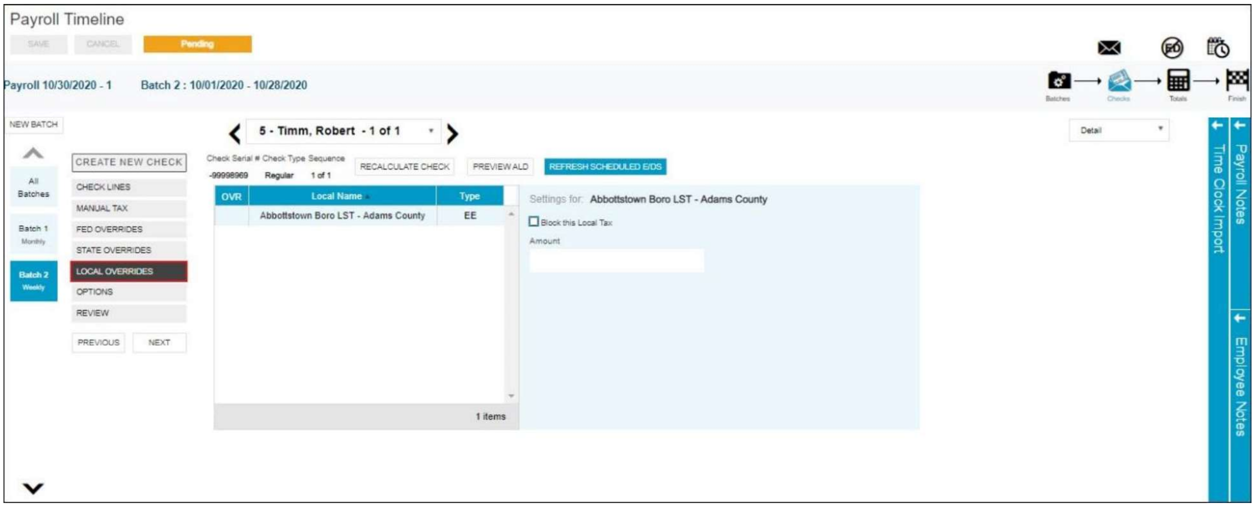
1. Complete the applicable fields.
2. Click the **Payroll – State Overrides** tab.

State Overrides screen



1. Complete the applicable fields. For detailed information about the fields on this screen, refer to the Payrolls – State Overrides screen in the Appendix at the end of this chapter.
2. Click the **Payroll – Local Overrides** tab.

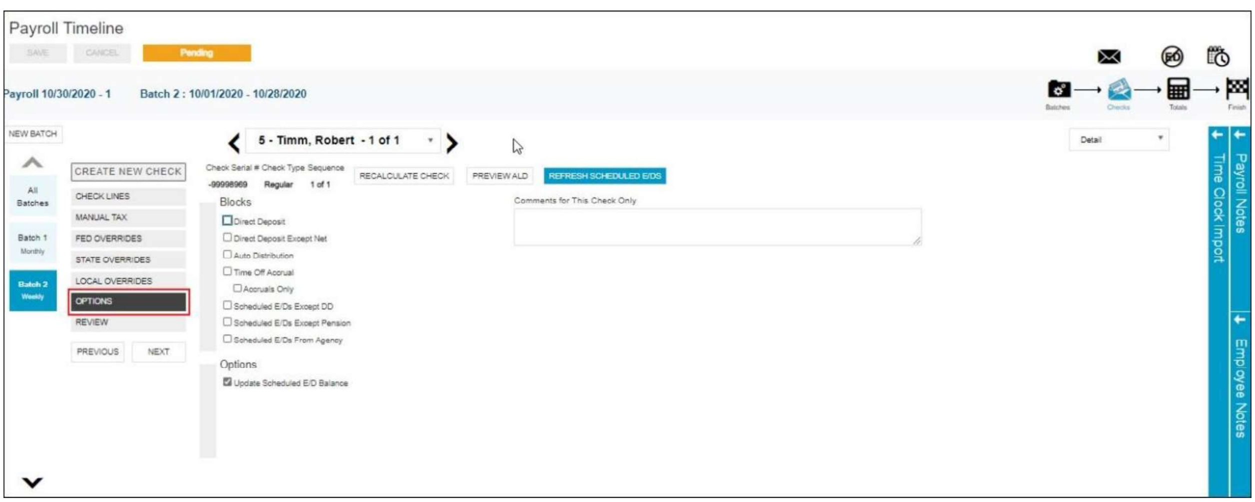
Local Overrides screen



1. Complete the applicable fields.
2. Click the **Payroll – Options** tab.

Payroll - Options screen

Click the **Payrolls –Options** tab to block scheduled earnings and deductions on employee checks. The information on this screen can be found mostly on the Payroll – Check – General tab.

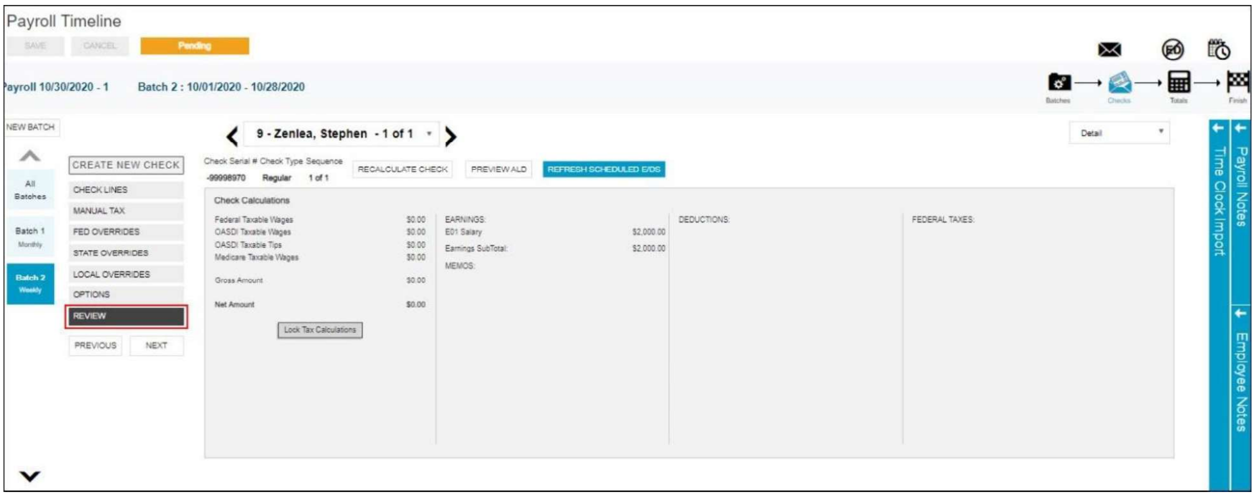


1. Complete the applicable fields. For detailed information about the fields on this screen, refer to the Payrolls – Options screen in the Appendix at the end of this chapter.

2. Click the **Review** tab to review [unprocessed] payroll checks with overrides, to verify for accuracy before submitting to payroll.

Payroll – Review screen

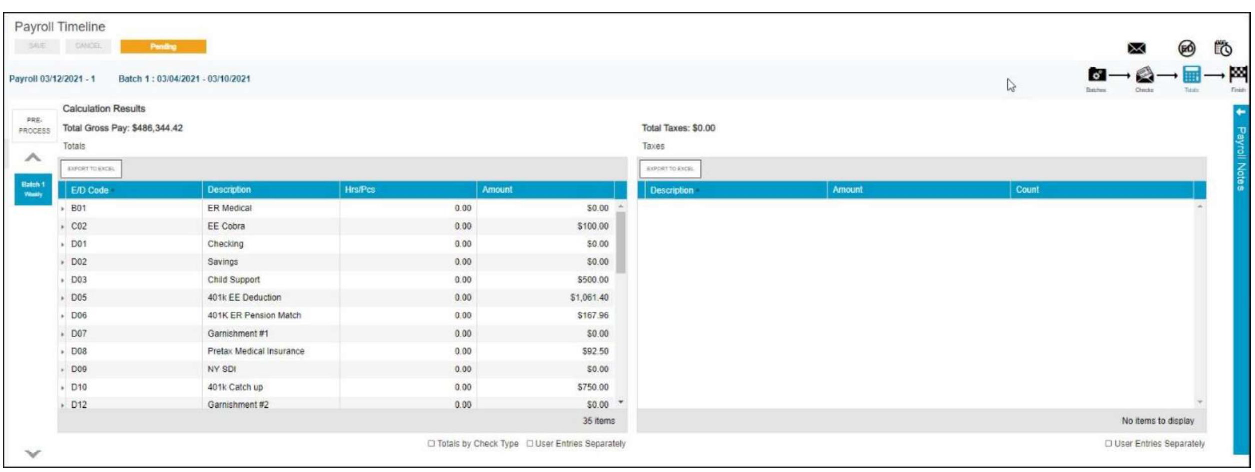
1. Click the **Review** tab to review [unprocessed] payroll checks with overrides, to verify for accuracy before submitting to payroll. For detailed information about these screens, refer to the Payrolls – Review screen in the Appendix at the end of this chapter.



1. Once verified, click the **Lock Tax Calculations** button to save those figures.
2. Click the **Recalculate Taxes** button to recalculate any changes made.

Calculation Results screen

Click the Totals symbol in the header to access the Payroll – Calculation Results screen to review totals of earnings and deductions, and taxes. For detailed information about the fields on this screen, refer to the Payrolls – Calculation Results screen in the Appendix at the end of this chapter.

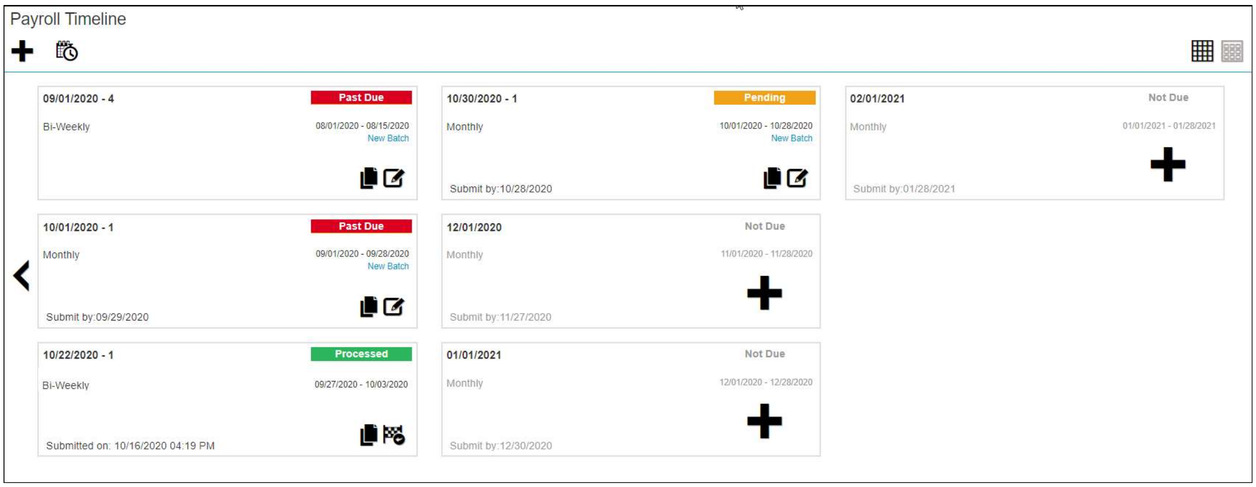


Note: if something needs to be edited, click the Batches symbol in the header which brings you back to the Batch screen.

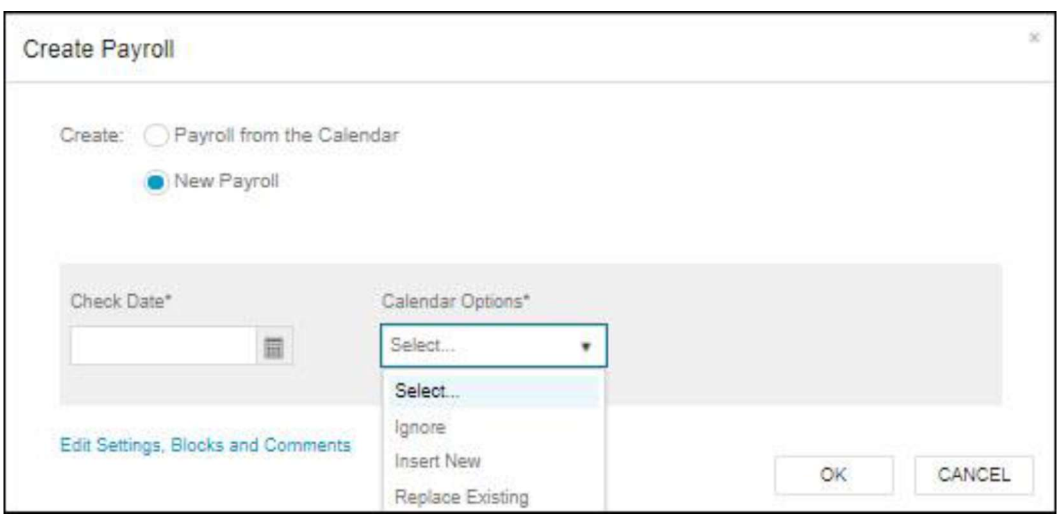
Creating an Unscheduled Payroll

To create a payroll that is not scheduled based on the calendar settings,

1. Click the **Payrolls** menu.

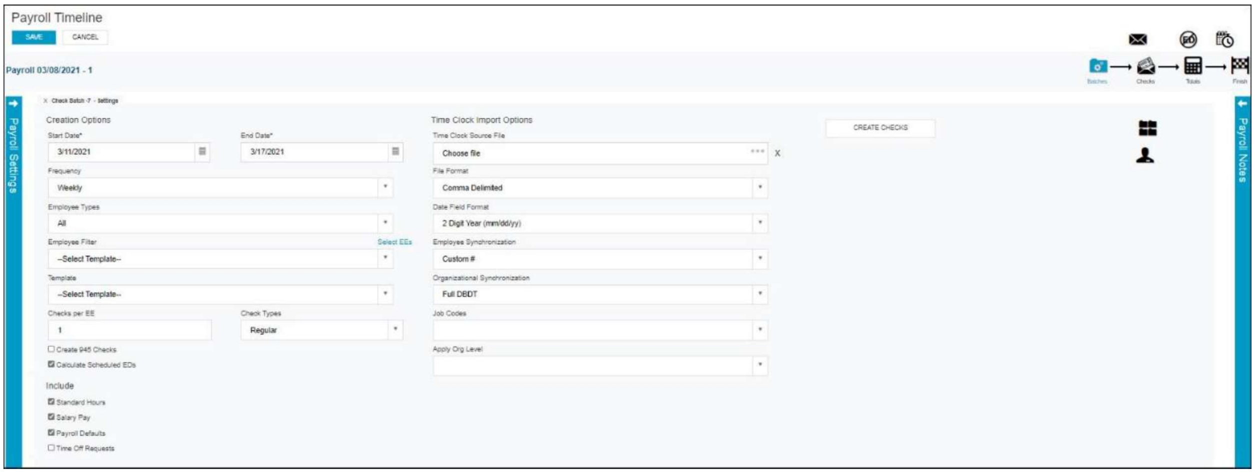


2. Click the large **plus sign** in the heading.
   Result: The Create Payroll screen opens asking if you are creating a Payroll from the Calendar or a New Payroll (Unscheduled).
3. Click **New Payroll**



4. Select the **Check Date** and select whether to
   - Ignore - do nothing to the calendar.
   - Insert New - insert the new check date into the calendar, or
   - Replace Existing - replace a check date already in the calendar.
5. Click **OK**.
   Result: The Check Batch Settings screen opens.

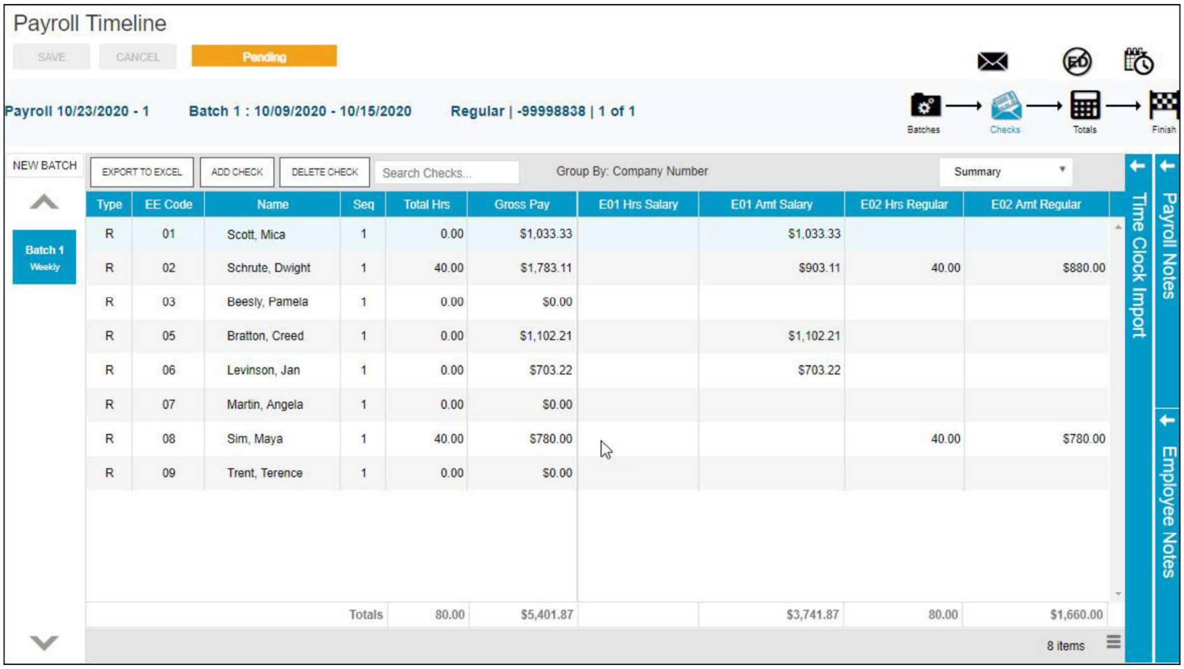
Check Batch Settings screen



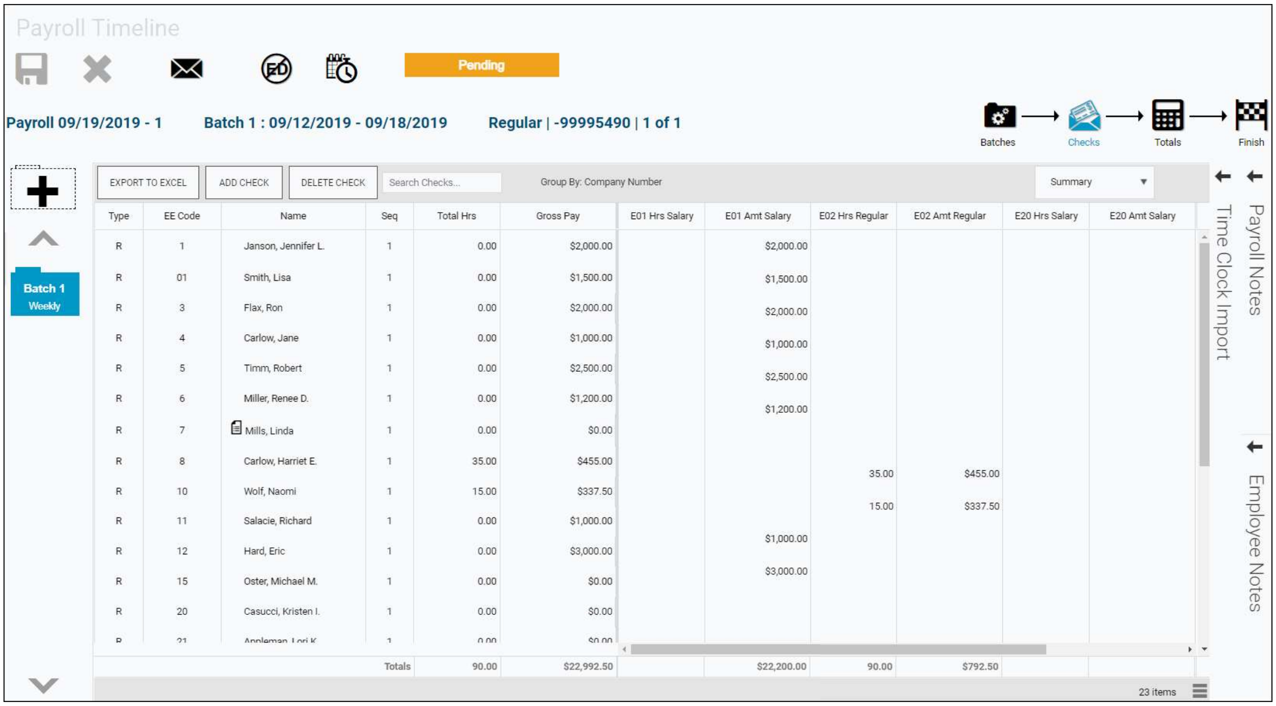
1. Select the items to include in the payroll in the Include section.
2. Complete required and applicable fields in the Time Clock Import Options section.
3. Click the **Create Checks** button.
4. Click **OK** in the window that confirms the checks have been created.
   Result: The Batch Checks screen opens.

Payrolls - Batch Checks Screen

This screen offers three different viewing options, based upon the level of detail required by the user. The view is selected from the dropdown field in the far right of the Navigation Bar. For detailed information about the fields on this screen, refer to the Payrolls – Batch Checks screen in the Appendix at the end of this section.



Type	EE Code	Name	Seq	Total Hrs	Gross Pay	E01 Hrs Salary	E01 Amt Salary	E02 Hrs Regular	E02 Amt Regular
R	01	Scott, Mica	1	0.00	$1,033.33		$1,033.33		
R	02	Schrute, Dwight	1	40.00	$1,783.11		$903.11	40.00	$880.00
R	03	Beesly, Pamela	1	0.00	$0.00				
R	05	Bratton, Creed	1	0.00	$1,102.21		$1,102.21		
R	06	Levinson, Jan	1	0.00	$703.22		$703.22		
R	07	Martin, Angela	1	0.00	$0.00				
R	08	Sim, Maya	1	40.00	$780.00			40.00	$780.00
R	09	Trent, Terence	1	0.00	$0.00				
			Totals	80.00	$5,401.87		$3,741.87	80.00	$1,660.00

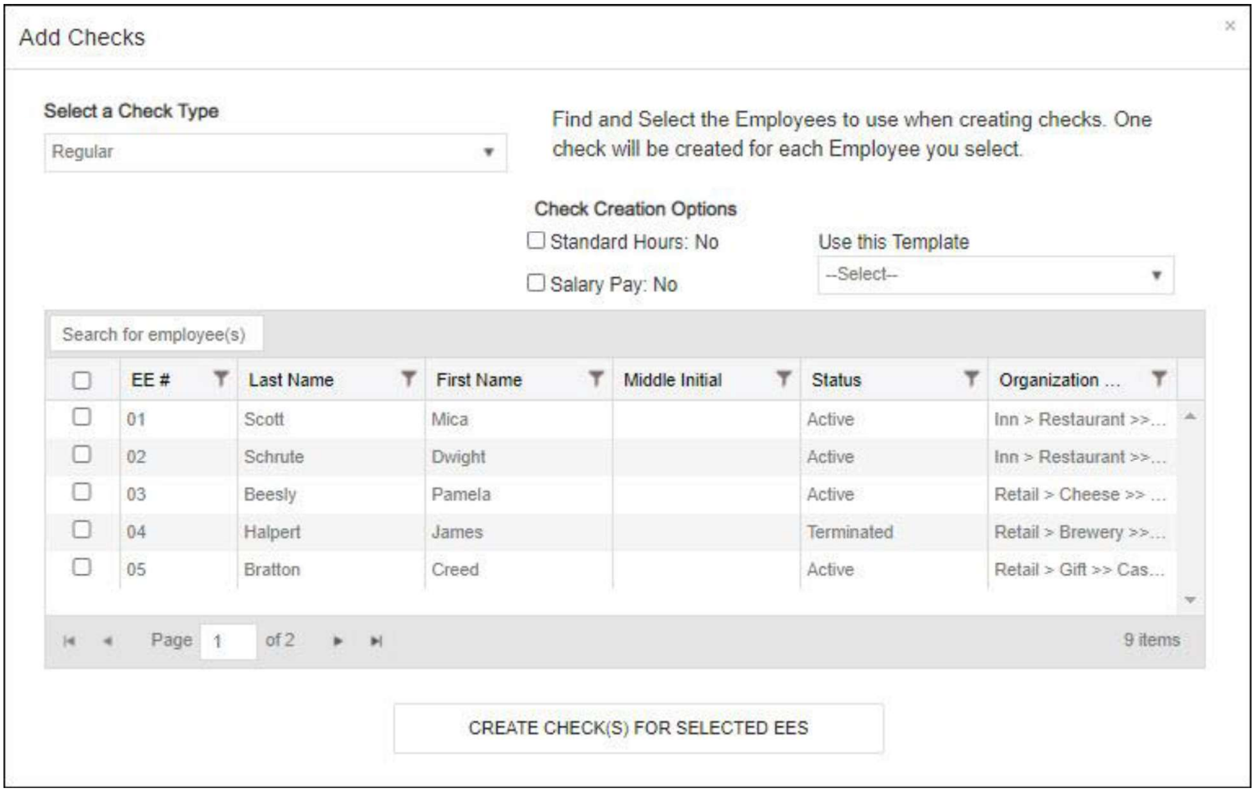


Summary View

Default view, this is the check entry screen, on which the user can add checks and edit information for employee checks. The first five columns are read only. The columns that follow can be edited, as well as having columns added and subtracted.

- To add or edit a column
  a. Click within the column to edit of the check being modified.
  b. Once finished click **Save** in the Header.
- To add a check for employees
  a. Click the **Add Check** button in the Navigation bar.

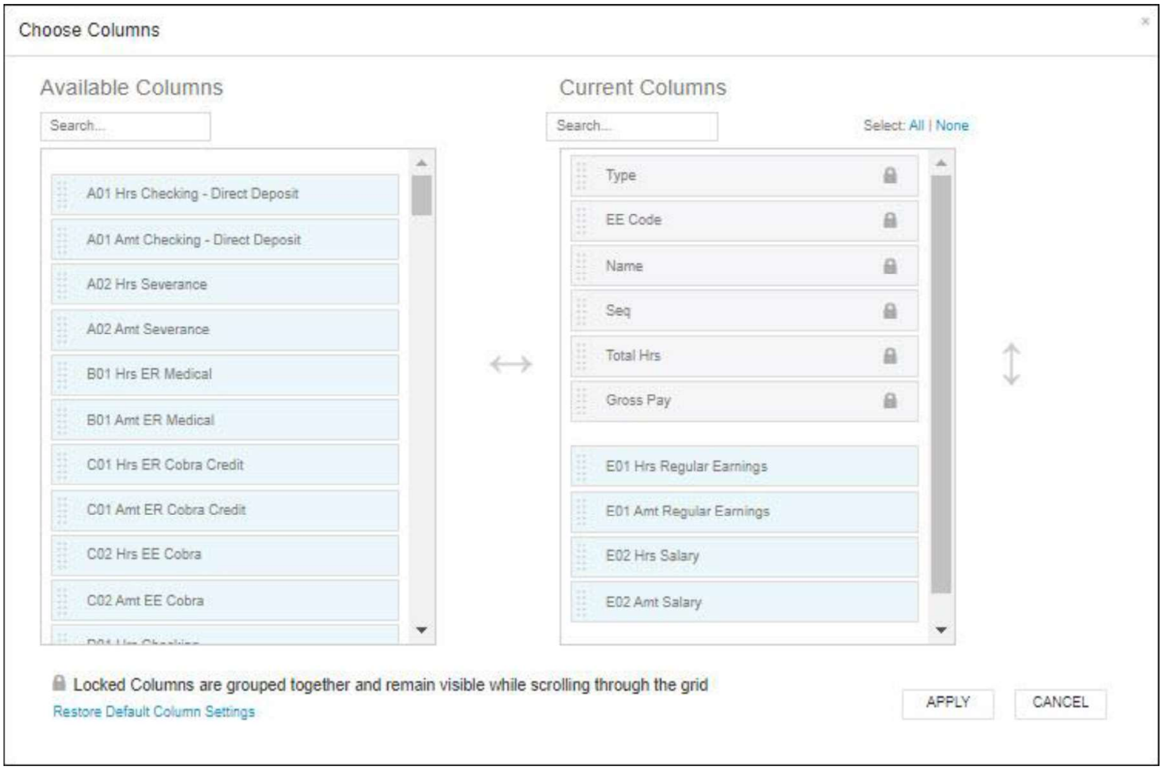
Result: The Add Checks screen opens.



1. Select the **Check Type** being created.
2. Select the employee(s) for whom to create a check.
3. Click the **Create Check(s) for Selected EEs** button.
   Result: The Batch Checks screen reopens with the new check(s) listed.

- To add additional E/D codes to the grid as columns, click  in the bottom right-hand corner of the Batch Checks Screen.

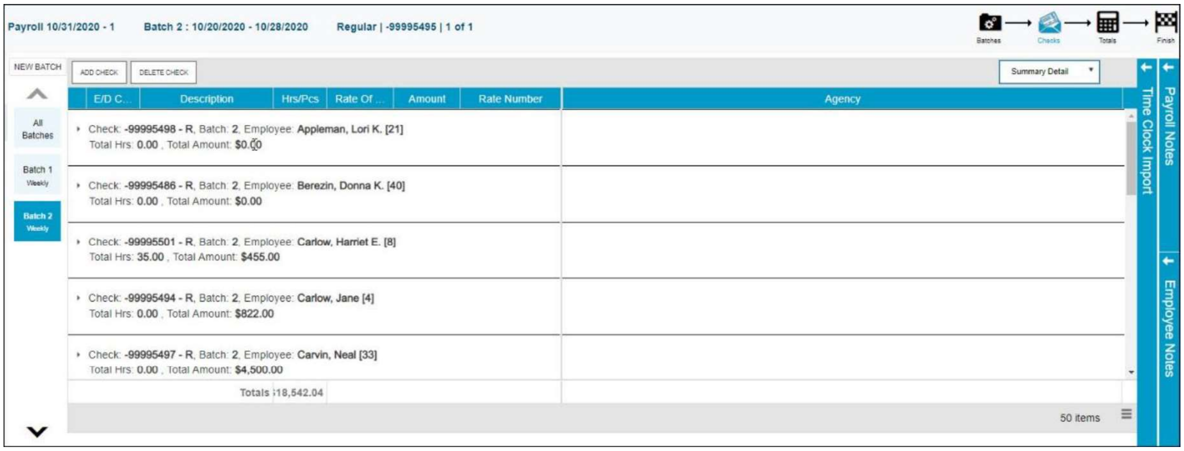
Result: The following screen opens listing Available Columns - E/Ds available to add to the grid, and a list of the Current Columns - the E/Ds currently listed as column headings in the grid.



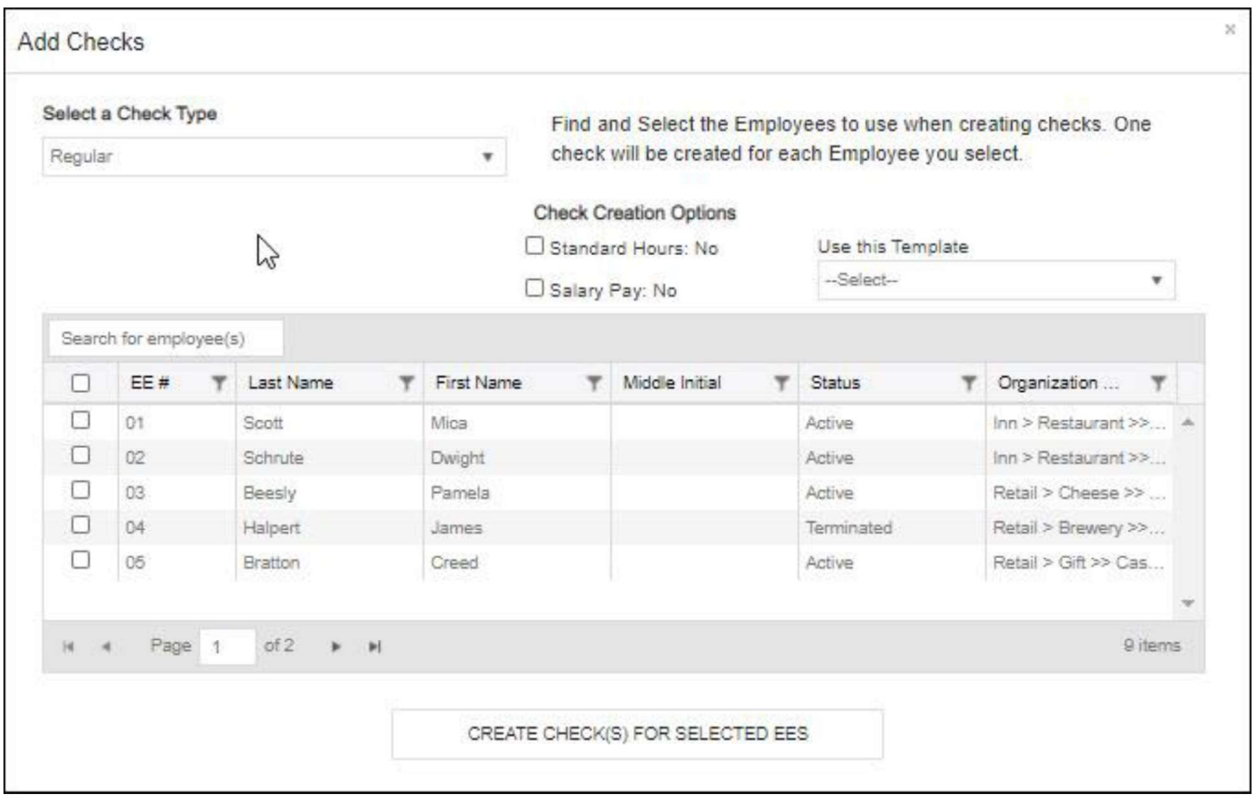
- To add E/Ds to the grid, select it/them in the Available Columns list on the left-hand side of the screen, and drag to the Current Columns list on the right.
- To remove columns from the grid, click the E/Ds in the Current Columns list and drag them to the Available Columns list on the left.
- Click **Apply**.

Summary Detail View

The Summary Detail View provides a more detailed view of the Summary screen, listing each check and its details.



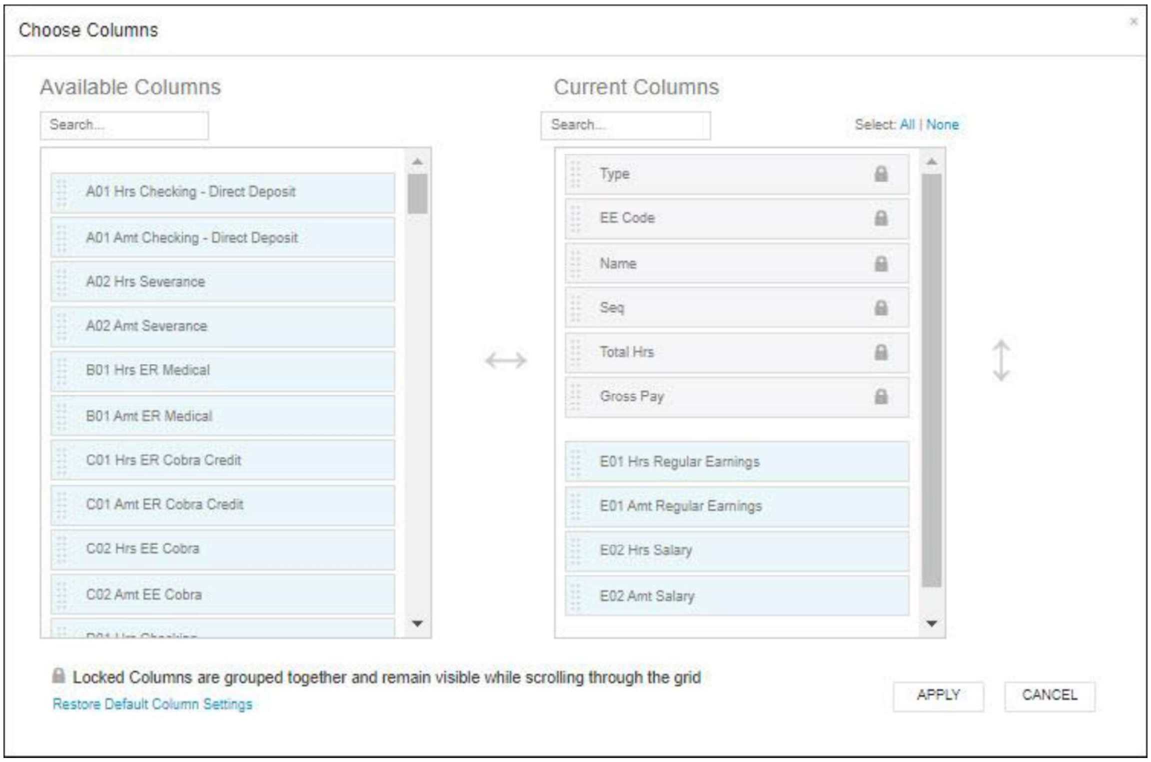
1. To add a check for employees, click the **Add Check** button in the Navigation bar.
   Result: The Add Checks screen opens.



2. Select the **Check Type** being created.
3. Select the employee(s) for whom to create a check.
4. Click the **Create Check(s) for Selected EEs** button.
   - To add a Check Line select a check and click the **Add Check Line** button.

- To add additional E/D Codes to the grid as columns, click in the bottom right-hand corner of the Batch Checks Screen.

Result: The following screen opens listing Available Columns - E/Ds available to add to the grid, and a list of the Current Columns - the E/Ds currently listed as column headings in the grid.

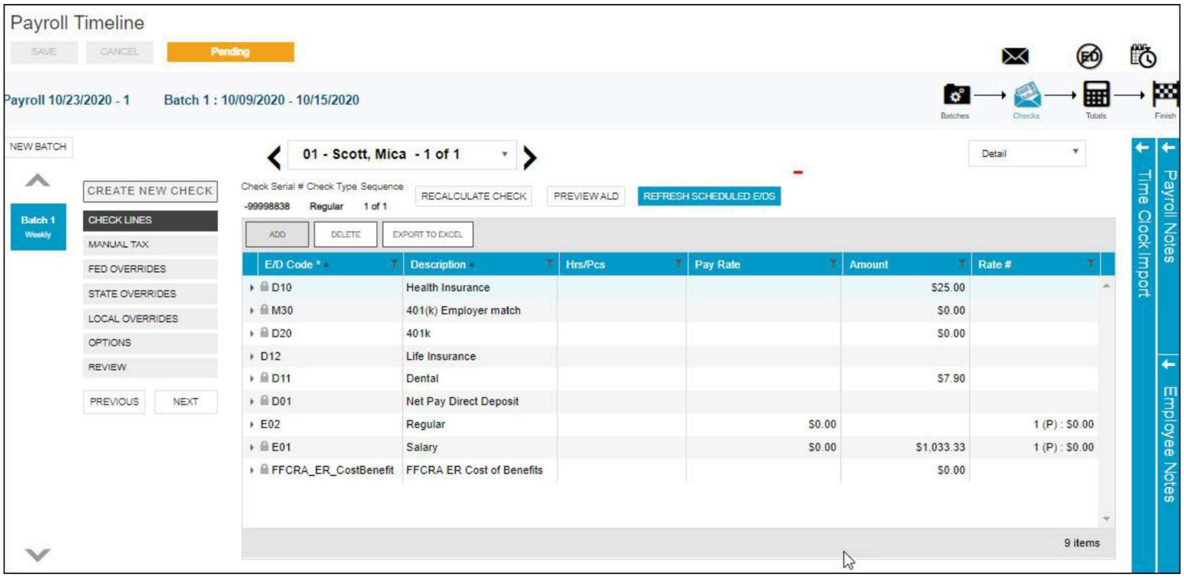


- To add E/Ds to the grid, select it/them in the Available Columns list on the left-hand side of the screen, and drag to the Current Columns list on the right.
- To remove columns from the grid, click the E/Ds in the Current Columns list and drag them to the Available Columns list on the left.

5. Click **Apply**.

Detail View

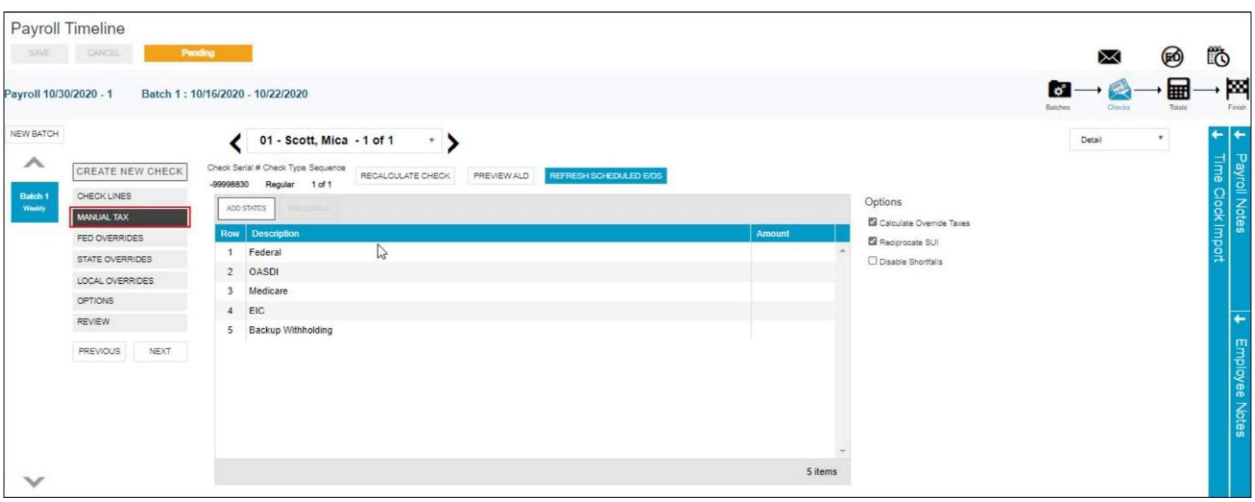
The Detail view provides the most detailed view of each check, and offers editing capabilities, including the ability to add (or delete) additional E/D codes to the checks.



1. Complete the required and applicable fields on this screen as well as on the Labor Defaults and Local Tax Overrides tabs. For detailed information about the fields on this screen, refer to the pages beginning at the Payrolls – Batch Checks screen in the Appendix at the end of this section.
2. Click the **Payroll – Manual Tax** menu item.
3. Press the **TAB** key or click the **Next** button when you complete entering information on this screen.

Manual Tax screen

Click the **Manual Tax** tab to override a tax for the check if applicable. For detailed information about this screen, refer to the Payrolls – Manual Tax screen in the Appendix at the end of this section.

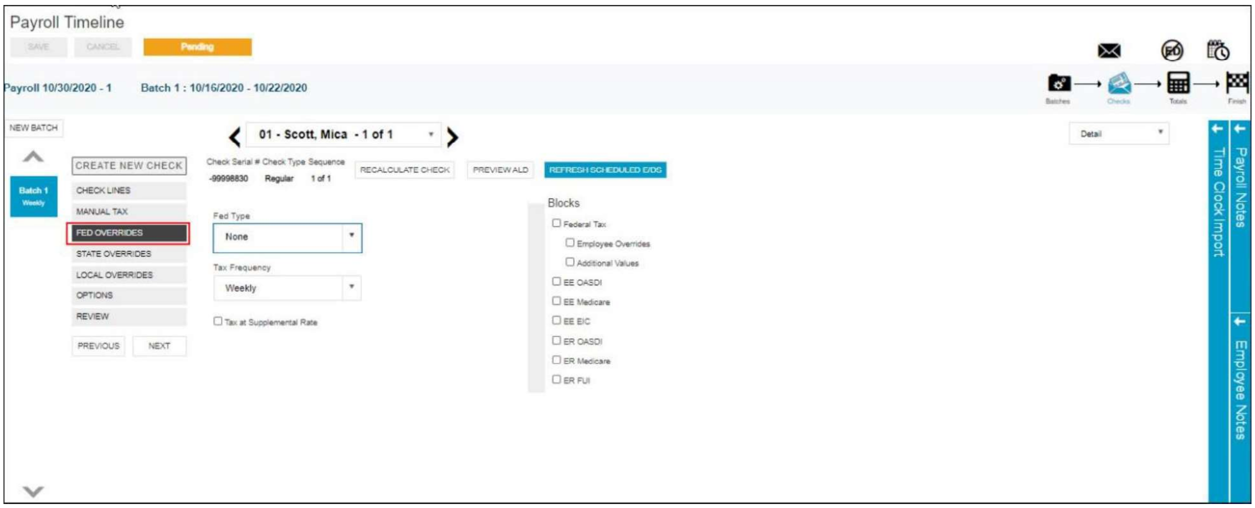


1. Complete the applicable fields
2. Click the **Payroll – Fed Overrides** tab.

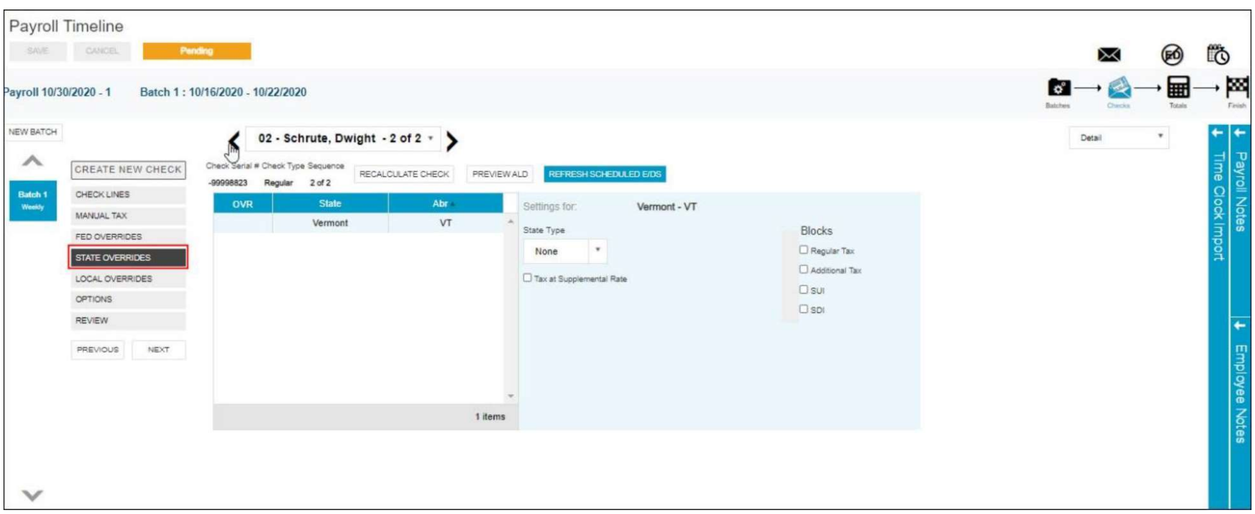
Fed Overrides screen

Click the **Fed Overrides** tab to block or override Federal taxes. For detailed information about this screen, refer to the Payrolls – Fed Overrides screen in the Appendix at the end of this section.

1. Complete the applicable fields.
2. Click the **Payroll – State Overrides** tab.

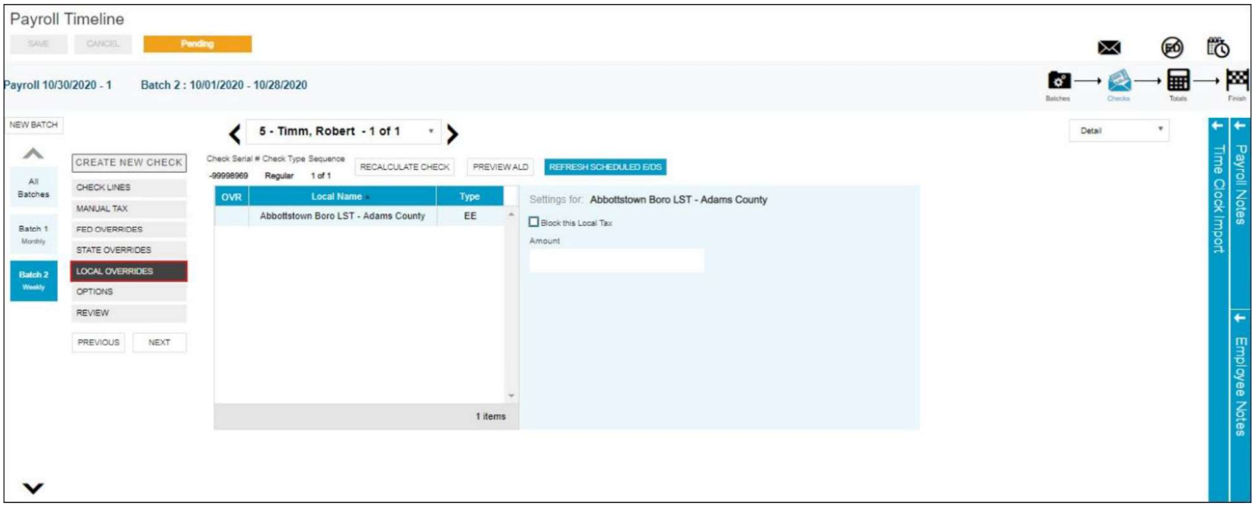


State Overrides screen



1. Complete the applicable fields. For detailed information about the fields on this screen, refer to the Payrolls – State Overrides screen in the Appendix at the end of this section.
2. Click the **Payroll – Local Overrides** tab.

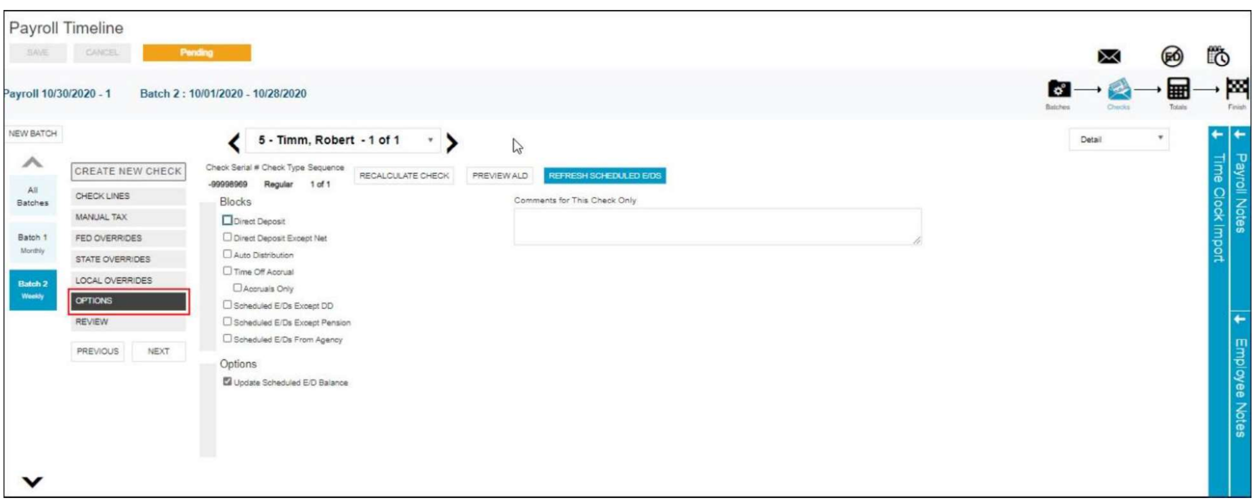
Local Overrides screen



1. Complete the applicable fields.
2. Click the **Payroll – Options** tab.

Payroll - Options screen

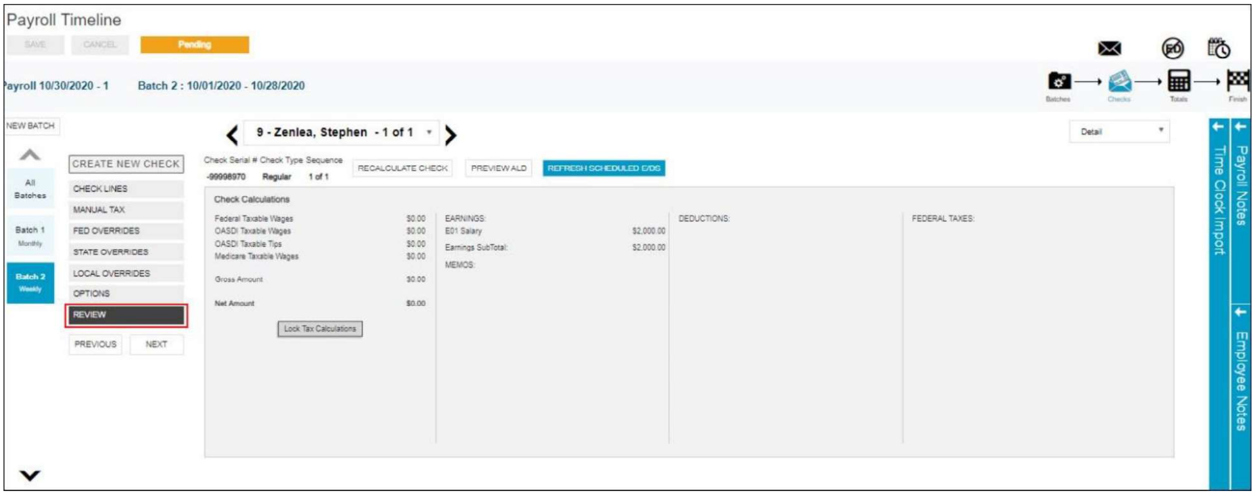
Click the **Payrolls –Options** tab to block scheduled earnings and deductions on employee checks. The information on this screen can be found mostly on the Payroll – Check – General tab.



1. Complete the applicable fields. For detailed information about the fields on this screen, refer to the Payrolls – Options screen in the Appendix at the end of this section.
2. Click the **Review** tab.

Payroll - Review screen

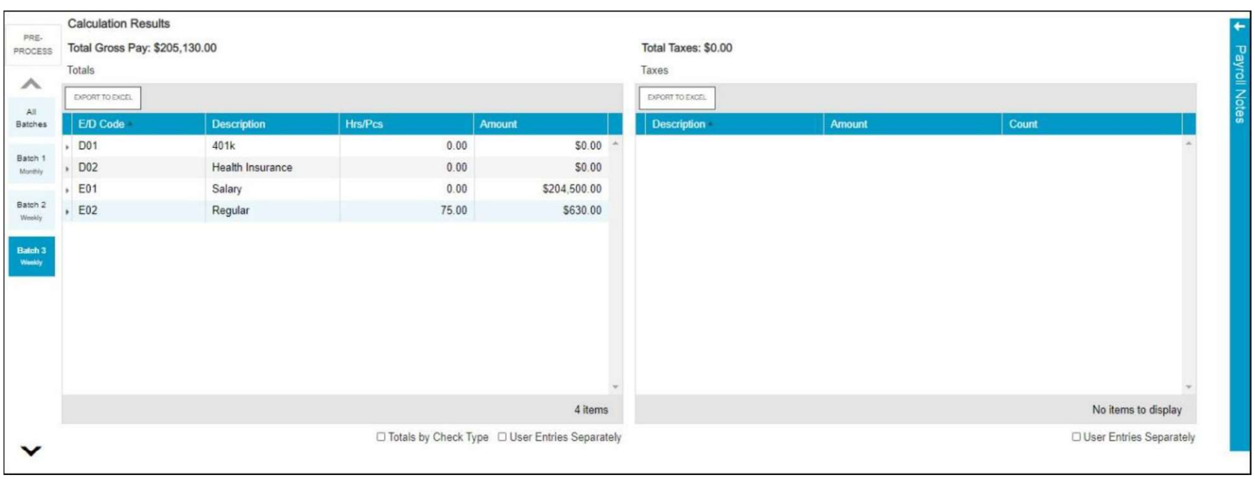
Click the **Review** tab to review [unprocessed] payroll checks with overrides, to verify for accuracy before submitting to payroll. For detailed information about these screens, refer to the Payrolls – Review screen in the Appendix at the end of this section.



1. Once verified, click the **Lock Tax Calculations** button to save those figures.
2. Click the **Recalculate Taxes** button to recalculate any changes made.

Calculation Results screen

Click the **Totals** symbol in the header to access the Payroll – Calculation Results screen to review totals of earnings and deductions, and taxes. For detailed information about the fields on this screen, refer to the Payrolls – Calculation Results screen in the Appendix at the end of this section.



Note: To edit information on this screen, click the **Batches** symbol in the Header which brings you back to the Batch screen.

Pre-Processing and Submitting the Payroll

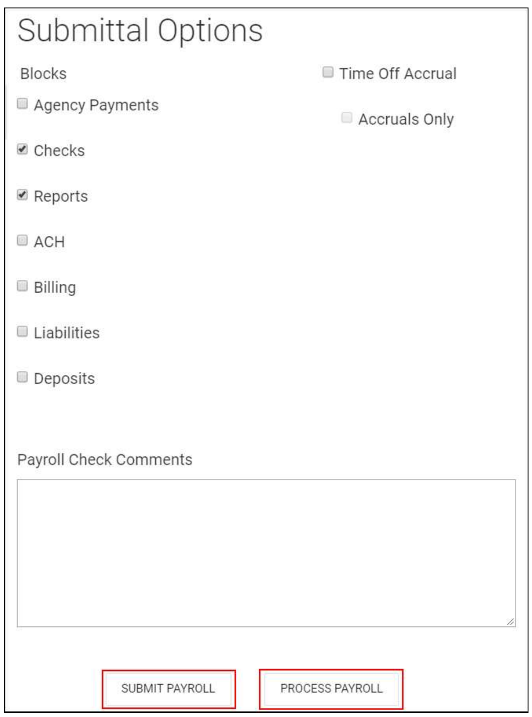
Pre-processing is always recommended prior to submitting a payroll.

After the checks have been created, when the **Calculate** button is clicked, the Status changes from Pending to Pre-Processing, and a message is created in the upper right corner of the screen advising that the task was added to the queue (lower left-hand corner as is in Classic).

Result: The Status changes back to **Pending** once the Pre-Processing is complete.

1. Click **Finish** in the header.
   Result: The Submittal Options screen opens.

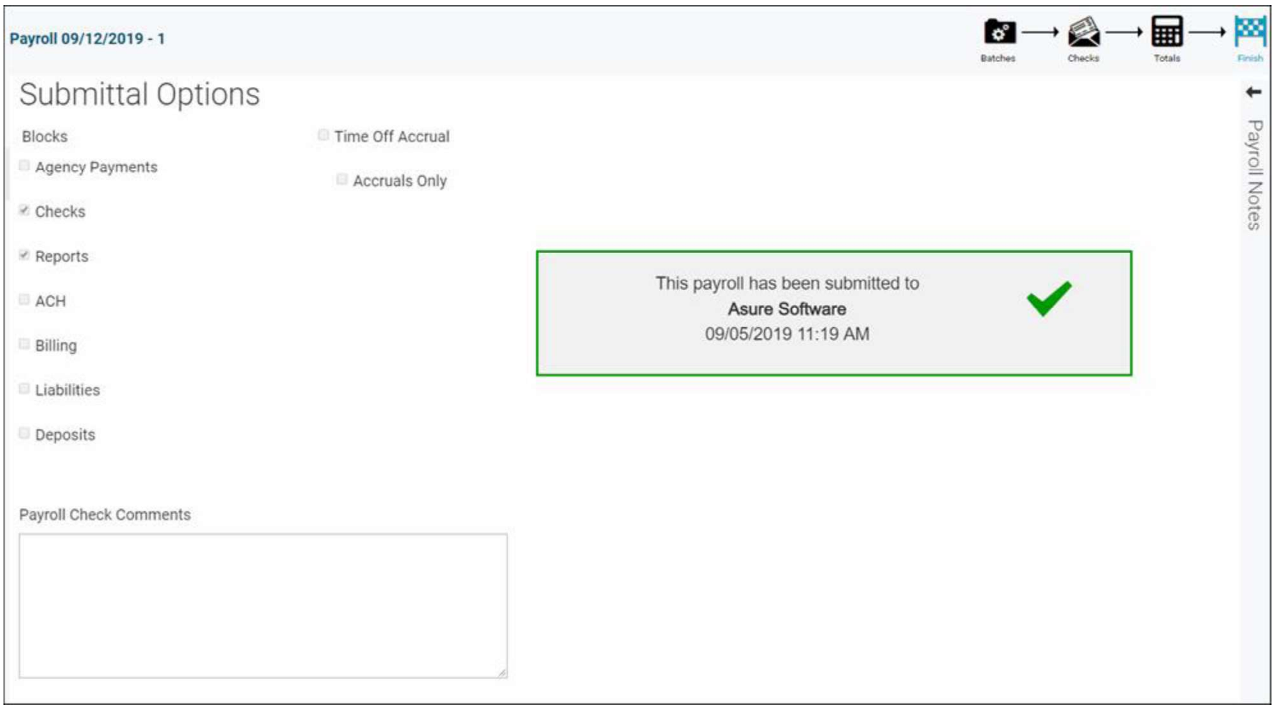
Note: The ability to block ACH, Billing, and Deposits is controlled by the service bureau. Contact your service bureau if you would like to use blocking.



2. Select applicable Submittal Options.
3. Click **Submit Payroll** or **Process Payroll**, depending on the arrangement with the client.
   - Submit Payroll **–** The status of the payroll is changed to **Submitted** until the payroll is processed by the service bureau; at which time the Status will change to **Processed**.

- Process Payroll – The payroll is processed directly, and the status will change to **Processed**, rather than being submitted for processing at the service bureau. (Additional security rights are required and are described at the beginning of this section.)

Note: If a payroll requires manager approval, the payroll goes into the Approve Payroll queue once submitted. If a payroll does not require manager approval, the payroll goes into the Process Payroll queue.



Editing / Completing a Payroll

Payrolls with a status of **Past Due** or **Pending** are the only payrolls that can be edited and have an Edit symbol in the lower right-hand corner of the coupon.

To edit a payroll,

1. Go to the Payroll – Payroll Timeline screen.
2. Click the **Edit** symbol on the payroll to be edited.
   Result: The Batch Checks screen opens.
3. Make all necessary edits and process the payroll.

The Results Screen

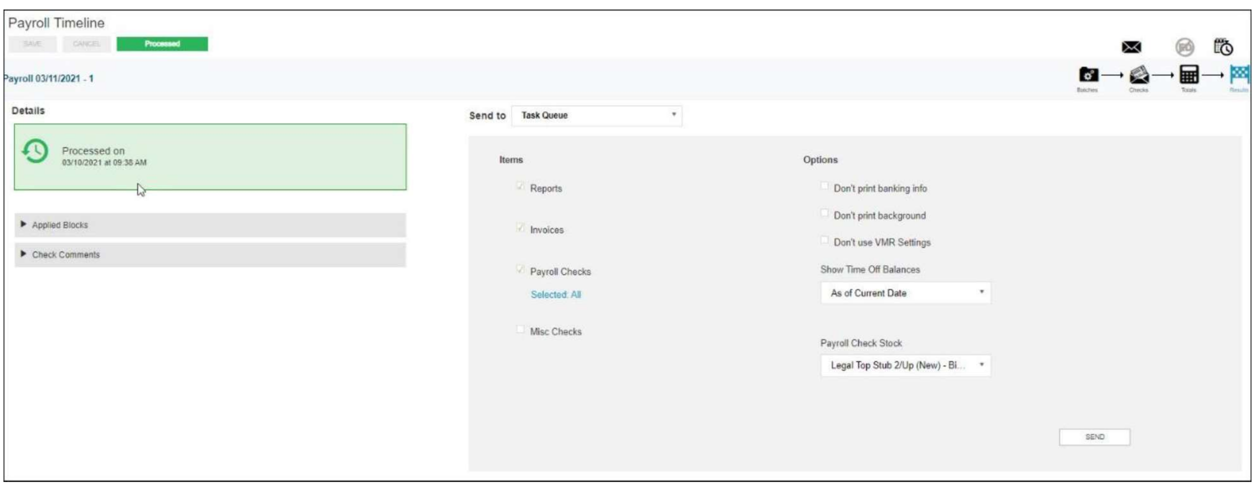
Users can view payroll results and reprint reports, invoices, payroll checks, or miscellaneous checks from the Results screen. For access to the Results screen, speak to your service bureau.

- Date and time the payroll was processed
- Any blocks applied to the payroll while setting it up
- Comments entered for the payroll processors
- On Premise Printing - users can reprint reports, invoices, payroll checks, or miscellaneous checks from the Results screen, and can select one or more individual payroll and/or miscellaneous checks to reprint.
- Send to **–** reprinted reports, invoices and/or checks can be sent through the Task Queue or via VMR if applicable. Select the location from the dropdown list.
- Options - any other instructions that were included when running the payroll or report.

Viewing Payroll Results

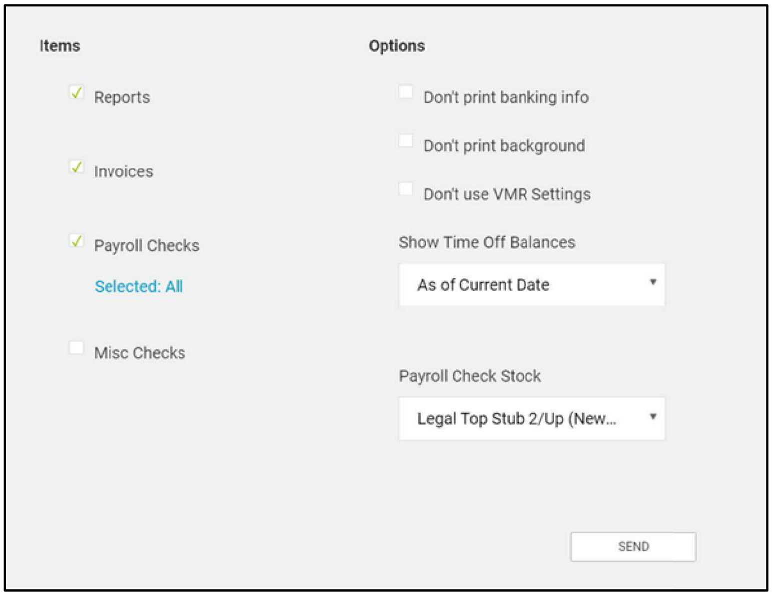
Users can view payroll results if a payroll has a Processed (P) or Void (V) status. To view,

1. Click the **Results**  symbol in the lower right corner of a payroll card in the Card View of the Payroll Timeline screen **–** OR -
2. Select a payroll from the Grid View and click the **Results** symbol in the header.
   Result: The Results screen opens.



Reprinting Reports and Invoices

1. Select the checkbox(es) in the Items section of the Results screen, of what need to be reprinted.



2. Select the applicable options for the reports and/or invoices being reprinted.
   - Do not print banking info.
   - Do not print background.
   - Do not use VMR settings (this option displays only when the user selects **Send to:** Task Queue; it does not appear when the user selects **Send to:** Virtual Mailroom.)

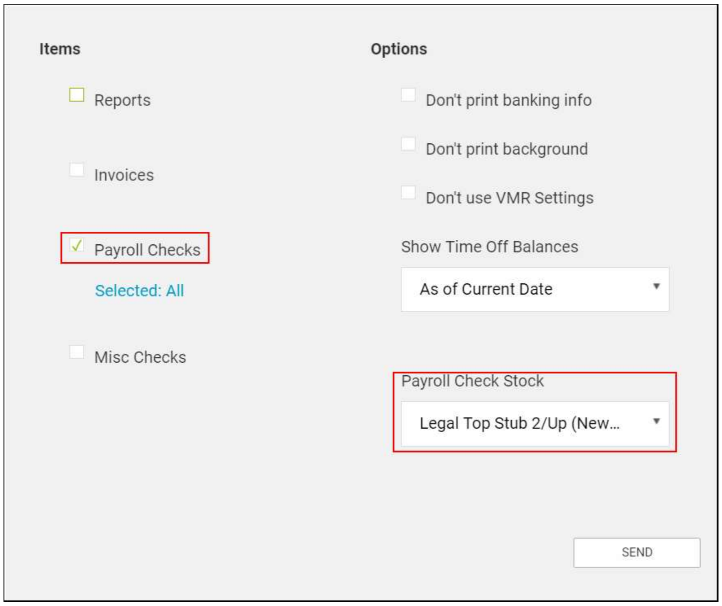
Time-off balances can be shown as of the **Current Day** or as of a **Historical Date**, using the dropdown field.

3. Click the **Send** button to send to the location specified in the **Send to** field. Note that the user is not printing directly to a printer.

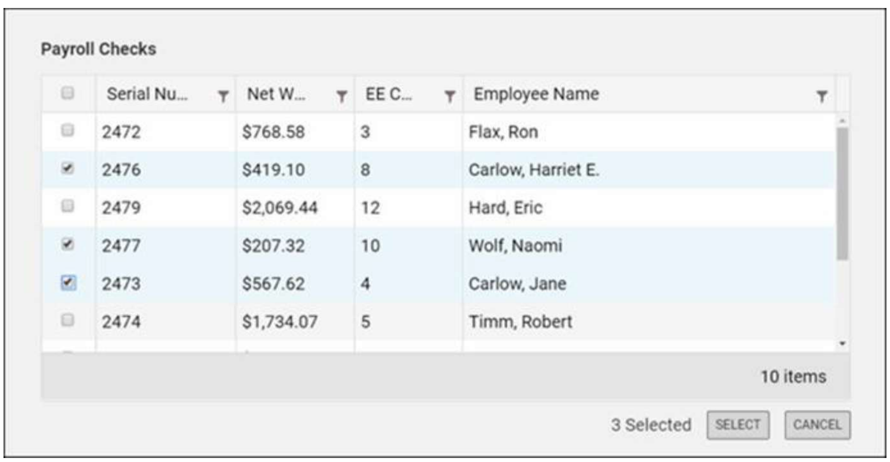
Reprinting Payroll Checks

Users can select one or more individual payroll checks to reprint. To do this,

1. Select **Payroll Checks** in the Items section of the Results screen.
2. When the user selects Payroll Checks, the “Selected: All” link is displayed, signifying that the system is applying the default, which is to select all payroll checks.
3. Select the payroll check stock for printing the checks from the **Payroll Check Stock** dropdown list on the right side of the screen.



4. To select a specific payroll check(s) to reprint, rather than all checks, click the "Selected: All" link. **Result:** The Payroll Checks screen opens, where specific checks are selected for reprinting.



5. Select the checkboxes of the checks to be reprinted.
6. Click the **Select** button.
7. Select the applicable options for the reports and/or invoices being reprinted.
   - Do not print banking info.
   - Do not print background.
   - Do not use VMR settings.
8. Time-off balances can be shown as of the **Current Day** or as of a **Historical Date**, using the dropdown field.
9. Click the **Send** button to send to the location specified in the **Send to** field. Note that the user is not printing directly to a printer.

Reprinting Misc. Checks

Users can select one or more individual miscellaneous checks to reprint. To do this,

1. Select the **Misc. Checks** option in the Items section of the Results screen.
   Result: The “Selected: None” link appears below signifying that the system is applying the default: No Misc. checks are selected **–** Note that this is the opposite of the behavior with the Payroll Checks option.
2. Select the payroll check stock for printing the checks from the Payroll Check Stock dropdown field on the right side of the screen.
3. To select a specific miscellaneous check(s) to reprint, rather than all checks, click the “Selected: None” link.
4. Select the checkboxes for the checks to be reprinted.
5. Click the **Select** button.
6. Select the applicable options for the checks being reprinted.
   - Do not print banking info.
   - Do not print background.
   - Do not use VMR settings.
7. Time-off balances can be shown as of the **Current Day** or as of a **Historical Date**, using the dropdown field.
8. Click the **Send** button to send to the location specified in the **Send to** field. Note that the user is not printing directly to a printer.

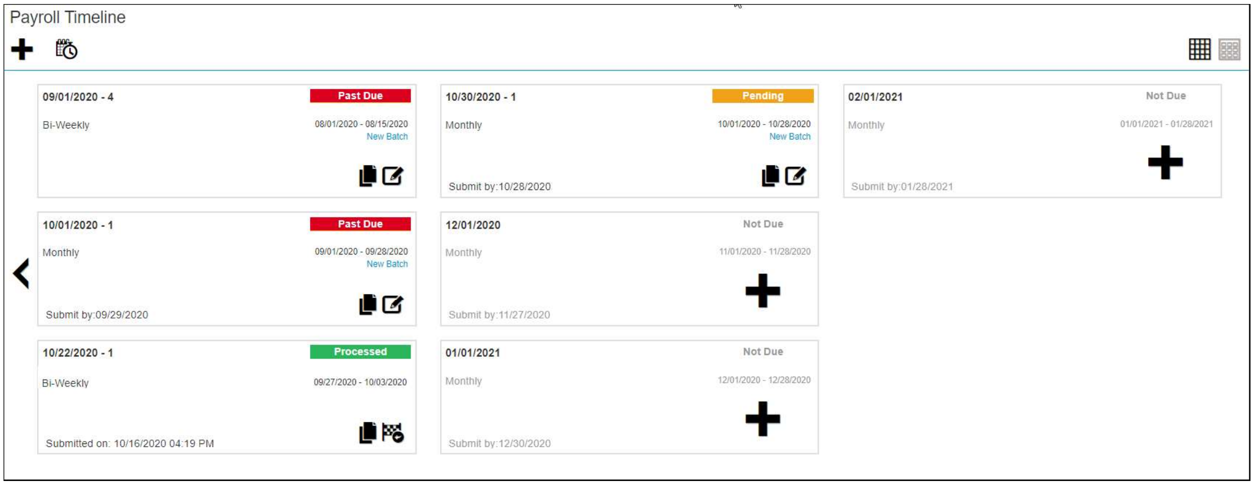
Copying a Payroll

Payrolls can be copied directly from the Payroll Timeline screen in Web Payroll (in either the Payroll Table view or the Payroll Card view).

Note: Voided checks will not be copied by the system.

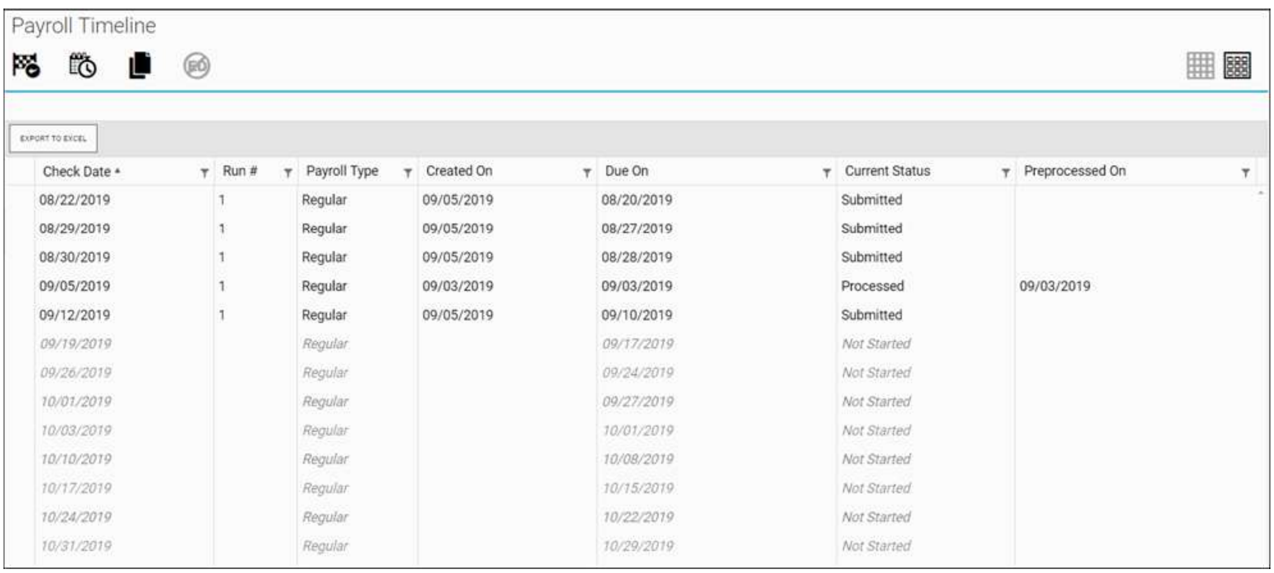
Copying a payroll in Card view

1. Click the Payrolls menu on the left-hand side of the screen.
   Result: The Payroll Timeline screen is displayed in Card view.



2. Click the Copy Payroll symbol in the bottom right corner of the Payroll Card to be copied.
3. A confirmation message is displayed: “Any voids or manual checks in the original payroll will be ignored. Are you sure you want to copy this payroll?”
4. Click **Yes**.

   Result: The selected payroll is copied. The run number for the new copied payroll is automatically incremented by 1 from the highest current payroll run number.



Check Date	Run #	Payroll Type	Created On	Due On	Current Status	Preprocessed On
08/22/2019	1	Regular	09/05/2019	08/20/2019	Submitted	
08/29/2019	1	Regular	09/05/2019	08/27/2019	Submitted	
08/30/2019	1	Regular	09/05/2019	08/28/2019	Submitted	
09/05/2019	1	Regular	09/03/2019	09/03/2019	Processed	09/03/2019
09/12/2019	1	Regular	09/05/2019	09/10/2019	Submitted	
09/19/2019		Regular		09/17/2019	Not Started	
09/26/2019		Regular		09/24/2019	Not Started	
10/01/2019		Regular		09/27/2019	Not Started	
10/03/2019		Regular		10/01/2019	Not Started	
10/10/2019		Regular		10/08/2019	Not Started	
10/17/2019		Regular		10/15/2019	Not Started	
10/24/2019		Regular		10/22/2019	Not Started	
10/31/2019		Regular		10/29/2019	Not Started	

Copying a Payroll in Table view

1. Go to the Payroll Timeline screen
2. Click the **Table view** symbol in the header.
3. Select a payroll [row] on the screen that you want to copy.
   - You cannot copy a processed setup-run.
   - Payrolls with a status of Submitted or On Hold can be copied.

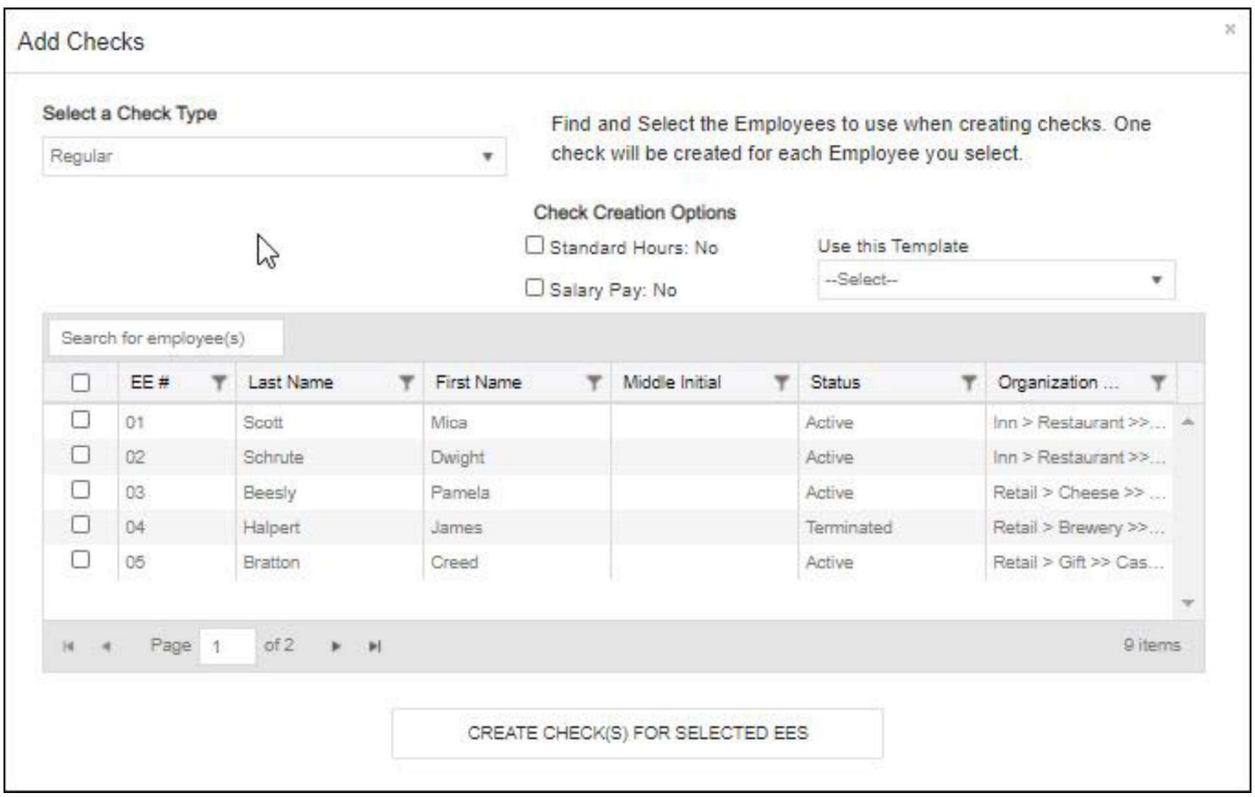
4. Click the **Copy Payroll** symbol in the top left of the header.

Note: The Copy Payroll symbol is not displayed if a payroll with a status of Void or Not Started is selected.

Adding Additional Checks

To add additional checks to a payroll,

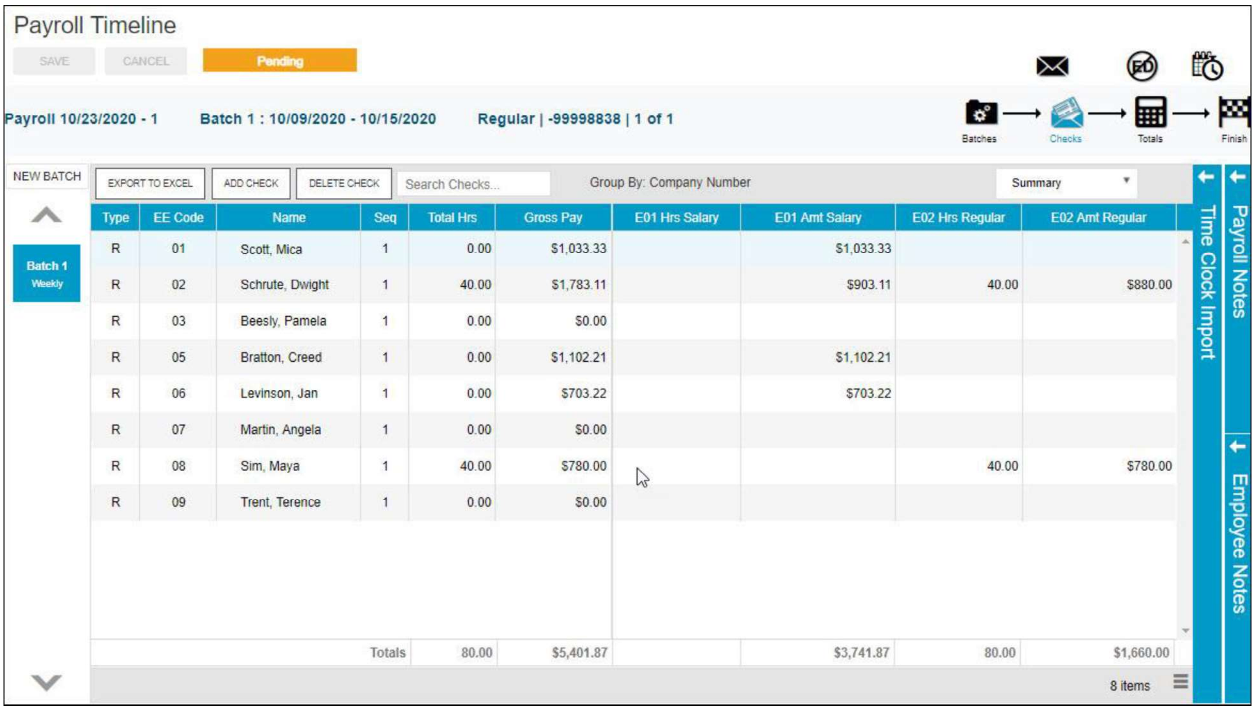
1. Go to the Payroll – Payroll Timeline screen.
2. Click the **Edit** symbol on the payroll to be edited.
   Result: The Batch Checks screen opens.
3. Click the **Add Check** button in the Navigation bar.
   Result: The Add Checks screen opens.



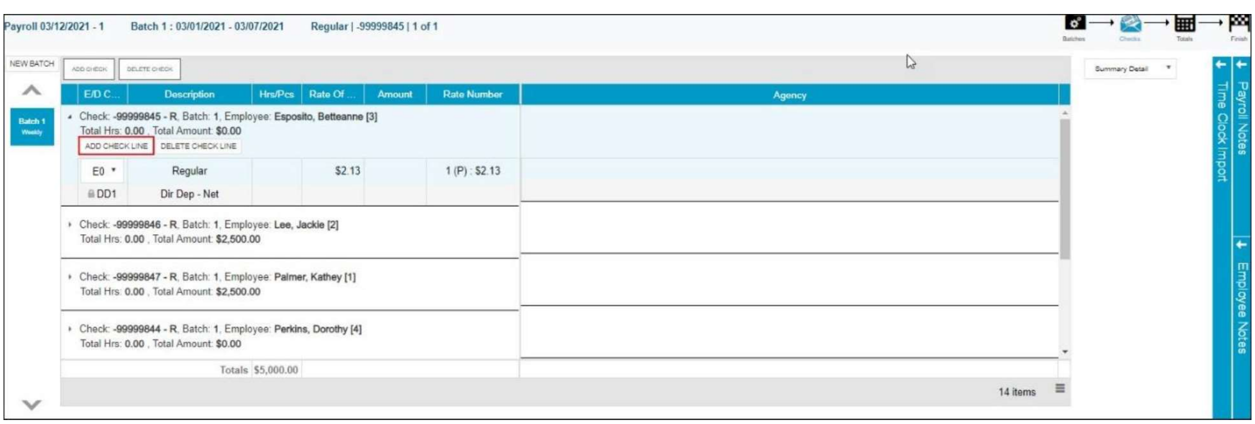
4. Select the **Check Type** being created.
5. Select the employee(s) for whom to create a check.
6. Click the **Create Check(s) for Selected EEs** button.
   Result: The Batch Checks screen reopens with the new check(s) listed.

Adding Check Lines

1. Go to the Payroll – Payroll Timeline screen.
2. Click the **Edit** symbol on the payroll to be edited.
   Result: The Batch Checks screen opens.



3. Change the view from **Summary** to **Summary Detail**.
4. Click the small arrow to open one of the check lines.
5. Click the **Add Check Line** button.



6. Select an E/D Code from the dropdown list.
7. Click **Save** in the Header.

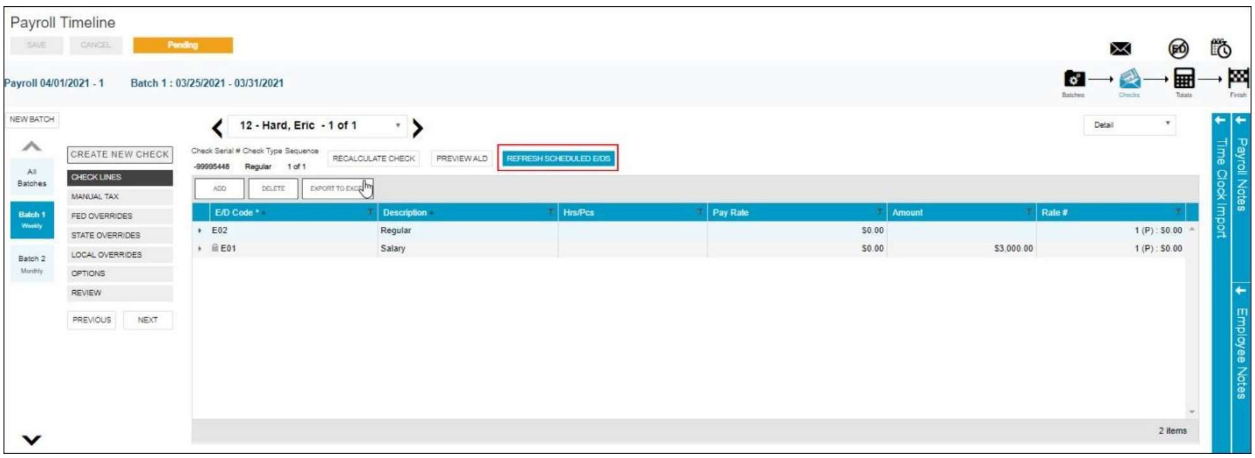
Refreshing Scheduled E/Ds for Checks and Batches

The Refresh Scheduled E/Ds button can be used to refresh E/Ds on select Payroll screens for a check or batch, before the payroll is submitted for processing. **Example**, after making changes to a check line for an individual pending check, refresh Scheduled E/Ds to revert all of the Scheduled E/Ds in the check line to the values originally set up on the Employee – Scheduled E/Ds screen.

This feature is available for checks in the Payroll – Detail view screen and for batches, on the Batch Card on the Batches screen

To begin,

1. Go to the Payrolls – Payroll Timeline screen.
2. Locate the Pending payroll requiring adjustment and click the **Edit** symbol.



3. Select the **Detail** view from the dropdown list
4. Click the **Refresh Scheduled E/Ds** button.

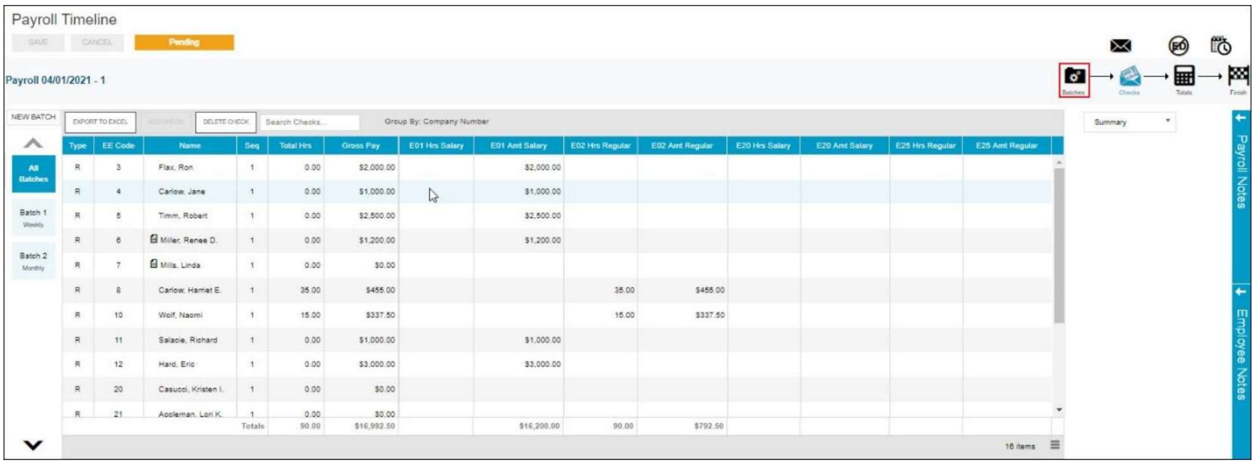
Once a user clicks the **Refresh Scheduled E/Ds** button, the payroll is locked from any adjustments while the refresh process is executing; it displays a “Refreshing E/Ds – Please wait” message. The Payroll Hot Keys also do not work while the system is locked for refreshing.

- Manually-added check lines are not impacted by the Refresh Scheduled E/Ds process. If a user deletes a manually added check line – refreshing will not revert it back to the original value.
- If a user deletes a locked check line (E05 for example) and then adds a new check line of E05, when they click the **Refresh Scheduled E/Ds** button, the system will return the original E05 and leave the new one, so that there are now two check lines
- The **Refresh Scheduled E/Ds** button is not enabled for Third Party or Void checks.
- If a check has no check lines – the button remains enabled.
- The **Copy Payroll** button can be used if the user wants to use the default Scheduled E/D setup and the payroll being copied had changes to some of the Scheduled E/Ds.

Refreshing Scheduled E/Ds for Batches

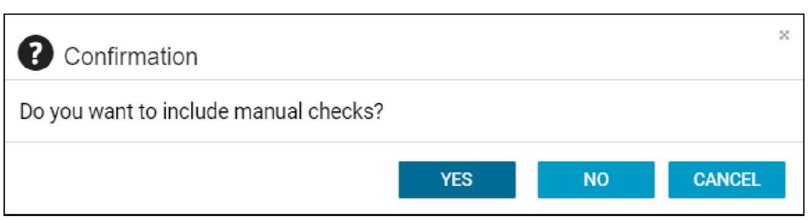
Scheduled E/Ds can be refreshed at the Batch level.

1. From the Payrolls – Payroll Timeline screen, locate the Pending payroll requiring adjustment and click the **Edit** symbol.



2. Click the **Batches** symbol at the top right of the Payroll screen to display the Check Batches screen

3. On the Batch for which to refresh the scheduled E/Ds, click the **Refresh E/Ds for this Batch** (ED) symbol.
   Result: A confirmation screen opens asking whether to include Manual Checks.

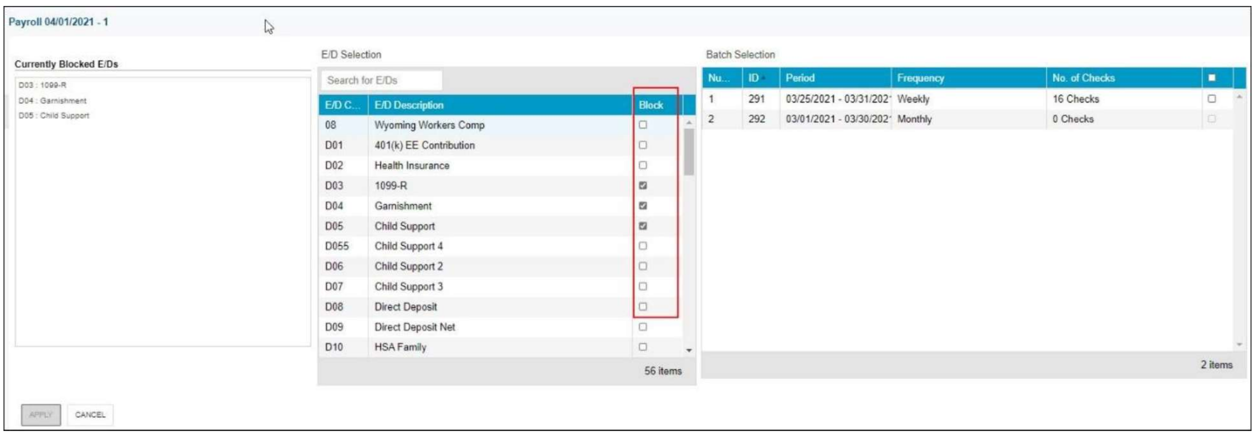


4. Select the applicable response.

Blocking Scheduled E/Ds from a Payroll

One or more Scheduled E/Ds can be blocked from any unprocessed payrolls.

1. Go to the Payroll – Payroll Timeline screen.
2. Click the **Table view** symbol in the header.
3. Select a payroll and click the Block Scheduled E/Ds symbol in the top left of the header
   Result: The Block Scheduled E/Ds screen is displayed.



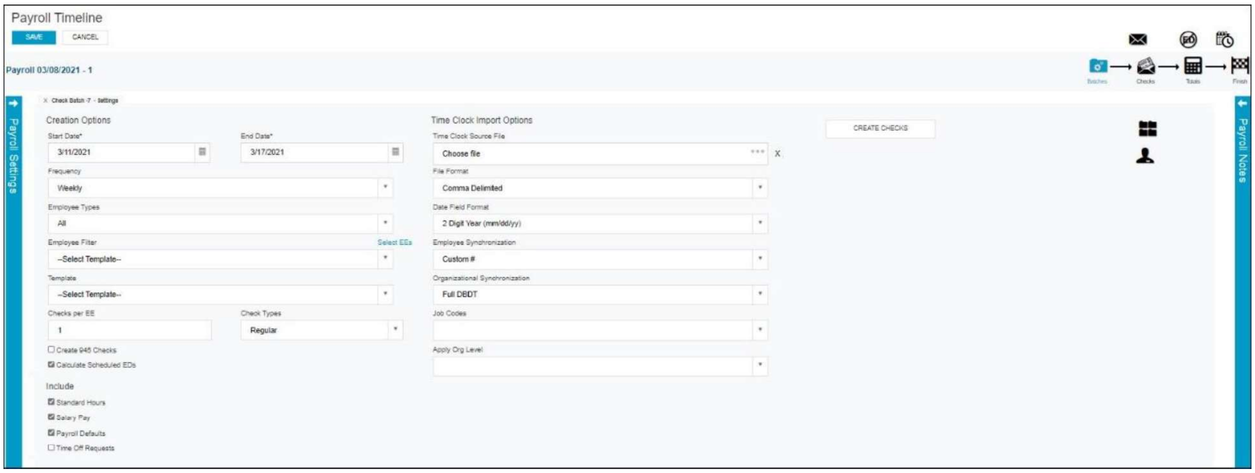
4. Select the Scheduled E/Ds to block from the payroll.
5. Select the batches from which the Scheduled E/Ds should be blocked.
6. Click **Apply**
   Result: The system displays a confirmation message "Are you sure you want to block the Scheduled E/Ds from the selected Batches? The selected batches will be refreshed, and any previously applied blocks will be overwritten.
7. Click **Yes**.
   Result: The system displays a screen asking if you want to include Manual Checks.
8. Click **Yes** to include manual checks or No.
   - If Yes, the system performs the Block Scheduled E/Ds function including refreshing the Scheduled E/Ds for all (regular and manual) checks.
   - If No, the system performs the Block Scheduled E/Ds function for regular checks only and excludes manual checks.

Creating Manual Checks

Users can create manual checks to be added to a payroll when creating a new batch, or adding to an existing batch.

Creating a new batch

1. On the Payroll Timeline screen select a payroll with a status of Pending and click the **Edit** symbol.
2. Click the **Plus** sign on the Batch Checks screen to create a new batch.
   Result: the Check Batch Settings screen opens



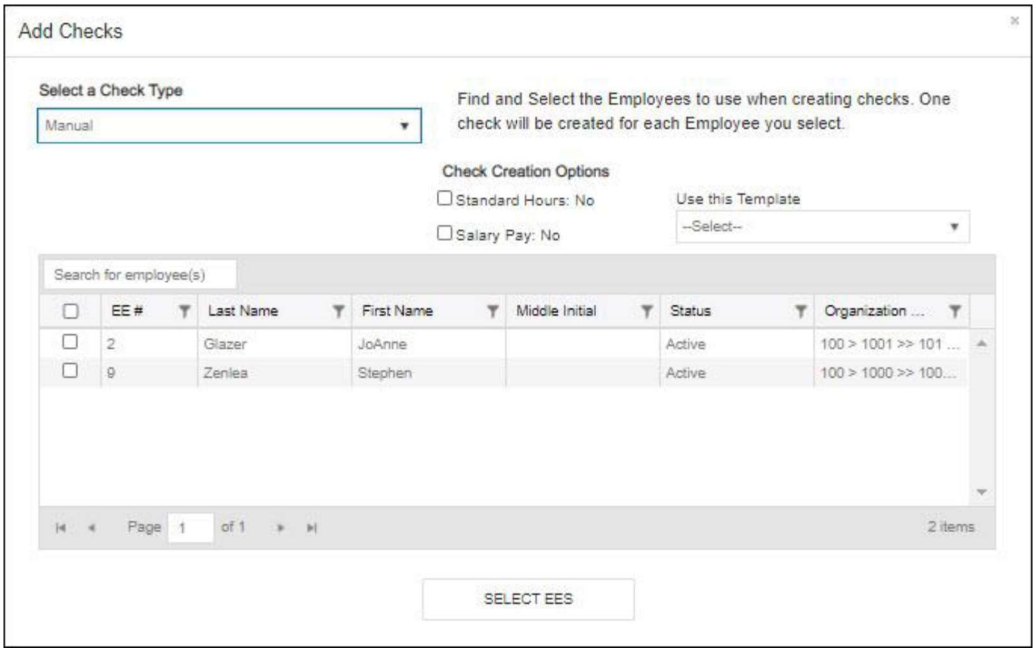
3. Complete the required and applicable fields, making sure to select “Manual” from the **Check Types** dropdown field.

A new field, **Update Scheduled E/Ds Balance**, is displayed with a default value of **Yes**. Leave it as is or change to **No** if applicable.

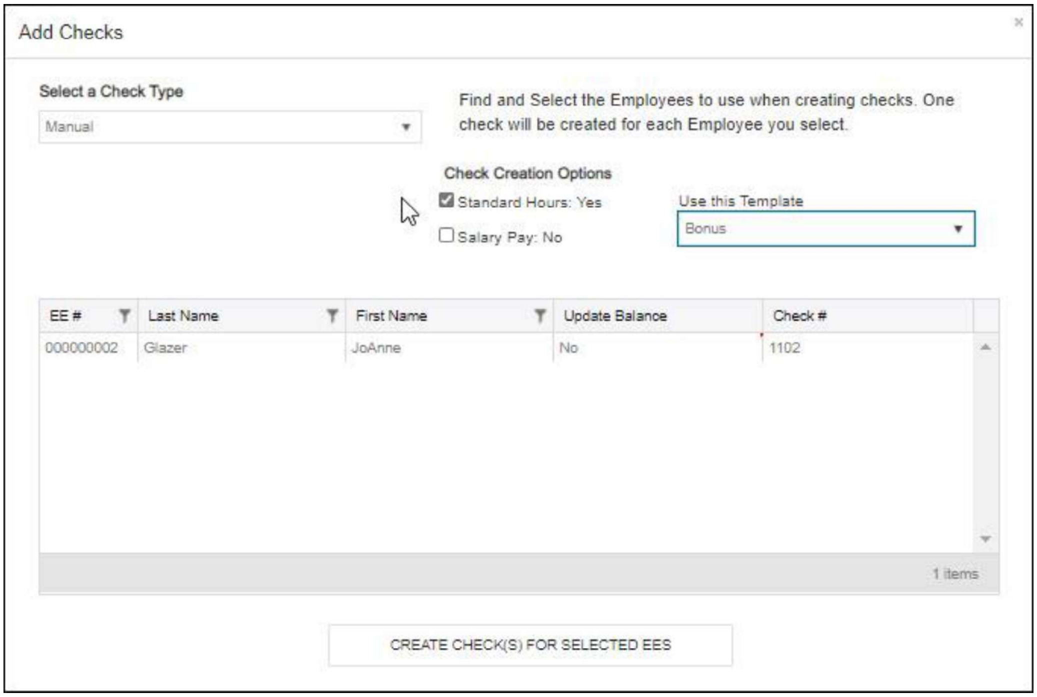
4. Click the **Create Checks** button and proceed as normal when running a payroll.

- Adding to an existing batch

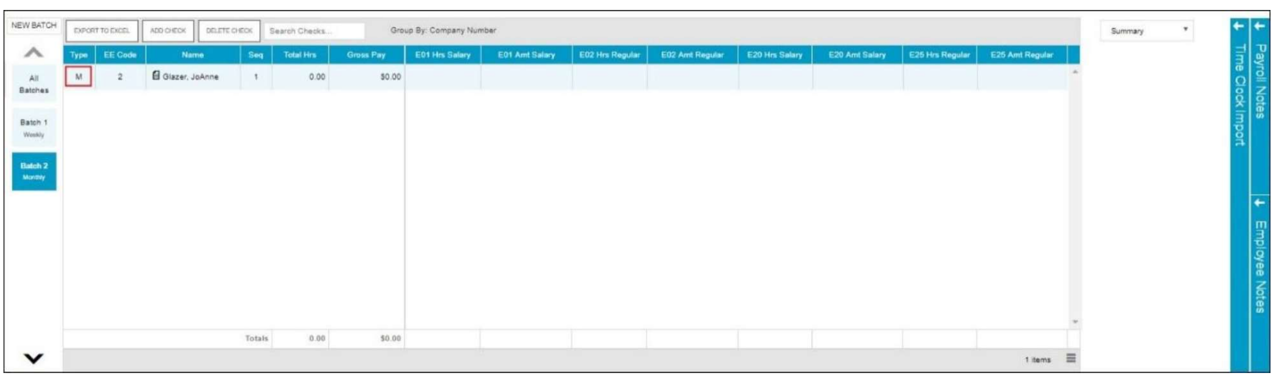
1. On the Payroll Timeline screen select a payroll with a status of Pending by clicking the **Edit** symbol.
2. Click a batch that has already been created.
3. Click the **Add Check** button in the Navigation bar.
   Result: The Add Checks screen opens.



4. Select “Manual” from the **Check Types** dropdown field.
5. Select the employees in the checkboxes who are to receive a manual check.
6. Click **Select EEs**
   Result: A Confirmation screen opens listing the check(s) to be created.
7. Click in the **Check#** column and give the check(s) a number.



8. Click the **Create Check(s) for Selected EEs** button.
   Result: The Batch Checks screen opens listing all checks in the batch. In the Type column, the Manual check is listed with an “M”.



9. Click the **Create Checks** button
10. Continue the payroll process as usual. Manual checks do not inherit salary/standard hours but do inherit payroll defaults

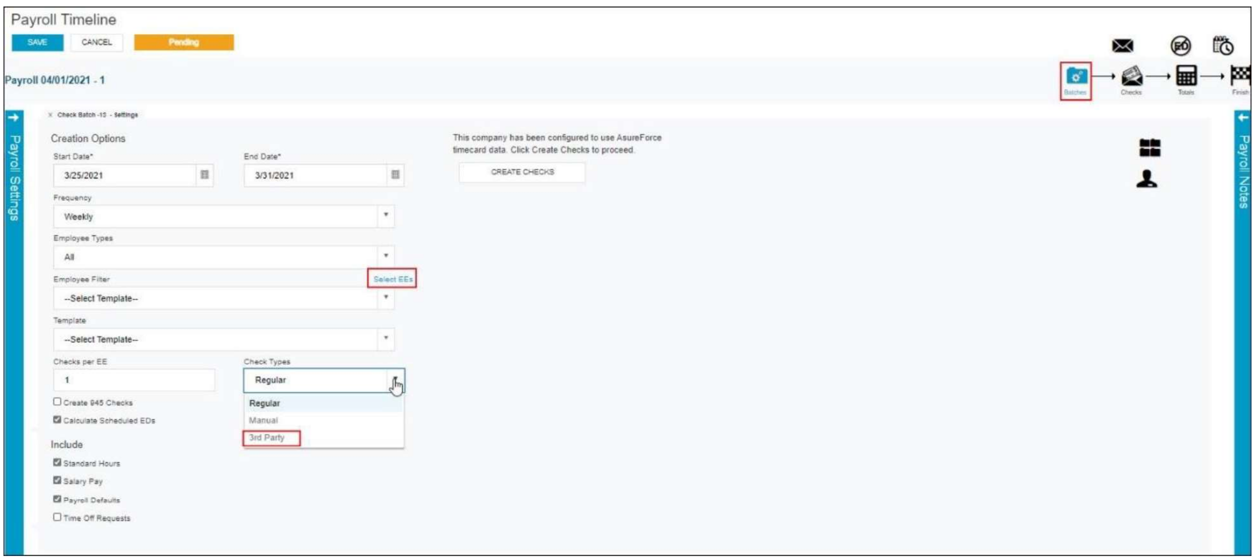
- Rate of pay/rate number is not applied automatically.
- Users must enter hours/rate and perform calculation to populate amount (does not calculate automatically).
- Scheduled E/D amounts like Child Support should accept entered amounts.
- No EP, EO or EQ hours or amounts in manual checks.

Creating Third Party Checks

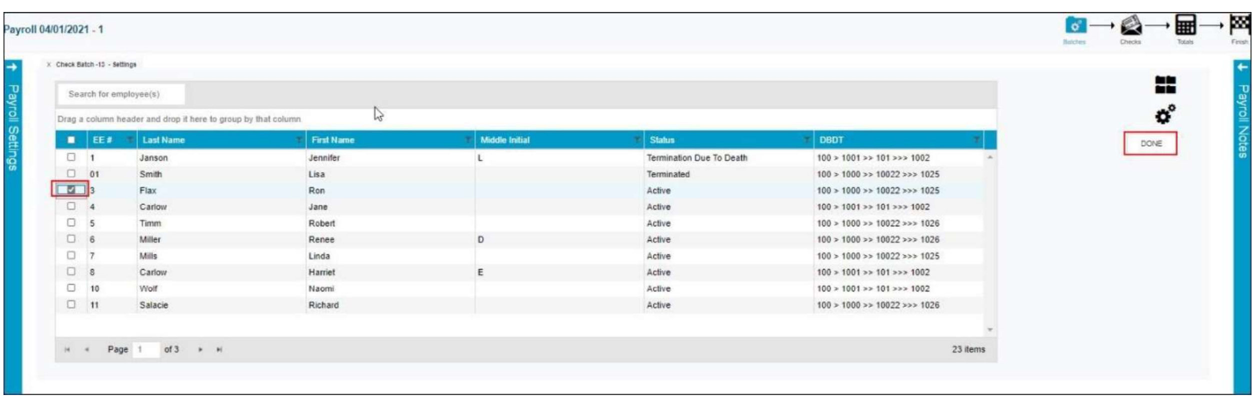
Users can create third party checks to be added to a payroll when creating a batch, or added to an existing batch. The difference in process is basically the same as creating a Manual check.

Creating Third Party Checks in a new batch

1. On the Payroll Timeline screen select a payroll with a status of **Pending** by clicking the **Edit** symbol.
2. Click the **Batches** symbol in the upper right corner of the screen.
3. Click the New Batch button on the Batch Checks screen to create a new batch.
   Result: The Payroll Settings screen opens



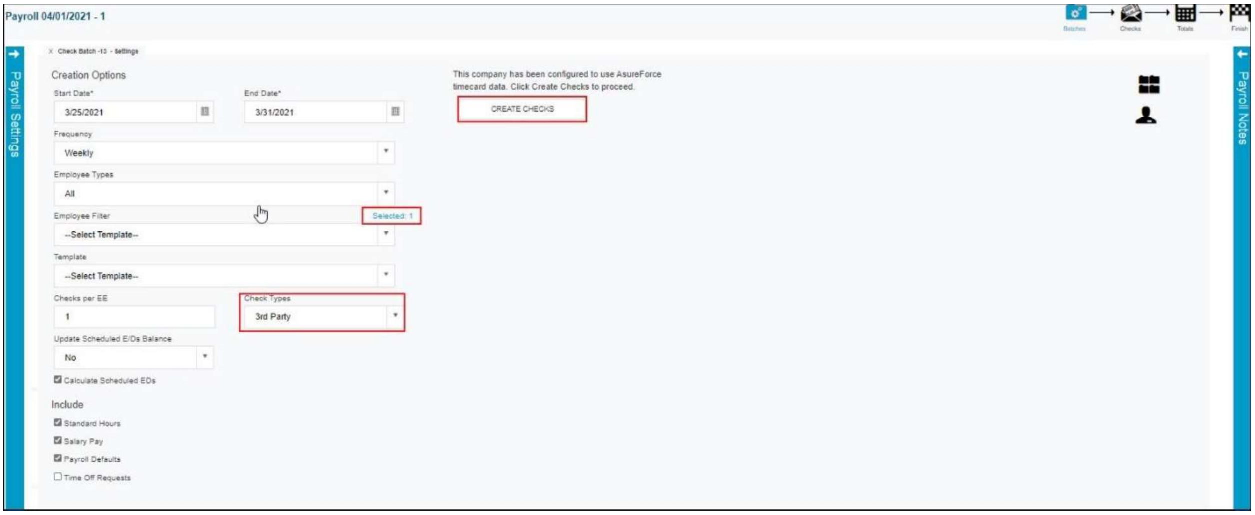
4. Click **Select EEs** to identify the **Employee(s)** to receive 3rd Party Checks.



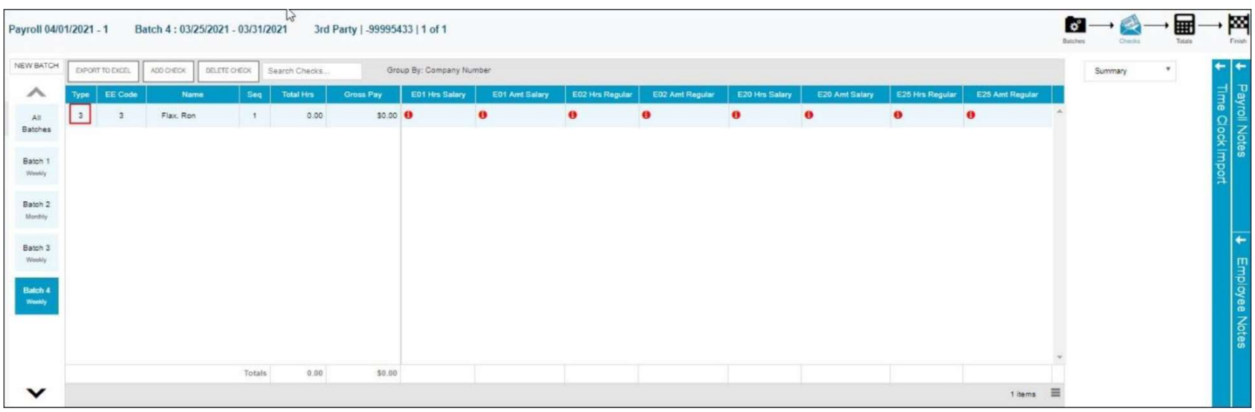
5. Click **Done**.

Result: The Batch Checks screen opens showing that one employee has been selected to receive a Check Type 3rd Party.

6. Click **Create Checks.**

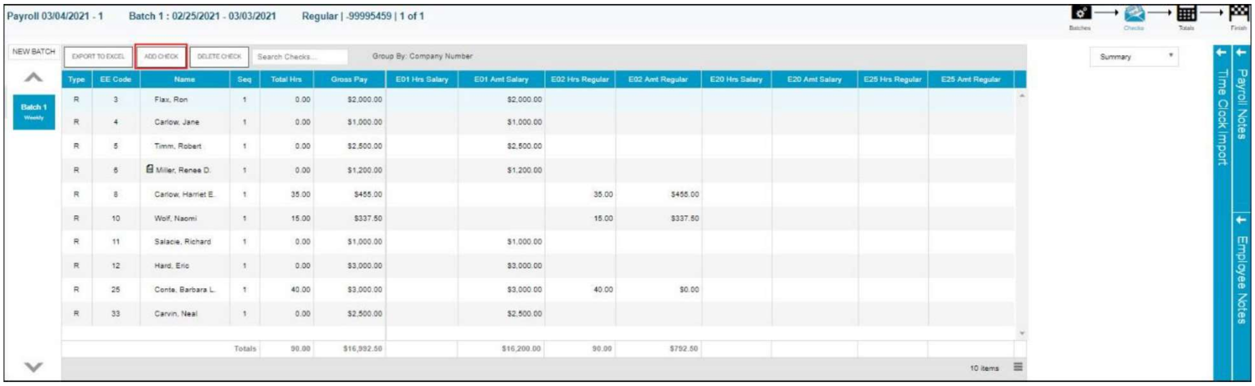


Result: The Batch Checks screen opens listing all checks in the batch. In the Type column, the 3rd Party check is listed with a "3".

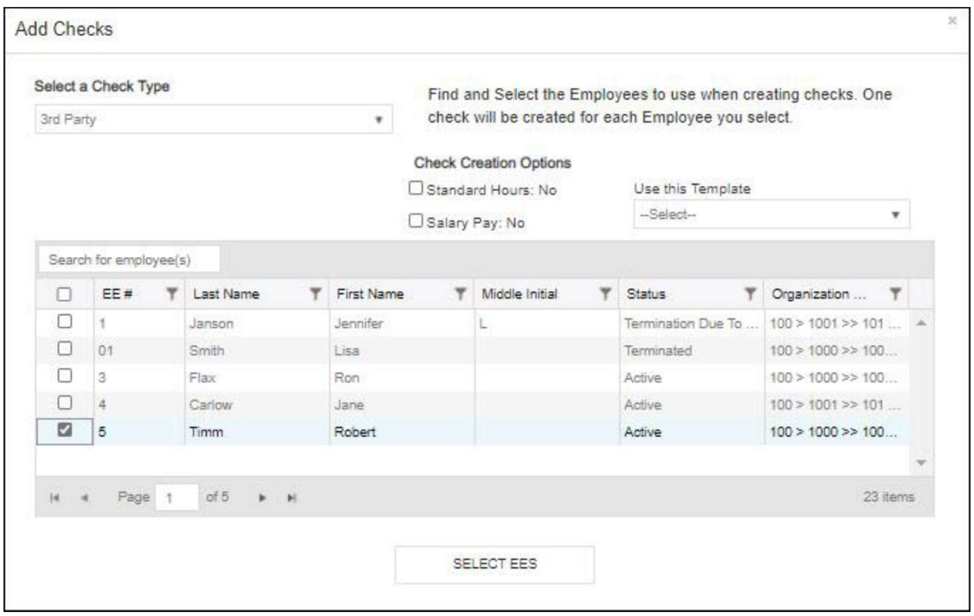


Adding Third Party Checks to an existing batch

1. On the Payroll Timeline screen select a payroll with a status of Pending by clicking the **Edit** symbol.
2. Click a batch already created.
3. Click the **Add Check** button in the Navigation bar.

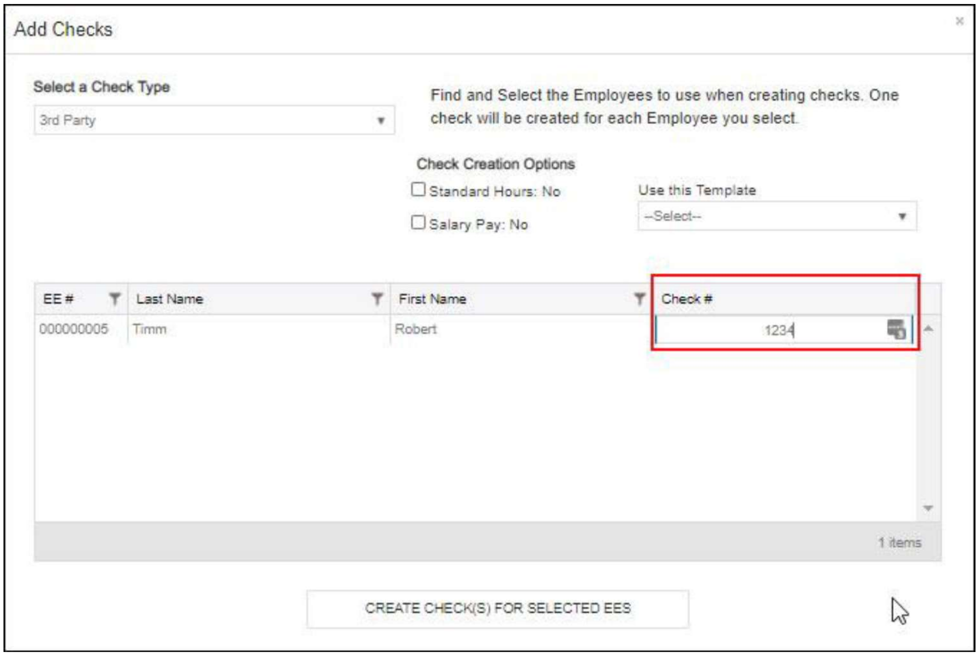


Result: The Add Checks screen opens

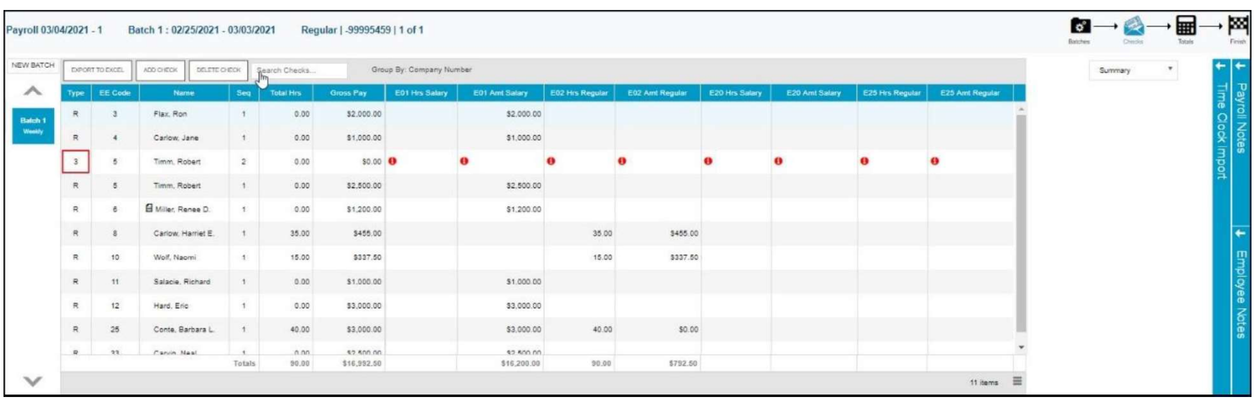


4. Select 3rd Party from the **Check Types** dropdown list.
5. Select the employees in the checkboxes who are to receive a manual check.
6. Click **Select EEs**

   Result: A Confirmation screen opens listing the check(s) to be created.
7. Click in the **Check#** column and give the check(s) a number.



8. Click the **Create Check(s) for Selected EEs** button.
   Result: The Batch Checks screen opens listing all checks in the batch. In the Type column, the Manual check is listed with a “3”.



Notes

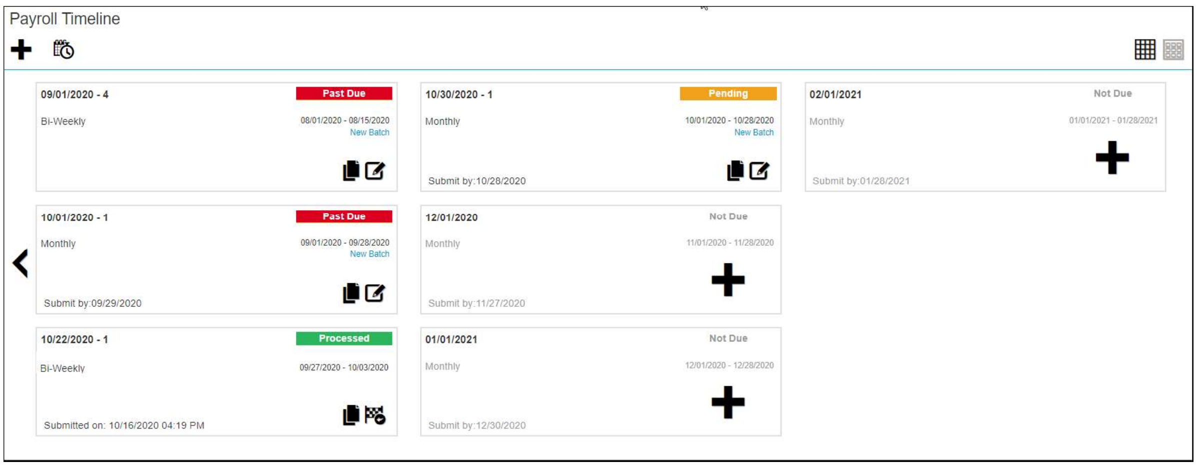
- Only E/D Code Types associated with 3rd Party Sick Pay are available for selection:
  - **EP** - Short term 3rd Party Sick
  - **EO** - Long term 3rd Party Sick
  - **EQ** - Non-taxable 3rd Party Sick
- Third Party checks do not inherit salary/standard hours.
- Rate of pay/rate number is not applied automatically.
- Users must enter hours/rate and perform calculation to populate amount (does not calculate automatically).

Voiding Checks

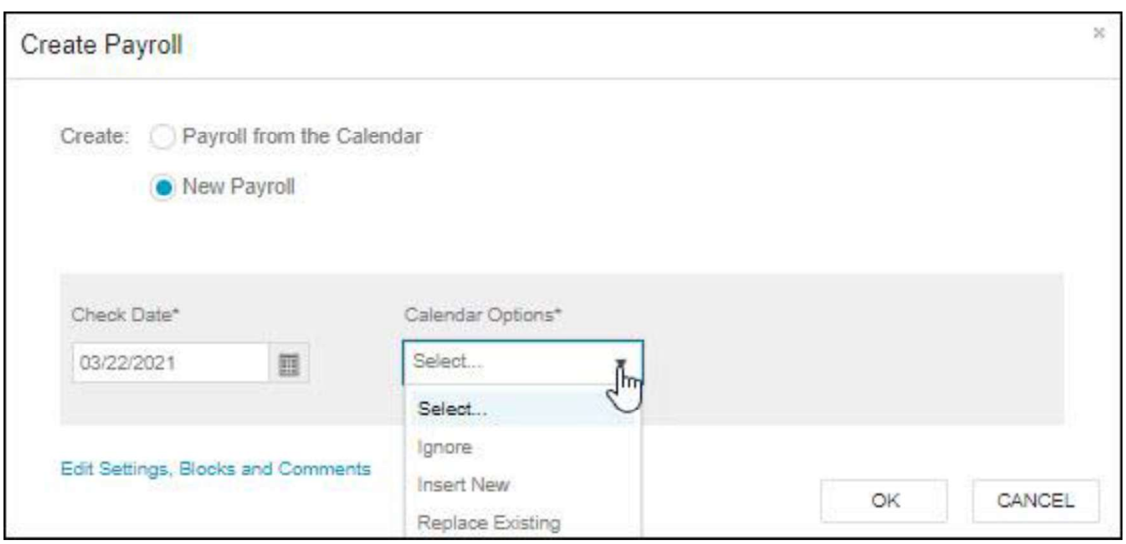
Users can void individual checks via the Payroll menu, either by creating a new payroll, or by editing a waiting payroll. The first step in voiding a check is finding the check to void.

Voiding a check by creating a new payroll

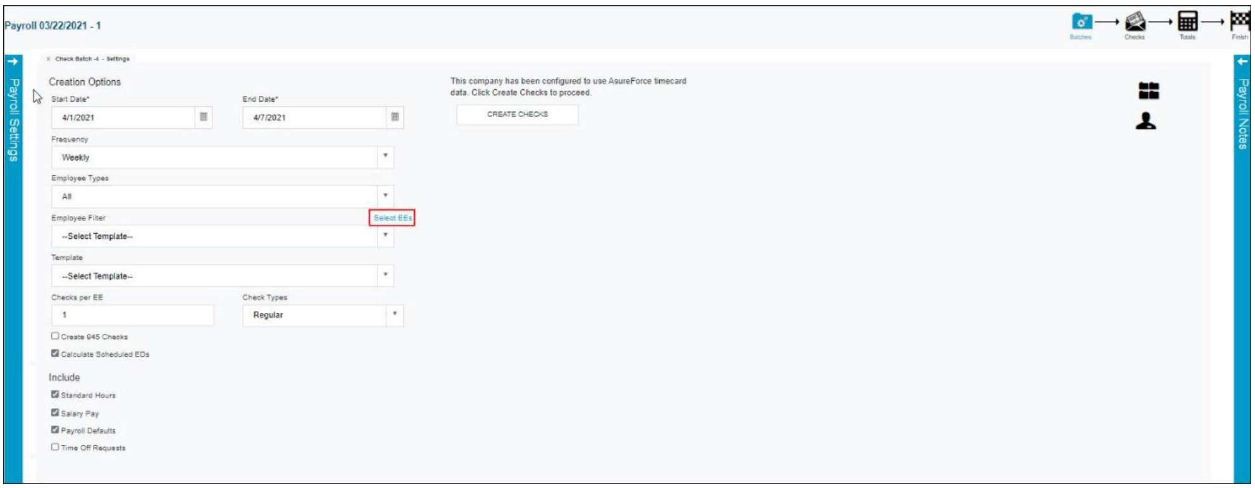
1. Go to the Payrolls - Payroll Timeline screen.



2. Click the large **plus sign** in the heading to create a new payroll.
   Result: A Create Payroll screen opens asking if you are creating a Payroll from the Calendar (scheduled) or a New Payroll (unscheduled.)

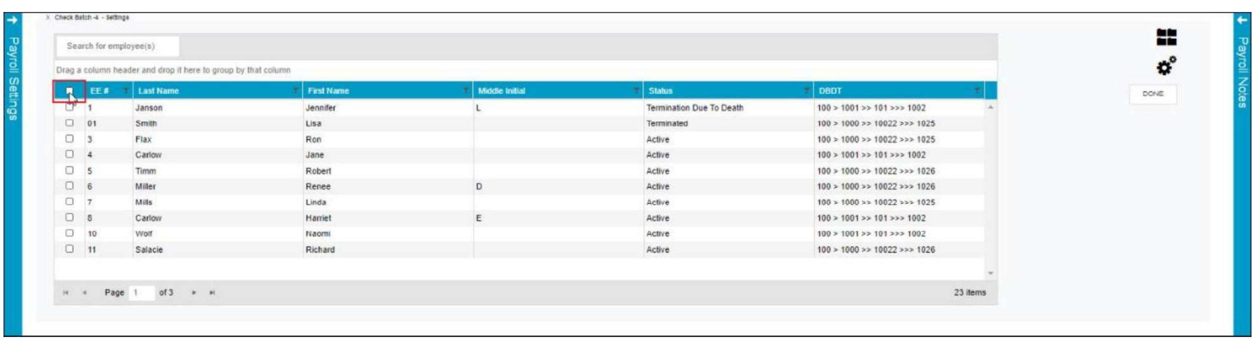


3. If it's a New Payroll, enter the **Check Date** and **Calendar Options:**
   - Ignore - this payroll will be treated as an unscheduled payroll and nothing will be added to the calendar
   - Insert New - the payroll created will be treated as a scheduled check date and the check date will be added to the Calendar.
   - Replace Existing - this payroll date replaces the next scheduled check date in the calendar, and the calendar will be updated with this new date.
4. Click **OK**.
   Result: The Check Batch Settings screen opens



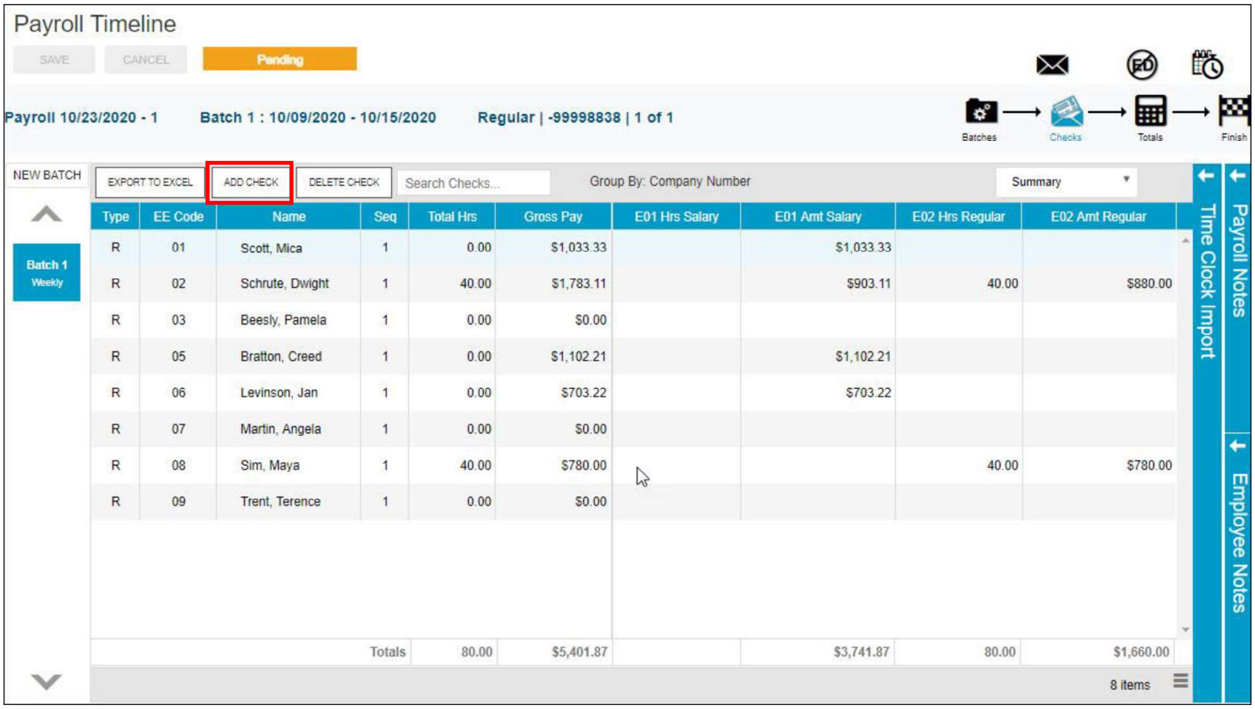
For detailed information about the individual fields on this screen, refer to the Payrolls – Check Batch Settings Screen in the Appendix at the end of this section.

5. Complete the required and applicable fields.
6. To select Employees, click **Select EEs** in the Creation Options section.

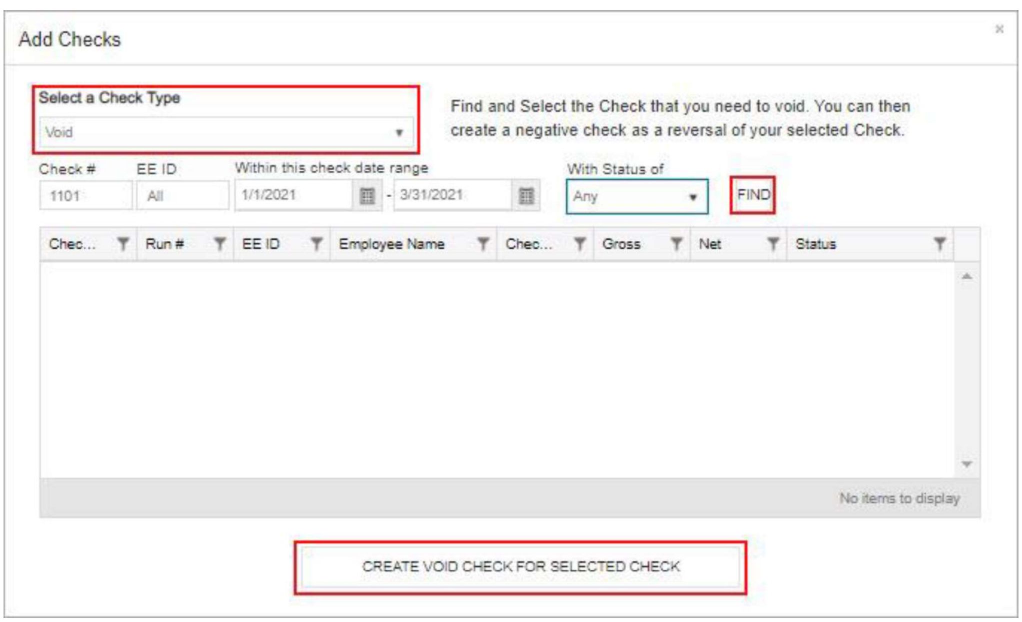


7. Click the checkbox (far left) at the top of the employees list to Select All or select individual employees.
8. Click **Done**, which brings you back to the Check Batch Settings screen.
9. Click the **Create Checks button.**
   Result: A confirmation opens letting the user know that the checks were successfully created.
10. Click **OK**.

Result: The Batch Checks Screen opens.



11. Click the **Add Check** button in the Navigation bar.
Result: The Add Checks screen opens.



12. Select Void for the **Check Type**.
13. Enter search criteria to find the check to void (Check #, EE ID, check range...)
14. Click the **Find** button.

    Result: The system searches company payrolls for the current year, displaying a list of checks that fit the criteria selected.

Warning: it is strongly recommended that checks from previous quarters not be voided.

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15. Highlight the check line to be voided.
16. Click **Create Void Check for Selected Check**.

    Result: user is brought back to the Batch Checks Screen. The Check Type for the voided check is now **V** and the selected check is highlighted.

Note: Voided checks are read only and cannot be adjusted.

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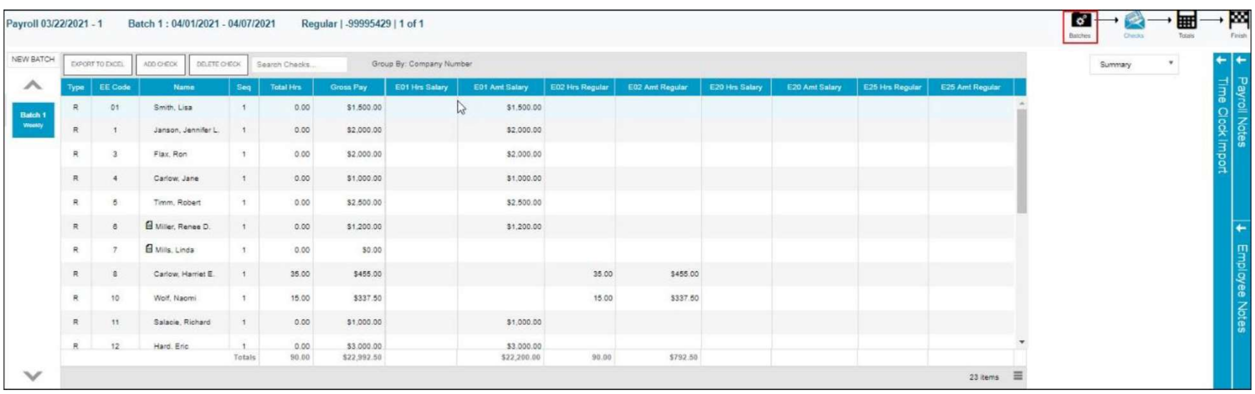
17. Process the payroll as if it were any other payroll.

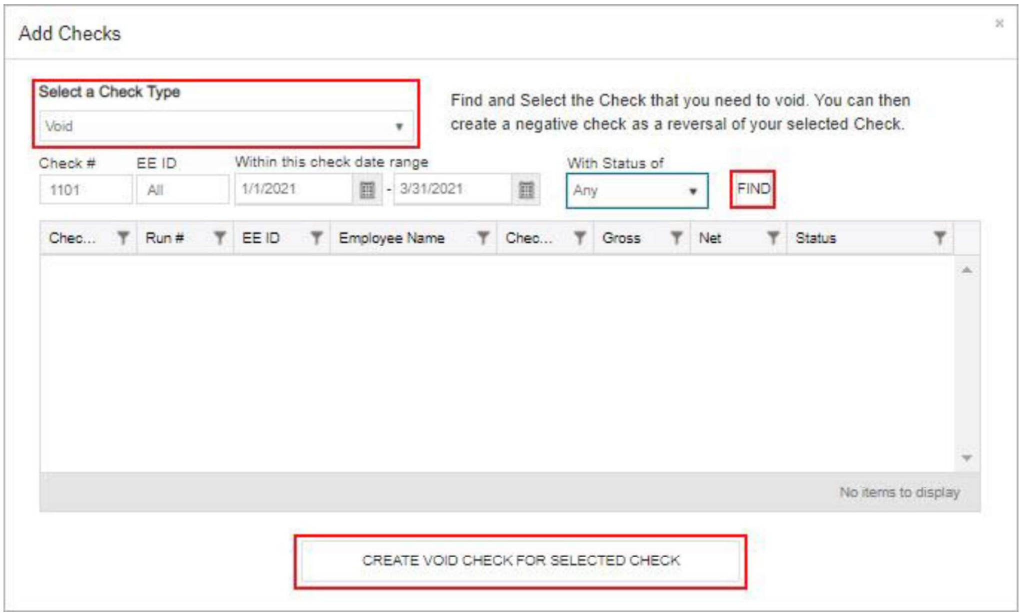
Voiding a check by editing a waiting payroll

1. On the Payroll Timeline screen click the **Edit** button for a payroll with a Pending status.
2. Click on / open a batch that has been created.

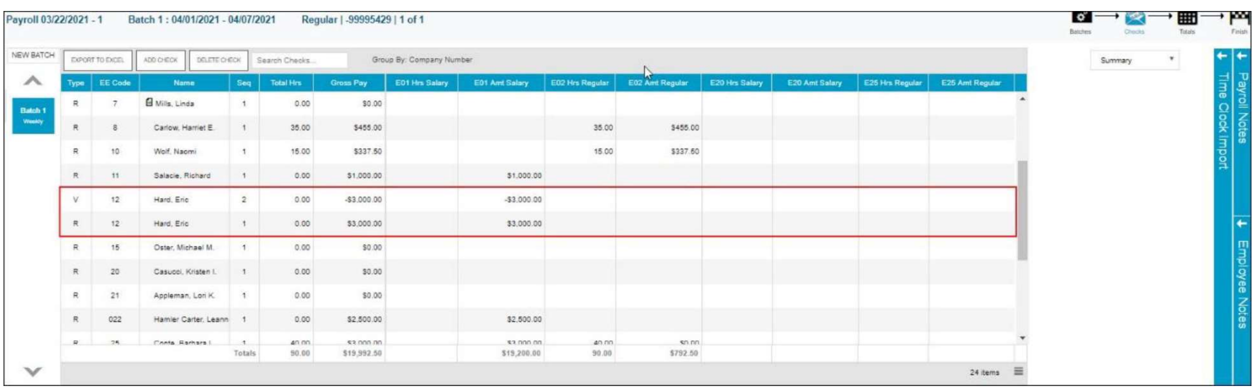


1. Click **Batches** in the upper right-hand corner of the header, opening the Check Batch Settings screen.
2. Click the **Add Check** button in the Navigation bar.

   Result: The Add Checks screen opens.



3. Select Void for the **Check Type**.
4. Enter search criteria to find the check to void
5. Click the **Find** button to display a list of checks that fit the criteria selected.
6. Highlight the check line to be voided.
7. Click **Create Void Check for Selected Check**.



There are now two check lines for the voided check - the original (Check Type R) and the one with a Check Type of V.

Note: Voided checks are read only and cannot be adjusted.

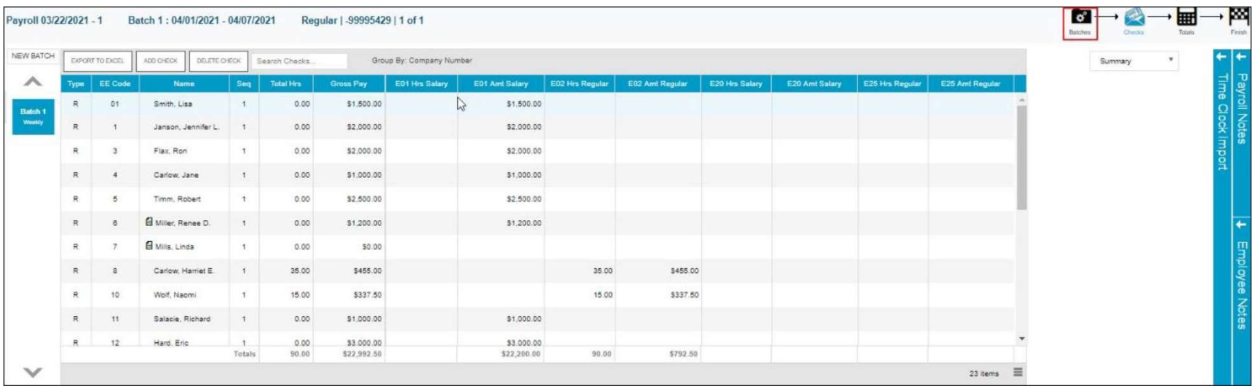
8. Process the payroll as usual.

Deleting Batches

There may be a need, from time to time, when a batch must be deleted.

To delete a batch,

1. From the Payroll Timeline screen, select a Pending payroll in which at least one batch was created and click the **Edit** symbol.
   Result: The Batch Checks screen opens.



2. Click the **Batches** symbol in the upper right corner.
3. If there is more than one batch created, select the batch to be deleted.

4. Click the **Delete** button in the left-hand corner of the Check Batch.
   Result: a message will open asking if you are sure you want to delete this batch > click **Yes**.

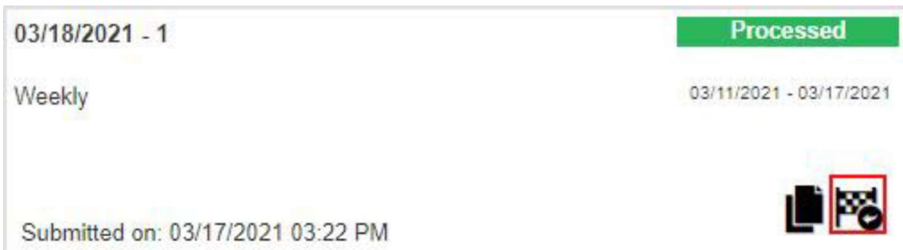
The batch is deleted, and the batch sequence number is updated accordingly.

Redistributing Labor Allocation

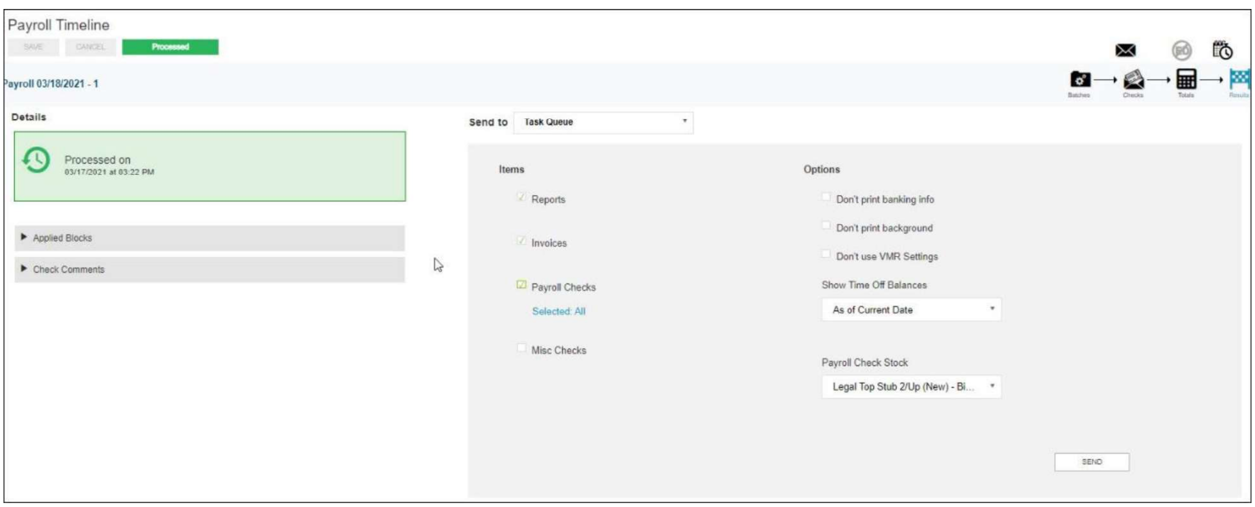
After a payroll has been processed the labor allocation sometimes needs readjustment for reporting purposes. Evolution Payroll supports the redistribute labor allocation process.

To redistribute labor allocation in Evolution Payroll,

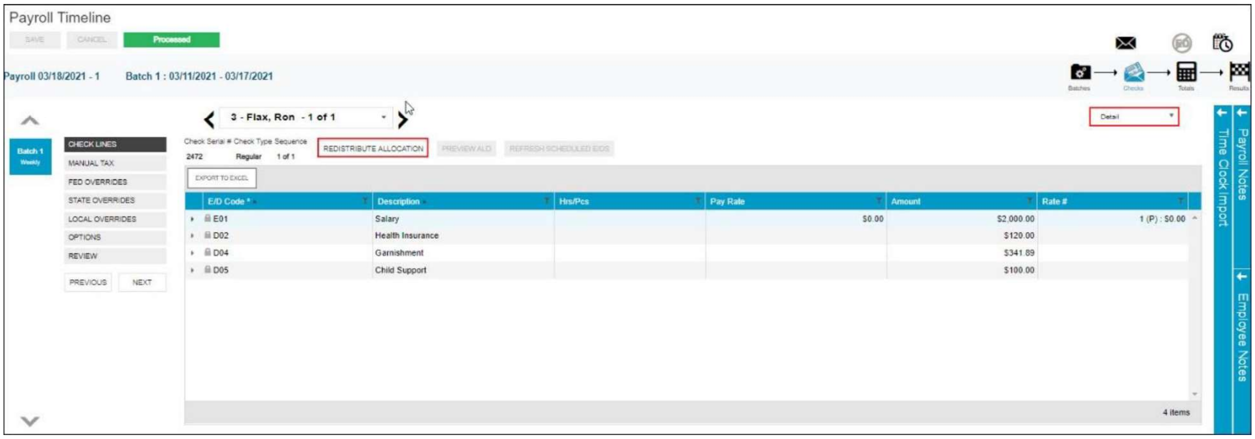
1. Go to the Payrolls – Payroll Timeline screen.
2. Locate the Processed payroll requiring readjustment and click the **Payroll Results** symbol.



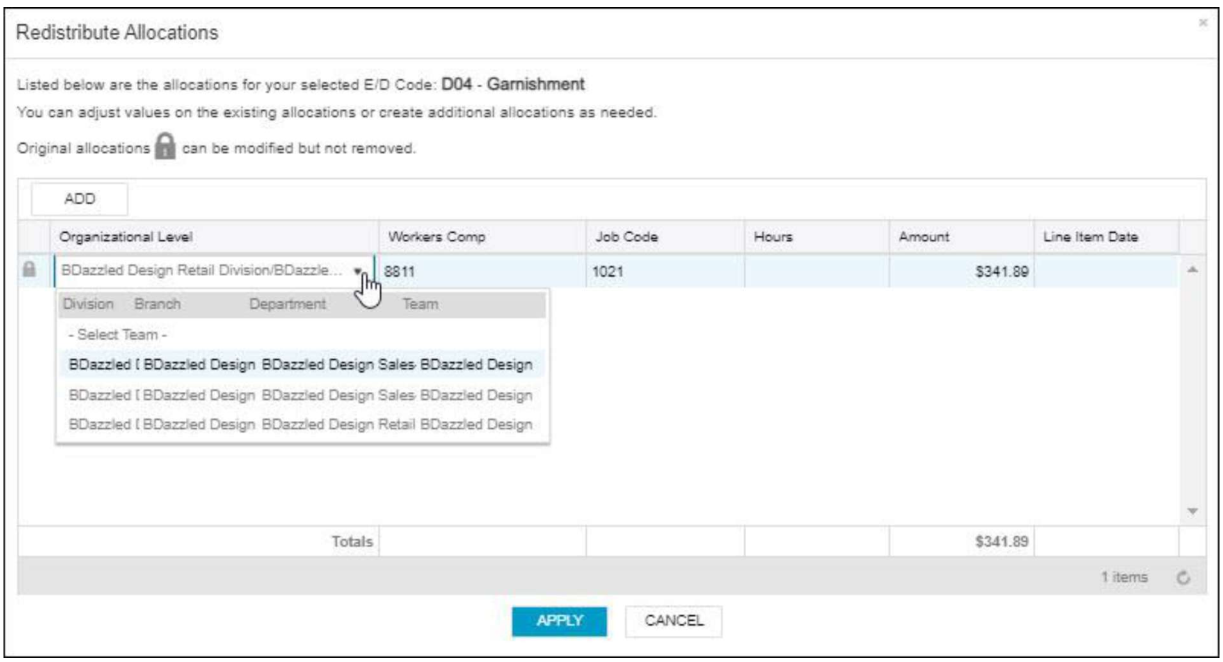
Result: The following payroll details screen opens.



3. Click the **Checks** symbol in the upper right corner of the header.
4. Select the batch if there is more than one.
5. Select the **Detail view** from the dropdown list.
6. Highlight one of the E/D Codes > Click the Redistribute Allocation button.



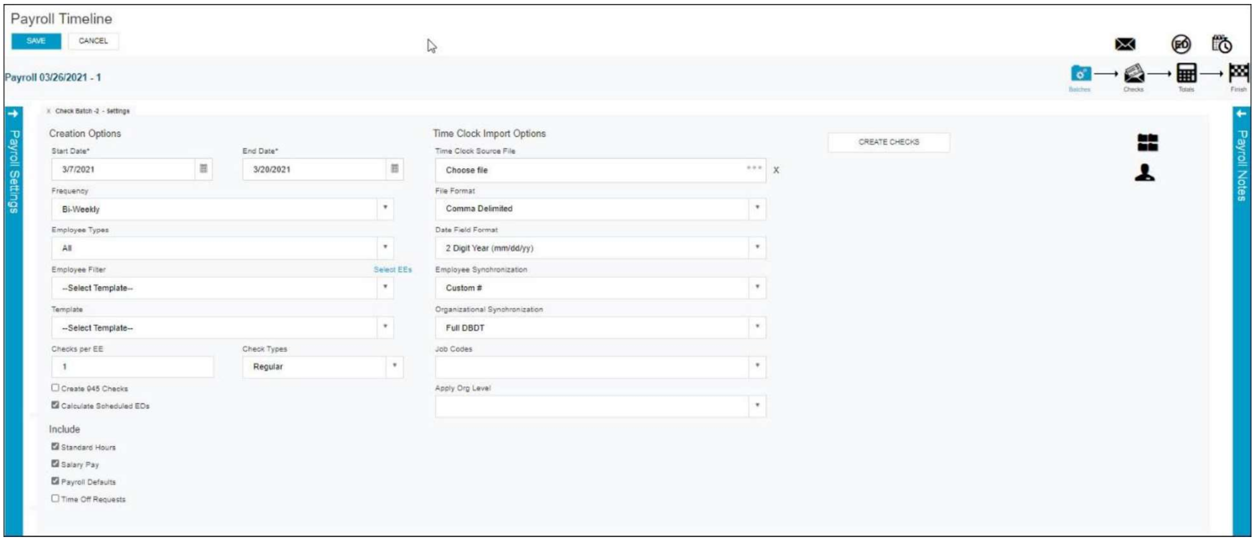
Result: The Redistribute Allocations screen is displayed. Users can modify the existing labor allocations (click within the field to modify) or add a new allocation.



7. Click **Apply.**

Time Clock Imports

1. Begin by following the initial steps to create either a scheduled or unscheduled payroll.
2. Time clock import parameters are on the Check Batch Settings screen



3. Once the required and applicable fields are completed on the left-hand side of the screen, complete the fields on the right regarding the time clock import file.

Field / Button	Description
Time Clock Source File	Select the file from which the data is being imported
File Format	Select the format of the import file
Date Field Format	Select the format of the date fields in the import file…mm/dd/yyyy, etc.
Employee Synchronization	Select how the employees are grouped in the import file – by name, employee number, etc.…
Organizational Synchronization	Select the organizational level if using D/B/D/Ts
Job Codes	Select whether job codes will be imported with the data
Apply Org Level	Select if keeping the organization level used in the import file

1.
2. Click the **Create Checks** button.
   Result: A log file is created displaying that the import was successful and/or unsuccessful

The Payrolls Menu - Appendix

Payrolls - Check Batch Settings screen

Field / Button	Description
Creation Options section	
Start Date	The beginning of the payroll batch period
End Date	The end of the payroll batch period
Frequency	The payroll frequency
Employee Types	The employee types to include in the payroll
Employee Filter – Select EEs	Click to select specific employees to include in the payroll
Template	The payroll template to use for this payroll, if any.
Checks per EE	The number of checks per employee
Check Types	The type of checks for this payroll
Include section	
Standard hours	Select to use standard hours in the payroll
Salary Pay	Select to use salary pay in the payroll
Payroll Defaults	Select to use payroll defaults in the payroll
Time Off Requests	Select to use time off requests in the payroll
Time Clock Import Options section	
Time Clock Source File	The source file of time clock data being used for the payroll.
File Format	The format of the source file
Date Field Format	The format of the date in the source file.

Field / Button	Description
Employee Synchronization	Method by which employees are synced (EE Number, Last Name, and First Name).
Organizational Synchronization	Level of D/B/D/Ts used for the company.
Job Codes	Whether or not job codes are used in the imported file.
Employee Pay rates	Whether or not employee pay rates are used in the imported file.
Scheduled E/Ds	Whether or not scheduled E/Ds are refreshed in the imported data.
Scheduled E/Ds on Additional Checks	Rule on allowing scheduled E/Ds on additional checks.
Create Check button	Begins the process of creating payroll checks.

Payrolls - Payroll Settings screen

Field / Button	Description
Check Date	The check date of the payroll
Run Number	Defaults to the next available number for payrolls processed on the date. If no payrolls processed or created for this date, the run defaults to “1”
Calendar options	Choose whether to add a new payroll date, change a payroll date, or ignore the payroll calendar. Defaults to Ignore when selected.
Payroll Type	The type of payroll to be processed
Blocks	Select each item to be blocked on this payroll
Actual Call In Date	The date the payroll was called in
Time Off Accrual	Select to allow Time Off Accrual to show in the payroll
Accruals Only	Select to allow the payroll to accrue time off, but not use show in the payroll.
Payroll Check Comment	The text to be displayed on checks.

Payrolls - Batch Checks Screen

Field / Button	Description
Create New Check	Click to create a new check for the employee
Add button	Click to add a new check line to the employee's check
Delete button	Click to delete a check line from the employee's check

Payrolls - Add Checks screen

Field / Button	Description
Check Types	Type of check being added to the payroll
Use this Template	Select a template to use if applicable
Standard Hours: Yes checkbox	Select if checks for regular hours are being added
Salary Pay: Yes checkbox	Select if checks for salaried hours are being added
Create Check(s) for Selected EEs button	Click to create check(s) for the selected employees

Payrolls - Check Lines - Basics screen

Field / Button	Description
E/D code column heading	Earning or deduction for which an addition or subtraction is made
Description column heading	Description of the E/D code added
Hrs/pcs column heading	Number of hours or pieces for which the earning or deduction represents
Rate of Pay column heading	Pay rate (if applicable) for hours added
Amount column heading	Dollar amount of the earning or deduction being added

Field / Button	Description
Rate # column heading	Pay rate number if the employee has more than one job/pay rate at the company
Rate Number	The primary rate number is #1. Others are subsequent numbers if the employee has two or three different positions with the company
Rate of Pay	Hourly pay rate for the rate number entered
Agency	Agency name if this is an agency check
Hours/Pieces	Number of hours or pieces the employee is expected to work/produce per pay period
Piece	Identify the piece if the employee is doing piecework
State	State in which the employee is employed
Work Address	Work address of the company
SUI	SUI amount the company pays per employee

Payrolls - Check Lines - Labor Defaults screen

Field / Button	Description
Division	Enter the Organization Level(s) with which the employee is associated
Branch	Enter the Organization Level(s) with which the employee is associated
Department	Enter the Organization Level(s) with which the employee is associated
Team	Enter the Organization Level(s) with which the employee is associated
Job Code	Job associated with the Workers' Comp Code selected. Click the plus sign to add a new Job Code, as long as the user's security is set up.

Field / Button	Description
Shift	Shift the employee works
Line Item Begin Date	Beginning date of the override
Workers' Compensation	Workers' Comp Code assigned to the job associated with the claim
Line Item End Date	End date for including the override

Payrolls - Check Lines - Local Tax Overrides screen

Field / Button	Description
Local Name	Name of the local tax
Exclude	Whether or not to exclude local tax from the check

Payrolls - Manual Tax screen

Field / Button	Description
Add States button	Click to add states to override that are not already displayed. States displayed are what was set up on the Employee – States – Employee screen in Evolution Classic.
Add Locals button	Click to add locals to override that are not already displayed. Locals displayed are what was set up on the Employee – Locals – Employee screen in Evolution Classic.
Description	Name of the tax
Amount	Dollar amount of the tax (only two decimal places allowed)
Options section	
Calculate Override Taxes checkbox	Default is selected
Reciprocate SUI checkbox	Default is selected

Field / Button	Description
Disable Shortfalls checkbox	Default is unselected
Note: *If all state / local taxes are already listed in the table, these buttons are disabled.	

Payrolls - Fed Overrides screen

Field / Button	Description
Federal Type	Type of federal tax to override
Tax Frequency	Frequency of tax payments
Tax at Supplemental Rate	Supplemental rate, if applicable
Amount	Dollar or percentage amount of the tax
Blocks	
Additional tax	Block the supplemental tax
EE OASDI	Block the employee OASDI
EE Medicare	Block the employee Medicare
EE EIC	Block the employee Earned Income Credit
ER OASDI	Block the employer OASDI
ER Medicare	Block the employer Medicare

Payrolls - State Overrides screen

Field / Button	Description
State	State for which there is an override
Abr	State abbreviation

Field / Button	Description
State Type	Is the override for regular tax or additional
Amount	Dollar or percentage amount of the tax override
Blocks	
Regular Tax	Is there a regular tax to block
Additional tax	Is there an additional tax to block
SUI	Is SUI being blocked
SDI	Is SDI being blocked

Payrolls - Options screen

Field / Button	Description
Blocks section	
Direct Deposit	Block all direct deposits
Direct Deposit Except Net	Block direct deposits except net checks
Auto Distribution	Block Auto Labor Distributions
Time off Accrual	Block Time Off Accrual information from displaying on the check stubs
Accruals Only	Block Time Off Accrual information, but just accruals
Scheduled E/Ds Except Direct Deposit	Block all Scheduled E/Ds except direct deposit
Scheduled E/Ds Except Pension	Block all Scheduled E/Ds except those for retirement plans
Scheduled E/Ds from Agency	Block all Scheduled E/Ds from agency checks

Field / Button	Description
Options section	
Update Scheduled E/D Balance	Select to update the Scheduled E/Ds balance after all blocks are added

Payrolls - Review screen

Field / Button	Description
Lock Tax Calculations button	Click to save any changes made to the information before the payroll processes.

Payrolls - Time Clock Import tab

Field / Button	Description
Time Clock Source File	Identifies the source file of time clock data being used for the payroll.
File Format	Format of the source file
Date Field Format	Format of the date in the source file
Employee Synchronization	Method by which employees are synced (EE Number, Last Name, and First Name)
Organizational Synchronization	Level of D/B/D/Ts used for the company
Job Codes	Whether or not job codes are used in the imported file
Employee Pay Rates	Whether or not employee pay rates are used in the imported file.
Scheduled E/Ds	Whether or not Scheduled E/Ds are refreshed in the imported data.
Schedule E/Ds on Additional Checks	Rule on allowing Scheduled E/Ds on additional checks.
Import button	Begins the process of importing the time clock data.

Payrolls - Calculation Results screen

Field / Button	Description
E/D code	Scheduled Earning or Deduction Code used in the payroll
Description	Describes the E/D code
Hrs. /Pcs.	Hours or Pieces if applicable
Pay Rate	Rate amount for the E/D
Amount	Total amount added or subtracted for the E/D
Taxes Section	This section has information displayed only if the payroll status is Processed. If the status is **Completed**, the Taxes section will be blank.
Description	Lists the taxable wages and taxes totals
Amount	Lists the total amounts of taxable wages and taxes
Count	The number of checks included in the total amounts of taxable wages and taxes

Check Finder Menu

The Check Finder menu link opens a Check Finder screen on which parameters are entered to search for a specific check by check number or employee code / name within a particular date range, and status.

The Reports Menu

The Reports menu lets the user see reports that have been published to Evolution Payroll from VMR, as well as process additional reports as needed. For information about report results in Evolution Payroll, talk to your service bureau.

There are two report types identified that we refer to

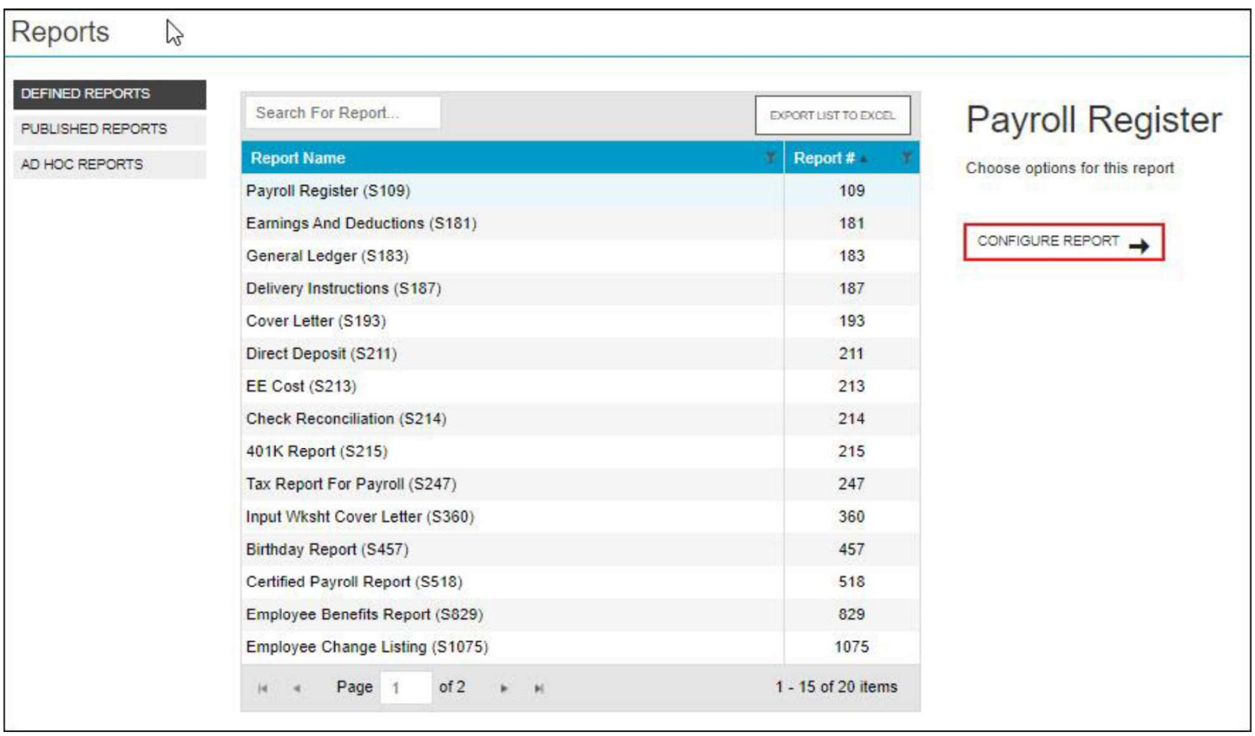
- Defined Reports and
- Published Reports.

Defined Reports are reports that can be generated from Evolution Payroll on demand.

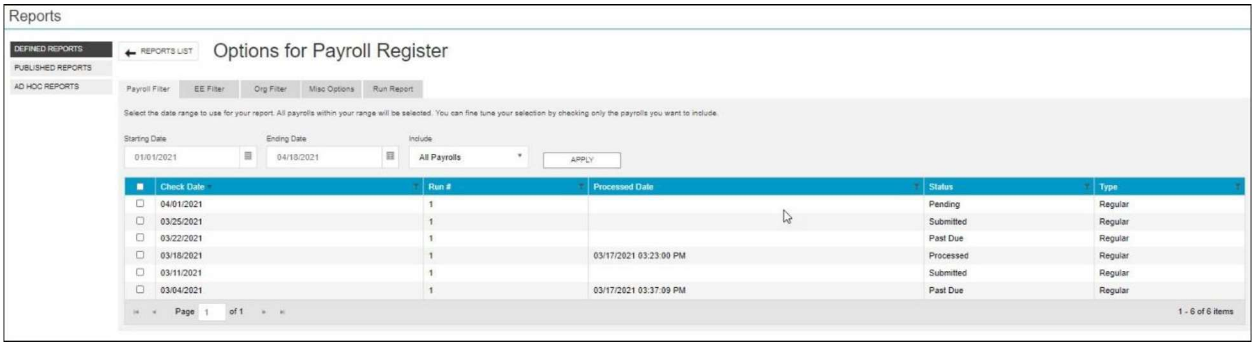
Published reports are reports that are generated in Evolution Classic and sent to Evolution Payroll using VMR.

Defined Reports

Defined reports are company level reports that can be generated by the user on demand in Evolution Payroll. These reports must be set up for the company ahead of time, by the service bureau. Refer to the Appendix at the end of this section for a list of available reports that can be generated in Evolution Payroll.



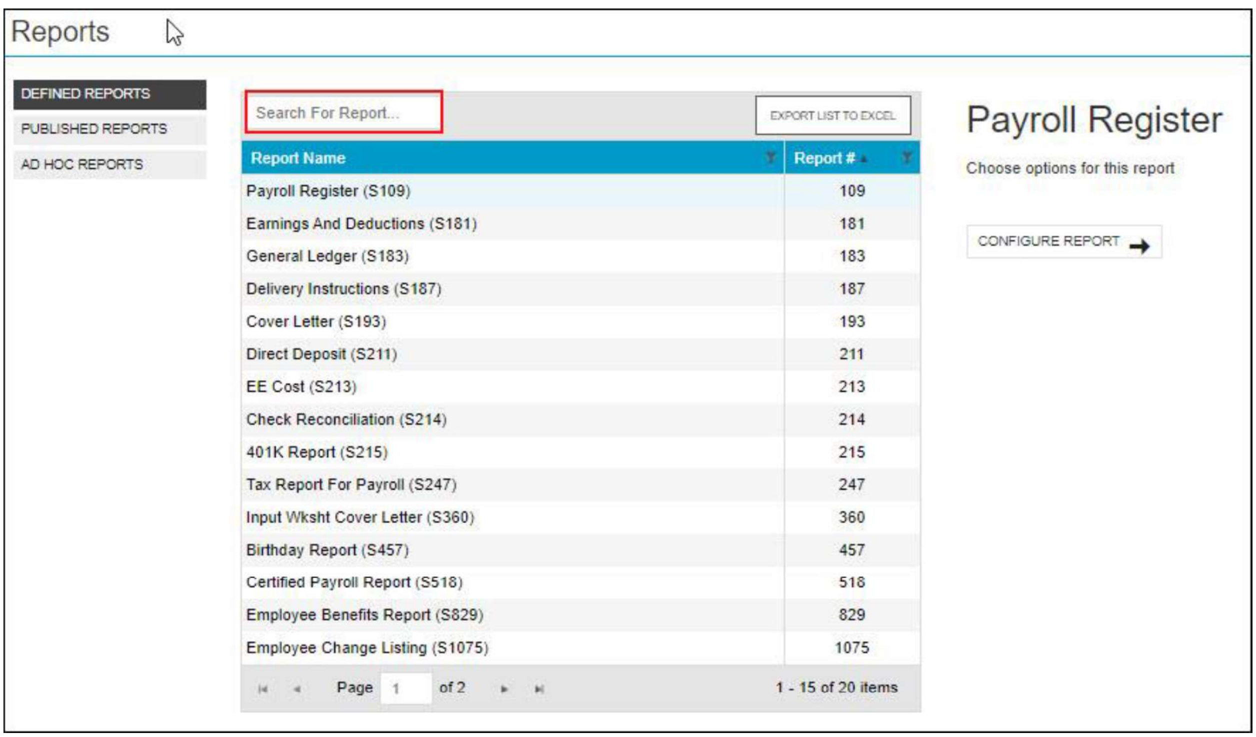
1. Select the report from the list.
2. Click the **Configure Report** button.
   Result: The parameters screen opens for the report being configured.



1. Click the tabs above the grid to access the report parameters. Each report can be filtered by Payroll, Employee (EE), and Organization Level (Org). Parameters on each tab are specific to the report that is being generated.
2. Click the **Reports List** button to return to the previous screen listing the Defined Reports.

Searching for a report

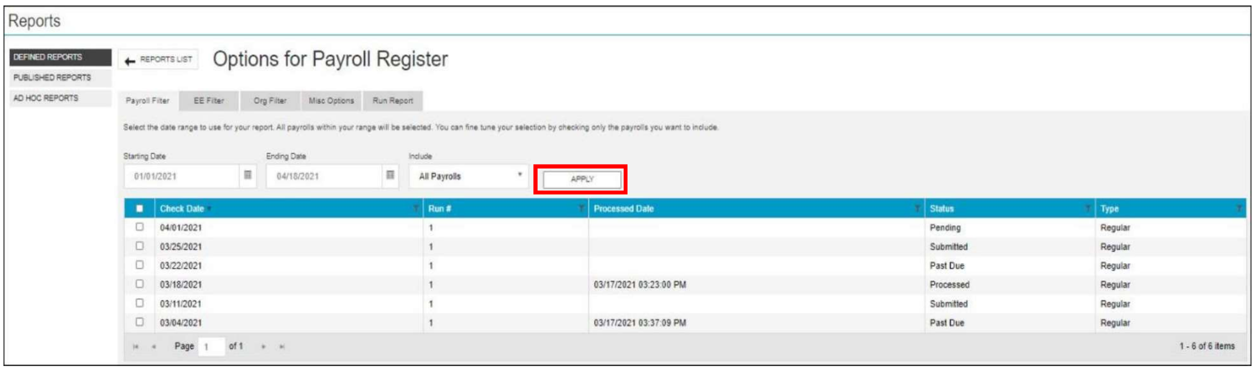
Users can search for a specific report by using the **Search for Report** tool at the top of the table, or by using the filters as described below.



Generating a Report

To generate a report from the Defined Reports screen:

1. Select the report from the list of the Reports.
2. Click the **Configure Report** button.
3. On the **Payroll Filter** tab select the Starting Date and Ending Date to filter the payrolls to a specific date range (optional) or use the **Include** dropdown list to select from displaying All Payrolls or Processed Payrolls only.



4. Click **Apply** to return a list of payrolls based on the filters selected.
5. Select the payroll(s) for which to run the report.

Note: Users must select at least one payroll to be able to select other filters and parameters or generate the report.

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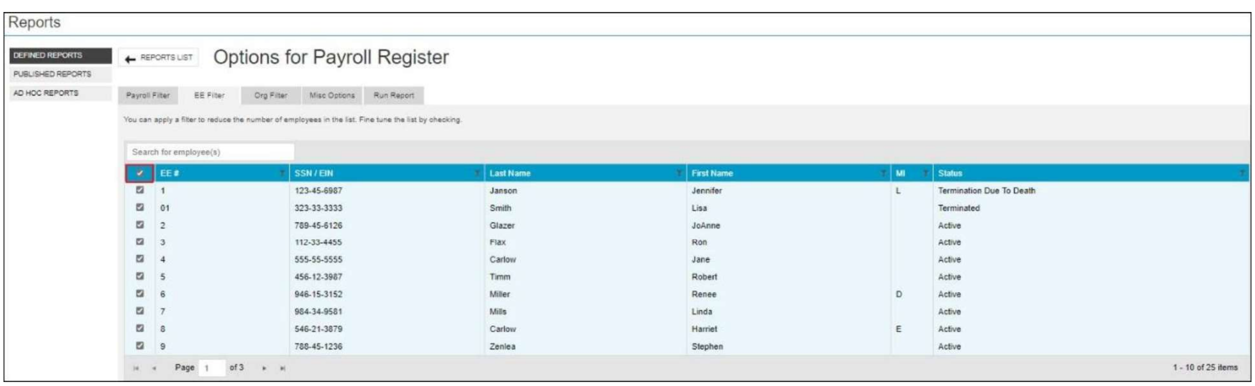
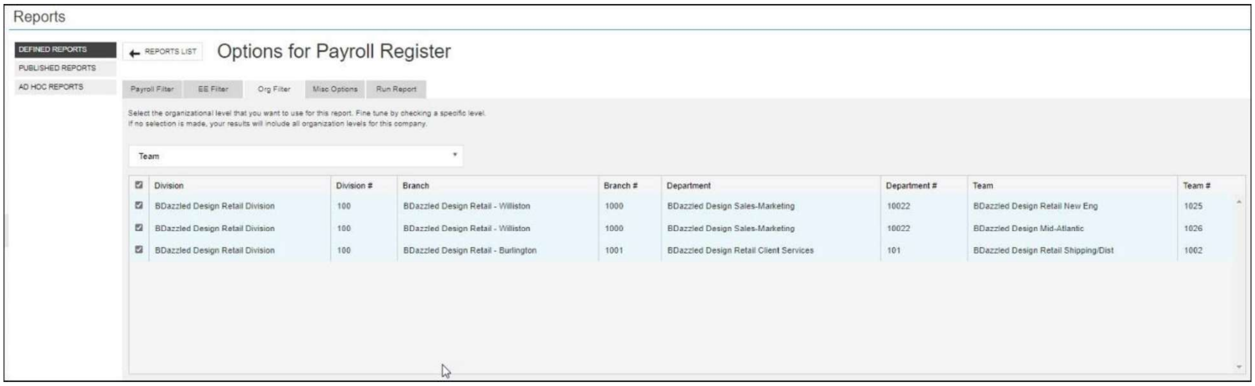
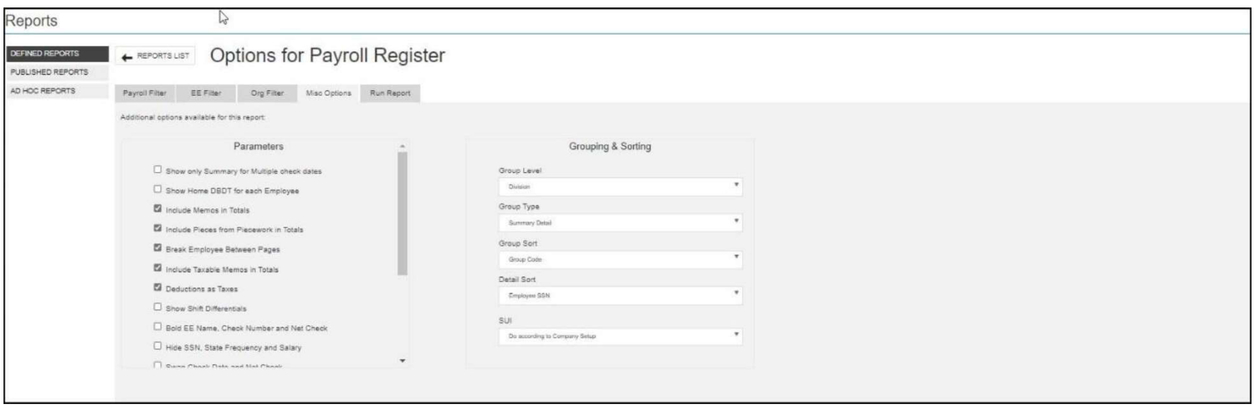
6. Click the **EE Filter** tab to select or deselect employees from the report or click the top box in the far-left column to select all employees.



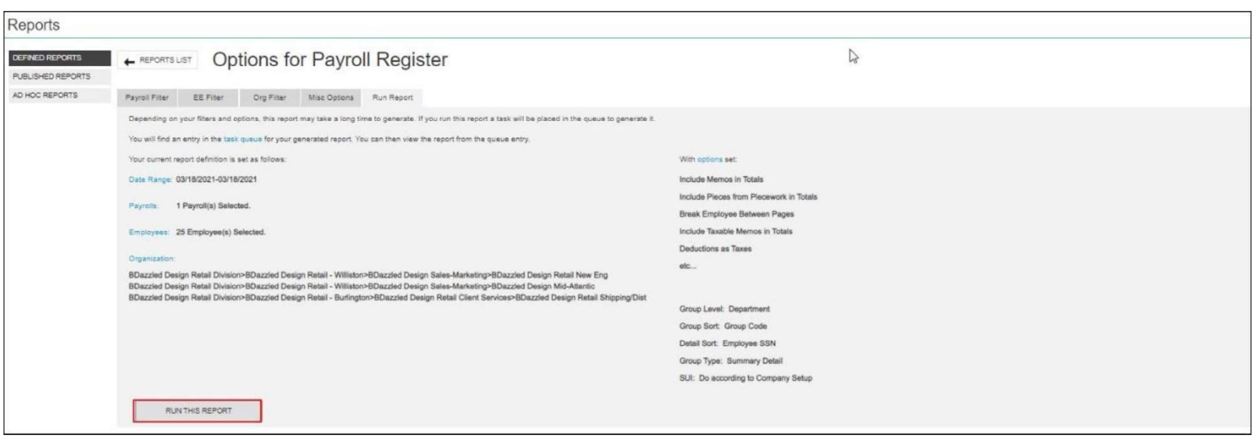
7. Click the **Org Filter** tab to filter by organization (D/B/D/T) level.



8. Click the **Misc. Options** tab to update parameters specific to this report.
9. This screen offers instructions for running the report, as well as grouping and sorting methods to choose from.



10. Click the **Run Report** tab to verify report settings.



11. Click Run This Report.

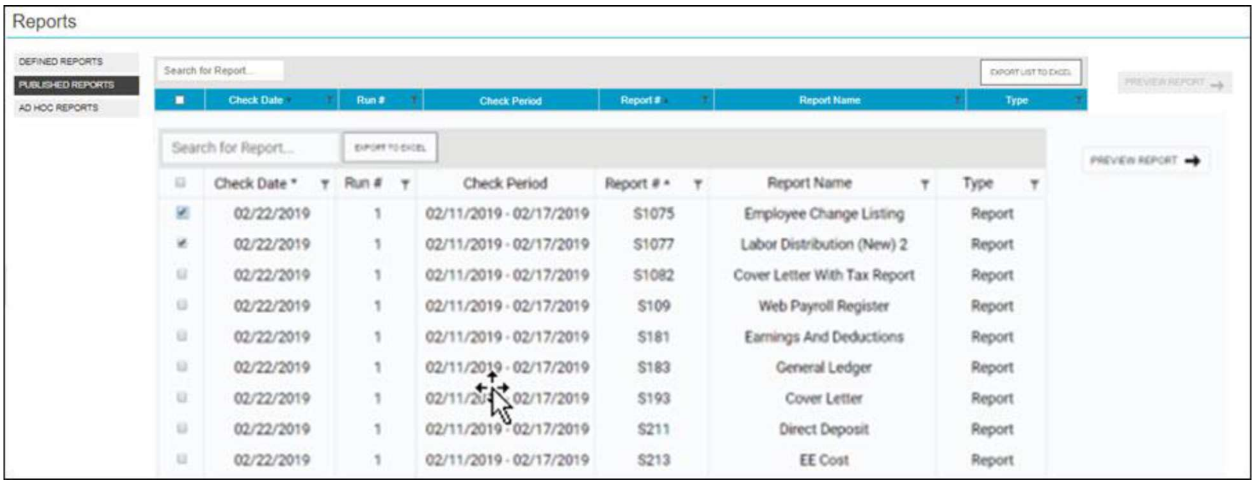
12. Click the **Task Queue** 

symbol once the report is generated to view and print the report.

Published Reports

The Published Reports screen offers access to reports, tax returns and ASCII files sent via the Virtual Mail Room (VMR) to Evolution Payroll. To display a preview of a Published Report,

1. Click the **Reports** Menu to open.
   Result: The Published Reports screen opens.



To preview, save, or print a published report,

2. Check the box in the left-hand column of the table to select the report(s) to be viewed, saved, or printed.
3. Click the **Preview Report** button to open a full-sized preview on a new screen.
4. Use the Resizing tools in the preview window, to zoom in or out to preview the report.
5. If more than one report is selected, use the arrows at the bottom of the Preview window to navigate between reports.
6. Click **Save** at the top of the Preview screen to save the report(s) to your hard drive and/or to open the report you are currently working on.
   Result: The report(s) will be saved to your device.
7. Print as normal from the **File** menu in the Windows Menu bar.
8. Click the **Reports List button** to return to the screen listing the Published Reports.

Ad Hoc Reports

Evolution Payroll contains an Ad Hoc Reporting feature, with which users can add a new Ad Hoc report, edit an existing Ad Hoc report, and run an Ad Hoc report.

Ad Hoc reports are executed at the users' discretion and can be customized. Capabilities include:

- Adding / removing columns
- Defining column headers and captions
- Filtering on any field (not just those in the visible columns)
- Grouping by fields
- Completing selected summary tasks in grouping such as Count, Sum of Integer Values
- Creating calculations based on columns in the reports
- Exporting the report results to Microsoft Excel

There are three general categories of Ad Hoc Reports:

- Ad Hoc - Payroll (S1132)
- Ad Hoc - Employee (S1134)
- Ad Hoc - Company (S1153)

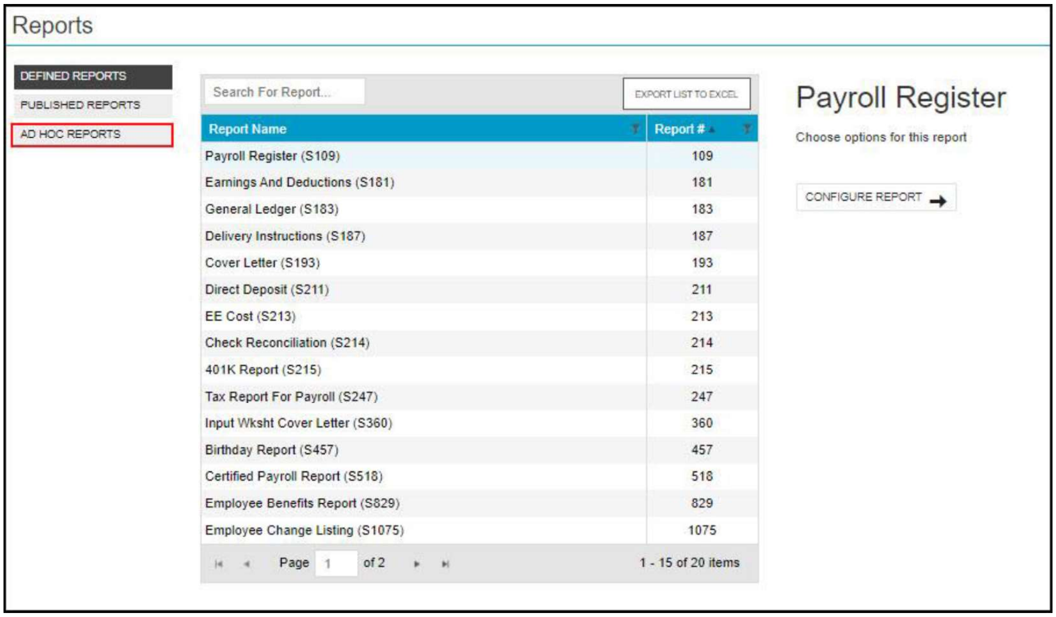
These reports serve as templates and can be selected and used as a base Ad Hoc report to which modifications can be made and saved with a new report name.

Security Settings

Users must be granted security privileges to use Ad Hoc reports in Web Payroll. Talk with your service bureau to use Ad Hoc reports.

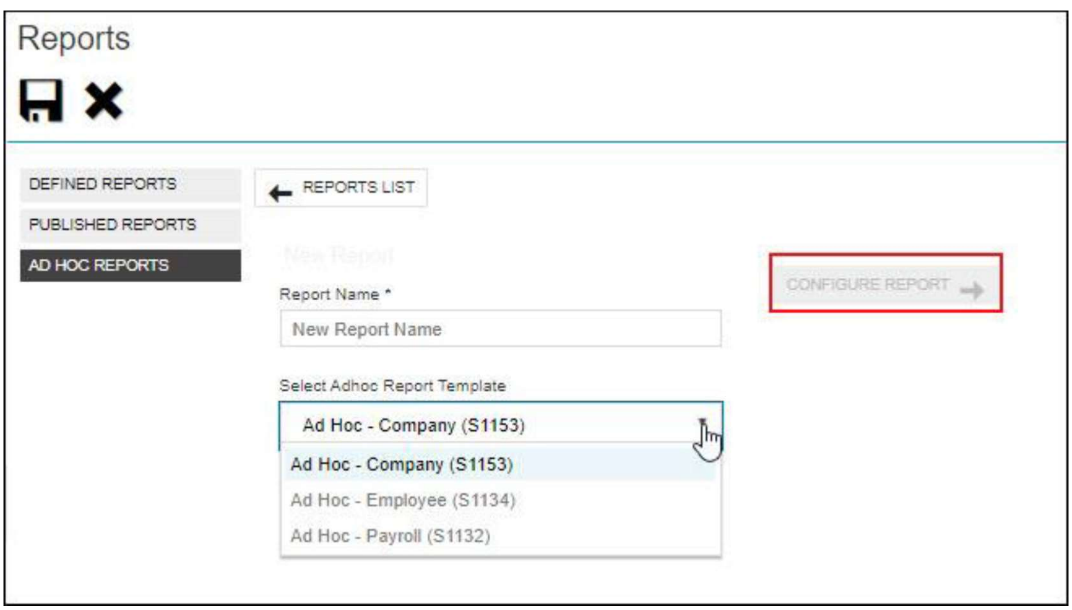
Adding a New Ad Hoc Report

1. Click the **Reports** menu to open.
2. Click **Ad Hoc Reports** in the Menu bar.

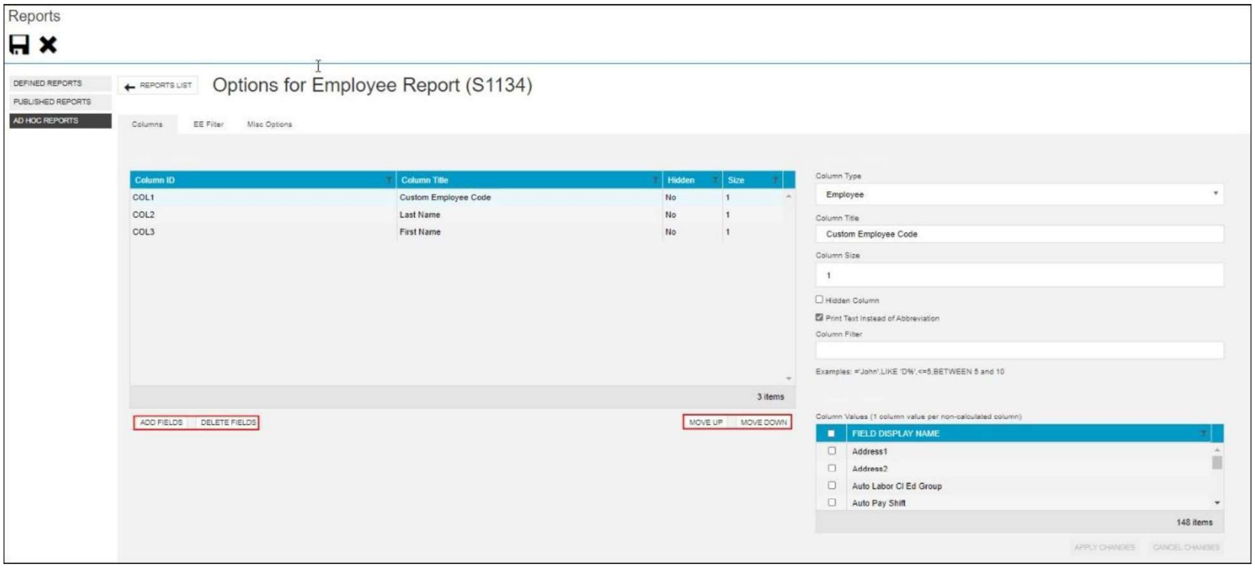


There are three standard Ad Hoc Report templates (Company, Employee, and Payroll) listed on the screen.

3. Click the large **plus sign** in the header.
4. Enter a Report Name for the new report.
5. Select a template on which to base the new report (the default template is Company).



6. Click the **Configure Report** button, which becomes active when a template is selected.



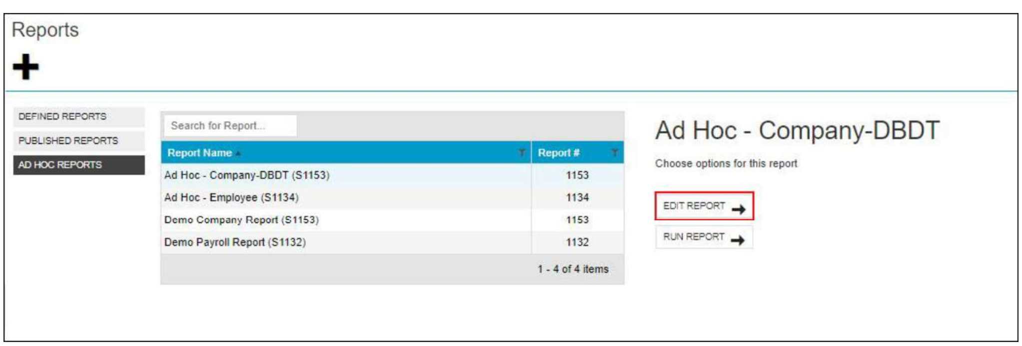
7. Click the buttons at the bottom of the screen to add or delete columns, or to move columns up or down.
8. Click **Add Fields** to add a **column** to the table.
   a. The column properties on the right-hand side of the screen become active.
   b. Enter the information about the column being added.
   c. Select the column values to define the information that will be populated in the columns.
9. Click **Apply Changes** or **Cancel Changes** at the bottom of the Column properties sections.

The tabs contain parameters to set for generating the report. The number of tabs available is dependent upon the type of report selected.

10. Click the **Sorting** tab to set additional parameters for the report.
11. Click the **Save** or **Cancel** symbol in the header when finished.

Editing an Existing Ad Hoc Report

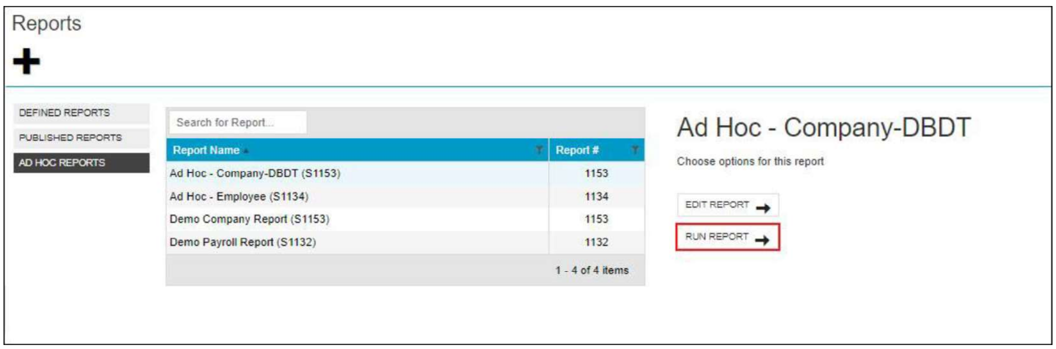
1. Click the **Reports** menu to open.
   Result: The Defined Reports screen opens.
2. Click **Ad Hoc Reports** in the menu bar.



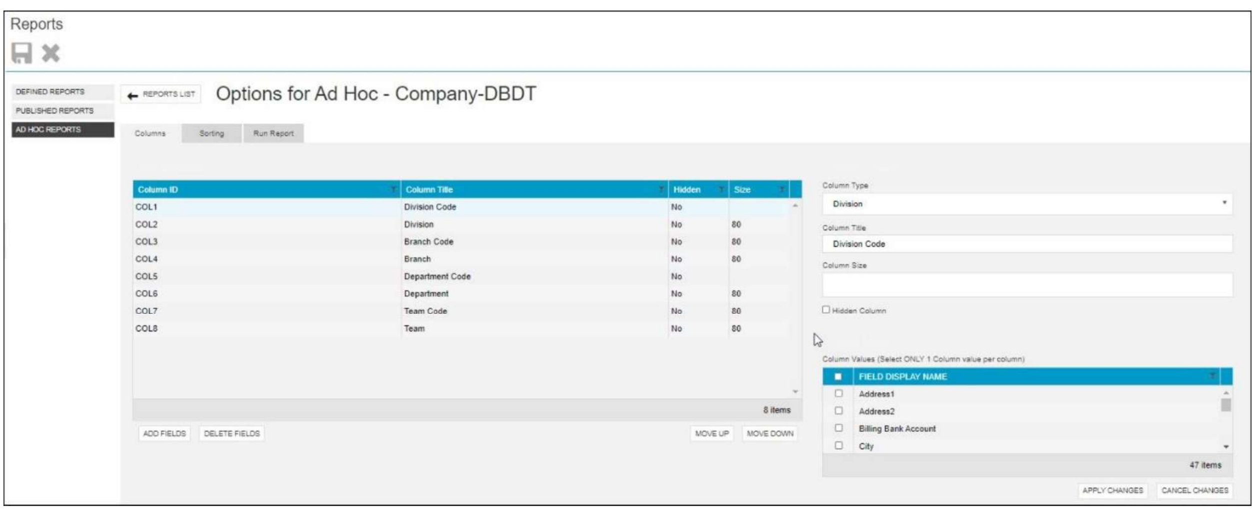
3. Select the Ad Hoc report from the list that is to be edited.
4. Click **Edit Report**.
5. Make any changes to the report parameters.
6. Click **Apply Changes**.
7. Click the **Save** symbol in the header.

Running an Ad Hoc Report

1. Click the Reports menu to open.
   Result: The Defined Reports screen opens.
2. Click **Ad Hoc Reports** in the menu bar.



3. Select the Ad Hoc report from the list.
4. Click the **Run Report** button.



5. Click each tab to set up all report parameters.
6. When complete, click the **Run this Report** button on the Run Report tab.
   Result: The system displays a confirmation message at the top right of the screen that your report task has been added to the queue.

7. Open the **Task Queue** to view or print the report from the Task Queue once the Ad Hoc report is generated.

Note: To create the report in Excel, save the file as an ASCII format and then convert it to Excel.

Ad Hoc Report Restrictions

Note the following restrictions concerning Ad Hoc reports:

- Report orientation is landscape only with a maximum of 133 bytes or characters.
- Reports may contain as many columns as can fit into a horizontal row of 133 characters.

Note: If a field is added that extends the row length beyond 133 characters, the report may or may not execute. If it executes, truncation of all data beyond the 133rd character will take place.

- There is no word or column auto-wrap to the next line.
- The Output ASCII File Name and Add to Existing File features are not active.
- The Duplexing check box is active. If selected, and the printer supports duplex printing, output will be printed on both.

The Reports Menu - Appendix

Reports - Defined Reports

Report
401(K) Report (S215)
ACA Eligibility Analysis Report (S2713)
ACA FTE Report (S2711)
ACA Rule of Parity Test Report (S2834)
Birthday Report (S457)
Certified Payroll Report (S518)
Check Reconciliation Report (S214)
Check Stub Detail Report (S2590)
Compensation Detail Report (S601)
Contact Report (S452)
Cover Letter Report (S193)
Cover Letter with Tax Report (S1082)
Direct Deposit Report (S211)
Employee Audit Report (S1075)
Employee Change Listing Report (S539)
Employee Change Listing Report (New) (S1075)
Employee HR Date Report (S457)
Employee Profiles Report (S263)
GL Export Report (S348)
General Ledger Report (S183)
HR Alert (S759)

Report
HR Mailing Labels (S449)
HR OSHA 300 Report (S462)
HR OSHA 300A Report (S567)
HR OSHA 301 Report (S451)
HR OSHA Injury Report by Cost (465)
HR OSHA Injury Report by Home Dept. (S453)
HR OSHA Report by Body Part Code (S466)
HR OSHA Report by Injury Code (S464)
HR OSHA Report by Status (S568)
HR Personnel Report (S463)
HR Veterans Report (S714)
HR Workers Compensation Code Report (S454)
Inactive Employees Report (S2731)
Individual Earnings Report (S431)
Input Worksheet (S351)
Job Costing Report (S229)
Labor Distribution Report (New) (S1077)
New Hire Pending Report (S292)
New Job Costing Report (S554)
Payroll Register Report (S109)
Period Summary Report (S404)

Report	Report
HR EEO-1 Report (S455)	Personnel Register (S344)
HR EEO-1 Section D Employment Data Report (S1537)	Portrait Input Worksheet (S262)
HR EEO-4 Headcount Report (S566)	Tax Notices Report (S341)
HR EEO Ethnic ID Report (S467)	Tax Report for Payroll (S247)
HR EEO Standard Report (S450)	Taxable Wages for Payroll Report (S236)
HR Emergency Listing by Emergency	Time Off Register Report with Hours (S920)
HR Employee Review Report (S850)	Workers' Compensation Report (S217)

For information about the parameters for particular reports, refer to the specific report document in the Asure Customer Portal.

Reports - Published Reports

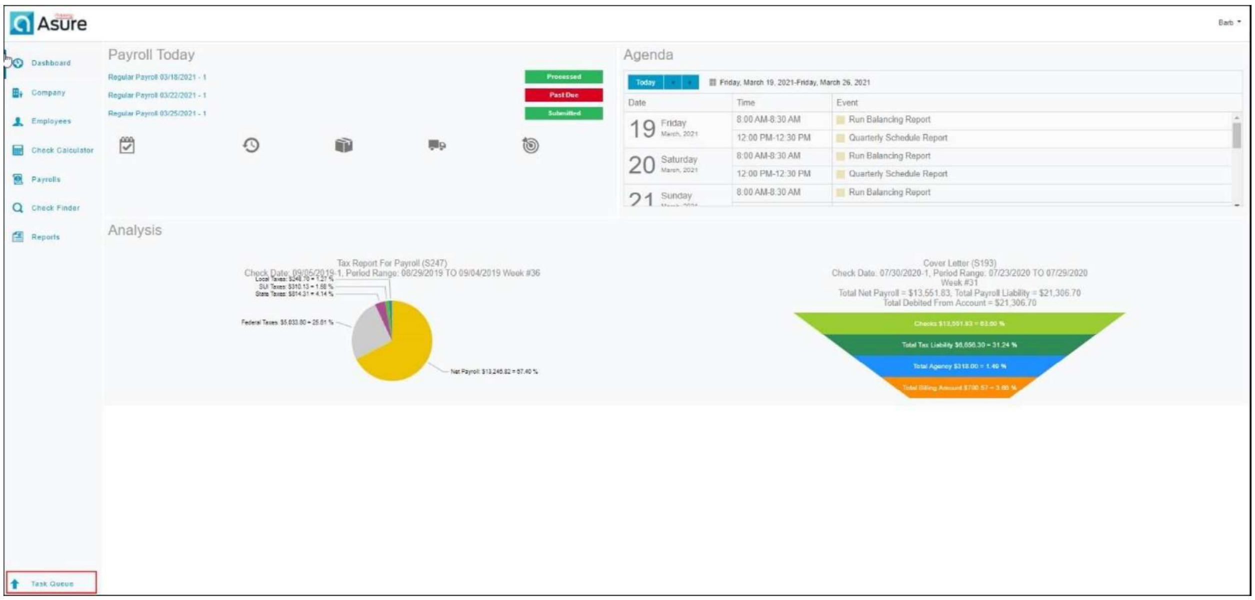
Column Name	Description	Example
Check Date	The date of the payroll from which the report was generated. For Tax Returns, this is the last date entered on the tax return screen when tax returns are processed.	1/20/2015 – Check Date 12/31/2014 – Tax Return Date
Run #	The payroll run from which the report was created. Tax Returns will show a run number of 0	1, 2, 3, etc… 0
Check Period	The batch period of the payroll for which this report was generated. Tax Returns will not display a batch period.	1/10/2014 – 1/16/2015
Report #	The Evolution report number for this report.	S193, S257, S356, etc.…
Report Name	The name of the report or tax return.	Cover Letter, SUI Tax Wages by Quarter, etc…
Type	The type of document displayed	Report, Tax Return

The Task Queue

The Task Queue contains all tasks for the current user. Tasks marked as read remain in the Task Queue for three (3) days before they are automatically deleted by the system. Unread tasks remain in the Task Queue for 10 days before they are automatically deleted by the system. ACH files and tax payments remain in the Task Queue for 10 days, whether they have been viewed or not.

The Task Queue has a table view listing of tasks, which you can use to display report results or more details about each task.

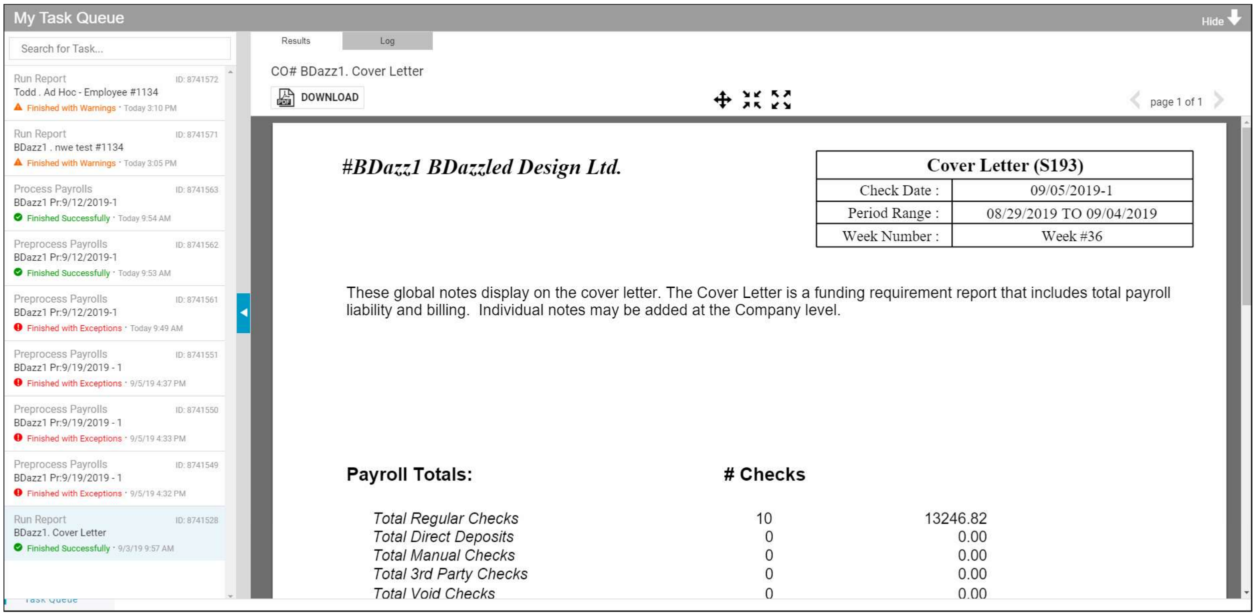
The Task Queue can be viewed from the Dashboard using the two navigation methods shown in the Navigating Web Payroll section of this document, or by clicking the arrow in the bottom left-hand corner of any screen in the application.



Result: The Task Queue opens listing the recent tasks run on the workstation.

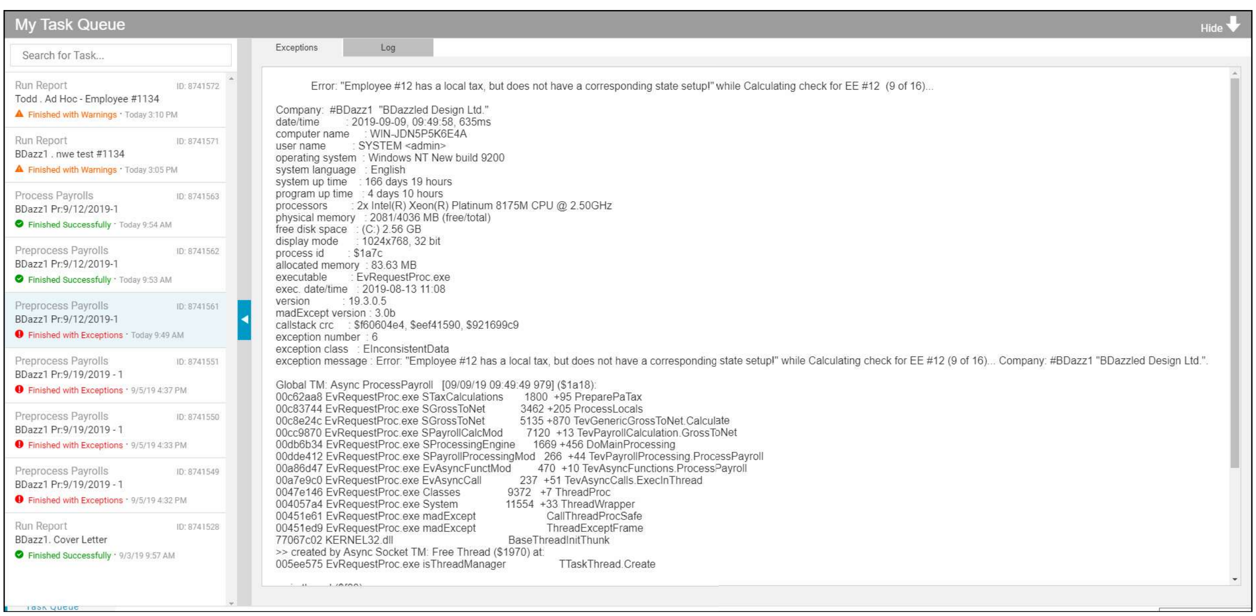
To review the report results, select a task (row) in the Navigation Panel on the left-hand side of the screen. The report results appear in the Preview pane in the right. In the screen above, the Preview Pane shows a preview of *The Cover Letter Report (S193).* The Status shows as **Finished Successfully** in the Navigation Panel.

If a task finishes with exceptions, those can also be viewed in the Preview section below the task list.



To review the report results, select a task (row) in the Navigation Panel on the left-hand side of the screen. The report results appear in the Preview pane in the right. In the screen above, the Preview Pane shows a preview of *The Cover Letter Report (S193).* The Status shows as **Finished Successfully** in the Navigation Panel.

If a task finishes with exceptions, those can also be viewed in the Preview section below the task list.



Click Hide in the upper right-hand corner of the screen to close the Task Queue and return to the previous screen.

Note: a task might return any of the following tabs, which are only shown if applicable to the specific task: Results / Exceptions / Warnings / Messages / Notes / Log.

Click **Save** to save a local copy of the Results / Exceptions / Warnings / Messages / Notes / Log.

* Saving can only be applied to the active tab.

Viewing/Downloading Reports

Users can view multiple reports that were run as part of processing the payroll, which enables the user to download all reports, as a group, in a .zip file format.