# Evolution Payroll<sup>®</sup> User Guide v 2.2



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# **Evolution Payroll Getting Started**

Evolution Payroll is a dynamic Payroll, HR, and Tax Management system developed by payroll and HR service bureau veterans for the Human Capital Management (HCM) industry.

It is a Web-based application that facilitates remote client tasks such as adding new employees, existing employee maintenance, managing and processing payrolls, running reports and more, via the Internet using a Web browser.

## System Requirements

### Screen Resolution

The Optimum Resolution for Evolution Payroll use is 1920 x 1080. Evolution Payroll is designed to fit most screens and screen resolutions by using a Responsive Web Design (RWD), which allows the components within the application to be moved and resized based on screen size and resolution. The minimum supported resolution is 1360 x 768.

### **Internet Browser**

Evolution Payroll is designed to leverage the features of the most current browser versions. For the best possible experience, we recommend using one of the browsers listed below.

Browser	Supported Version
Internet Explorer	10.0+
Firefox	28.0+
Chrome	33.0+
Safari	7.0+



# Security Settings

Access to Evolution Payroll is granted in Evolution. Users may be granted access to as many or as few menus and functions in Evolution Payroll as the service bureau determines appropriate.

### **User or Group Security Rights**

Additional settings specify whether individual users have full access, read-only access, or no access.

- 1. Go to the Admin Security Users (or Groups) screen, and select the user.
- 2. Click the **Details** tab **User Rights** button.
  - Modify settings by right-clicking the green plus sign / red minus sign, and selecting Enabled or Disabled.
  - Click the small **plus signs** (far left) to open a menu "tree". Everything can be selected individually to give or remove permissions to users.
- 3. Click the black plus sign next to Employee to open related topics
- 4. Right-click the item to be changed from standard group rights

Note: each item must be selected individually.

User Security rights (Sample)			
System templates:	SB templates:	•	🕞 Save
Admin (Disabled) (Disabled: 6) [     Aux Payroll (Disabled) (Disabled: 2)     Aux Payroll (Disabled) (Disabled: 18) [     Company (Enabled) (Disabled: 18) [     Auto Labor Distribution (En     Additional info (Enabled) (FROM     Auto Labor Distribution (En     Auto Locals (Enabled) (FROM U     Auto Labor Distribution (En     Auto Locals (Enabled) (FROM U     Auto Locals (Enabled) (F	: 11) [FROM GROUP] [FROM USER] FROM USER] (FROM USER] (FROM USER] (FROM USER] (USER] (USER] (USER] (USER] (USER] (FROM USER] (FROM USER] (FROM USER] (FROM USER] (FROM USER] (FROM USER] (FROM USER] (THOM GROUP] (THOM GROUP] FROM GROUP] (FROM GROUP] (FROM GROUP]	E	Cancel

**Enabled** - the selected item is visible in the Edit Employee section of the Employees screens in Evolution Payroll. The user can Add/Edit and Delete Information.

**Read-Only** - the selected item is visible in Employees screens in Evolution Payroll. The Add button is disabled, and Edit and Delete are not functional for that item.

**Disabled** - the selected item is not visible in the Employees screens in Evolution Payroll.



# Logging into Evolution Payroll

Evolution Payroll uses the Enhanced Security Level setting from the SB Admin – Service Bureau - Flags & Settings tab in Evolution. Currently there are three levels of enhanced security to choose from. The table below highlights the levels and their requirements.

#### Low

- Requires only a password to login
- Users must set up three questions / answers
- Forgot password functionality is available
- 3 invalid login attempts will lock the account (forcing the user to answer the security questions)
- 3 invalid answers to the general security questions will block the account

### Medium

- Requires a password to login
- Users must set up three questions / answers
- The user is asked to define two Extra Security Questions / Answers in extended login
- Forgot password functionality is available
- 3 invalid login attempts will lock the account (forcing the user to answer security questions)
- 3 invalid answers to security questions will block the account

### High

- Requires a password to login
- Users must set up three questions / answers
- The user is asked to define two Extra Security Questions / Answers in extended login
- Forgot password functionality is *not* available
- 3 invalid login attempts will block the account

In addition to establishing the level of enhanced security, other security considerations must be set on this screen.

Password Duration - how often passwords are required to be changed

Minimum Password Length - minimum number of characters the password must contain

Enforce Mixed Password - new passwords must contain at least one alpha, one numeric, and one special character Send Screenshot with Error – the system automatically sends a screen print when an error message is received.

7



General Info Flags & Settings Cover Letter Notes	Tax Cover Letter Notes   Invoice Notes   VMR	R Confidentiality Notice   T	Terms of Use External Logins
Default Check Format * Pressure Seal Letter Greatland (New) Misc Check Format * Pressure Seal Letter Greatland (New) Auto Save * 3	C Anexsys     C Bank of America     G Batch Provider     Use PreNote     G Yes     C No     FE	ust Impound Type * ax Impound Type * irect Deposit Impound Type lling Impound Type * 'orkers Comp Impound Type of C Yes	Internal Check ACH changes No
MICR Vertical Adjustment	Bank Check To Bank Check To C Wells Fargo C Citibank Ta: C Wells Fargo/Keybank C Wells Cashiers Ta: C BBI C Union Bank of California	otal ACH File Amount* otal ACH File Limitations* ax Exception Impound Typ ax Payment Client	5,000,000.00 N/A • Wire Transfer •
Enforce Mixed Password Send Screenshot With Error Enforce mandatory DDB for W2 employees Yes No Mark Liabilities as Paid Default Yes No	Days Prior To Check Date for Backdat	te	

Once security requirements have been established in Evolution,

1. Open a Web browser and enter the URL provided by iSystems.

evolutio	<b>n</b> <sup>o</sup>	
Secure User Login Enter your creations for access User Name Password I forget my password Sign In	Please sign in with your credentials to continue	

- 2. The first time a use logs in, enter the Username and Password assigned to them by the service bureau.
- 3. Click Sign In.



**Result**: a pop-up box opens regarding setting up security questions.

4. Click **OK**.



5. Select Questions 1, 2, and 3 from the dropdown lists and provide answers to the questions.

HCM Technology Secure User Legin	n°			
User Name Rflax	Provide Security Validation Question 1 *	Answer 1 *		
	- Select Question -	Required		
	Question 2 *	Answer 2 *		
	- Select Question - •	Required		
	Question 3 *	Answer 3 *		
	- Select Question - •	Required		

- 6. Click Submit.
- If the Enhanced Security field in Evolution has either a medium or high value, the user will be prompted to create and answer two additional security questions, which will be asked each time the user logs in.
   Result: the Dashboard opens.

)	Payroll To	day				Agend	la				Selection →	
oard	Regular Payroll 07/3 Regular Payroll 08/0				Submitted	Today	🔹 🕨 🔠 Wednesday, Au	gust 05, 2015-Wednesday, Au	gust 12, 2015		Code WEB1150	
	Regular Payroll 08/0				Submitted On Hold	Date	Time	Event			Name	
<b>Ý</b> ny	<b>2</b>	•	Ĩ		1						D&L Services (HCM)	
	06/11/2015 - 1 06/11/2015 - 1	03/17/2015									Company	
	06/11/2015 - 1	03/17/2015	03/17/2015	03/17/2015							Code WEB1150	
rees	02/19/2015 - 1	03/17/2015									Name	
ļ											D&L Services (HCM)	
₽Q	Published	Reports				Analysis						
	Labor Distribution (*	New) (S1077)										
	Cover Letter With T						Check Date: 08/06/20	Tax Report For Payroll ( 15-2. Period Range: 07/26/	(S247) 2015 TO 08/01/2015 Week #32			
-	Cover Letter With T		2)									
	Payroll Register (S1 Earnings And Deduc						State Taxes: \$744.96 = 4.92					
°.	Delivery Label (S18											
	Cover Letter (S193)					<	Federal Taxes: \$4,728.83 = 31.20	5-		>		
	Workers Compensa											
	Taxable Wages For Tax Report For Pay		ate (S236)						Net Payrolt \$9,435.88 = 62.27 %			





### **Forgotten Password**

If the user forgets their password, click I forgot my password on the login screen.

• A new screen opens requiring the user to enter their username and click **Submit**.

Once submitted, three security questions displayed on the screen must be answered to continue.

	Provide Security Validation Answer these questions to verify journeed
Submit your user name to start. User Name	Question 1 Text
	Question 2 Text
Bubmit	Question 3 Tent
Dauma	Submit

**Note:** If a user answers any of the security questions incorrectly three times, s/he will get a message that the account is blocked, and instruct them to contact their service bureau.

- After answering all three security questions, the user clicks the **Submit** button.
- A new screen opens, on which the user is to set up a new password.

Secure User Login	Forgot Password
Submit your user name to start. User Name Isanterre	Set Your Password Mainmun length must not be less than 2 charaders. New Password
	Confirm Password
	SetPassword

- The user enters and confirms the new password, and clicks the **Set Password** button.
- The main Login screen opens, where the username and new password are entered. **Result:** The Evolution Payroll Dashboard opens.

**Note:** If an account becomes blocked and is then unblocked by Admin, user must redefine questions/answers upon next login.



### Terms of Use

Service bureaus can define the Terms of Use for their internal and external users. These Terms of Use are presented when users first log in, after the Terms of User are entered (or changed) on the SB Admin - Service Bureau - Terms of Use tab.

When users log in and see the Terms of Use, they must accept the terms to use Evolution Payroll. Once accepted, the Terms of Use are not presented again unless a change is made by the service bureau to the terms. To accept the Terms of Use, click the **Accept** button.

- New users are presented with the Terms of Use after the user has selected three security questions and answers.
- Existing users will see the Terms of Use upon initial login or if the Terms of Use have changed.

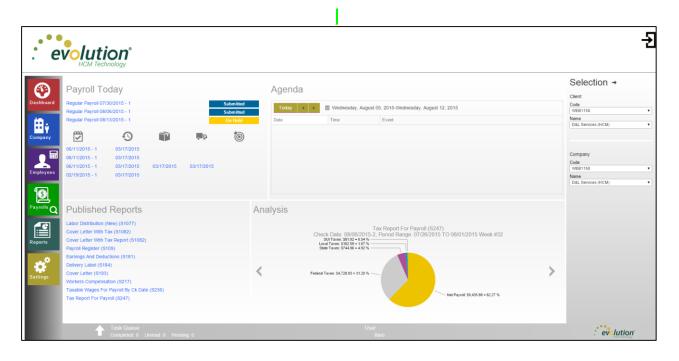
**Note:** If the service bureau has not entered anything in the Terms of Use tab, nothing needs to be accepted by the users.

When the user accepts, the Dashboard screen opens.



# The Dashboard

Information on the Evolution 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.



### Menu Bar

Use the Menu Bar on the left-hand side of the screen to navigate within Evolution Payroll, similarly to the Menu Bar in Evolution. 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 status for each payroll is shown to the right of the payrolls.



Payroll To	oday			
Regular Payroll 07	/30/2015 - 1			Submitted
Regular Payroll 08	/06/2015 - 1			Submitted
Regular Payroll 08/	/13/2015 - 1			On Hold
	•		, p	1
06/11/2015 - 1	03/17/2015			
06/11/2015 - 1	03/17/2015			
06/11/2015 - 1	03/17/2015	03/17/2015	03/17/2015	
02/19/2015 - 1	03/17/2015			

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

Symbol	Description
~	Check date of the payrolls listed below
9	Processed date of the payrolls listed below
	Packaged date of the payrolls listed below
~ B	In Transit date of the payrolls listed below
1	Date Delivered of the payrolls listed below

### Agenda

The agenda functions similarly to the User Scheduler, 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 Evolution to access the Agenda in Evolution Payroll.

Today 🖌 🕨 🕅 Wednesday, August 05, 2015-Wednesday, August 12, 2015						
Date	Time	Event				
06 Thursday August, 2015	10:00 AM-10:30 AM	tyuytutyu				
07 Friday August, 2015	7:00 PM-7:30 PM	Unit test 4396				
08 Saturday August, 2015	10:00 AM-10:30 AM	tyuytutyu				
10 Monday August, 2015	10:00 AM-10:30 AM	tyuytutyu				



# **Published Reports**

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

Published Reports	***
Employee Change Listing (New) (S1075)	
Labor Distribution (New) (S1077)	
Labor Distribution (New) (S1077)	
Payroll Register (S109)	
Payroll Register (S109)	
Delivery Label (S184)	
Delivery Label (S184)	
Cover Letter (S193)	
Cover Letter (S193)	
Direct Deposit (S211)	

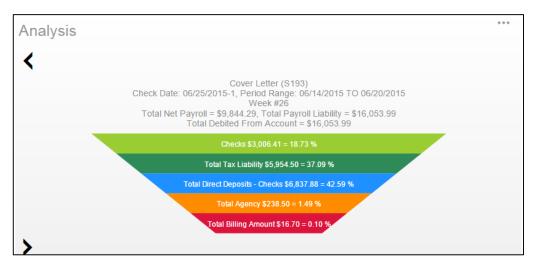
# Analysis

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  $\square$  or right  $\square$  arrow to scroll to the next view.

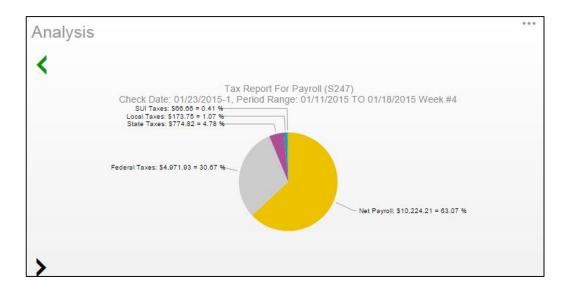
The Analysis tile always shows data for the last processed payroll and is updated when next payroll is processed. For the graphs to be displayed, the reports must be properly configured to display on the dashboard.

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.





### Setting company reports to show on the Dashboard

- 1. In Evolution, go to Reports Setup Reports.
- 2. Select the company from the list on the left-hand side of the screen and click the **Details** tab.
- 3. Click the **Plus** sign to add a new record.
- 4. Select the report to be added.
- 5. Update the Print Frequency, Priority to Print, and Number of Copies as needed
- 6. Select the option to **Display on Dashboard**.

Report	Payroll Processing Print Settings
Report* Cover Letter (S193)	Print Frequency* Every Scheduled Pay
Report Print Name* Cover Letter	Week Number Month
#Name: Cover Letter #Ticket: #Author: Dimitry Shapovalov #Date: #Description: This report is the cover letter	Number of Copies*           1         Image: Summarize         Duplexing
Options	
Output ASCII file name	··· Add to existing file
🗖 Favorite 🦷 Hide for Remotes 🥅 F	rint with Adjustment Payrolls Only
Override Report Mail Box	
Report Parameters	💷 Run Reports

**Note:** Print Frequency must be set to Every Pay to be updated on the Dashboard each time a payroll is processed. Number of copies must be set to 1 or more.



## **Selection Pane**

The Selection Pane along the right-hand side of the screen is where the Client and Company are selected from the dropdown list to view company-specific information. When the Dashboard first opens, the default client shown is the one with the lowest Internal Client Number. The Selection Pane is accessible in every screen within Evolution Payroll.

Note: When a different Client/Company is selected, the user is automatically returned to the Dashboard screen.

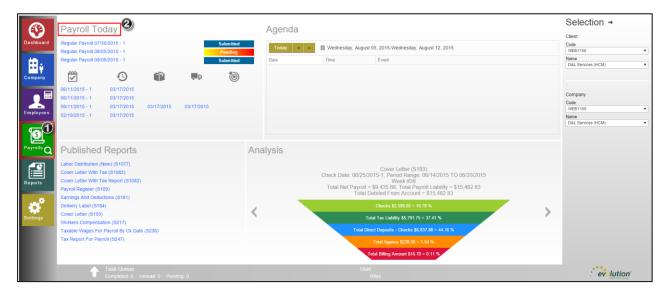
Selection →	
Client	
Code	
Webtest	•
Name	
Webtest - ESS/WC	•
Company	
Code Webtest	
Name Webtest - ESS/WC	Ŧ
evolution	



# Navigating Evolution Payroll

Navigate within Evolution 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. When tabbing, the next screen will open when the **TAB** key is pressed in the last field on the screen. To navigate to the topic and screens desired from the Dashboard, users can

- 1. Click the Menus, or
- 2. Click the **Tile** titles



### The Employee Menu

After clicking the Employee menu, click the active button (the button that is not grayed-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. Click the active button to access the next screen, which offers a different view and lists the menu items within the Employee menu.

mploy -	/ees					
arch for Emple	oyee					Preview
EE# Ţ	Last Name 🍸	First Name	T State	T Zip Code	T Status	Goldie Greenburg 3
1	Lewis	AI	NY	10066	Active	Last Name: First Name:
2	Smith	Bill	MA	10022	Active	Greenburg Goldie
3	Greenburg	Goldie	NY	10044	Active	SSN/EIN:
4	Soffer	Harry	VT	05401	Active	982-44-3369
5	Pinkman	Jessie	NY	10011	Active	Status:
6	Bichon	Selma	MA	88855	Active	Active
7	Goodman	Saul	VT	05401	Active	Address: 951 Smith Street
8	Clark	Willie	VT	05401	Active	Ithaca, NY 10044
9	White	Walter	NY	10012	Active	
10	Bigole	Susan	VT	05401	Active	
11	Simon	Simon	NY	11234	Active	
12	Miller	Mary	VT	05401	Active	<b>v</b>



Employees											
Personal	3-Gree	nburg, Goldie ▼ ●SSN * ●EIN *	K Employee Type	e *	Lewis, AI S	mith, Bill Greer	nburg, G	Soldie <sub>Soffer, H</sub>	arry Pinkn	nan, Jessie Bicho	n, Selma 🍾
		982-44-3369	W-2		3			Active			*
Labor Defaults		First Name *		M.I.	Last Name *			Current Hire Date *		Original Hire Date	
Pay		Goldie			Greenburg			02/17/2003			
Federal		Address 1 *					Hire Status	Termination Date		Rehire Eligible *	
State		951 Smith Street					St			Yes	*
Local	hics	Address 2					High	Employment Type *			
Child Support	Demographics							N/A			*
Direct Deposit	bou	City *			State *	Zip Code *		On Call From		On Call To	
	Del	Ithaca			NY 🔻	10044					
Scheduled E/Ds		County			Phone	Extension		ACA Status *			
Delivery								Part Time			
Time Off Accrual		Email									
Notes								Healthcare Coverage * No ER Paid Ins/Not Elig	ible		*
		Birth Date 02/17/2004	Gender * Female	*	Ethnicity * Black Or Africa •	Tribe	2	Dependent Coverage *		Benefit Eligible	
		02/17/2004	1 emaie	•	Diack of Allica ¥		Benefits	No	*	Denetit Eligible	
							Be				
Previous Next								Group Term Policy			
THOMOUS HOAT								GTL Hours		GTL Rate	
								OTETIOUIS		OTE Nale	
								L			

### **Tables**

Several screens in Evolution 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:

earch for Emplo	iyee					Preview		
EE# 🍸	Last Name 🔻 🔻	First Name	T State	T Zip Code T	Status T	Goldie Greenburg		
1	Lewis	AI	NY	10066	Active	Last Name:	First Name:	
2	Smith	Bill	MA	10022	Active	Greenburg	Goldie	
3	Greenburg	Goldie	NY	10044	Active	SSN/EIN:		
4	Soffer	Harry	VT	05401	Active	982-44-3369		
5	Pinkman	Jessie	NY	10011	Active	Status:		
6	Bichon	Selma	MA	88855	Active	Active		
7	Goodman	Saul	VT	05401	Active	Address: 951 Smith Street		
8	Clark	Willie	VT	05401	Active	Ithaca, NY 10044		
9	White	Walter	NY	10012	Active			
10	Bigole	Susan	VT	05401	Active			
11	Simon	Simon	NY	11234	Active			
12	Miller	Mary	VT	05401	Active			
					1 - 12 of 12 items 🖒			

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

**Filtering** – if a column header has a filter **s** 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 Er	nployee				
EE#	🝸 Last Name 🕂	First Name	T State	▼ Zip Code	T Status T
4	Soffer	Harry	VT	Show items with value that:	Active
7	Goodman	Saul	VT	Is equal to 🔹	Active
8	Clark	Willie	VT	vt	Active
10	Bigole	Susan	VT	And 🔻	Active
12	Miller	Mary	VT		Active
				Is equal to 🔻	
				Filter Clear	
					•

The filter symbol remains white to let the viewer see that the filter is being used.

**Column Re-ordering** – click and drag the column heading to re-order the data – for example, click and drag the Zip Code column to view in a different order:

Search for Emp	loyee				
EE# 🝸	Last Name 🕎	First Name 🍸	State 🝸	Zip Code 🛛 🝸	Status 🍸
1	Lewis	AI	NY	10066	Active
2	Smith	Bill	МА	10022	Active
3	Greenba	Goldie		10044	Active
4	Soffer	ilarry	VT	05401	Active
5	Pinkman	Jessie	NY	10011	Active
6	Bichon	Selma	MA	88855	Active
7	Goodman	Saul	VT	05401	Active
8	Clark	Willie	VT	05401	Active
9	White	Walter	NY	10012	Active
10	Bigole	Susan	VT	05401	Active
11	Simon	Simon	NY	11234	Active
12	Miller	Mary	VT	05401	Active

**Sorting** – similarly to 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.

Search for Emp	loyee				
EE# 🍸	Zip Code 🌱 🍸	First Name 🛛 🍸	Last Name 🍸	State 🔻	Status 🗾
1	10066	AI	Lewis	NY	Active
2	10022	Bill	Smith	MA	Active
3	10044	Goldie	Greenburg	NY	Active
4	05401	Harry	Soffer	VT	Active
5	10011	Jessie	Pinkman	NY	Active
6	88855	Selma	Bichon	MA	Active
7	05401	Saul	Goodman	VT	Active
8	05401	Willie	Clark	VT	Active
9	10012	Walter	White	NY	Active
10	05401	Susan	Bigole	VT	Active
11	11234	Simon	Simon	NY	Active
12	05401	Магу	Miller	VT	Active



# 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 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

# New Terminology

There is new terminology used throughout Evolution Payroll that warrants introduction. The table below explains the new terminology that you will see in this document as well as in the application.

Name	Example	Description
Menu Bar	Dashbard	Colored blocks on the left-hand side of the screens that correspond to a menu. Click the menus to be brought to the main screen of the menu selected.

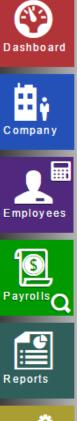


Menu Items	Personal Labor Defaults Pay Federal State Local Child Support Direct Deposit Scheduled E/Ds Delivery Time Off Accrual Notes	Within some of the menus (Company and Employee) there is a sub-menu on the left side of the screen with menu items that pertain to the topics of those menu items. Our example is from the Employees menu.
Sections	Brahus Active   Current Hire Case   Comment Hire Case   Communication Case   Free   Fr	Many of the screens in the application are divided into sections. These sections have headings that separate the information pertaining to the sections.
Tabs	Interest     Interes     Interest     Interest     Intere	There are two types of tabs you will see in the application: Those at the far right- hand side of the screen, and those along the top of the screen. The instructions within this guide will be explicit to direct you to the right tab.



# The Menu Bar

The Menu Bar contains many of the same menus as are in Evolution, based on security rights the user has been given. Note that the list of Menu Items within each menu are color-coded to match the menu selected, indicating in which menu the user is currently working.

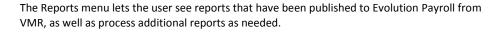


Information on the Evolution Payroll Dashboard is laid out in sections, or tiles, from which users can navigate to the information selected.

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 Evolution. The data in the Company menu is currently read-only however it can be edited in Evolution.

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

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





The Settings Menu is where users can change their password, or edit their security questions.



# The Company Menu - Screens and Fields

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 Evolution. The data in the Company menu is currently read-only however it can be edited in Evolution.

### 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.

#### Legal Address Section

Basics		Name				Company Code
		D&L Services (HCM)				WEB1150
Organization Levels		D.B.A				EIN
ED Codes						00000000
States		Address 1				Customer Service Team
		12345 Smith Street				
		Address 2				Customer Service Representative
		City	State	Zip Code		Email
ious Next		Burlington	vt	05401		
		Phone	Fax			Payroll
		802-123-4567				302875106
		Name				Тах
					Its	
	SS	Address 1			Bank Accounts	Workers' Compensation
	Legal Address				Acc	000000000
	PQ	Address 2			ž	Billing
	gal				Ba	000000000
	Le	City	State	Zip Code		Direct Deposit
		ONY	Oldie	Lip code		000000000

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.



Field / Button	Description
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.
Customer Service Representative	Name of the Customer Service Representative.
Email	Email address of the Customer Service Representative.

#### **Bank Accounts section**

Basics		Name					Company Code
rganization Levels		D&L Services (HCM)					WEB1150
-		D.B.A					EIN
ED Codes							00000000
States		Address 1					Customer Service Team
		12345 Smith Street					
		Address 2					Customer Service Representative
		City	State	9	Zip Code		Email
ious Next		Burlington	vt		05401		
		Phone	Fax				Payroll
		802-123-4567					302875106
		Name					Тах
						Its	000000000
	SS	Address 1				Bank Accounts	Workers' Compensation
	dre					Acc	000000000
	Legal Address	Address 2				h	Billing
	gal					Ba	000000000
	Le	City	State	9	Zip Code		Direct Deposit
			otati				000000000



Field / Button	Description
Bank Accounts section	
Payroll	The payroll bank account number.
Тах	The tax bank account number.
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

The Company - Organization Levels screen displays the Division, Branch, Department, and Team organization levelspecific information, if applicable, for this company. Each company level (previously known as D/B/D/T in Evolution) 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.

North Eastern Division	Details for: North Eastern	Division
<ul> <li>Northeast Branch</li> <li>Northeast Sales Dept</li> </ul>	Number	No East
Jessie's Team	Description	North Eastern Division
<ul> <li>Western Division</li> </ul>	Home State	VT
<ul> <li>Western Branch</li> <li>Western Sales Dept</li> </ul>	Override EE Rate #	
Gladys' Team	Override Pay Rate	
Central Division Central Branch	Payroll Bank Account #	302875106
<ul> <li>Central Sales Dept</li> </ul>	Tax Bank Account #	000000000
Gus' Team A South Eastern Division	Billing Bank Account #	302875106
✓ Southeast Branch	DD Bank Account #	
<ul> <li>Southeast Sales Dept</li> <li>Walt's Team</li> </ul>		

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.



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.

### 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.

											Defaul	t	
Code 🔻	Description	T	Rate	T	Rate #	T	OT Rate	T	Start D	T	Amount	T	
M1	ACA Hours												,
E4	Sick											10.00	
E3	Vacation											11.00	
E02	Regular												
E01	Salary												
D7	Child Support - 2												
D6	Health Insurance												
D5	Garnishment												
D4	Child Support												
D3	Direct Deposit - Net												
D2	Direct Deposit - Partial 2												
D1	Direct Deposit - Partial 1												
<												>	
											1	2 item	10



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

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

Company						
Basics	Description	▼ Code ▼	Setting for: New York - NY		Local Rates	
Organization Levels ED Codes States	Alaska Massachusetts New York Pennsylvania	AK MA NY PA	EIN 123456789 SDI EIN 123456789 State Tax Exempt		Tax Name New York City Res. New York City Non-Res. MCT Mobility Tax	Rate 0.0025 0.0011
Previous Next	Vermont 1	VT 1 - 5 of 5 items	SUI Exempt		1	1 - 3 of 3 items
			Tax Name NY-Re-employment NY-SUI 1	Rate           0.00075           0.04025           1 - 2 of 2 items		



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.
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 - Screens and Fields

Employee information can be viewed, added, and edited in the Employees menu. There is also a shortcut button on

the Employees Menu: the **Check Calculator** button. The shortcut button will be discussed in more detail at the end of this section.

The following is the first screen that opens when the Employees menu is accessed. Note the preview on the righthand side of the screen, of the highlighted employee in the table.

ch for Empl	iyee						Preview
	LastName T	Fint Name T	State T	Zip Code T	Status	T	AlLewis
1	Lewis	A	NY	10088	Adve	~	Last Name: First Name:
2	Smith	Bit	MA	10022	Active		Lewis Al
3	Greenburg	Goldie	NY	10044	Active		SSNEN
4	Soffer	Harry	VT	05401	Active		884-77-3311
5	Pinkman	Jessie	NY	10011	Adve		Status:
8	Bichon	Selma	MA	88855	Active		Active
7	Goodman	Saul	VT	05401	Adve		Address:
8	Clark	Wille	VT	05401	Active		963 Main Street Brooklyn, NY 10066
9	White	Water	NY	10012	Adive		Crossija, HT 10000
10	Bigole	Susan	VT	05401	Active		
11	Simon	Simon	NY	11234	Active		
12	Miler	Mary	VT	05401	Active	Ŧ	
					1 - 12 of 12 items	6	

The two buttons in the heading are used to toggle between the Table view (above) and the Employee view (below.)

C,												
Personal	1-Lewi	s, Al 🔹 🖌					Lewis,	AI SI	mith, Bill Greenburg, Goldi	ie Soffer, Har	rry Pinkman, Jessie	Bichon, Selm
Labor Defaults		*SSN* CEIN*	Employee Type *		EE Code *		Time Clock #		Status *			
Pay		884-77-3311	W-2	*	1				Active			
Federal		First Name *		M.I.	Last Name *				Current Hire Date *		Original Hire Date	
State		AI			Levis			~	02/17/2000			
		Address 1 *						Statu	Termination Date		Rehire Eligible *	
Local		963 Main Street						e S		00	Yes	
Child Support	Lice	Address 2				Edit Emplo	× ×	별	Employment Type *			
Direct Deposit	Demographics								NA			
Scheduled E/Ds	ŏ	City *					ist one payroll in a status that to Employees.		On Call From		On Call To	
Delivery	B	Brooklyn				prevents out	to Employees.			00		
Time Off Accrual		County			Phone		OK		ACA Status *			
Notes									Part Time			
NO10-3		Email							Healthcare Coverage *			
		Birth Date	Gender*		Etherland .		Tribe		No ER Paid Ins/Not Eligible			
		02/17/1953	Male	*	Ethnicity * White	*	Inde	Lts	Dependent Coverage *		Benefit Eligible	
vious Next		02/11/000 E						Benefits	No	*		
vious Next								B	Group Term Policy			
									GTL Hours		GTL Rate	

**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.



### **Employee Searches**

Employee searches can be done from either of the Main Employee screens, using the Search field in the upper lefthand side of the screen.

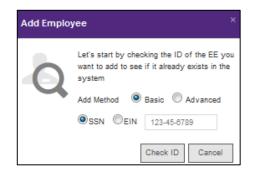
<u>Table View</u> – on the screen that provides the Table view, the search criteria is very broad. Any of the information in the columns can be used to search for an employee. (Employee number, name, state, and zip code)

<u>Employee View</u> – on the screen that provides the Employee view, the only acceptable criteria by which to search are the employee code, or the employee's last name.

### **Adding Employees**

To begin the process of adding a new employee, click the **plus sign**. **Result:** The Add Employee dialog box opens on which the user selects the Add Method of **Basic** or **Advanced**.

**Note:** The option of selecting **Basic** or **Advanced** is available only if Quick Entry is enabled as a Security Right. If it is not enabled, the user automatically goes to the Personal screen, and enters using the **Advanced** method.



The user also selects whether the Tax ID is a **SSN** or **EIN** and adds the Social Security Number or Employer Identification Number.

If the Social Security Number or EIN is already in the system, the Employee – Basics screen opens\* with the existing demographic information already copied into the new employee fields.

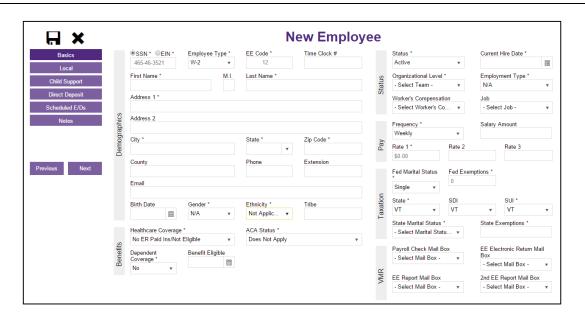
\* see note above



### **Employees - Basics screen**

The Employees – Basics screen is displayed only when creating a new employee, when the Basic method is selected. The Basics screen contains only the most common fields needed when entering an employee, including multiple pay rates and organizational levels. When using the Basic method, only the information on the Basics screen is required to save the employee. Additional Employees Menu items are available on the left-hand side of the screen if needed. If the sections on the Basics screen do not provide enough detail about the employee, users may select the Advanced method on the Add Employee dialog box.

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



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.
Employee Type	Select W-2 or 1099
First Name	The employee's first name
МІ	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



Field / Button	Description
County	The county in which the employee lives
Phone	The employee's phone number
Email Address	Employee's email contact information
Birth Date	Birth date
Gender	Gender
Ethnicity	Required
Tribe	Required. If American Indian is chosen, enter the Tribe name in the adjacent field.
Benefits section	
ACA Status	This may be automatically filled for new employees with the default ACA Status set up on the Company - General - Company Info - ACA tab, used to determine whether the employees are to be included in the full-time eligibility determination.
Healthcare Coverage	The employee's coverage status
Dependent Coverage	If the employee is eligible, the coverage, if any, available for dependents
Benefit Eligible	Date on which the employee becomes eligible to receive benefits.

H ×					N	e <mark>w Empl</mark> o	yee					
Basics		●SSN* ○EIN*	Employee Type *	EE Code *		Time Clock #		Status *		Current	Hire Date *	
Local		465-46-3521	W-2 v	12				Active	*			
		First Name *	M.I.	Last Name *			2	Organizational Lev	rel *	Employ	ment Type *	
Child Support							Status	- Select Team -	*	N/A		*
Direct Deposit		Address 1 *					S	Worker's Compens	ation	Job		
Scheduled E/Ds								- Select Worker's	Co •	- Sele	ct Job -	
Notes	Demographics	Address 2						Frequency *		Calaas	Amount	
	apl							Weekly	•	Salary	Amount	
	logi	City *		State *		Zip Code *	>	· · · ·				
	)err				*		Pay	Rate 1 *	Rate 2		Rate 3	
		County		Phone		Extension		\$0.00				
Previous Next		county		Thone		Extension		Fed Marital Status	Fed Exer	nptions *		
		Email						*	0			
							_	Single •				
		Birth Date	Gender *	Ethnicity *		Tribe	tion	State *	SDI		SUI *	
			N/A v	Not Applic	•	1100	Taxation	VT •	VT	*	VT	*
							-	State Marital Statu	IS *	State E	xemptions *	
		Healthcare Coverage *		ACA Status *				- Select Marital S	tatu 🔻			
	2	No ER Paid Ins/Not El	ligible v	Does Not App	ly	•						
	Benefits	Dependent Benefit Eligible					Payroll Check Mai		EE Ele Box	ctronic Return	Mail	
	Ber	Coverage *						- Select Mail Box	- v		ct Mail Box -	
		No v					MR	EE Report Mail Bo	×	2nd EE	Report Mail E	Box
							>	- Select Mail Box			ct Mail Box -	*



Field / Button	Description
Status section	
Status	Select the employment status from the dropdown list.
Current Hire Date	Date employee was hired
Organization Level	Organization level at which the employee works if the company is set up using Divisions, Branches, Departments, and Teams.
Employment Type	Select the Employment Type from the dropdown list
Workers' Compensation	Workers' Comp Code assigned to the Job associated with the claim if applicable.
Job	Job associated with the Workers' Comp Code selected.
Pay section	
Frequency	How often the employee's paycheck is processed.
Salary Amount	Salary earned per pay period
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.
Taxation section	
Fed Marital Status	Marital status for federal tax purposes
Fed Exemptions	Number of exemptions for the employee
State Marital Status	Marital status for state tax purposes
State Exemptions	Number of state exemptions for the employee
State	State to which the employee pays taxes
SDI	State to which the employer pays Disability taxes on behalf of the employee.
SUI	State to which the employer pays Unemployment taxes on behalf of the employee.



Field / Button	Description				
VMR section					
Payroll Check Mailbox	Select the mailbox for the employee as needed to override the company settings.				
EE Report Mailbox	Jettin 23.				
EE Electronic Return Mailbox					
2nd EE Report Mailbox					

### **Employees - Advanced screens**

The Employees – Advanced screens allow the user to add an employee with more detail than what is contained in the Employee – Basics method. Note the additional Employee Menu items on the left-hand side of the screen as compared to the Basics screen.

**Important!** When creating a new employee using the Advanced screens, you must progress to the **Local** Menu Item (if applicable; if there are no locals for the new employee, you must progress to the **State** Menu Item) before the new employee can be saved. If you exit before that, the new employee information that was entered is lost.

Employees –	Personal so	creen							
Employees									
	enburg, Goldie 🔻	٢	Lewis, Al	Smith, Bill Greenb	urg, Go	oldie Soffer, Harry	Pinkman, Jes	ssie Bichon, Selma	
Personal	●SSN* ○EIN*	Employee Type *	EE Code *	Time Clock #	3	Status *			
Labor Defaults	982-44-3369	W-2 *	3			Active			*
	First Name *	M.I.	Last Name *			Current Hire Date *		Original Hire Date	
Pay	Goldie		Greenburg		(0)	02/17/2003	=		8
Federal	Address 1 *				Status	Termination Date		Rehire Eligible *	
State	951 Smith Street				e S			Yes	*
Local Child Support	Address 2				Hire	Employment Type *			
Child Support						N/A			*
Direct Deposit	City * Ithaca		State *	Zip Code * 10044		On Call From		On Call To	
Scheduled E/Ds							=		田
	County		Phone	Extension		ACA Status *			
Delivery	Email					Part Time			*
Time Off Accrual	Cmail					Healthcare Coverage *			
Notes	Birth Date	Gender *	Ethnicity *	Tribe		No ER Paid Ins/Not Eligible			*
	02/17/2004	Female +	Black Or African A *		fits	Dependent Coverage *		Benefit Eligible	
					Benefits	No	*		m
					8	Group Term Policy			
Previous Next						GTL Hours		GTL Rate	

Field / Button	Description
SSN	Required before any other information is entered, 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.
Employee Type	Select W-2 or 1099



Field / Button	Description
First Name	The employee's first name
МІ	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
Email Address	Employee's email contact information
Birth Date	Date of birth
Gender	Gender
Ethnicity	Required
Tribe	Required. If American Indian is chosen, enter the Tribe name in the adjacent field.

### Employees – Personal screen Hire Status/Benefits

H ×				N	ew Emplo	yee			
Personal			Employee Type * W-2 *	EE Code * 12	Time Clock #		Status * Active		
Position Labor Defaults		First Name *	MI	Last Name *			Current Hire Date *	Original Hire Date	
Pay Federal		Address 1*				Status	Termination Date	Rehire Eligible * Yes	
State	ohics	Address 2				Hires	Employment Type *		•
Local Child Support	Demographics	City *		State *	Zip Code *		N/A On Call From	On Call To	*
Direct Deposit	ð	County		Phone	Extension		ACA Status *		
Scheduled E/Ds Delivery		Enal					Does Not Apply		٠
Notes			Gender *	Ethnicity *	Tribe		Healthcare Coverage * No ER Paid Ins/Not Eligible		٠
		=	NA +	Not Applic v		Senett	Dependent Coverage * No *	Benefit Eligible	
Previous Next							Group Term Policy		
							GTL Hours	GTL Rate	

Field / Button	Description
Hire Status section	



Field / Button	Description
Status	Select the employee's Status from the dropdown list.
Current Hire Date	Enter if this is a rehire
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	
ACA Status	This may be automatically filled for new employees with the default ACA Status based on company setup, used to determine whether the employees are to be included in the full-time eligibility determination.
Healthcare Coverage	The employee's coverage status – applicable in Vermont only.
Dependent Coverage	If the employee is eligible, the coverage, if any, available for dependents
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

### Salary Information section

H ×	01-Go	ode, Alice K.			C	Boode, Alice	e K. Cat, Cheshired M.	Rabbit, White A. Hatte
Personal		Worker's Compensation			Division	Branch	Department	Team
Labor Defaults		- Select Worker's Compensation -	•					
Pay	Salary Information	Job - Select Job -	•		Div1     NY Branch			
Federal	rma	Union			<ul> <li>Department Nan</li> </ul>	ne Field		
State	Info	Teacher's Union	Ψ.		Not Defined			
Local	ary	Pay Group		-	Team2			
Child Support	Sa	- Select Pay Group -	Ψ.	eve	Test 2Nd Dept			
Direct Deposit		General Ledger Tag		Organizational Level	NH Branch VT Branch			
Scheduled E/Ds				izat	✓ Branch 23			
Delivery				Jrgan	1 ⊿ New Branch 01			
Time Off Accrual				0	Branch 1 Dept 1	14		
Notes					▲ DEPT 1			
					Team 1			
					✓ Div2 Div2 Branch1			
					⊿ Div3			
Previous Next					Div3 Branch1			
					Division 4			

Field / Button	Description
Workers' Compensation	Workers' Comp Code assigned to the Job associated with the claim.
Job	Job set up by the company.
Pay Group	Select the pay group.
General Ledger Tag	Enter if the company is using General Ledger.

### **Organizational Level section**

Enter information if the company is set up using Divisions, Branches, Departments, and Teams.

mployees	
Personal       Vorker's Compensation         Labor Defaults       - Select Worker's Compensation         Pay       - Select Job -         Federal       Job         State       - Select Job -         Othid Support       - Select Worker's Compensation         Direct Deposit       - Select Job -         Schedded EDs       - Select Horion -         Delivery       - Select Horion -         Time Off Accrual       Notes	Unison         Branch         Degartment         Team           Western Division         Branch         Degartment         Team           Vestern Division         North Eastern Division         Western Branch         Western Sales Dept           • Northeast Branch         Western Branch         Western Branch         Gladys' Team           • Northeast Branch         • Western Division         Seales Team           • Western Division         • Western Branch         • Western Branch           • Western Division         • Western Branch         • Western Branch           • Western Division         • Central Sales Dept         Gladys' Team           • Central Sales Dept         Gladys' Team         Gladys' Team           • South Eastern Division         • Southeast Branch         • Southeast Branch           • Southeast Branch         • Southeast Branch         • Southeast Branch           • Southeast Branch         • Southeast Branch         • Southeast Branch           • Southeast Branch         • Southeast Branch         • Southeast Branch



# 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.

### Salary Information section

Employees													
Personal Labor Defaults Pay Shifts Piscework Auto-Labor Dist. Fishera Fishera Coal Child Support	Salary Information	Pay Frequency Weekly Salary Amount \$2,500.00 Std Hours 40.00 Rate Number 1 Rate Annount * 50.00 Wage Limit	Position Planned Updates	Raise Date	Image: Constraint of the second se		_	Add Jobs - Se Pay - Se Pay	Al Smith, E Delete Yes Number elect Jobs Number Grade elect Pay Grade Pc Grade elect Pay Grade Pc Grade Division Western Divi	Rate Num	Code - Select Code Description State Department	Rate Amount * \$0.00	
Direct Deposit Scheduled E/Ds Delivery Time Off Accrual Notes Previous Next		Limit Frequency Annual Annualized Calc Annual \$130,000.00	Po	Effective Date	I9 on File * Yes ▼ Corp Officer * No ▼			hal Level		t Branch east Sales Dept sie's Team vision			¥ 2 items

Field / Button	Description
Pay Frequency	How often the employees' paycheck is processed.
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.)
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**

Personal Labor Defaults		Pay Frequency * Bi-Weekly	5	Raise Date	Ralse Rate	. [	Add	Smith,					
Pay		Salary Amount 5210.00	Upda	Raise Amount	Pay Frequency * Weekly *		Per Per	nay T	Rate	Number 1	• T	Rate Amount \$12.00	
Shits		Std Hours	Planned	Raise %				Number lect Jobs Numb		0	Code - Select Cod		1
Auto-Labor Dist.	ation	Rate Number 2		New Hire Report *		4		Pay Grade Position First Level Manager *		B Description			
Federal State	Selary Information	Rate Amount * \$37.76		Completed FLSA Exempt *	•	ides	Pay Bar	Grade d 2		Workers	State		
Local Child Support	Selary	Wage Limit	uog	Position - Select Position -		Overrides		Division	Branch		Department	Teatt	
Direct Deposit		Limit Frequency Every Pay	Pos	Effective Date	t) as file *			+ Div1					
Scheduled E/De Delivery		Annualized		High Comp	No + Corp Officer *			+ Dep	<ul> <li>NY Branch</li> <li>Department Name Field</li> </ul>				
Time Off Account Notes		Cale Annual \$23,348.00		Yes +	No +		lave	Т	of Defines earn2 2Nd Dep				
							2	105	2Nd Uep	-			6 items

The following fields are informational only, and do not affect pay amounts now or in the future.

Field / Button	Description
Planned Updates section	
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 <b>Raise Rate</b> 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	<ul> <li>Required field         <u>Pending</u> - select this option any time prior to the employee's first payroll, after which time it is automatically updated to Complete.         <u>Completed</u> - if the service bureau is using new hire reporting services, the employee has been reported as a new hire         <u>Completed by Predecessor</u> - 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.         <u>No</u> - system saves the employee record and doesn't ask any more questions         <u>Yes</u> - 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     </li> </ul>



Field / Button	Description
	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**

If the employee has earned wages from another position with the company, create an override to the standard wages.

Personal		Pay Frequency * BI-Weekly	*	98	Raise Date	Raise Ra	te		Add	Delete		insurg, e	oldie Soffe	
Labor Defaults		Salary Amount		pdates	Raise Amount	Pay Freq	siency *		Pr	imary *	T Rate Num	ber" T	Rate Amount	• T
Pay		\$898.00		5		Weekly	*			No		1	\$12.00	
Shifts		Std Hours		8	Raise %				Jobs	Number		Code		
Piecework		80.00		B					- Se	lect Jobs Num	ber- v	- Select (	Code - v	
uto-Labor Dist.	8	Rate Number			New Hire Report					Grade Position		3 Descriptio	n	
Federal	tet.	2			Completed		*			t Level Manage		510		
State	Information	Rate Amount *			FLSA Exempt *			8		Grade	the state	State		
	두	\$37.74			No		*	Overrides	Ban	d 2	• 3	>		
Local	ala.	Wage Limit		8	Position			8		Division	Branch	Departmen	t Team	
Child Support	00			ositix	- Select Positio	n -	*							
Direct Deposit		Limit Frequency Annual		P	Effective Date	19 on F	le "			< Div1				
cheduled E/Ds			•			No	*			4 NY B	ranch			
Delivery		Annualized			High Comp	Corp O	flcer*				partment Name	Field		
me Off Accrual		Calc Annual			Yes +	No	*				Not Defined			
Notes		\$23,348.00							Invol		Tearn2			

Field / Button	Description
Add / Delete buttons	Click to add a pay rate or delete a pay rate that is no longer applicable.
Primary column heading	Select <b>NO</b> , 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.



### **Overrides – Job section**

	4	Add	Delete						
		Prir	mary *	T Ra	ite Numbe	r*≜ T	Rate Amount *	T	
	4		No		1		\$12.00		Â
			lumber			Code			
			ct Jobs Numb	er- 🔻	Workers Comp	8810	•		
			rade Position Level Manager		s	Description Office			
		Pay G	-	¥	rker				
des		Band			Mol	State			
Overrides			-			VT			
2			Division	Branc	h	Department	Team		
			.⊿ Div1						
			⊿ NY Brand Stress And Stress	anch					
			⊿ Dep	artment N	lame Field				
			٩	lot Define	d				
		-	T	eam2					
		eve	Tes	t 2Nd Dep	ot				-
								6 items	

Field / Button	Description
Jobs Number	Number identifying the job that the employee has at the company. Overrides what was set up on the Employee – Pay Rates screen.
Pay Grade Position	Position the employee holds in the pay grade at the company. Overrides what was set up on the Employee – Pay Rates screen.
Pay Grade	Pay Grade in which the employee's position falls. Overrides what was set up on the Employee – Pay Rates screen.

### Shifts Sub-menu

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

<b>R</b> X 01-000	Se, Alice K. 🔹 🖌			Lowis	ΔΙ			
Personal				Lewis	, Al Smith, Bill	Greenburg	, Goldie Soffe	r, Harry
Labor Defaults	Id Delete							
Pay	Shit*	Ŧ	Shift Rate	т	Shift %	T	Detault	
Shifs	Extra Shift		\$25.000		1.30%		No	
Piecework	Shitt1		\$546.000		65.00%		No	
Auto-Labor Dist.								
Federal								
State								
Local								
Child Support								
Direct Deposit								
Scheduled E/Ds								
Delivery								
Time Off Accrual								
Notes								
NUES								
								2.0



### Piecework Sub-menu

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

X	1-Levits, Al 🔹 🗶	Lewis, Al Smith, Bill Greenburg, Goldie Soffer, Harry Pinkman,	Jessie 🖒
Personal	Add Delete		
Labor Defaults			т
Pay	Piece*	T         Rate Amt         T         Rate Qty           \$45.00	66.00
Shifts	Piece1	\$45.00	453.00
Piecework	Piece I	\$123.00	453.00
Auto-Labor Dist.			
Federal			
State			
Local			
Child Support			
Direct Deposit			
Scheduled E/Ds			
Delivery			
Time Off Accrual			
Notes			
			*
			2 items
Previous Next			

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 <b>Add</b> 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 Evolution, where it was originally set up at the Client level.

### Auto Labor Distribution Sub-menu

The Auto Labor Distribution screen is where to set up and apply employees' time and pay rates based on the D/B/D/T levels employees work. Before this can be applied to employees, Auto Labor Distribution must be set up in Evolution at the Client level.

**Note:** if the **Auto Labor Distribution** field on the Company – General – Company Info – Payroll and Employees tab is set to No, the Auto Labor Distribution sub-menu will not be displayed here.



Personal		Labor Distribution Options * Distribute Both	Ŧ		Add Delete				
Labor Defaults		Auto Labor Distribution F/D Crown			Percentage * 🔻 🔻	Organizational Level	Ţ	Job 🔺 📑	Workers Comp
Pay	Settings	401k Match	*		90	Div1/NY Branch/Department Name Field/null			8810
Shifts	Settl				10	Div1/NY Branch/Department Name Field/null		job #1	8810
Piecework	•••								
Auto-Labor Dist.									
Federal									
State				5					
Local				Allocation					
Child Support				Alle					
Direct Deposit									
Scheduled E/Ds									
Delivery									
Time Off Accrual									
Notes									
					Total: 100%				
									2 it

Field / Button	Description
Labor Distribution Options	Defaults to <b>Distribute Both</b> - 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 <b>Auto Labor</b> <b>Distribution E/D Group</b> 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**

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

#### **Taxation section**

	1-Lewi	s, Al 🔹 🖌				L	ewis, Al Smith, Bill	Grei	enburg, Goldie Soffer, Harry Pinkman, Jessie
Personal		Marital Status * Exemptions *			Type *		Residential State *		Distribution Code
Labor Defaults		Single v 0			W-2 *		NY v		
Pay	_	Tax Type * Value			First Name			1099R	Tax Amt Determined * Total * No *
Federal	axation	None v	ε	E				109	NO Y NO Y
State	Тах	FUI Rate Credit	For	P	Middle Name				Pension Plan *
Local		Override Fed Minimum Wage	CVV	WZ.	Last Name				
Child Support		oronnao roa miniman rrago							
Direct Deposit		Federal Tax Status *			Name Suffix				
Scheduled E/Ds	s	Include v							
Delivery	Statuses	OASDI Exempt*			Deceased *		Statutory EE *		
	x Sti	No v			No •		No v		
Time Off Accrual	Тах	Medicare Exempt*	Sottinge	Bun	Legal Rep *		Deferred Comp *		
Notes	Ш	No v	Set of	sel	No v		No v		
		FUI Exempt *	CIMI	M	Pension * No v				
	ses	No v			No v				
	ER Tax Statuses	OASDI Exempt*							
Previous Next	ax St	No +							
	2 Ta	Medicare Exempt *							
	ü	No v							

Field / Button	Description						
Marital Status	Marital status for federal tax purposes						
Exemptions	Number of exemptions for the employee						
Тах Туре	Additional or override tax amount.						
Value	Based on the tax type, the corresponding value.						
FUI Rate Credit	The amount by which to override a FUI Rate Credit, if applicable.						
Override Fed Minimum Wage	Value used to override the Federal Minimum Wage rate used in payroll for minimum wage makeup calculations.						
	<ul> <li>If a value is entered, the amount is used as the rate for minimum wage makeup calculations.</li> </ul>						
	• The value may be overridden if a State Minimum Wage override is entered on the Employee - States - Overrides tab. In that case, Evolution 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.						
	<ul> <li>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.</li> </ul>						



#### **EE Tax Statuses section**

H ×	1-Lew	s, Al 🔹 ⊀					L	ewis, Al Smith, Bill	Gre	enburg, Goldie S	Soffer, Ha	irry Pinkman,	Jessie 🖒
Personal		Marital Status *	Exemptions *			Type *		Residential State *		Distribution Code			
Labor Defaults		Single 👻	0			W-2 *		NY v					
Pay		Tax Type *	Value			First Name			œ	Tax Amt Determined *		Total *	
	Taxation	None v			_				<b>999R</b>	No	Ψ.	No	*
Federal	аха	FUI Rate Credit		-		Middle Name			-	Pension Plan *			
State	-			5	N					None			*
Local		Override Fed Minimum Wage		2	>	Last Name							
Child Support													
Direct Deposit		Federal Tax Status *				Name Suffix							
Scheduled E/Ds	Tax Statuses	Include	٣										
Delivery	tatu	OASDI Exempt *				Deceased *		Statutory EE *					
Time Off Accrual	x S	No	٣	9	2	No +		N0 *					
	T 10	Medicare Exempt *		Cattinge	Ű,	Legal Rep *		Deferred Comp *					
Notes	Ш	No	٣	000	ñ	No v		No v					
		FUI Exempt*		NV.	7/1	Pension * No v							
	ses	No	Ψ			No v							
	ER Tax Statuses	OASDI Exempt *											
Previous Next	x St	No	•										
	Ta	Medicare Exempt *											
	H	No	•										

Field / Button	Description
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**

Personal		Marital Status *	Exemptions *			Type *		ewis, Al Smith, Bill Residential State *		Distribution Code			
Labor Defaults		Single 👻	0			W-2		NY v					
Pay		Tax Type *	Value			First Name			щ	Tax Amt Determi	ned *	Total *	
Federal	Taxation	None v			_				1099R	No	*	No	٠
	аха	FUI Rate Credit		W2 Form		5 Middle Name			-	Pension Plan *			
State	+				V2 F	Last Name				None			*
Local		Override Fed Minimum Wage			>								
Child Support													
Direct Deposit		Federal Tax Status *				Name Suffix							
Scheduled E/Ds	ses	Include		*									
Delivery	tatu	OASDI Exempt *				Deceased *	Statutory EE *						
Time Off Accrual	EE Tax Statuses	No		*	v No v No								
Notes	1 L	Medicare Exempt*			Settings	Legal Rep *		Deferred Comp *					
Notes	ш	No		*	Se	No		No v					
		FUI Exempt*			W2								
	Statuses	No		*		No							
	atus	OASDI Exempt *											
vious Next	Tax St	No		*									



Field / Button	Description
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 Forms section

Personal		Marital Status *	Exemptions *			Type *		Residential State *		Distribution Code			
Labor Defaults		Single v	0			W-2	*	NY	*				
Pay		Tax Type *	Value			First Name			щ	Tax Amt Determined	•	Total *	
-	U	None v							1099R	No	*	No	
Federal	Taxation	FUI Rate Credit			W2 Form	Middle Name			-	Pension Plan *			
State	Ě				5 E					None			,
Local		Override Fed Minimum Wage			≥	≥ Last Name							
Child Support									_				
Direct Deposit		Federal Tax Status *				Name Suffix			_				
Scheduled E/Ds	GS	Include		*									
	Tax Statuses	OASDI Exempt *				Deceased *		Statutory EE *					
Delivery	st	No		*		No	*	No	Ŧ				
Time Off Accrual	Ta)	Medicare Exempt*			gui	Legal Rep *		Deferred Comp *					
Notes	Ш	No		*	Settings	No	*	No	*				
					W2	Pension *							
	\$	FUI Exempt* No			_	No	*						
	Statuses	NO		Ŧ									
	tatt	OASDI Exempt *											
	()	No		*									
revious Next	*												
Previous Next	ER Tax	Medicare Exempt *											

Field / Button	Description
W-2 Form section	
Туре	Type of tax form being filed if not W-2; select from the dropdown list.
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

H X	1-Lew	ís, Al 🔹 👗					l	ewis, Al Smith	Bill Gre	eenburg, Goldie So	ffer, Ha	arry Pinkman,	Jessie
Personal		Marital Status *	Exemptions *			Type *		Residential State *		Distribution Code			
Labor Defaults		Single 👻	0			W-2 •		NY	*				
Pay		Tax Type *	Value			First Name			œ	Tax Amt Determined *		Total *	
	ion	None v			_				A000	No	*	No	*
Federal	Taxation	FUI Rate Credit			orm	Middle Name			-	Pension Plan *			
State	÷.				W2 Form					None			*
Local		Override Fed Minimum Wage			5	Last Name							
Child Support													
Direct Deposit		Federal Tax Status *				Name Suffix							
Scheduled E/Ds	ses	Include	*										
Delivery	EE Tax Statuses	OASDI Exempt*		- [		Deceased *	_	Statutory EE *					
	st	No	*		s	No v		No	*				
Time Off Accrual	Ta	Medicare Exempt*			ettings	Legal Rep *		Deferred Comp *	_				
Notes	Ш	No	*		S	No v		No	*				
		FUI Exempt*			W2	Pension *							
	s					No v							
	tuse	OASDI Exempt*		1									
Previous Next	Sta	No	•										
	Тах	Medicare Exempt *											
	ER Tax Statuses	No	*										
	_												

Field / Button	Description
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

H X	1-Lewi	s, Al 🔹 👗				L	ewis, Al Smith, Bill	Gre	enburg, Goldie So	ffer, Ha	arry Pinkman, s	Jessie 🖒
Personal		Marital Status *	Exemptions *		Type *		Residential State *		Distribution Code			
Labor Defaults		Single v	0		W-2 *		NY v					
Pay		Tax Type *	Value		First Name			ж	Tax Amt Determined *		Total *	
Federal	tion	None v		-				1099R	No	۳	No	•
	axation	FUI Rate Credit		W2 Form	Middle Name			-	Pension Plan *			
State	÷			12 F					None			*
Local		Override Fed Minimum Wage		\$	Last Name							
Child Support												
Direct Deposit		Federal Tax Status *			Name Suffix							
Scheduled E/Ds	EE Tax Statuses	Include	*									
Delivery	atu:	OASDI Exempt *			Deceased *		Statutory EE *					
	× St	No	Ψ	s	No v		No v					
Time Off Accrual	Ta	Medicare Exempt *		ting	Legal Rep *		Deferred Comp *					
Notes	Ш	No	*	Settings	N0 *		N0 *					
		FUI Exempt *			Pension *							
	s	No	×		No v							
	tuse	OASDI Exempt*										
Previous Next	Sta	No	*									
	ER Tax Statuses	Medicare Exempt *										
	Υ.	No	*									



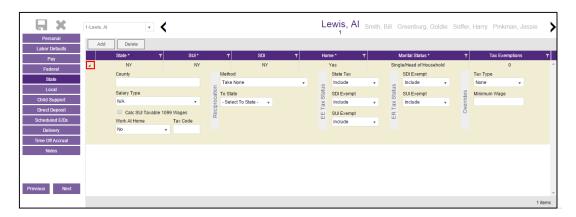
Field / Button	Description
1099-R section	
Distribution Code	If a pension distribution was taken, this is the distribution code reported on the 1099-R.
Tax Amount Determined	Was there a tax amount determined and reported on the 1099-R?
Total	Was the distribution a total distribution of all assets in the pension plan?
Pension Plan	The type of pension plan reported on the 1099-R

## **Employees - State screen**

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

H X	1-Lewis, Al	٣	<						Le	ewis, Al	Smith	, Bill	Greenburg, Go	oldie So	offei	r, Harry Pinkm	nan, Jess	sie 🕨
Personal	Add	Delete																
Labor Defaults Pay		State * v	T SUI*	٢	r s	DI	Ŧ		Hon	ne* `	T		Marital Status *		Ţ	Tax Exen	nptions	т
Federal	4	NY	NY			NY				Yes		Si	ngle/Head of House	hold			0	*
State		County		Met						State Tax			SDI Exempt			Тах Туре		
Local				E	ke None			*	sn	Include	٣	sn	Include	Ŧ		None	*	
		Salary Type		to S					Status	SDI Exempt		Stat	SUI Exempt		des	Minimum Wage		
Child Support		N/A		Reciprocation	elect To State -	٣			Tax	Include	٣	Tax Status	Include	Ŧ	Overrides			
Direct Deposit		Calc SUI Taxable		Red					Ξ.	SUI Exempt		E E			Ó			
Scheduled E/Ds		Work At Home	Tax Code							Include	٠							
Delivery		No	· ·															
Time Off Accrual																		
Notes																		
Previous Next																		Ŧ
																		1 items

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.





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**

Personal	1-Lewis, Al	Ŧ	<				Le	ewis, Al	Smith, I	Bill (	Greenburg, G	oldie	Soffer	, Harry Pinkn	nan, Jess	sie
Labor Defaults	Add	Delete														
Pay		State * v	⊤ SUI*	Ŧ	SDI	T	Hor	1e *	T	l	Marital Status *		T	Tax Exen	ptions	T
Federal		NY	NY		NY		_	r'es		Sing	gle/Head of House	hold			0	
State		County		Method				State Tax			SDI Exempt			Тах Туре		
				_ Take None		٣	S	Include	*	SI	Include	٣		None	Ŧ	
Local		Salary Type		To State			Status	SDI Exempt		Status	SUI Exempt		les	Minimum Wage		
Child Support		N/A	*	- Select To	State - 🔻		ax S	Include	*	Tax S	Include		Overrides			
Direct Deposit		Calc SUI Taxal	ble 1099 Wages	Recip			E H	SUI Exempt		ERT			õ			
Scheduled E/Ds		Work At Home	Tax Code	LE.			ш	Include	Ŧ	ш						
Delivery		No	*				1									
Time Off Accrual																
Notes																
revious Next																
																1 iten

Field / Button	Description
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**

H X	1-Lewis, Al	Ŧ	<				I	Lewis, Al	Smith, E	Bill	Greenburg, G	oldie S	Soffer	, Harry Pinkm	an, Jessi	ie 🗲
Personal	Add	Delete														
Labor Defaults Pay		State * •	T SUI*	т	SDI	т		Home *	T		Marital Status *		T	Tax Exem	ptions	т
Federal	4	NY	NY		NY			Yes		Sin	gle/Head of House	hold			)	^
State		County		Meth			_ [	State Tax		1	SDI Exempt			Тах Туре		
				_ Tak	e None		•	Include	•	S	Include	Ŧ		None		
Local		Salary Type		Cation	tate		Ctatus .	SDI Exempt		Status	SUI Exempt		des	Minimum Wage		
Child Support		N/A	*	or - Se	lect To State - 🛛 🔻		200	Include	•	ă	Include	Ŧ	Overrides			
Direct Deposit		Calc SUI Taxable	e 1099 Wages	- Se			H U	SUI Exempt		ER T			2			
Scheduled E/Ds		Work At Home	Tax Code				u	Include	*	ш.						
Delivery		No	Ψ													
Time Off Accrual																
Notes																
Previous Next																
																1 items

Field / Button	Description
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**

Personal			<							1						, Harry Pinkm		
Labor Defaults	Add	Delete																
Pay		State * •	T	SUI*		T	SDI	T	Hor	ne *	т		Marital Status *		T	Tax Exem	ptions	
Federal	4	NY		NY			NY			Yes		Sin	gle/Head of House	hold			)	
State		County				Method				State Tax			SDI Exempt			Тах Туре		
					_	Take None			ŝ	Include	•	2	Include	*		None		
Local		Salary Type			atio	To State			Status	SDI Exempt		Status	SUI Exempt		es	Minimum Wage		
Child Support		N/A		Ŧ	roc	- Select To Sta	ite - 🔻		Tax S	Include		Tax S	Include		Overrides			
Direct Deposit		Calc SUI Taxal	ble 1099 Wag	es	Reciprocation				EET	SUI Exempt		ER Ta			õ			
Scheduled E/Ds		Work At Home	Tax (	Code	œ				ш	Include		ш						
Delivery		No	v															
Time Off Accrual																		
Notes																		
revious Next																		



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

#### **Overrides section**

H X	1-Lewis, Al	Ŧ	<					Le	ewis, Al	Smith, B	ill (	Greenburg, Gold	lie S	offer	, Harry Pinkn	nan, Jes	ssie 🗲
Personal Labor Defaults	Add	Delete															
Pay		State * •	T SUI*		<b>T</b> SI	К	т	Hor	ne* 1	r	1	Marital Status *		T	Tax Exer	nptions	т
Federal	4	NY	NY			NY			Yes		Sing	gle/Head of Househol	d			0	*
State		County			ethod				State Tax			SDI Exempt	_		Тах Туре		
				_ T	ake None		Ŧ	12	Include	Ŧ	s	Include	Ŧ		None	Ŧ	
Local		Salary Type			State			Status	SDI Exempt		Status	SUI Exempt		les	Minimum Wage		
Child Support		N/A	*	- DOC	Select To State -	*		ax S	Include	*	ax S	Include	Ŧ	Overrides			
Direct Deposit		Calc SUI Taxable	e 1099 Wages	Reciproc				EET	SUI Exempt		ERT			ð			
Scheduled E/Ds		Work At Home	Tax Code	LL.				ш	Include	*	ш						
Delivery		No	v														
Time Off Accrual																	
Notes																	
Previous Next																	×
																	1 items

### **Employees - Local screen**

Local taxes can be viewed, added or deleted on this screen. The screen lists all of the local taxes and their details for this employee. 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.

H ×	1-Lewis, Al	• <					Lev	wis, A	41	Smith, B	ill Greenbu	ırg, Gol	die Soffer,	Harry I	<sup>p</sup> inkman, Jes	ssie 🕻
Personal Labor Defaults	Add	Delete														
Pay		Local *	т	State * T	Co	unty *	т	Local Typ	oe *	T	Tax Rate *	т	Misc Amount	Ţ	Tax Code	T
Federal	4	New York City Res.		New York	New	rork City Res.		EE	E							^
State		Active Yes		Tax Status Include		Deduct Behavior Always			ŝ	Pretax De Yes	ductions			axable Wa	ges	
Local		Tes	*	include	*	Aiways		*	Overrides			Ŧ				
Child Support									Ovel	Tax Type None						
Direct Deposit																
Scheduled E/Ds																
Delivery																
Time Off Accrual																
Notes																
Previous Next																
																1 items



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

### Employee – Locals

X	1-Lewis, Al	- <						Lev	vis, /	AI	Smith, B	ill Greenbu	urg, Gold	die Soffer,	larry	Pinkman, Jes	sie 🗲
Personal Labor Defaults	Add	Delete															
Pay		Local * 🔺	T	State * 1	r	Co	ounty *	<b>т</b> 1	ocal Typ	pe *	Ŧ	Tax Rate *	T	Misc Amount	Ŧ	Tax Code	Ŧ
Federal	4	New York City Res.		New York		New	York City Res.		E	E							*
State		Active		Tax Status			Deduct Behavior				Pretax De	ductions		% Of T	axable Wa	ages	
Local		Yes	*	Include		*	Always		*	errides	Yes		*				
Child Support										Oven	Tax Type None						
Direct Deposit										Ŭ	None						
Scheduled E/Ds																	
Delivery																	
Time Off Accrual																	
Notes																	
Previous Next																	*
																	1 items

Field / Button	Description
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**

H X	1-Lewis, Al	•	(				Le	wis, /	AI	Smith, Bi	ll Greenbu	urg, Gold	ie Soffer	Harry	Pinkman, Je	ssie
Personal	Add	Delete														
Labor Defaults	7100			State *	0		<b>T</b>	I and The		T	T D-to 1	<b>.</b>		t T	Tou On do	Ŧ
Pay		Local *	ו	Sidle 1			T	Local Typ		T	Tax Rate *	Ť	Misc Amour	IL T	Tax Code	Ţ
Federal	1	New York City Res.		New York	New Y	ork City Res.		EI								- I
State		Active Yes		Tax Status Include		Deduct Behavior Always			s	Pretax De Yes	ductions		% O1	Taxable W	ages	
Local		165	*	include	*	Awayo		•	ride			•				
Child Support									Overrides	Tax Type None						
Direct Deposit									Ľ	None		•				
Scheduled E/Ds																
Delivery																
Time Off Accrual																
Notes																
Previous Next																
																1 items

Field / Button	Description
Overrides section	
Pre-tax Deductions	Does the taxable wage base used to calculate local taxes include pre-tax deductions?
Тах Туре	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**

The Employees – Child Support screen is where Child Support case information can be added, deleted and viewed.

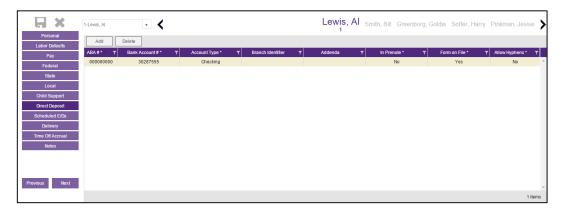
H X	1-Lewis, Al	- <				Lewis, Al s	mith, Bill Green	burg, G	oldie S	offer, H	arry Pinkman, Je	essie
Personal	Add Delet	-										
Labor Defaults												
Pay	Priority * 🔺 🍸		State Origin	T	Medical Eligible * *			۲	FIPS	T	Custom Field	T
Federal	1	111223365	Vt		Yes	Office Of Child Support	No					
State	2	22233666	NY		Not Applicable	Office Of Child Support	No					
Local												
Child Support												
Direct Deposit												
Scheduled E/Ds												
Delivery												
Time Off Accrual												
Notes												
evious Next												
												2 iten



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 <b>Healthcare Coverage</b> field value on the Employees – Basics screen.
Agency	Child Support Agency responsible for collecting the money for payment.
Arrears	Change to <b>Yes</b> 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**

Users can add, delete, and view direct deposit information.



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



Field / Button	Description
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**

Users can add, delete, and view Scheduled E/Ds.

• 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.

	1-Le	wis, Al		- <							 Le	wis, Al Smith,	Bill G	reenburg, G	oldie	Soffer, Harr	y Pin	kman, Je	ssie 🗲
Personal		Add	Delete	1															
Labor Defaults		Code *			Description *			0.1	ation Method '	_	T	Amount \$	_	Amount %		01-17		<b>F</b> -1-1-1	
Pay							T	Calcul			T		T	Amount %	Ţ	Starting *	T	Ending	Υ
Federal	-	D			ect Deposit - Par				Fixed			25				02/17/2015			Ê
State		Basic	Schedule	Limits	Thresholds														
Local		Code				0	Description					s Pay/Deduct				tions to Zero			
Child Support		D1			٣			osit - Partial 1			No			Ŧ	No				Υ.
Direct Deposit		Priority					Calculation L					t Whole Check			Take H	iome Pay			
							- Select E/	D Group -		۳	No			Ŧ					
Scheduled E/Ds		Calcula	nte Using								Send 1	Го							
Delivery		Metho	od defined fo	r this E/D						٣	Direc	t Deposit							Y.
Time Off Accrual		9	Calculation Me	thod			Amount 9					Direct Deposit Account							
Notes			Fixed			Ŧ	25.00					30287555						• +	
			E/D Group				Amount 1	6				Reference to Display on C	heck						
			- Select E/D	Group -		v													
Previous Next	+	D	3	(	Direct Deposit - N	let			None							02/17/2015			
Homodo		D	4		Child Support				Fixed			50				03/01/2015			*
																			5 items

H ×	1-Lewis	, Al	· <		Lewis, Al Smith, E	Bill Greenburg, G	oldie Soffer, Har	y Pi	nkman, Jes	sie
Personal	A	dd Delete	1							
Labor Defaults		Code * • T	Description *	Calculation Method *	T Amount S	T Amount %	▼ Starting *	<b>•</b>	Ending	T
Pay		D1	Direct Deposit - Partial 1	Fixed	25	, vindunt id	02/17/2015	-	Linding	· ·
Federal		D3	Direct Deposit - Net	None	20		02/17/2015			
State		D4	Child Support	Fixed	50		03/01/2015			
Local		D6	Health Insurance	% of Gross		1	02/17/2015			
Child Support		D7	Child Support - 2	Fixed	21		02/17/2015			
Direct Deposit Scheduled E/Ds Delivery Time Off Accrual										
Notes										
Previous Next										-
										5 items



Field / Button	Description
Basic tab	
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	<ul> <li>Select which calculation method will be used to calculate payroll deductions for the Scheduled E/D. There are three options:</li> <li>1. Use the calculation method that has been defined for the E/D</li> <li>2. Use the calculation method defined at the Company Benefit level</li> <li>3. Use the calculation method defined at the Employee Benefit level</li> </ul>
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 401(k)s.	as a member of an E/D Group, which simplifies the calculation of earnings such
Always Pay / Deduct	Offers flexibility to override E/D, similar to Blocking Week 1 - 5 <u>All payrolls</u> - earnings are paid whether or not there are earned wages for the employee; deductions are tracked to be taken from the next payroll. <u>Current Payrolls</u> - 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

If there are insufficient earnings for the deduction, the Scheduled E/D is processed based on the selection in the **Deductions to Zero field**.

<u>No</u> - 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.



Field / Button	Description
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.
	<ul> <li>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.</li> <li><u>No</u> - 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. 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, Evolution takes the shortfall, but not the deduction.</li> </ul>
Deduct Whole Check	Value selected defaults based on the setting applied on the Client - E/Ds - Scheduled Defaults tab <u>Yes</u> - deducts the net check (use for direct deposits)
Send To*	<u>No</u> - deducts a portion of the check 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

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

Always Pay/Deduct		Deductions to Zero		
No	*	No		
Deduct Whole Check		Take Home Pay		
No				
Send To				
Agency				
Agency Name				
Health Insurance Admin			Ŧ	
Reference to Display on Check				

• <u>Agency</u> - when Agency is selected in the Send To field, a dropdown field opens below, where the user selects the Agency.



Always Pay/Deduct		Deductions to Zero	
No	*	No	Ŧ
Deduct Whole Check		Take Home Pay	
No			
Send To			
Client/Company			Ψ.
Reference to Display on Check			

• <u>Client / Company</u> – When Client / Company is selected

Always Pay/Deduct		Deductions to Zero	
No	*	No	*
Deduct Whole Check		Take Home Pay	
No	*		
Send To			
Direct Deposit			•
Direct Deposit Account			
- Select Direct Deposit -		•	+
Reference to Display on Check			

• <u>Direct Deposit</u> - when Direct Deposit is selected in the Send To field, a dropdown field opens below, where the user selects an account number, or clicks the plus sign to add a new account number.

H ×	1-Lewis, Al 🔹	(			Lewis, Al Smith	, Bill Greenburg, Goldie	Soffer, Harry Pinkman	n, Jessie Bichon, Selm
Personal	Add Cancel							
Labor Detaults								
Pay	Code * T	Description *	T	Calculation Method *	T Amount S	T Amount %		T Ending T
Federal	4			Fixed			08/06/2015	
State	Basic Schedule Lim	its Thresholds						
Local	Code		Description		Always Pay/Deduct		Deductions to Zero	
Child Support	- Select Code -	•			No	*	No	•
Direct Deposit	Priority		Calculation Link		Deduct Whole Check			
Scheduled E/Ds			- Select E/D Group -	٣	No	٣		
	Calculate Using				Send To			
Delivery	Method defined for this E/D			٠	Client/Company			•
Time Off Accrual	Calculation Method Fixed		Amount \$		Reference to Display on Check			
Notes		*						
	E/D Group - Select E/D Group -		Amount %					
	- Select E/D Group -	•						
evious Next	> D1	Direct Deposit - Partial 1		Fixed	25		02/17/2015	
	<ul> <li>D3</li> </ul>	Direct Deposit - Net		None			02/17/2015	

### Schedule tab



Field / Button	Description
Schedule tab	All payment schedule-related information is on this screen.
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

### Limits tab

This tab contains limits information, if any, about each Scheduled E/D assigned to the employee.

H ×	1-Lewis, Al	,	<			Le	wis, Al Smith, Bill G	Greenburg, Gol	die Soffe	er, Harry Pinkma	n, Jessi	Bichon, S	Selm 🗲
Personal	Add	Cancel											
Labor Defaults Pay		Code * - T	Description *	т	Calculation Method *	т	Amount \$	T Amou	1% T	Starting *	т	Ending	T
Federal	*				Fixed					08/06/2015			Â
State	Basi	E/D Group	Limits Thresholds		E/D Group			Amount E/D G					
Local		- Select E/D Grou	ıp -	*	- Select E/D Group -		*	- Select E/C					
Child Support	Smu	Pay Period %			Pay Period %			Hours E/D Ge					
Direct Deposit Scheduled E/Ds	Minimu	Pay Period S			Pay Period S			- Select E/C	Group -			٣	
Delivery	-	Pay Period 5		- interior	Pay Period S			Hourly Rate					
Time Off Accrual				-17	EE Annual S			~					
Notes					Client Annual S								
Previous Next	•	D1 D3	Direct Deposit - Partial 1 Direct Deposit - Net		Fixed		25			02/17/2015			
												6	6 items

Field / Button	Description
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.
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



Field / Button	Description
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	

### Thresholds tab

H ×	1-Lew	s, Al		<				L	ewis,	, Al Smith, Bill	Greent	urg, Goldie	Soffer, H	Harry Pinkma	an, Jess	sie Bichon,	Selm
Personal Labor Defaults	,	Add	Cancel														
Pay		C	ode" T	Description *	T		Calculation Method *	۲	·	Amount \$	۲	Amount %	T	Starting *	T	Ending	T
Federal							Fixed							08/06/2015			*
State		Basic	Schedule	Limits Thresholds													
			Action				EID Group										
Local			Reset Balance a	nd Issue Agency Check		52	- Select E/D Group -			*							
Child Support			Remaining			plot	Amount S										
Direct Deposit		s				res											
Scheduled E/Ds		Targets	Balance Taken			÷	Use Pension Limit										
Delivery		Ĥ					Coer ension can										
Time Off Accrual			Amount S														
Notes																	
NURS																	
			D1	Direct Deposit - Partial 1			Fixed			25				02/17/2015			
			D3	Direct Deposit - Net			None							02/17/2015			
			D4	Child Support			Fixed			50				03/01/2015			
Previous Next			D6	Health Insurance			% of Gross					1		02/17/2015			-
																	6 items

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



# **Employees - Delivery screen**

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

Personal		Address 1 *				_	Address 1		
Labor Defaults		2 Oak Road				_			
Pay		Address 2 Apt. D1					Address 2		
Federal		City *	State *		Zip Code *	Address	City	State	Zip Code
State	(0	Burlington	OH	*	12234	Add			•
Local	fres	County		Country			County		
Child Support	Add			Burlington		vert			
Direct Deposit	Primary Address	Email				ayroll Override	Phone 1	Extension	Print Voucher
Scheduled E/Ds	hing	Scookingham@lsystemsllc.Com				ayn			Yes
Delivery		Phone 1 (093) 222-2222			Extension	á.	Phone 2	Extension	
Time Off Accrual		Phone 2			Extension		Phone 3	Extension	
Notes		Phone 3			Extension				
vious Next		Payroll Check Mail Box Tax Returns	¥	EE Electronic Tax Returns	: Return Mail Box	Ţ	Password for V	VMR Deliveries	
THEAT	/MR	EE Report Mail Box	-	2nd EE Repo		•			
	>	Payroll Details	*	Payroll Detai		*			

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
EE Report Mailbox	override the company setup for VMR, select the Mailbox Group here.
EE Electronic Return Mailbox	
2 <sup>nd</sup> 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**

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 to make TOA available to employees.



Field / Button	Description
Active	Whether or not the TOA plan is currently active for the employee
Туре	What type of TOA plan it is – PTO, Sick, Vacation, etc
Balance	Tab over to the <b>Accrued</b> 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
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 - Notes screen**

H X	1-Lewis, Al	- <b>&lt;</b>		Lewis, Al Smit	th, Bill Greenburg	, Goldie Soffer, H	arry Pinkman, Jessie	Bichon, Selm 📏
Personal								
Labor Defaults								
Pay	otes							
Federal	Ž I							
State	Payroll Notes							
Local								
Child Support								li li
Direct Deposit								
Scheduled E/Ds								
Delivery	tes							
Time Off Accrual	NO I NO							
Notes	General Notes							
	Ge							
Previous Next								

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	These are general notes about the employee and payrolls, and are stored with the employee data and only appear on this screen - not on checks. When deleting a note, be sure to delete all of the spaces, before saving and committing.

## **Employees - Shortcut Button**

### Check Calculator

The **Check Calculator** Shortcut button 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.



D&L Services (HCI	A)	Check De	tails				
EE Code - Name I-4/ Levis 963 Main Street Brooklyn, NY 10 Redenii Taxabie Wages 0.43Di Taxabie Wages 0.43Di Taxabie Wages 0.43Di Taxabie Wages 0.43Di Taxabie Wages	066 R Netto G 52 52 52	Regular Eamings Outr	3240.58 Totel: 3240.58	DEDUCTIONS: Direct Desset - Net Desuctions DuoTotal:	\$100.00 \$100.00	PEDERAL TAXED OADDI Tax Medicate Tax Pederal Tax OTATE TAXED: NY State Tax LOCAL TAXED: Net Yon City Ret Taxes SubTotal:	\$14.79 53.46 520.28 \$4.03
heck Settings Earnings/Deductions	Federal	State	SUI	Local	Option	15	Actions
Add C	ancel					[	Calculate
E/D Code *. 1	Description	T HisPos 1	PayRate	T Amount T	Rate #	т	Send To Payroll
E02	Regular		\$0.0			\$0.00	
A D3	Direct Deposit - Net			\$100.00			

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.
Earnings/Deductions tab	Use the Add / Delete buttons to add or delete earnings or deductions to or from the check.
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.

The following screen opens, on which to specify the payroll in which to include the check for processing.

Send this Check to	Payroll		Choose a Payroll for this check	×
D&L Services (HCM) EE	Name AL Lewis	Net Amount \$0.00	02/26/2015     Batch 1 - Weekly - 06/28/2015 to 07/04/2015	Save/Return
	963 Main Street Brooklyn, NY 10066		New Batch 04/23/2015	1
Options set for this	Check		05/14/2015 08/04/2015	
Updates:			08/18/2015 08/25/2015	7
Tax Calculations are not	tlocked in. 💕		07/18/2015 📾 07/20/2015	Go To Payroll
	Change Options	]	m 07/22/2015	



Field / Button	Description
Options for this Check section	
Make this a Manual Check	Select to create a Manual check.
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.
Choose a Payroll for this Check *	Select the batch and payroll in which to include the check.
Save/Return button	Saves the calculated check to the selected batch/payroll and returns the user to the Check Calculator.

\* The Batch Frequency of the payroll selected must match the employee's pay frequency.



# The Employees Menu - Adding New Employees

Employees can be added, edited and viewed in the Employees menu in Evolution Payroll. When navigating, it is recommended that you use the **TAB** key to move from field to field (**TAB** + **SHIFT** key to move to a previous field). Upon reaching the last field on a screen, click the **TAB** key to progress to the next screen, and continue entering information.

To add a new employee in Evolution Payroll,

- 1. Select and open the client and company from the dropdown list 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 left-hand side of the screen.

Search for En	minute in the second					Preview	w		Name Webtest - ESS/WC
EE # 7		First Name Bill	T State MA	T Zip Code 10022	T Status Active		Lewis nt Name Fint Name	13	Company
4	Soffer Pinkman Bichon	Harry Jessie	VT NY	05401 10011	Active	55	ewis Al Incelin 84-77-3311		Code Wettest Name
6	Goodman	Selma Saul	MA VT VT	88855	Active	St	atus: ctive		Webtest - ESS/WC
8 9 10	Clark White Bigole	Wille Walter Susan	NY VT	05401 10012 05401	Active Active Active	96	stress 33 Main Street rooklyn, NY 10066	I	
11	Simon	Simon	NY VT	11234	Active			I	
13	Lewis	Al Goldie	NY	10066	Active			I	
					1 - 12 of 12	items C			
								I	

- Click the large plus + sign in the heading to create a new record Result: The Add Employee box opens.
- 4. Select the Add Method **Advanced** (Basic is the default) if the information on the Basics screen is not detailed enough for the new employee.

**Note:** The option of selecting **Basic** or **Advanced** is available only if Quick Entry is enabled as a Security Right. If it is not enabled, the user automatically goes to the Personal screen, and enters using the Advanced method.

Add Employ	/ee ×
Ô	Let's start by checking the ID of the EE you want to add to see if it already exists in the system
	Add Method ® Basic © Advanced
	@SSN ©EIN 123-45-6789
	Check ID Cancel



- 5. Select whether the Tax ID is a **SSN** or **EIN** and enter the Social Security Number or Employer Identification Number.
- 6. Click Check ID.

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.

Note: if the Advanced Add Method was selected, the Employees – Personal screen opens.

### **Employees - Basics screen**

The Employees – Basics screen is displayed only when creating a new employee, when the Basic method is selected. The Basics screen contains the most common fields used when entering an employee, including multiple pay rates and organizational levels. When using the Basic method, only the information on the Basics screen is required to save the employee. Additional Employees Menu items are available on the left-hand side of the screen if needed. If the sections on the Basics screen do not provide enough detail about the employee, users may select the **Advanced** method in the Add Employee dialog box.

<b>. x</b>						New Employ	ycc						
Basics		SSN* OEN*	Employee Type *		EE Code *	Time Clock #		Sta	atus *		Current H	ire Date *	
Local		123-45-8789	W-2 *		13			A	ctive	*			=
Child Support		First Name *	ML		Last Name *		2	On	rganizational Level *		Employm	ent Type *	
							Status	-	Select Team -	*	NA		*
Direct Deposit		Address 1 *					0,	We	brker's Compensation		Job		
Scheduled E/Ds								-	Select Worker's Compensati	vn - 🔻	- Select.	Job -	*
Notes	Demographics	Address 2						Ere	equency *		Salary An	acust.	
	grag								Veekly		Jalary Pa	NOT NOT	
	e a	City *			State *	Zip Code *	Pay		ate 1 *	Rate 2		Rate 3	
	å						<u>п</u>		0.00	nave 2		Rate 5	
us Next		County			Phone	Extension							
		Email							ed Marital Status * Single *	Fed Exemptio	ns'		
		Email					_		•				
		Birth Date	Gender *		Ethnicity *	Tribe	axation		ate '	SDI		SUI*	
			NA *		Not Applicable *	inve	Taxa	V		VT	•		*
							-		ate Marital Status *		State Exe	mptions *	
		Healthcare Coverage *			ACA Status *			-	Select Marital Status -	*			
	£	No ER Paid Ins/Not Eligible	*		Does Not Apply		*	Pa	avroll Check Mail Box		EE Electr	onic Return Mail Box	
	Benefits	Dependent Coverage *	Benefit Eligible						Select Mail Box -	*		Vail Box -	*
	õ	No *		1			ų		E Report Mail Box		2nd EE B	eport Mail Box	
							Ś		Select Mail Box -		- Select I		

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

- 1. Complete the required and applicable fields on the Employee Basics screen. For detailed information about the fields on this screen, refer to the Employees Basics Screen section in this document.
- Press the TAB key or click the Next button when you complete entering information on this screen.
   Result: From this screen, the Employees Local screen opens.

Note: Skip to page 68 to resume New Employee Basic set up.



# Employees - Personal screen

If more detailed information is needed than the Basics screen provides, select the **Advanced** method on the Add Employee dialog box. Note the additional Employee Menu items on the left-hand side of the screen.

**Important!** When creating a new employee using Advanced method, you must progress through the **State** Menu Item before the new employee can be saved.

X						New Emplo	yee				
Personal		●SSN* ©EIN*	Emplo	yee Type *	EE Code *	Time Clock #		Status *			
or Defaults		645-35-1351	W-2	*	16			Active			*
Pay		First Name *		M.I.	Last Name *			Current Hire Date *		Original Hire Date	
									Ē		E
ederal		Address 1 *					Hire Status	Termination Date		Rehire Eligible *	
State							e St		(II)	Yes	*
Local	hics	Address 2					主	Employment Type *			
d Support	Demographics							N/A			*
ct Deposit	bù	City *			State *	Zip Code *		On Call From		On Call To	
duled E/Ds	a				Ŧ				Ē		Ē
elivery		County			Phone	Extension		ACA Status *			
Off Accrual		Email						Does Not Apply			*
		Email						Healthcare Coverage *			
Notes		Birth Date	Gende	r*	Ethnicity *	Tribe		No ER Paid Ins/Not Eligible			*
			N/A		1		fits	Dependent Coverage *		Benefit Eligible	
							Benefits	No	Ŧ		(II
Next							8	Group Term Policy			
NEAL								GTL Hours		GTL Rate	

- 1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to Employees Advanced screen in this document.
- Press the TAB key or click the Next button when you complete entering information on this screen.
   Result: The Employees Labor Defaults screen opens

### **Employees - Labor Defaults screen**

Personal	Worker's Compensation		Division	Branch	Department	Team
Labor Defaults	- Select Worker's Compensation -	•	Western Division	Western Branch	Western Sales Dept	Gladys' Team
Pay	Job - Select Job - - Select Union - - Select Union - - Select Union - Pay Group - Select Pay Group -	*	<ul> <li>North Eastern Division</li> <li>Northeast Branch</li> </ul>			
Federal	E Union		<ul> <li>Northeast Sales Dept</li> </ul>			
State	- Select Union -	Ψ				
Local	Pay Group		Western Division			
Child Support	- Select Pay Group -	Ψ	Western Branch			
Direct Deposit Scheduled E/Ds	General Ledger Tag		Jessie's Team Western Division Western Branch Western Sales Dept Gladys' Team Central Division Central Division			
Delivery			<ul> <li>Central Sales Dept</li> </ul>			
Time Off Accrual			Gus' Team			
Notes			<ul> <li>South Eastern Division</li> </ul>			
			<ul> <li>Southeast Branch</li> <li>Southeast Sales Dept</li> </ul>			
			Walt's Team			

- 1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the <u>Employees Labor Defaults screen section</u> in this document.
- Press the TAB key or click the Next button when you complete entering information on this screen.
   Result: The Employees Pay screen opens.



### **Employees - Pay screen**

Personal		Pay Frequency *		Raise Date	Raise Rate			A		-			die Soffer	
Labor Defaults		Bi-Weekly *	102 102					~						
		Salary Amount	pdates	Raise Amount	Pay Freque	ency *			Primary *	T Rate	Numbe	н"• Т	Rate Amount *	· •
Pay		\$898.00	100	3	Weekly	*			No		1		\$12.00	
Shifts		Std Hours	90	Raise %					Jobs Number			Code		
Piecework		80.00	Pla						- Select Jobs N	mber - v	8	- Select Co	de - v	
Auto-Labor Dist.	c	Rate Number		New Hire Report					Pay Grade Positi	on	Comp	Description		
Federal	Information	2		Completed					First Level Mana	iger v	50			
	E	Rate Amount *					10		Pay Grade		Workers	State		
State		\$37.74		FLSA Exempt * No			verride		Band 2		>			
Local	Salary	Wage Limit					DNBL		Division	Branch		Department	Team	- 1
Child Support	38		tio	- Select Position			0		Continuen	Cranci		Ceparonera		
Direct Deposit		Limit Frequency	Pos											
Scheduled E/Ds		Annual +		Effective Date	19 on File No				# Div1					
		Annualized				٠				Branch				
Delivery				High Comp	Corp Offs					Department N		ield		
Time Off Accrual		Calc Annual		Yes +	No	٠				Not Define Team2	đ			
Notes		\$23,348.00							avel	Test 2Nd Dep				

- 1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the <u>Employees Pay screen section</u> in this document.
- 2. If there are any overrides, click the **Add** button to add the required information.
- Press the TAB key or 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 Evolution, after which they can be applied to employees in Evolution Payroll. Some employees may be assigned multiple shifts.

Users must have Employee – Shifts menu access set up in Evolution to be able to create and apply shifts.

Employees				
+				III 🖽 🖽
	-Goode, Alice K. 🔹 🗶		Lewis, Al Smith, Bill G	Greenburg, Goldie Soffer, Harry
Personal Labor Defaults	Add Delete			
Pay	Shit*	T Shift Rale T	Shit%	T Default T
Shife	Extra Shift	\$25.000	1.30%	No
Piecework	Shitt1	\$546.000	65.00%	No
Auto-Labor Dist.				
Federal				
State				
Local				
Child Support				
Direct Deposit				
Scheduled E/Ds				
Delivery				
Time Off Accrual				
Notes				
				2 items
Previous Next				
1000				

- 1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the Employees Pay screen Shifts section in this document.
- 2. Press the **TAB** key or 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 Evolution at the Client level.

Users must have **Employee – Piecework menu** access set up in Evolution to be able to create and apply piecework.

	1-Lexis, Al 🔹 🗶	Lewis, Al Smith, Bill Greenburg, Goldie	Soffer, Harry Pinkman, Jessie
Personal	Add Delete		
Labor Defaults	Piece* T	Rate Amt T	Rate Qty T
Pay	Piece2	\$45.00	66.00 <b>*</b>
Shifts	Piece2 Piece1	\$45.00	453.00
Piecework	Piecel	\$123.00	453.00
Auto-Labor Dist.			
Federal			
State			
Local			
Child Support			
Direct Deposit			
Scheduled E/Ds			
Delivery			
Time Off Accrual			
Notes			
			*
			2 items
Previous Next			

- 1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the <u>Employees –Pay screen Piecework section</u> in this document.
- Press the TAB key or click the Next button when you complete entering information on this screen.
   Result: The Employees Auto Labor Dist screen opens.

### Auto Labor Distribution Sub-menu

The Auto Labor Distribution screen is where employees' time and pay rates are set up and applied, based on the D/B/D/T levels employees work.

Users must have **Employee – Auto Labor Distribution menu** access set up in Evolution to be able to create and apply Auto Labor Distribution.

H X	1-Lew	ńs, Al 🔹 👗				Lewis, Al	Smith, Bill Greenburg,	Gold	ie Soffer, Harry	Pinkman, Jes	sie
Personal		Labor Distribution Options *			Add Delete	01					
Labor Defaults		Distribute Both	•		Percentage * T	Orga	anizational Level	T	Job 🗸 🔻	Workers Comp	T
Pay	sfic	Auto Labor Distribution E/D Group 401k Match	×		90		h/Department Name Field/null			8810	
Shifts	Settings				10	Div1/NY Branc	h/Department Name Field/null		job #1	8810	
Piecework											
Auto-Labor Dist.											
Federal											
State				tion							
Local				Allocation							
Child Support				A							
Direct Deposit											
Scheduled E/Ds											
Delivery											
Time Off Accrual											
Notes					Total: 100%						*
					10(d). 100%						
										2	items
Previous Next											

- 1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the <u>Employees Pay screen ALD section</u> in this document.
- 2. Press the **TAB** key or click the **Next** button when you complete entering information on this screen.



# **Employees - Federal screen**

Personal		undefined *	undefined *		undefined *	undefined *		nburg, Goldie So undefined			
Labor Defaults		Single +	0		W-2	NY					
		undefined *	undefined		undefined		œ	undefined *		undefined *	
Pay	FO	None +					1099R	No	•	No	
Federal	Taxation	undefined		orm	undefined		444	undefined *			
State	Ta			W2 FI				None			
Local		undefined		8	undefined						
Child Support											
Direct Deposit		undefined *			undefined						
Scheduled E/Ds	se s	Include	•								
THE REAL PROPERTY.	24	undefined *			undefined *	undefined *					
Delivery	Tax Stati	No			No	No					
ime Off Accrual	Ta	undefined *		Bui	undefined *	undefined *					
Notes	Ш	No		Settings	No	No					
		1 marten an		V2	undefined *						
	40	undefined * No		-	No						
	tuse										
ous Next	ER Tax Stati	No									
	Xe										
	a	undefined * No									

- 1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the Employees Federal screen section in this document.
- Press the TAB key or click the Next button when you complete entering information on this screen.
   Result: The Employees State screen opens.

## **Employees - State screen**

	1-Lewis, Al	Ŧ	<				Le	wis, Al	Smith,	Bill (	Greenburg, G	oldie S	offer	r, Harry Pinkm	an, Jess	ie 🗲
Personal	Add	Delete														
Labor Defaults	7100		T SUI*	T	SDI	T	Hor	vo.*	T		Marital Status *		T	Tax Exem	nfione	Ŧ
Pay	4	NY	T SUP	- T	NY	- T		res	r		le/Head of House	hold	1		)	7
Federal	<u>.</u>	County		Method				State Tax		Only	SDI Exempt	noiu		Тах Туре	, 	
State		oouniy		Take Non	e	Ŧ		Include			Include			None	*	
Local		Salary Type		To State			Status	SDI Exempt		Tax Status	SUI Exempt		S	Minimum Wage		
Child Support		N/A			o State - 🔻		x St	Include		x St	Include	*	Overrides	initial rage		
Direct Deposit		Calc SUI Taxabl	e 1099 Wages	Recip			E Tax	SUI Exempt		R Ta			Ove			
Scheduled E/Ds		Work At Home	Tax Code	Ω.			Ш	Include		ER						
Delivery		No	¥													
Time Off Accrual																
Notes																
Previous Next																-
																1 items

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.

- 3. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the <u>Employees State screen section</u> in this document.
- 4. Click the **Add** button to add another state as needed, or click the **Delete** button to delete a state from the employee's record.
- Press the TAB key or click the Next button when you complete entering information on this screen.
   Result: The Employees Local screen opens.



# Employees - Local screen

H X	1-Lewis, Al	- <						L	ewis	, Al <sub>Si</sub>	mith, Bill	Greenburg, Go	ldie Sof	ier, Harry Pink	man, Jes	sie Bichon,	Selm >
Personal Labor Defaults	Add	Delete															
Pay		Local*	т	State *	T	Co	unty *	۲	Lo	al Type *	Ŧ	Tax Rate *	т	Misc Amount	т	Tax Code	т
Federal	4	New York City Res.		New York		New Y	York City Res.			EE							^
State		Yes		Include			Always		*	les	Yes		*				
Local										Overrides	None						
Child Support										б							
Direct Deposit	i																
Scheduled E/Ds																	
Delivery																	
Time Off Accrual																	
Notes																	
1																	
Previous Next																	
TTOTIOUS NEXT																	~
																	1 items

- 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 <u>Employees Local screen section</u> in this document.
- 3. 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.
- 4. Click the **Next** button

Result: The Employees – Child Support screen opens.

### **Employees - Child Support screen**

H X	1-Lewis, Al		- <					Lewis, Al	Smith	n, Bill Gr	eenbu	g, Gold	ie So	ffer, Harry	>
Personal	Add	Delete	_												
Position							_								
Labor Defaults	Priority * •	T	Case # T	Olate origin	۲	Medical Eligible *	۲		_	Arrears *	۲	FIPS	T	Custom Field	т
Pay	1		111223365	Vt		Not Applicable		Office Of Child Suppor		No					*
Federal	2		22233666	NY		Not Applicable		Office Of Child Suppor	rt	No					
State															
Local															
Child Support															
Direct Deposit															
Scheduled E/Ds															
Delivery															
Time Off Accrual															
Notes															
															_
Previous Next															2 items
															2 items

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

- 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 <u>Employees – Child Support screen section</u> in this document.
- 2. Click Save when you have completed entering information on this screen.
- Press the TAB key or click the Next button.
   Result: The Employees Direct Deposit screen opens.



#### **Employees - Direct Deposit screen**



- 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 section in this document.
- 2. Click Save when you have completed entering information on this screen.
- 3. Press the **TAB** key or click the **Next** button.

**Result:** The Employees – Scheduled E/Ds screen opens.

#### **Employees - Scheduled E/Ds screen**

Personal		Add	Delete	1														
Labor Defaults																		
Pay		Code	· • •		Description *		T Calc	lation Method *		T	Amount \$	T	Amount %	T	Starting *	۲ ۲	inding	
Federal	4	C	01	Dir	ect Deposit - Partia	11		Fixed			25				02/17/2015			
State		Basic	Schedule	Limits	Thresholds													
Local		Code				Des	cription			Alway	s Pay/Deduct			Deductio	ons to Zero			
		D1			•	Di	rect Deposit - Partial			No			*	No				٣
Child Support		Priorit	/			Calc	ulation Link			Deduc	t Whole Check			Take Ho	ime Pay			
Direct Deposit						- S	elect E/D Group -		*	No			*					
Scheduled E/Ds		Calcul	ate Using							Send	То							
Delivery		Meth	od defined fo	r this E/D					*	Dire	ct Deposit							Ŧ
Time Off Accrual			Calculation Me	thod			Amount S				Direct Deposit Account							
Notes			Fixed		+		25.00				30287555					٣	+	
			E/D Group				Amount %				Reference to Display on Che	ck					-	
			- Select E/D	Group -	*													
ious Next			03		Direct Deposit - Net			None							02/17/2015			
Next			)4		Child Support			Fixed			50				03/01/2015			

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. The table below identifies some of the most common E/D Codes that are and those that 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) catch-up 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		No
Hourly		No
Sick		No
Vacation		No
Paid Time Off		No
Bonuses		No

To set up employee-level Scheduled E/Ds

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 section in this document.

Basic	Schedule	Limits	Thresholds								
Code					Description		Always Pay/Deduct		Deductions to Zero		
D1			٣		Direct Deposit - Partial 1		No	*	No		
Priority	у				Calculation Link		Deduct Whole Check		Take Home Pay		
						*	No	٣			
Calcul	ate Using						Send To				
Meth	od defined for thi	s E/D				*	Direct Deposit				*
	Calculation Method				Amount \$		Direct Deposit Account				
	Fixed			*	25.00		30287555			٠	+
	E/D Group				Amount %		Reference to Display on Check				
				*							

2. Click the **Schedule** tab when this screen is complete.



4	D1	Direct Deposit - Partial 1		Fixed	25		02/17/2015		
Bas	sic Schedule	Limits Thresholds							
	Starting			Payrolls Affected			Block Based On		
d N	02/17/2015		ts	All	•	ks	Custom Defined	τ	
Effect	Ending		ffec	Frequency		Bloc	Weeks blocked		
ů.	i i		A	Every Pay	Ŧ		0 1 0 2 0 3 0 4 0 5		

3. Click the **Limits** tab when this screen is complete.

80 Group	 ED Group	Amount ED Group	
- Select E/D Group -	Select E/D Group -	Select E/D Group -	*
Pay Period %	Pay Period %	Hours ED Group	
Pay Period 5	2	E - Select E/D Group -	
Pay Period 5	Pay Period 5	Hourly Rate	
	njon	Max	
	2 EE Amual S		
	Citert Annual 5		

4. Click the **Thresholds** tab when this screen is complete.

	Action			E/D Group	
	None	*	sp	- Select E/D Group -	*
	Remaining		Thresholds	Amount \$	
Targets			hre		
Larg	Balance Taken		-	Use Pension Limit	
	Amount 5				

- 5. Click Save when you have completed entering information on this screen.
- 6. Press the **TAB** key or click the **Next** button.

Result: The Employees – Notes screen opens.

## Employees - Delivery screen

Personal		Address 1 *					_	01 Address 1	nith, Bill Greenburg				
Labor Defaults		2 Oak Road											
Pay		Address 2 Apt, D1						Address 2					
Federal		City *	State *			Zip Code *	Payroll Override Address	City		State		Zip Code	
State		Burlington	OH		•	12234	Add				*		
Local	fres	County		Country			ide	County					
Child Support	Add			Burlingto	on		vert						
Direct Deposit	Primary Address	Email Scookingham@lsystemsllc.Com						Phone 1	Extensi	on		Print Voucher Yes	
Scheduled E/Ds	Prir	Phone 1				Extension	ayı		Extensi			165	*
Delivery		(093) 222-2222				Extension		Phone 2	Extensi	on			
Time Off Accrual		Phone 2				Extension		Phone 3	Extensi	on			
Notes		Phone 3				Extension							
		Payroll Check Mail Box				eturn Mail Box		Password fo	or VMR Deliveries				
Previous Next	VMR	Tax Returns	*	Tax R	Returns		*						
	N N	EE Report Mail Box Payroll Details			E Report I oll Details								



- 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 <u>Employees Delivery screen section</u> in this document.
- 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. Press the **TAB** key or click the **Next** button.

**Result:** The Employees – Time off Accrual screen opens.

#### **Employees - Time off Accrual screen**

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

	1-Lewis, Al	- <				Lewis, Al Smith, Bill	Greenburg, Goldie So	ffer, Harry Pinkman, Jes	sie Bichon, Selm 🗲
Personal Labor Detaults	Add	Delete					Overrides		
	Active *	т Туре• т	Balance *	T Used * T	Accrued * T	Effective Date T Accrual Ma		T Rollover Type T	Rollover Date T
Pay Federal	⊿ Yes	Time Off Acrual	30.00	20.00	50.00				
State		Accrual Date •	Accrued	Accrued Capped	Used	Note	Check Date	Run # Check #	
Local		07/21/2015	50.00		0.00	Manual Adj:			<b>^</b>
Child Support		07/21/2015	0.00		20.00	Manual Adj:			
Direct Deposit									
Scheduled E/Ds	tory								
Delivery	Recent History								
Time Off Accrual	ecen								
Notes	Ω.								
Previous Next									2 items
									1 items

- 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 <u>Employees – Time off Accrual</u> <u>screen section</u> in this document.
- 2. Select the Type of TOA being added.
- 3. Tab over to the Accrued tab and enter the amount the employee has accrued. A window opens requesting a reason for the adjustment. Enter a reason > click **OK**.

You are about to adjust ACCRUED value	×
Please provide reason for the adjustment and press Ok or press Cancel in adjustment. Adjustment reason (28 char max):	you do not wish to make the
	Ok Cancel

Result: the Balance fills in.

- 4. Enter a Used amount if applicable.
- 5. Complete the following fields.



- 6. Click **Save** when you have completed entering information on this screen.
- 7. Press the **TAB** key or click the **Next** button.
  - Result: The Employees Notes screen opens.

#### **Employees - Notes screen**

#### **Payroll Notes**

Notes entered here can be viewed by the payroll processor, or other internal colleagues.

#### **General Notes**

These general notes about the employee and payrolls are stored with the employee data and only appear on this screen - not on checks.

	1-Lewis, Al	- <b>&lt;</b>	Lewis, AI Smith, Bill Greenburg, Goldie Soffer, Harry
Personal			
Position			
Labor Defaults	otes		
Pay			
Federal	Payroll Notes		
State			
Local			
Child Support			
Direct Deposit			
Scheduled E/Ds	fes		
Delivery	N N		
Time Off Accrual	General Notes		
Notes	8		
			8. 
Previous Next			



# The Payroll Menu - Screens and Fields

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

There are five statuses you may see represented on the Timeline screen described in the table below.

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.

Pa	yroll Timeline					
+	-					
	04/23/2015 - 1	On Hold	05/14/2015 - 1	Past Due	06/04/2015 - 1	3 days left
	Weekly	04/12/2015 - 04/18/2015	Weekly	05/03/2015 - 05/09/2015 New Batch	Weekly	05/24/2015 - 05/30/2015 New Batch
				_		
	Submitted on: 05/29/2015 09:05 AM	&	Submit by:05/11/2015		Submit by:06/01/2015	
	04/30/2015	Not Started	05/21/2015 - 1	Submitted	06/05/2015 - 1	Processed
	Weekly	04/19/2015 - 04/25/2015	Weekly	05/10/2015 - 05/16/2015	Weekly	05/03/2015 - 05/10/2015
		_ <b>_</b>				/
	Submit by:04/27/2015		Submitted on: 05/28/2015 04:16 PM	66	Submitted on: 05/28/2015 12:23 PM	66
	05/07/2015	Not Started	05/28/2015 - 1 Setup Run	Submitted	06/11/2015 - 1	Processed
	Weekly	04/26/2015 - 05/02/2015	Weekly	05/17/2015 - 05/23/2015	Weekly	05/31/2015 - 06/06/2015
		_ <b>_</b>				
	Submit by:05/04/2015		Submitted on: 05/28/2015 04:38 PM	66	Submitted on: 05/11/2015 01:29 PM	<b>66</b>



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

Check Date •	T Run #	Payroll Type	▼ Created On	T Due On	▼ Current Status	▼ Preprocessed On
01/20/2016		Regular		01/18/2016	Not Started	
01/13/2016		Regular		01/11/2016	Not Started	
01/06/2016		Regular		01/04/2016	Not Started	
12/30/2015		Regular		12/28/2015	Not Started	
2/23/2015		Regular		12/21/2015	Not Started	
2/21/2015		Regular		12/17/2015	Not Started	
2/16/2015		Regular		12/14/2015	Not Started	
2/14/2015		Regular		12/10/2015	Not Started	
2/09/2015		Regular		12/07/2015	Not Started	
2/07/2015		Regular		12/03/2015	Not Started	
2/02/2015		Regular		11/30/2015	Not Started	
11/30/2015		Regular		11/25/2015	Not Started	
11/25/2015		Regular		11/23/2015	Not Started	
				11/19/2015	Not Started	

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

Symbol	Description
<b>60</b>	View – visible only on processed payrolls, click to view details of the payroll including batches, check lines, etc.
	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.
Ŵ	Delete – click to delete previous changes. Also, to delete a batch.
×	Cancel Changes – click to cancel changes made to a screen or payroll.
<b>o</b> °	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.



Symbol	Description
1	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.
888	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 lets 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.

#### Navigation Bar - on the Payroll - Batch Checks screen

Between the Header and the Column Headings is a Navigation bar, which contains additional buttons and fields.

Add Check	Delete Check	Search for Employee	gruus

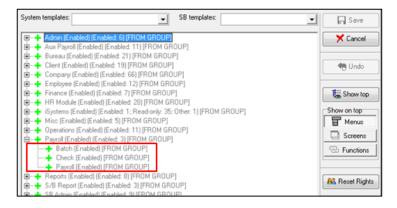
Field / Button	Description
Add Check button	Click to add checks to a batch
Delete Check button	Click to delete a check from a batch
Search field	Search for a specific check
View Selection field	Select the view with which to view payroll data on the screen.
	<b>Summary View</b> - Default view, this is the check entry screen, on which the user can add checks and edit information for employee checks.
	<b>Summary Detail View</b> - The Summary Detail View provides a more detailed view of the Summary screen, listing each check and its details.
	<b>Detail View</b> - 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.



### **Payroll Security**

Prior to creating a new payroll in Evolution Payroll, the following security rights must be enabled:

- 1. Go to the Admin Security Users screen.
- 2. Select the user from the list.
- 3. Click the **Details tab** > **Click the User Rights** button.
- 4. The following Payroll rights must be enabled (green plus sign).
  - Payroll Batch
  - Payroll Check
  - Payroll Payroll



- 5. Click the **Functions** button.
- 6. The following rights must be enabled:
  - Ability to Submit Payrolls
  - Ability to Mark Payrolls as Completed
  - Access to Wages
  - Access to Rates



istem te	emplates: SB templates:	-	Save
+	Ability to create backdated payrolls (Enabled) [FROM GROUP]	*	X Cancel
+	Ability to create Manual ACH (Enabled) [FROM GROUP]		
+	Ability to define benefits enrollment (Enabled) [FROM GROUP]		
+	Ability to delete client (Enabled) [FROM GROUP]		🗮 Undo
	Ability to Delete Processed Payrolls (Enabled) [FROM GROUP]		
-	Ability to delete VMR Mail Boxes (Enabled) [FROM GROUP]	-	
- <b>-</b>	Ability to delete/alternate processed tax returns (Enabled) [FROM GROUP]		🛛 😹 Show top
-	Ability to directly process payrolls (Enabled) [FROM GROUP]		
-	Ability to edit data dictionary (Enabled) [FROM GROUP]		Show on top
-	Ability to edit payroll bank account register (Enabled) [FROM GROUP]		Menus
+	Ability to edit RW library (Enabled) [FROM GROUP]		De
+	Ability to export using EvoX (Enabled) [FROM GROUP]		Screens
+	Ability to globally update pay rates (Enabled) [FROM GROUP]		- Function
+	Ability to import using EvoX (Enabled) [FROM GROUP]		
-	Ability to login into EvoClock from Evolution (Enabled) [FROM USER]		
-	Ability to manually correct OASDI & Medicare (Enabled) (FROM GROUP)		00 D
	Ability to mark payrolls as completed (Enabled) [FROM GROUP]		AS Reset Righ
-	Ability to pay liabilities w/o funds (Enabled) [FROM GROUP]		
+	Ability to pre-process by batch (Enabled) [FROM GROUP]		
+	Ability to print unprocessed manual checks (Enabled) [FROM GROUP]		
+	Ability to put a Client On or Off Read Only Mode (Enabled) [FROM GROUP]		
+	Ability to reprint payroll reports (Enabled) [FROM GROUP]		
+	Ability to reprint processed misc checks (Enabled) [FROM GROUP]		
+	Ability to reprint processed payroll checks (Enabled) [FROM GROUP]		
+	Ability to rollback tax payments (Enabled) [FROM GROUP]		
+	Ability to see and edit EE HR documents (Enabled) [FROM GROUP]		
+	Ability to see hidden tables (Enabled) [FROM GROUP]		
+	Ability to set effective period for locals (Enabled) [FROM GROUP]		
	Ability to submit payroll (Enabled) [FROM GROUP]		
	Ability to undelete records (Enabled) [FROM GROUP]		
+	Ability to unlock a company with a "high" credit hold (Enabled) [FROM GROU	P]	
+	Ability to unmask sensitive data on reports (Enabled) [FROM GROUP]		
+	Ability to unvoid voided check (Enabled) [FROM GROUP]	E	
+	Ability to update as of another date (Enabled) [FROM GROUP]		
+	Ability to use offline client (Enabled) [FROM GROUP]		
+	Ability to void check from previous quarter (Enabled) [FROM GROUP]		
	Ability to void checks (Enabled) [FROM GROUP]		
	Ability to void payroll (Enabled) [FROM GROUP]		
+	Access to Bank Acct Numbers - Check (Enabled) [FROM GROUP]		
	Access to Bank Acct Numbers - Misc Check (Enabled) [FROM GROUP]		
	Access to Client Bank accounts (Enabled) [FROM GROUP]		
	Access to Company Cash Management (Enabled) [FROM GROUP]		
	Access to company salespersons (Enabled) [FROM GROUP]		
	Access to Dashboard (Enabled) [FROM GROUP]		
	Access to Employee Bank accounts (Enabled) [FROM GROUP]		
	Access to evoMRC (Enabled) [FROM GROUP]		
	Access to pay rates (Enabled) (Enabled: 1) [FROM GROUP]		
	Access to SB EIN (Enabled) [FROM GROUP]		
	Access to SB report info (Enabled) [FROM GROUP]		
	Access to SB sensitive info (Enabled) (Enabled: 1) [FROM GROUP]		
	Access to Service Bureau accounts (Enabled) (Enabled: 1) [FROM GROUP]		
	Access to SSN (Enabled) (FROM GROUP)		
	Access to wages (Enabled) [FROM GROUP]		
	Apply EE Quick Entry in WebClient (Enabled) [FROM USER]		
	Auto Create Checks including Termed EEs (Enabled) [FROM GROUP]		
	Display User Name in Audit (Enabled) [FROM USER]		
	Payroll wizard including deposit/liability, billing, and ACH block options (Enable	ed) (FROM GROUP	



### Payrolls - Timeline screen

12/29/2014 - 1	Processed	01/12/2015 - 2	On Hold	01/19/2015	Not Due
Weekly	12/11/2014 - 12/17/2014	Weekty	12/25/2014 - 12/01/2014	Weekty	01/01/2015 - 01/07/2015
Submitted on: 12/22/2014 10:17 AM	<b>60</b>	Submitted on: 01/12/2015 01:52 PM	<b>66</b>	Submit by otracols	+
12/31/2014 - 1	Processed	<b>11/14/2015 - 1</b>	Submitted	01/21/2015	Not Due
Weekty	12/21/2014 - 12/28/2014	Weekly	01/04/2015 - 01/11/2015	Weekty	01/11/2015 - 01/18/2015
Submitted on:				-	-
12/24/2014 10:55 AM	<b>60</b>	Submitted on: 01/12/2015 11:24 AM	*	500 Submit by: 01/19/2015	т
01/21/2015 - 1	Pending	01/15/2015 - 1	Past Due	01/26/2015	Not Due
Weekly	01/11/2015 - 01/18/2015 New Batch	Weekly	01/04/2015 - 01/11/2015	Weekby	01/06/2015 - 01/14/2015

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

Click the large plus + sign in one of the payroll cards to create a scheduled payroll based on the calendar settings.

Result: The Check Batch Settings screen opens (below).

OR

• Click the large **plus sign** in the header, beneath the Payroll Timeline title to add an unscheduled payroll. **Result:** the Payrolls - Payroll Settings screen opens (following page)

#### Payrolls - Check Batch Settings screen

oli 10	0/22/2015 - 1									$aabla$ $\rightarrow$ $abbaa$ - Batches - Checks -	→ III	→
х	Check Batch -4 - Settings											
	Start Date		End Date			Time Clock Source File						
	10/11/2015	8	10/17/2015	00		Choose file		x				
	Frequency					File Format					•	
	Weekly				22	CSV - Comma Separated Values	*				-	
US	Employee Types				Option	Date Field Format						
ation Options	All				ŏ	2 Digit Year (mm/dd/yy)	*					
0	Employee Filter			Select El	is od	Employee Synchronization						
atio	Select Template				Ē	Custom #	*		Create Checks			
Cre	Template				Clock	Organizational Synchronization						
	Select Template				ē	Full DBDT	*					
	Checks per EE		Check Types		Ē	Job Codes						
	1		Regular	*		Do Not Import Job Codes	*					
	Calculate Scheduled EDs					Apply Org Level						
	Standard Hours					From File	*					
	Salary Pay											
Include	Payroll Defaults											

Field / Button	Description
Creation Options section	
Start Date	The beginning of the Payroll Batch period
End Date	The end of the Payroll Batch period

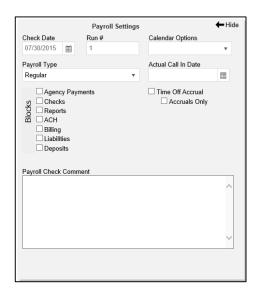


Field / Button	Description
Frequency	The Payroll frequency
Employee Types	The employee types to include in the payroll
Employee Filter – Select EEs	Click to select specific employees to include in the payroll
Template	The Payroll Template to use for this payroll, if any.
Checks per EE	The number of checks 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.
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 Check.
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"
Payroll Type	The type of payroll to be processed
Blocks	Select each item to be blocked on this payroll
Calendar options	Choose whether to add a new payroll date, change a payroll date, or ignore the payroll calendar. Defaults to Ignore when selected.
Actual Call In Date	The date the payroll was called in
Time Off Accrual	Select to allow Time Off Accrual on the payroll
Accruals Only	Select to allow the payroll to Accrue time off, but not use time off in the payroll.
Payroll Check Comment	The text to be displayed on checks.



### 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.

<u>Summary View</u> – (default) this is the check entry screen, on which the user can add checks and edit information for employee checks. See screen print above.

	015 - 1	Batch 1 : 10/11/201	5 - 10/17	/2015 R	egular   -99999331	1 of 1		$[a] \longrightarrow \bigotimes_{Checks} \longrightarrow \bigoplus_{Totals} -$
Add	Check Dele	te Check Search Ch	ecks	Grou	p By: Company Number			Summary +
Type	EE Code	Name Soffer, Harry	Seq 1	Total Hrs 40.00	Gross Pay \$1,000.00	E01 Amt Salary	E02 Hrs Regular 40.00	E02 Amt Regular
R	5	Pinkman, Jessie	1	40.00	\$600.00		40.00	\$600.00
R	6	Bichon, Selma	1	40.00	\$640.00		40.00	\$640.00
R	7	Goodman, Saul	1	40.00	\$600.00		40.00	\$600.00
R	8	Clark, Willie	1	40.00	\$3,120.00		40.00	\$3,120.00
R	9	White, Walter	1	40.00	\$1.000.00		40.00	\$1,000.00
R	10	Bigole, Susan	1	40.00	\$350.00		40.00	\$350.00
R	11	Simon, Simon	1	40.00	\$350.00		40.00	\$350.00
R	12	Kirk, Jim	1	0.00	\$0.00	\$0.00		
R	13	Number, Jenny	1	35.00	\$700.00		35.00	\$700.00
R	14	Warren, Peter	1	20.00	\$200.00		20.00	\$200.00
				40.00	\$400.00		40.00	\$400.00

<u>Summary Detail View</u> – provides a detailed view of the summary screen, listing each check and its details. Checks and / or check lines can be added or deleted, as well as earn codes and columns.

Payroll 10	01/2015 - 1 Batch 1 : 09/20/2015 - 09/26/2015 Manual   102   2 of 2 Bitches 6		Totals -	→ 🔤 Finish
+	Add Check Delete Check Summa	y Detail	*	+ + z
~	ED Code Description HisPics Rate Of Pay Amount Rate Number Agency			Notes/In Time Clo
All Batches			Å	Notes/Instructions Time Clock Import
Batch 1 Weekly	Onex: 402 - R. Batch: 1. Employee: Bigole, Sasan [10]     Total Hm: 40.00, Total Amount: \$450.00			
Weekly	Oneck: 459 - R. Batch: 1, Employee: Clark, Willie [0]     Total Hm: 40.00, Total Amount: \$3,120.00			
	Oheck: 453 - R. Batch: 1, Employee: Goodman, Saul [7]     Tolal Hrs: 40.00, Tolal Amount: \$550.00			
	Oheck: 461 - R. Bakh: 1. Employee: Greenburg, Godde [3]     Total Hm: 40.00, Total Amount \$2,215.00			
	Check: 450 - R, Batch: 1, Employee: Kark, Jim [12]     Totals			
×		48 items		

<u>Detail view</u> – This 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.



Payroll 10/2	22/2015 - 1 Batch 1 :	10/11/2	015 - 10/17/2015							Batches	→ 🍂 —	→ 🖩 - Totals	→ BBB Finish
+ <	Create New Check	<	1 - Lewis, AI - 1 of 1		• >	Check Serial # -99999640	Check Type Regular	Sequence 1 of 1	Recalculate Check	Preview ALD	Detail	Ŧ	<ul> <li>Notes/instructions</li> <li>Time Clock Import</li> </ul>
Batch 1 Weekly	Check Lines Manual Tax		Add Delete	Description -	Ŧ	Hrs/Pcs	Ŧ	Pay Rate	• <b>T</b>	Amount 1	r Rate #	т	Import
	Fed Overrides		E02	Regular			40.00		\$0.00	\$0.0	0 1 (	P):\$0.00 ^	
	State Overrides	•	🗎 E01	Salary					\$0.00	\$2,500.0	0 1 (	P):\$0.00	
	Local Overrides		■ D1	Direct Deposit - Partial 1									
	Options	•	☐ D3	Direct Deposit - Net									
	Review		₽ D4	Child Support						\$50.0	0		
				Health Insurance						\$25.0	0		
				Child Support - 2						\$21.0	0		
	Previous Next												
												7 items	

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

**Note:** in the case of a regularly scheduled payroll, if the pay rate and total hours are known, the calculation is done automatically, and the check lines cannot be altered.

To add a check while working in the Detail view, the **Create New Check** button is above the menu items on the left (see screen print below.) Click it to open the **Add Checks** screen.

Create New Check	1	Lewis, Al		• >	Check Serial # -99999604	Check Type Regular		ecalculate Check				Detail	*	•
Check Lines	Add	Cancel				regula		curculuic officer.						
Manual Tax Fed Overrides		E/D Code	т	Description +	т	Hrs/Pcs	т	Pay Rate	т	Amount	т	Rate #	т	
State Overrides	× .	Select	*										^	
Local Overrides		E02		Regular			40.00		\$0.00		\$0.00		1 (P): \$0.00	
	•			Salary					\$0.00		\$2,500.00		1 (P) : \$0.00	
Options		■ D1		Direct Deposit - Partial 1										
Review	÷	☐ D3		Direct Deposit - Net										
		🗎 D4		Child Support							\$50.00			
		☐ D6		Health Insurance							\$25.00			
		■ D7		Child Support - 2							\$21.00			
Previous Next														

#### Add Checks screen

To add a check while working in the Summary, or Summary Detail views, click the **Add Check** button on the far left of the Navigation bar.

**Result:** the Add Checks screen opens.



Search for employee(s)         EE# Y       Last Name       First Name       Middle Initial       Y       Status       Y       Organizatio       Y         1       Lewis       Al       Ali       Active       West > WB >> WS.         2       Smith       Bill       Active       So East > SB > S.         3       Greenburg       Goldie       Active       West > WB >> WS.         4       Soffer       Harry       Active       Central > CB > S.         5       Pinkman       Jessie       Central       Active       West > WB >> WS.	elect ( Regula	a Check 1 ar	Гуре	Ŧ	Find and Select the Employees to use when creating checks. One check will be created for each Employee you select.								
EE#       Y       Last Name       Y       First Name       Y       Middle Initial       Y       Status       Y       Organization         1       Lewis       Al       Active       Active       West>WB>> WS.         2       Smith       Bill       Active       So East> SB >> S.         3       Greenburg       Goldie       Active       West>WB>> WS.         4       Soffer       Harry       Active       Central > CB >s.         5       Pinkman       Jessie       Active       West>WB>> WS.					Standard Hours: No		olate v						
1       Lewis       Al       Active       West > WB >> WS         2       Smith       Bill       Active       So East > SB >> S.         3       Greenburg       Goldie       Active       West > WB >> WS         4       Soffer       Harry       Active       Central > CB >> S         5       Pinkman       Jessie       Active       West > WB >> WS	Sear	ch for em	oloyee(s)										
2     Smith     Bill     Active     So East > SB > S.       3     Greenburg     Goldie     Active     West > WB >> WS.       4     Soffer     Harry     Active     Central > CB >> S.       5     Pinkman     Jessie     Active     West > WB >> WS.		EE#	▼ Last Name	▼ First Name	e 🔻 Middle Initial	▼ Status	▼ Organizatio ▼						
3     Greenburg     Goldie     Active     West>WB>>WS.       4     Soffer     Harry     Active     Central>CB>>S.       5     Pinkman     Jessie     Active     West>WB>>WS.		1	Lewis	AI		Active	West > WB >> WS						
4     Soffer     Harry     Active     Central > CB > S       5     Pinkman     Jessie     Active     West > WB >> WS		2	Smith	Bill		Active	So East > SB >> S						
5     Pinkman     Jessie     Active     West > WB >> WS.		3	Greenburg	Goldie		Active	West > WB >> WS						
		4	Soffer	Harry		Active	Central > CB >> S						
C Distant Colors		5	Pinkman	Jessie		Active	West > WB >> WS						
		0	Dishan	Colmo		Alativa	Co Foots OD ss O						
13 iter							13 items						

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 screen

To add additional check lines to the batch, begin by highlighting the employee for whom to add the check line(s) on the batch check screen, and switch to the **Detail** view.

Click the **Add** button in the Navigation bar. This creates a new line in the table below, where a new E/D Code must be selected from the dropdown list.

The user can also click the Check Lines menu item

#### Payrolls - Check Lines - Basics tab

															-
•						Check Serie	if CheckTape	. Secure					Detail		
~	Create New Check	< 1	- Lewis, Al		• >	-30000624	Reputer		Recalculate Check						
	Check ( Jines Marical Tax	Add	Delete												
-	Fed Overlides		ED CHE? 4		Description a	Ŧ	Hofee	7	Fay Rate		Amount		Refe #		
	The Oversides		682		Reputer			40.00		\$9.99		50.00		1(P):50.00	
	Local Overrides		Labor Defaults	Local Tax Ove	rtides										
	Options		Rate Number		Hours/Pcs				State		944				
	Factors		1(P):50.00		40.00				- Select -		- Select -				
			Rate Of Pay		Piece				Viol Address						
			0.00		- Select -				Use Default						
			Agency												
	Period Net		- Select -												
			8.621		Salary					50.00		2.500.00		1(P):58.00	
			8.01	0	ined Oxposit - Partial 1										
			800		Direct Depend - Net										



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
Rate # column heading	Pay rate number if the employee has more than one job/pay rate at the company
Basic tab	
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

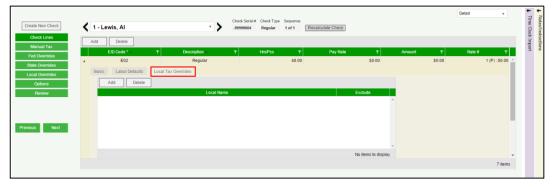
#### Payrolls - Check Lines – Labor Defaults tab

yroll 08/28/2015	1 Batch 1 : 0	8/17/201	15 - 08/23/2015									Batches	→ 🖄		→ Pir
	le New Check	<	- Lewis, Al		•>	Check Se -9999960	rial # Check Type M Regular		Recalculate Check				Detail	٠	Time Clock Import
tch 1 Kekly Fe Sta	anual Tax d Overrides ie Overrides	Ad	Id Delete E/D Code * + E/D Code	▼ Local Tax	Description + Regular	T	Hrs/Pcs	<b>¥</b>	Pay Rate	<b>¥</b> \$0.00	Amount	<b>¥</b> \$0.00	Rate #	▼ 1 (P):\$0.00	
	al Overrides Options Review		Division	Branch	Department		Team		Code alect Job	. +	Workers Comp	ensation	٠		
Previou	s Next		<ul> <li>Northeast Branch</li> <li>Northeast Sale: Jessie's Tea</li> <li>Western Division</li> </ul>						elect Shift - Item Begin Date		Line Item End	Date			
		:	Western Branch E01 D1		Salary Direct Deposit - Partial 1			•		\$0.00		\$2,500.00		1 (P) : \$0.00	
-														7 items	



Field / Button	Description
Labor Defaults tab	
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 <b>plus</b> sign to add a new Job Code, as long as the user's security is set up.
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 tab



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



#### Payrolls - Check Lines – Recalculate Check screen

Once a new check or check lines have been added for an employee, the user can click the **Recalculate Check** button, to view the check stub with the changes.

Payroll 10/22/2015 - 1						Batches	$\rightarrow \bigotimes_{Checks} \rightarrow$	otals
Create Now Check	2 - Smith, Bill - 1 of 2	• >	Check Serial # -99999645	Check Type Sequence Regular 1 of 2	Recalculate Check	Preview ALD	Detail	<ul> <li>Notes/instructions</li> </ul>
A Batch as Check Lines Batch 1 Weekly Batch 2 Weekly Coptions Batch 2 Veekly Coptions Review Previous Next	Check Calculations           Fields 71 zuklik Wages         51.465.00           OAADT Takek Wages         51.465.00           OAADT Takek Top         50.00           Medicare Takek Wages         51.005.00           Gross Ansunt         50.00           Net Amount         50.00           Lock Tax Calculations	EAPINHOS: Salary Exemps SalTota:	\$1,500.00 \$1,500.00	DEDUCTIONS Health insurance Direct Depost - Het Deductions SubTotat	55.00 51, 187.31 51, 186.31	FEDERAL TAXES OASDITAR Medicar Tax Federal Tax STATE TAXES MA Safe Tax Taxes SueTotal	192.69 121.68 1315.65 1453.77 1313.69	LINCOONS
~								

#### Payrolls - Check Lines – Recalculate Check screen

Click the **Preview ALD** button to view Auto Labor Distribution information on employee check stubs. The information is read only. The information is only available for employees set up with Auto Labor Distribution; otherwise an error message is displayed.

The button is disabled for processed payrolls.

E/D Code	T Description T	Hours T	Amount 🔻	Org Level 🛛 🔻	Job 🔻	WComp	T
E01	Salary	4.04	\$16.16	Division 1 B1	45te		
E01	Salary	4.04	\$16.16	Division 1 B2 D	45te		
E01	Salary	4.04	\$16.16	Division 1 B2 D			
E01	Salary	0.12	\$0.49	Division 1 B1			
E02	Regular	0.00	\$7.44	Division 1 B1	45te		
E02	Regular	0.00	\$7.44	Division 1 B2 D	45te		
E02	Regular	0.00	\$7.44	Division 1 B2 D			
E02	Regular	0.00	\$0.23	Division 1 B1			



### Payrolls - 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 Evolution.

					т т И †
Create New Check	🖌 1 - Lewis, Al	Check Serial # Check Type     .99999604 Regular			Notes/Instructions Time Clock Import
Check Lines			Recarculate Offect	Calculate Override Taxes	Notes/Instructions Time Clock Import
Manual Tax	Add States Add Locals			Reciprocate SUI	ction
Fed Overrides	Row	Description	Amount	Disable Shortfalls	4 0
State Overrides	1 Federal		<u>^</u>	Options	
Local Overrides	2 OASDI 3 Medicare			do	
Options	4 EIC				
Review	5 Backup Withholding				
Previous Next					
			*		
			5 items		

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



### Payrolls - 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 Evolution. The State and Local tabs require the same information, but regarding the state or local taxes for the employee.

Payroll 08/28/2015	1 Batch 1 : 08/17/2015 - 08/23/2015	Batches	→ 🚵 –	→ IIII	→ BBB
Batch 1 Weekby M Fe Stat	Ind. Lines Fed Type Fed Type Federal Tax Federal Tax Frequency Overrides Tax Frequency Overrides Tax Frequency Tax Frequency Federal Fat Federal Feder	Inte Check]	Detail	•	Notev/Instructions     Time Clock Import

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

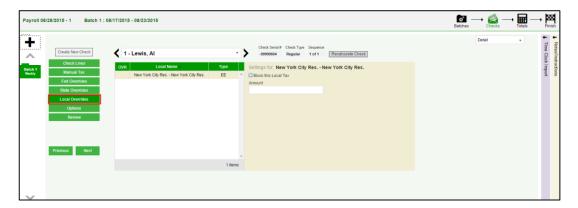


### Payrolls - State Overrides screen

Payroll 08	8/28/2015 - 1 Batch 1 : 08/1	7/2015 - 08/23/2015			Batches → 🚉 —	→ 🗰→	Finish
Batch 1 Weekly	Create New Check Manual Tax Fed Genetics State Ovendes Local Ovendes Review Previous Next	VI - Lewis, Al OVR Sale New York	Check Serial & Check Type Sequence approximation of the second s	ats Check Pepular Tax Addonal Tax Addonal Tax S ON	Detail		Notes/Instructions     Time Clock Import
~			1.0000				

Field / Button	Description
State	State in which there is an override.
Abr	State abbreviation
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 - Local Overrides screen



Is there a local override to be added? Or is there a Local Tax that should be blocked? Enter the amount if applicable.



#### Payrolls - Options screen

Click the Payrolls – Check 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. There is also a place to leave comments for this check.

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

#### Payrolls - Review screen

The Payrolls – Review screen offers the user a place to review [unprocessed] payroll checks with overrides to verify for accuracy before sending to payroll.

View check details (Earnings, Deductions, Taxes, and Net/Gross amounts) to compare the gross to net amounts.

Payroll 08	/28/2015 - 1 Batch 1 : 08	1/17/2015 - 08/23/2015							Batches			→ Einish
Batch 1 Weekly	Create New Check Check Lines Manual Tax Fed Overrides State Overrides Options Review Previous Next	Contract of the second se	\$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00	EARNINGS: Salary Earnings SubTrac	Check Serial #	1 of 1 Recalculate Check	\$50.00 \$21.00 \$25.00 \$98.00	FEOBRAL TAXES		Detail	×	Notes/Instructions     Time Clock Import
$\sim$												



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

To add time clock import information to the payroll, click the **Time Clock Import Options** flyout tab (far right). This screen is identical to the Time Clock Import Options section of the Payrolls - Check Batch Settings screen on page 90.

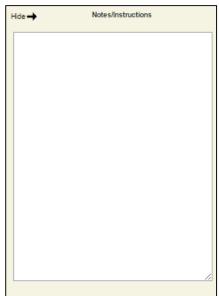
Hide →	Time Clock In	mport
Time Clock Source File		x
Choose file File Format	• • •	^
CSV - Comma Separate	ed Values 🔹	
Date Field Format		
2 Digit Year (mm/dd/yy	) •	
Employee Synchronization	on	
Custom #	*	
Organizational Synchroni	ization	Import
Full DBDT	*	
Job Codes		
Do Not Import Job Cod	es v	
Employee Pay Rates		
Never Use	*	
Scheduled E/Ds		
Never Refresh	*	
Scheduled E/Ds on Addit	tional Checks	
Allow All	٣	

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 - Notes / Instructions tab

Click the **Payrolls – Notes / Instructions** tab to add and edit notes for a specific payroll. This tab is available on four Payroll screens. In Evolution, the Notes tab is found in Payroll – Payroll.



Payrolls – Notes / Instructions tab

The Payrolls – Notes/Instructions tab is available for all pending payrolls, but not after the payroll has been processed or submitted for review.

**Note:** If company security is set to read only, notes can be added in Evolution on the Payroll – Payroll – Notes tab.

ck Batch 1		Hide 🕇	Notes/Instruction
¢°	05/24/2015–05/30/2015 Weekly Hourly & Salary 12 Checks		
	ID: 85		
ck Batch 2	05/24/2015-05/30/2015 Weekty Hourly & Salary		
	ID: -3		



## Payrolls - Calculation Results screen

Click the calculator symbol in the header accesses the Payrolls – Calculation Results screen to review totals of earnings and deductions, and taxes.

tch 1	Tota	I Gross Pa	y: \$1446	0.00				т	otal	Taxes:	\$106300.47			
eekly		E/D Code		Description	Hrs/Pcs	A	mount			Descriptio	on 🔺	Amount	Count	
		⊿ D1		Direct Deposit -	Parti	0.00	\$200.00	~	-	Federal G	Gross Wages		\$14,208.60	•
		E/D Detail	For: D1 - D	)irect Deposit - Pa	artial 1					Tax Deta	il For: Federal Gros	s Wages		
		Туре	Src	EE Code 🔺	Employee N	Hrs/Pcs	Amount			Src	EE Code 🔺	Employee Name	Hrs/Pcs	Amount
		R	s	1	AI Lewis	0.00	\$25.00			s	1	AI Lewis	0.00	\$2,475.00
		R	s	4	Harry Soffer	0.00	\$150.00			s	10	Susan Bigole	0.00	\$350.00
		R	s	8	Willie Clark	0.00	\$25.00			s	11	Simon Simon	0.00	\$350.00
	ŝ								laxes	s	2	Bill Smith	0.00	\$1,495.00
	Totals							ļ	3	s	3	Goldie Greenburg	0.00	\$2,785.00
										s	4	Harry Soffer	0.00	\$1,000.00
							~			s	5	Jessie Pinkman	0.00	\$600.00
							3 items							11 items
		D2		Direct Deposit -	Deal	0.00	5400.00			Federal T	·		\$2,539,70	
		<ul> <li>D2</li> <li>D3</li> </ul>		Direct Deposit -		0.00	\$100.00	-			ax axable Wages		\$2,539.70	
		¥ U3		Direct Debosit -	net	0.00	9 items			recerari	axable wades		314.200.00	43 ite

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 <b>Completed</b> , 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



### Payrolls - Submittal Options screen

This is the last screen to edit before submitting the payroll for review or for processing.

The screen shows the current status and any blocks and other submittal options selected on the Payrolls – Payroll Settings screen when the payroll was created. Add final submittal options before clicking **Submit for Review** or **Submit Payroll**.

Submit by: 05/18/2015		$ \begin{array}{cccccccccccccccccccccccccccccccccccc$
Submittal Options		entents checks relation
Agency Payments Time Off Accrual		
Checks Accruals Only		
Reports		
S ACH		
📅 🗌 Billing		
Liabilities	This securely has been Dressed to	
Deposits	This payroll has been Processed to iSystems IIc	)
	05/29/2015 09:45 AM	
Payroll Check Comments		
^		
~		



# The Payrolls Menu - Creating a Payroll

This section covers creating both scheduled and unscheduled payrolls. Each will be discussed in detail.

# Creating a Scheduled Payroll

To create a payroll in Evolution Payroll,

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

avroll Timeline ►					<b>#</b>
12/29/2014 - 1	Processed	01/12/2015 - 2	On Hold	01/19/2015	Not Due
Weekly	12/11/2014 - 12/17/2014	Weekty	12/25/2014 - 12/01/2014	Weekty	01/01/2015 - 01/07/2015
Submitted on: 12/22/2014 10:17 Abl	*	Submitted on: 01/12/2015 01:52 PM	<b>66</b>	Submit by 01/15/2015	+
12/01/2014 - 1	Processed	01/14/2015 - 1	Submitted	01/21/2015	Not Due
Weekty	12/21/2014 - 12/28/2014	Weekby	01/04/2015 - 01/11/2015	Weekty	01/11/2015 - 01/18/2015
<b>S</b>					
Submitted on: 12/24/2014 10:55 AM	<b>60</b>	Submitted on: 01/12/2015 11:24 AM	66	Submit by: 01/19/2015	+
01/21/2015 - 1	Pending	01/15/2015 - 1	Past Due	01/26/2015	Not Due
Weekty	01/11/2015 - 01/18/2015 New Eatch	Weekly	01/04/2015 - 01/11/2015	Weekty	01/08/2015 - 01/14/2015
			New Batch		
Submit by: 01/19/2015	ß	Submit by: 01/12/2015	ß	Submit by: 01/22/2016	+

2. Click the large **plus** + **sign** in one of the payroll cards to create payrolls based on the calendar settings. **Result:** The Check Batch Settings screen opens.

### **Check Batch Settings Screen**

	Timeline										
yroll 1	0/22/2015 - 1								Batches → 🚔 -	→ IIII →	Finit
х	Check Batch -4 - Settings										
	Start Date	End Date			Time Clock Source File						
	10/11/2015	 10/17/2015			Choose file		х				
	Frequency				File Format						
	Weekty			2	CSV - Comma Separated Values					-	
S	Employee Types			Option	Date Field Format						
Options	All			ģ	2 Digit Year (mm/dd/yy)	*					
0	Employee Filter		Select EEs	port	Employee Synchronization						
atio	Select Template		*	Ē	Custom #	*		Create Checks			
Creatio	Template			Clock	Organizational Synchronization						
	Select Template		*	e	Full DBDT	*					
	Checks per EE	Check Types		틆	Job Codes						
	1	Regular			Do Not Import Job Codes	*					
	Calculate Scheduled EDs				Apply Org Level						
	Standard Hours				From File	*					
e	Salary Pay										
Include	Payroll Defaults										
Ē	Time Off Requests										

- 1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the Payrolls Check Batch Settings Screen section in this document.
- 2. Select the items to include in the payroll in the Include section.



- 3. Complete required and applicable fields in the Time Clock Import Options section.
- 4. Click the **Create Checks** button.
- Click OK in the window that confirms the checks have been created.
   Result: The Batch Checks Screen opens.

#### **Batch Checks Screen**

ayroll Ti	imel		Pending						
yroll 10/23	2/201	5-1 E	Batch 1 : 10/11/201	5 - 10/17	7/2015 R	egular   -9999!	9331   1 of 1		$\overbrace{\texttt{Batches}}^{\texttt{IOI}} \longrightarrow \bigotimes_{\texttt{Checks}}^{\texttt{IOI}} \longrightarrow \varlimsup_{\texttt{Totals}}^{\texttt{IOI}} \longrightarrow$
•	Add Ch	eck Delet	e Check Search Che	rcks	Grou	p By: Company N	Imber		Summary +
. 🗖	Type R	EE Code 4	Name Soffer, Harry	Seq 1	Total Hrs 40.00	Gross Pay \$1,000.00	E01 Amt Salary	E02 Hrs Regular 40.00	Summary   E02 Ami Ropular  51,000.00  \$600.00
	R	5	Pinkman, Jessie	1	40.00	\$600.00		40.00	\$600.00
leekly	R	6	Bichon, Selma	1	40.00	\$640.00		40.00	\$640.00
	R	7	Goodman, Saul	1	40.00	\$600.00		40.00	\$600.00
	R	8	Clark, Willie	1	40.00	\$3,120.00		40.00	\$3,120.00
	R	9	White, Walter	1	40.00	\$1,000.00		40.00	\$1,000.00
	R	10	Bigole, Susan	1	40.00	\$350.00		40.00	\$350.00
	R	11	Simon, Simon	1	40.00	\$350.00		40.00	\$350.00
	R	12	Kirk, Jim	1	0.00	\$0.00	\$0.00		
	R	13	Number, Jenny	1	35.00	\$700.00		35.00	\$700.00
	R	14	Warren, Peter	1	20.00	\$200.00		20.00	\$200.00
	R	15	Thumb, Tom	1	40.00	\$400.00		40.00	\$400.00
				Totals	3,905.00	\$101,110.00	\$6,800.00	535.00	\$8,960.00

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 <u>Payrolls – Batch Checks Screen section</u> in this document.

#### **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
  - 1. Click within the column to edit of the check being modified.
  - 2. Once finished click **Save** in the Header.
- To add a check for employees
  - 1. 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 additional E/D Codes as columns, click in the bottom right-hand corner of the screen, and select the E/D Codes from the list.



	a Check Ty	ре		will be o		oyees to use wher imployee you seled	n creating checks. One check zt.
Regula	ar		*				
					reation Options ard Hours: No	Use this Ten	nplate
				Salary	Pay: No	-Select-	v
Sear	ch for emplo	oyee(s)					
	EE#	▼ Last Name	▼ First Na	me 🔻	Middle Initial	▼ Status	▼ Organizatio ▼
	1	Lewis	AI			Active	West > WB >> WS
	2	Smith	Bill			Active	So East > SB >> S
	3	Greenburg	Goldie			Active	West > WB >> WS
	4	Soffer	Harry			Active	Central > CB >> S
	5	Pinkman	Jessie			Active	West > WB >> WS
	^		~ '				0 5 1 00 0
							16 items

#### **Summary Detail View**

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

Payroll 10/	/01/2015 - 1 Batch 1 : 09/2	20/2015 - 09/26/2015 Ma	nual   102   2 of 2					Batches	→ 🚔 —	+ 📰 - Totals	→ 🔀
+	Add Check Delete Check								Summary Detail	*	<b>↓</b> ↓
~	E/D Code Description	on Hrs/Pcs	Rate Of Pay	Amount	Rate Number		Agency				me Clo
All atches	Check: 460 - R, Batch: 1, Employe Total Hrs: 40.00, Total Amount: \$6 Add Check Line Delete Check	546.40								Å	Time Clock Import
tch 1 ekly	<ul> <li>Check: 462 - R, Batch: 1, Employe Total Hrs: 40.00, Total Amount: \$4</li> </ul>										
rekly	<ul> <li>Check: 459 - R, Batch: 1, Employe Total Hrs: 40.00, Total Amount: \$3</li> </ul>										
	<ul> <li>Check: 453 - R, Batch: 1, Employe Total Hrs: 40.00, Total Amount: \$6</li> </ul>										
	<ul> <li>Check: 461 - R, Batch: 1, Employe Total Hrs: 40.00, Total Amount: \$2</li> </ul>										
	Check: 450 - R, Batch: 1, Employe	e: Kirk, Jim [12] Totals 440.	00	\$14,999.90						Ţ	
~									48 ite	ms (	

- 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 columns, click in the bottom right-hand corner of the screen, and select the desired column(s) from the list.



	Add Check	elete Check							Summary Detail	
	E/D Code	Description	Hrs/Pcs	Rate Of Pay	Amount	Rate Number	Age	ncy		
l	Total Hrs: 49.4 Add Check L	R, Batch: 1, Employee: Bichon, 5 10. Total Amount: \$646.40 ine Delete Check Line	ielma [6]							Â
	S +	Health Insurance			\$6.40					
	<b>⊜</b> D3	Direct Deposit - Net								
	E02	Regular	40.00	\$16.00	\$640.00	1 (P):\$16.00				
	Total Hrs: 40.0	R, Batch: 2, Employee: Bichon, 5 00, Total Amount: \$646.40 R, Batch: 1, Employee: Bigole, Si 30, Total Amount: \$450.00								-
	Total Hrs: 40.0									

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

#### **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.

Payroll 10	/01/2015 - 1 Batch 1 : 05	9/20/2015 - 09/26/2015				Batches	$\longrightarrow \bigotimes_{\mathrm{Checks}} \longrightarrow \bigoplus_{\mathrm{Totals}} \longrightarrow \bigotimes_{\mathrm{Finish}}$
AII	Create New Check Check Lines	S - White, Walter	• >	Check Serial # Check Type Sequence -99999454 Regular 1 of 1	Recalculate Check		Letal     Time Clock Import
Batches Batch 1 Weekly	Manual Tax Fed Overrides State Overrides	E/D Code • • • • •	Description = Regular	Y His/Pcs Y 40.00		Y         Amount         Y           .00         \$1,000.00	Rate # T 1 (P) : \$25.00 *
Batch 2 Weekly	Local Overrides Options Review	Rate Number 1 (P) : \$25.00 Rate Of Pay	+ Hours/Pcs 40.00 Piece		State Select Work Address	v Select	v
	Previous Next	25.00 Agency - Select	- Select		Use Default	•	
		→ A D6	Health Insurance			\$200.00	v 2 items
$\mathbf{v}$							

- 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 <u>Payrolls – Check Lines Screen section</u> in this document.
- 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 information on this screen is the same as is on the Payrolls > Check > Manual Tax tab in Evolution. For detailed information about this screen, refer to the <u>Payrolls – Manual Tax Screen section</u> in this document.

Payroll 1	0/01/2015 - 1	Manual   102   2 of 2		$\operatornamewithlimits{\textcircled{\sc line transformed black}}_{Batches} \longrightarrow \operatornamewithlimits{\textcircled{\sc line transformed black}}_{Checks} \longrightarrow \operatornamewithlimits{\fbox{\sc line transformed black}}_{Totals} \longrightarrow \operatornamewithlimits{\fbox{\sc line transformed black}}_{Finish}$
All Batches Batch 1 Weekly Batch 2 Weekly	Check New Check Check Lines Manual Tax Fed Overlides State Overlides Local Overlides Options Review	13 - Number, Jenny     Add States     Add States	Check Seruir & Check Type Segurno -999940 Regetter 1 of 1 Recalculativ Check Description Amount Plante Shortfalls  P Calculativ Override Taxa P Calculativ Override Tax P Calculativ	Detail • Perceivant
×	Previous Next		, S Jama	

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

#### Fed Overrides screen

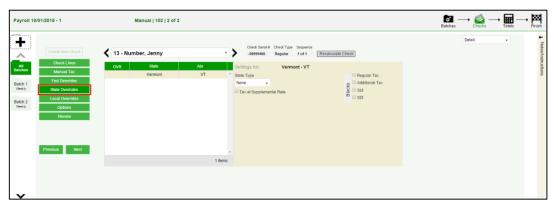
Click the **Fed Overrides** tab to block or override Federal taxes. Information on this screen is the same information as is found on the Payrolls – Check – Tax Overrides tab in Evolution. The State and Local tabs require the same information, regarding the state or local taxes for the employee. For detailed information about this screen, refer to the <u>Payrolls – Fed Overrides Screen section</u> in this document.

Payroll 10	101/2015 - 1	Manual   102   2 of 2		$\operatornamewithlimits{\hbox{\scriptsize for }}_{\operatorname{Batches}}\longrightarrow \operatornamewithlimits{\hbox{\scriptsize for }}_{\operatorname{Checks}}\longrightarrow \operatornamewithlimits{\hbox{\scriptsize for }}_{\operatorname{Totals}}\longrightarrow \operatornamewithlimits{\hbox{\scriptsize Finish}}_{\operatorname{Finish}}$
All Batch 1 Viewby Batch 2 Viewby	Creats Hear Check Check Lines Manual Tax Fed Overndes State Overndes Local Overndes Local Overndes Review	Fed Type None * Tax Frequency Weekly *	Cled Serial Cled Type Separate 9999940 Repair 1 of Recalculate Check Federal Tax Federal Tax	► Newsimunotions
×	Previous Next			

- 1. Complete the applicable fields. For detailed information about the fields on this screen, refer to page 89 in this document.
- 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 <u>Payrolls State Overrides Screen section</u> in this document.
- 2. Click the **Payroll Local Overrides** tab.

#### Local Overrides screen

Payroll 10/01/2015 - 1		$\fbox{\tiny \texttt{Batches}} \longrightarrow \operatornamewithlimits{\textcircled{\baselineskiplimits}}_{Checks} \longrightarrow \operatornamewithlimits{\fbox{\baselineskiplimits}}_{Totals} \longrightarrow \operatornamewithlimits{\vcenter{\baselineskiplimits}}_{Finish}$
Create New Ch	-22224TO REQUIR TO T T TREALCORE CITES.	Detail v Hores/Instruction
All Conditions of the second s	Over         Local Name         Lypic         Settings for: New York City Res New York City Res.           New York City Res New York City Res.         EE                EBlock this Local Tax               Amount	ktion
Previous 1	not	

- 1. Complete the applicable fields. For detailed information about the fields on this screen, refer to the Payrolls Local Overrides Screen section in this document.
- 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.

Payroll 10	01/2015 - 1									Batches	→ 🛃		→ B
+		<	5 - Pinkman, Jessie	•		k Serial # Check Type 99410 Regular	Sequence 1 of 1	Recalculate Check			Detail	•	Notes/Instruction
All Batches Batch 1 Vaekby Batch 2 Viewthy	Check Lines Manual Tax Fed Overrides State Overrides Coptions Review Preview Next	Options Blocks		Comments fi	or This Check Or	nly							tructions
¥		l											

- 1. Complete the applicable fields. For detailed information about the fields on this screen, refer to the <u>Payrolls Options Screen section</u> in this document.
- 2. Click the **Review** tab.
- 3. 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 page 88 in this document.

#### 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 <u>Payrolls – Review Screen</u> <u>section</u> in this document.

Payroll 10/0	1/2015 - 1							Batches	→ 🚉 —	• III	→ BBB Finish
+	Create New Check	<b>4</b> 5 - Pinkman, Jessie		• >	Check Serial # Check Type -99999410 Regular	Sequence 1 of 1 Recalculate Check		l	Detail	¥	
All Batches Batch 1 Vieekly Batch 2 Vieekly	Manual Tax Fed Overrides State Overrides Local Overrides Options Review	Check Calculations Poders Taxabie Voges CASD Taxabie Yoges CASD Taxabie Yog Medicare Taxabie Voges Orses Answer Net Amount Lock: Tax: Calculations	\$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00	EARINIGS: Regular Eamings SubTotal	\$600.00 \$600.00	DEDUCTIONS	FEDERAL TAXES				Jations
	Previous Next										

- 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 <u>Payrolls – Calculation</u> Results section in this document.

Batch 1	Tota	I G	Fross Pay	: \$1446	0.00				٦	Total Taxes: \$106300.47					
Weekly		1	E/D Code 🔺		Description	Hrs/Pcs	A	mount			Descriptio	n 🔺	Amount	Coun	t .
		4 1	D1		Direct Deposit - I	Parti	0.00	\$200.00	~	4	Federal G	ross Wages		\$14,208.60	
		E	E/D Detail Fo	or: D1 - D	)irect Deposit - Pa	rtial 1					Tax Deta	il For: Federal Gro	ss Wages		
			Туре	Src	EE Code 🔺	Employee N	Hrs/Pcs	Amount			Src	EE Code 🔺	Employee Name	Hrs/Pcs	Amount
			R	s	1	Al Lewis	0.00	\$25.00			s	1	AI Lewis	0.0	0 \$2,475.00
			R	s	4	Harry Soffer	0.00	\$150.00			s	10	Susan Bigole	0.0	0 \$350.00
			R	s	8	Willie Clark	0.00	\$25.00			s	11	Simon Simon	0.0	0 \$350.00
	<u>s</u>									Taxes	s	2	Bill Smith	0.0	0 \$1,495.00
	Totals									Ta	s	3	Goldie Greenburg	0.0	0 \$2,785.00
											s	4	Harry Soffer	0.0	0 \$1,000.0
								$\sim$			s	5	Jessie Pinkman	0.0	0 \$600.00
		3 Items												11 iten	
						2.4					- · · · ·			00 500 70	
		۲ I			Direct Deposit - I		0.00	\$100.00	~		Federal T	ax axable Wages		\$2,539.70	
$\mathbf{v}$			U3		Direct Debosit - I	vet	0.00	\$6.537.88 9 items			Federal I	axable vvades		\$14.208.60	43

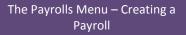
Note: if something needs to be edited, click the Batches symbol in the header which brings you back to the Batch screen.

# 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.

12/29/2014 - 1	Processed	01/12/2015 - 2	On Hold	01/19/2015	Not Due
Weekly	12/11/2014 - 12/17/2014	Weekdy	12/25/2014 - 12/01/2014	Weekty	01/01/2015 - 01/07/2015
					-
Submitted on: 12/22/2014 10:17 AM	*	Submitted on: 01/12/2015 01:52 PM	&	Submit by: 01/16/2016	+
12/31/2014 - 1	Processed	Ø1/14/2015 - 1	Submitted	01/21/2015	Not Due
Weekty	12/21/2014 - 12/28/2014	Weekty	01/04/2015 - 01/11/2015	Washty	01/11/2015 - 01/18/2015
Submitted on: 12/24/2014 10:55 AM	*	Submitted on: 01/12/2015 11:24 AM	*	Bubmit by: 01/19/2015	+
01/21/2015 - 1	Pending	01/15/2015 - 1	Past Due	01/26/2015	Not Due
Weekly	01/11/2015 - 01/18/2015 New Batch	Weekly	01/04/2015 - 01/11/2015	Weekty	01/08/2015 - 01/14/2015





Click the large plus + sign in the heading.
 Result: The Payroll Settings screen opens.

	Payroll Settings		🗲 Hide
Check Date	Run #	Calendar Options	
07/30/2015	1		
Payroll Type		Actual Call In Date	
Regular	•		
Agency Payr Checks Reports ACH Billing Liabilities Deposits		Time Off Accrual	
Payroll Check Comn	nent		^

- 3. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the <u>Payrolls Payroll Settings screen section</u> in this document.
- 4. Click Save 🖬 in the header on the left.

**Result:** A status of **Pending** is displayed in the header on the left.

- 5. Click Hide in the upper right-hand corner of the Payroll Settings screen.
- Click the large plus sign behind where the Payroll Settings screen was, to continue.
   Result: The Check Batch Settings screen opens.

#### **Check Batch Settings screen**

×	9/12/2015 - 1	nding	-							$ \overbrace{\text{Batches}}^{\text{IOI}} \longrightarrow \bigotimes_{\text{Checks}}^{\text{IOI}} \longrightarrow \overbrace{\text{Tot}}^{\text{IOI}} $	
х	heck Batch -3 - Settings										
	Start Date		End Date			Time Clock Source File					-
	8/16/2015		8/23/2015	10		Choose file		х		-	
	Frequency					File Format					
	Weekly				52	CSV - Comma Separated Values	*			_	<b>K</b>
SU	Employee Types				otion	Date Field Format					
Options	All			*	t Option	2 Digit Year (mm/dd/yy)	•				
° c	Employee Filter			Select EE	s lõ	Employee Synchronization					
Creatio	Select Template			*	Clock Im	Custom #	•		Create Checks		
Ce	Template				Cloc	Organizational Synchronization					
	Select Template				9	Full DBDT	•				
	Checks per EE		Check Types		Ē	Job Codes					
	1		Regular	•		Do Not Import Job Codes	*				
	Calculate Scheduled EDs					Apply Org Level					
	Standard Hours					From File	•				
Iclude	Salary Pay Payroll Defaults Time Off Requests										

- 1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the <u>Payrolls Check Batch Settings screen section</u> in this document.
- 2. Select the items to include in the payroll in the Include section.
- 3. Complete required and applicable fields in the Time Clock Import Options section.



- 4. Click the **Create Checks** button.
- Click OK in the window that confirms the checks have been created.
   Result: The Batch Checks Screen opens.

## Payrolls - Batch Checks Screen

Payroll		line	Pending							
Payroll 10	/22/201	15 - 1	Batch 1 : 10/11/201	5 - 10/17	//2015 R	egular   -99999	9331   1 of 1		$ \underset{\text{Batches}}{\text{Image}} \longrightarrow \underset{\text{Checks}}{\text{Image}} \longrightarrow \underset{\text{Totals}}{\text{Image}} -$	Finist
+	Add C	heck Dele	te Check Search Che	acks	Grou	p By: Company Nu	mber		Summary 👻	<b>t</b>
<b>_</b>	Type R	EE Code 4	Name Soffer, Harry	Seq 1	Total Hrs 40.00	Gross Pay \$1,000.00	E01 Aml Salary	E02 Hrs Regular 40.00	E02 Amt Regular \$1,000.00	Time Clock Import
Batch 1	R	5	Pinkman, Jessie	1	40.00	\$600.00		40.00	\$600.00	ack Import
Weekby	R	6	Bichon, Selma	1	40.00	\$640.00		40.00	\$640.00	ort
	R	7	Goodman, Saul	1	40.00	\$600.00		40.00	\$600.00	
	R	8	Clark, Willie	1	40.00	\$3,120.00		40.00	\$3,120.00	
	R	9	White, Walter	1	40.00	\$1,000.00		40.00	\$1,000.00	
	R	10	Bigole, Susan	1	40.00	\$350.00		40.00	\$350.00	
	R	11	Simon, Simon	1	40.00	\$350.00		40.00	\$350.00	
	R	12	Kirk, Jim	1	0.00	\$0.00	\$0.00			
	R	13	Number, Jenny	1	35.00	\$700.00		35.00	\$700.00	
	R	14	Warren, Peter	1	20.00	\$200.00		20.00	\$200.00	
	R	15	Thumb, Tom	1	40.00	\$400.00		40.00	\$400.00 😓	
				Totals	3,905.00	\$101,110.00	\$6,800.00	535.00	\$8,960.00	
$\mathbf{\vee}$									15 items	

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 <u>Payrolls – Batch Checks screen section</u> in this document.

#### **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
  - 1. Click within the column to edit of the check being modified.
  - 2. Once finished click **Save** in the Header.
- 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.

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

• To add additional E/D Codes as columns, click in the bottom right-hand corner of the screen, and select the E/D Codes from the list.



select	a Check Ty	pe			d Select the Emple reated for each E		n creating checks. One check
Regula	ar		•	will be c		inployee you selec	<i>a</i> .
					Creation Options		
				Standa	ard Hours: No	Use this Ten	nplate
				Salary	Pay: No	Select	Ŧ
Sear	ch for empl	oyee(s)					
	EE#	▼ Last Name	▼ First Na	ne T	Middle Initial	▼ Status	▼ Organizatio ▼
	1	Lewis	AI			Active	West > WB >> WS
	2	Smith	Bill			Active	So East > SB >> S
	3	Greenburg	Goldie			Active	West > WB >> WS
	4	Soffer	Harry			Active	Central > CB >> S
	5	Pinkman	Jessie			Active	West > WB >> WS
	~						0 5 1 00 0
							16 items

#### **Summary Detail View**

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

Payroll 10/	/01/2015 - 1 Batch 1 : 09/2	20/2015 - 09/26/2015 Ma	nual   102   2 of 2					Batches	→ 🚔 —	+ 📰 - Totals	→ 🔀
+	Add Check Delete Check								Summary Detail	*	<b>↓</b> ↓
~	E/D Code Description	on Hrs/Pcs	Rate Of Pay	Amount	Rate Number		Agency				me Clo
All atches	Check: 460 - R, Batch: 1, Employe Total Hrs: 40.00, Total Amount: \$6 Add Check Line Delete Check	546.40								Å	Time Clock Import
tch 1 ekly	<ul> <li>Check: 462 - R, Batch: 1, Employe Total Hrs: 40.00, Total Amount: \$4</li> </ul>										
rekly	<ul> <li>Check: 459 - R, Batch: 1, Employe Total Hrs: 40.00, Total Amount: \$3</li> </ul>										
	<ul> <li>Check: 453 - R, Batch: 1, Employe Total Hrs: 40.00, Total Amount: \$6</li> </ul>										
	<ul> <li>Check: 461 - R, Batch: 1, Employe Total Hrs: 40.00, Total Amount: \$2</li> </ul>										
	Check: 450 - R, Batch: 1, Employe	e: Kirk, Jim [12] Totals 440J	00	\$14,999.90						Ţ	
~									48 ite	ms (	

- 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.



ayroli 10	01/2	2015 - 1		Manual   102   2 d	of 2				Batches	→ 🚵 —	Totals	
+		d Check	elete Check							Summary Detail	Ŧ	
~		E/D Code	Description	Hrs/Pcs	Rate Of Pay	Amount	Rate Number	Agency				
All atches	Ì	Total Hrs: 40.0	8, Batch: 1, Employee: Bichon, S 10, Total Amount: \$646.40 Delete Check Line	elma [6]							Î	
itch 2		i D6	Health Insurance			\$6.40						
Veekly		🗎 D3	Direct Deposit - Net									
		E02	Regular	40.00	\$16.00	\$640.00	1 (P):\$16.00					
	• (	Total Hrs: 40.0	R, Batch: 2, Employee: Bichon, S 10, Total Amount \$646.40 R, Batch: 1, Employee: Bigole, St 10, Total Amount \$450.00								_	
	<u>،</u> (	Check: 508 - F	R, Batch: 2, Employee: Bigole, So Totals			\$30,125.80					-	
~										102 ite	ms (	

- 5. Select an E/D Code from the dropdown list.
- 6. Click **Save** in the Header.
- To add additional columns, click in the bottom right-hand corner of the screen, and select the desired column(s) from the list.

#### **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.

roll 10/	01/2015 - 1 Batch 1 :	09/20/20	15 - 09/26/2015									Batches			
•	Create New Check	<	9 - White, Walter		• >	Check Serial -99999454	Check Type Regular		Recalculate Check				Detail	٠	
l 1es	Check Lines Manual Tax	A	dd Delete												
	Fed Overrides		E/D Code * •	т	Description .	т	Hrs/Pcs	т	Pay Rate	т	Amount	т	Rate #	т	
th 1 My	State Overrides		E02		Regular			40.00		\$25.00		\$1,000.00		1 (P) : \$25.00	^
_	Local Overrides		Basic Labor Defaults	Local Tax Over	rides										
h 2 kly	Options		Rate Number		Hours/Pcs				State		SUI				
	Review		1 (P): \$25.00	*	40.00				Select		Select		*		
			Rate Of Pay		Piece				Work Address						
			25.00		- Select		*		Use Default						
			Agency												
	Previous Next		Select	٠											
			<b>≘</b> D6		Health Insurance							\$200.00			
															÷
														2 items	

- 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 <u>Payrolls – Batch Checks screen section</u> in this document.
- 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 information on this screen is the same as is on the Payrolls > Check > Manual Tax tab in Evolution. For detailed information about this screen, refer the <u>Payrolls</u> <u>– Manual Tax screen section</u> in this document.

Payroll 10/01/2015	i - 1	Manual   102   2 of 2					Batches	→ 🚔 -		→ B
All Batches M Batch 1 Fe Uwesty Sta Batch 2 Loo Westy	Anual Tax Anual Tax Adventdes Also Oventdes Also Oventdes Options Review	Add States And Coole Rev 1 Federal 2 0A30 2 0A30 3 Medicare 4 5 Beckup Withholding	Cestifier	Check Servir # Check Typ -9999940 Regular	Recalculate Check	> Ontions		Detail	•	Notes/Instructions
~					5 item	Ψ \$				

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

## Fed Overrides screen

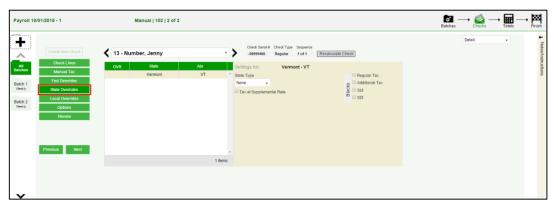
Click the **Fed Overrides** tab to block or override Federal taxes. Information on this screen is the same information as is found on the Payrolls – Check – Tax Overrides tab in Evolution. The State and Local tabs require the same information, regarding the state or local taxes for the employee. For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

Payroll 10/01/2015 - 1	Manual   102   2 of 2		$ \underset{\text{Batches}}{\textcircled{\text{Batches}}} \longrightarrow \underset{\text{Checks}}{\textcircled{\text{Checks}}} \longrightarrow \underset{\text{Totals}}{\fbox{\text{Inish}}} \longrightarrow \underset{\text{Finish}}{\overleftarrow{\text{Prinish}}} $
Actors Actors	13 - Number, Jenny       Field Type       None       Tax Frequency       Veeloy       Tax at Supplemental Rate	Check Serial & Check Type Sequence  Optimized Register text  Pedenal Tax  Pedenal Tax  Check Serial & Check Type Sequence  Pedenal Tax  Check Serial & Check Type Sequence  Check Serial & Check Type Ser	Detail • Personnaturations
Previous Next			

- 1. Complete the applicable fields. For detailed information about the fields on this screen, refer to page 89 in this document.
- 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 <u>Payrolls State Overrides screen section</u> in this document.
- 2. Click the **Payroll Local Overrides** tab.

### Local Overrides screen

	//01/2015 - 1		Batches	→ 🚔 –	→ International	→ Finish
All Batches Batch 1 Weekly Batch 2 Weekly	Check Lines Manual Tax Fed Overrides State Overrides Local Overrides Options	5 - Pinkman, Jessie     Check Steld & Check Type     Sequence       Over     Local Name     Type       New York City Res New York City Res.     EE     Settings for: New York City Res.       New York City Res New York City Res.     EE     Discon this Local Tax		Detail	*	Notes/Instructions
v	Review Previous Hent	- 1 items				

- 1. Complete the applicable fields. For detailed information about the fields on this screen, refer to the Payrolls Local Overrides screen section in this document.
- 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.

Payroll 10	/01/2015 - 1			$\operatornamewithlimits{\textcircled{\sc constraint}}_{Batches} \longrightarrow \operatornamewithlimits{\textcircled{\sc constraint}}_{Checks} \longrightarrow \operatornamewithlimits{\textcircled{\sc constraint}}_{Totals} \longrightarrow \operatornamewithlimits{\textcircled{\sc constraint}}_{Finish}$
+	Create New Check	5 - Pinkman, Jessie	Check Serial # Check Type Sequence -99999410 Regular 1 of 1 [Recalculate Check]	Detail • Here Instruction
All Batches Batch 1 Viewly Batch 2 Viewly	Check Lines Manual Tax Fed Overrides State Overrides Local Overrides Options Review	Direct Deposit Direct Deposit Auto Distribution Time Of Accuait Accuait School (Constraints) Conducted EDS Except DO Scheduled EDS Except DO Scheduled EDS From Agency K Upstale Scheduled ED Balance	Comments for This Check Cely	nation
*	Previous Next	Options		

- 1. Complete the applicable fields. For detailed information about the fields on this screen, refer to the <u>Payrolls Options screen section</u> in this document.
- 2. Click the **Review** tab.
- 3. 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 page 88 in this document.

### 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 <u>Payrolls – Review screen</u> <u>section</u> in this document.

Payroll 10/01/2015 - 1					Batches Checks		Finish
Create New Check	🗲 5 - Pinkman, Jessie		eck Type Sequence egular 1 of 1 Recalculate Check	5	Detail	×	↓ Notes/Inst
All Clear Clears Hatches Manual Tax Batch 1 Field Overrides Batch 2 Local Overrides Batch 2 Local Overrides Utenly Options	Check Calculations Peters Tracials Wages Odd Tracies Wages Odd Tracker Wages Orses Amount Net Amount Lock Tax Calculations	50.00 EARNINGS 50.00 Regular 50.00 Earnings 5 50.00 50.00	060000 800.00	FEDERAL TAXES			Instructions
Previous Next	•						
~							

- 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 <u>Payrolls – Calculation</u> Results screen section in this document.

tch 1	Tota	I Gross P	ay: \$1446	0.00				Т	ota	I Taxes: \$	\$106300.47			
eekly		E/D Code	*	Description	Hrs/Pcs	A	mount			Descriptio	n 🔺	Amount	Cou	nt
		⊿ D1		Direct Deposit -	Parti	0.00	\$200.00	~	-	Federal G	ross Wages		\$14,208.60	
		E/D Deta	I For: D1 - D	irect Deposit - Pa	irtial 1					Tax Detai	il For: Federal Gro	s Wages		
		Туре	Src	EE Code 🔺	Employee N	Hrs/Pcs	Amount			Src	EE Code	Employee Name	Hrs/Pcs	Amount
		R	s	1	Al Lewis	0.00	\$25.00			s	1	Al Lewis	0.	00 \$2,475.0
		R	s	4	Harry Soffer	0.00	\$150.00			s	10	Susan Bigole	0.	00 \$350.0
		R	s	8	Willie Clark	0.00	\$25.00			s	11	Simon Simon	0.	00 \$350.0
	<u>s</u>								axes	s	2	Bill Smith	0.	00 \$1,495.0
	Totals							Ĥ	<u>-</u>	s	3	Goldie Greenburg	0.	00 \$2,785.0
										s	4	Harry Soffer	0.	00 \$1,000.0
							~			s	5	Jessie Pinkman	0.	00 \$600.0
							3 items							11 iter
		▶ D2		Direct Deposit -	Parti	0.00	\$100.00		,	Federal Ta	ax		\$2.539.70	
		▶ D3		Direct Deposit -		0.00	\$6.537.88	~			axable Wages		\$14.208.60	
~							9 items							4

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

## Pre-Processing and Submitting the Payroll

Prior to submitting the payroll, we recommend pre-processing the payroll as we do in Evolution.

When you click **Calculate** to the left of the screen name 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 Evolution).

Calculation Ress	as.					
haia	E true ty Den Type	El var finne big		Same	E uny firms for	andrey
BIC Celle	Easting the	te Are	ant.	December 1	Annual Engl	1
+ 281	4014	9.00	\$247.91	<ul> <li>Federal Dross Wages</li> </ul>	\$12:521.41	1.14
1.000	meeth insulation	0.00	8407.79	<ul> <li>Factorial Tex</li> </ul>	80,002.19	
- 0.0	Child Buggert	0.00	\$100.00	<ul> <li>Patent Tauttle Hapes</li> </ul>	\$12,621.41	
. Drf	Dental Insurance		\$128.18	· Louis (Albertamore Bark LDT)	Section 2	1
- 04	Value Pan	0.00	947.75	<ul> <li>Loss patension line (27) -</li> </ul>	82.00	
× 821	Beary	1.00	\$12,045,08	<ul> <li>Local (Albertariour Berls (187)).</li> </ul>	84,201.41	- 2
s 822	Regular	75.00	\$1,010.00	<ul> <li>Lase (ACT Intellig Set Set</li></ul>	91,510,30	1
				<ul> <li>Loss (RCT Healty fac) Ter</li> </ul>	8.3	
				<ul> <li>Louid (NCT Booking Tex) Tex.</li> </ul>	81,256.17	
				<ul> <li>Loost (free York City Res.)</li> </ul>	81,700.00	
				<ul> <li>Lotal (New York Dig Res.) Tel.</li> </ul>	8175.01	
				<ul> <li>Loss (New York Dig Res.) 7</li> </ul>	BL 105.07	
				<ul> <li>Webcits Once Higgs</li> </ul>	8-2 am 12	
				- Weitness Tex	100.0	

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



	ats			2001	1.00	A1782030000
tran.	Totals by Check Ty			Taxies		nnies Separately
ED Cole	Ceremon	Histor Av		Description	Anson	Court
+ 001	4018	0.00	\$2.00	<ul> <li>Pederal Oroes Wages</li> </ul>	\$12,621,41	1
+ 002	Health Insulance	0.00	\$0.00	+ Federal Tax	\$2,002.18	1
» 005	Child Support	0.00	\$0.00	<ul> <li>Pederal Tanatrie Wages</li> </ul>	\$12,521.41	
. 017	Cental Insurance.	0.00	80.00	<ul> <li>Local (Astorturown Boro LST)</li> </ul>	\$4,500.00	3
018	Vision Plan	0.00	\$0.00	+ Local (Abbottateurs Bors LST)	\$2.00	2
+ E01	Salary	0.00	\$12,000.00	+ Local (Abbottatown Boro LST)	14.251.41	2
. 802	Repler	75.00	\$0.00	· Local (HCT Misking Tax) Give .	35,500.00	1
a 1604	ER Insurance Premium	0.00	\$0.00	· Local (NCT Vicibility Tax) Tax	\$5.76	3
				· Local (NCT Nobility Tex) Tex	35.250.07	1
				· Local (New York City Res.)	\$5,500.00	5
				. Local (New York City Res.) Tex	\$175.07	1
				. Local (New York City Res.) T.	\$6.100.07	5
				<ul> <li>Medicare Gross Wages</li> </ul>	\$12,609,32	
				- Medicare Tex	\$100.01	
				Madinana Terratia Mistan	BYT 844 12	
			T-8 of 8 issue	(a)(a) Pape 1 m14 (a		1 - 15 of 55 items

Finally, click Finish in the header.
 Result: the Submittal Options screen opens.

Submittal Options Agency Payments Checks Reports S ACH Billing Liabilities Deposits	Time Off Accrual
Payroll Check Comments	

- 5. Add final Submittal Options.
- 6. Click **SB Review** or **Submit Payroll**, depending on the arrangement with the client.

<u>SB Review</u> - The Status of the payroll is changed to **On Hold** until the service bureau reviews and processes the payroll; at which time the Status will change to **Processed**.

<u>Submit Payroll</u> – 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**.



Payroll 05/21/2015 - 1	Payroll Timeline		
Process	ed Submit by: 05/18/2015		$ \begin{array}{cccccccccccccccccccccccccccccccccccc$
Submittal Options			
Agency Payments	Time Off Accrual		
Checks	Accruals Only		
Reports			
ACH			
Liabilities		This payroll has been Processed to	0
Deposits		iSystems IIc 05/29/2015 09:45 AM	<b>49</b>
Payroll Check Comments			
	^		
	~		

# 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.
- 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.

# Adding Additional Checks

To add additional checks to a payroll,

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

Select Regula	a Check Typ ar	00		Find and Select the Employees to use when creating checks. One check will be created for each Employee you select.						
				neck Creation Options Standard Hours: No Salary Pay: No	Use this Tem Select		•			
Sear	ch for emplo	yee(s)								
	EE#	T Last Name	▼ First Name	▼ Middle Initial	▼ Status	▼ Organizatio	T			
	1	Janson	Jennifer	L	Active		-			
	2	Glazer	JoAnne	В	Active					
	3	Flax	Ron		Active					
	4	Carlow	Jane		Active					
	5	Timm	Robert		Active					
-	0	Cormon	Danaa	D	Antivo					
						12 ite	ems			
			Create C	heck(s) for Selected	EEs					



- 4. Select the Check Type being created.
- 5. Select the employee(s) for whom to create a check.
- 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.

Add 0	heck Dele	te Check Search Che	cks	Group By: Cor	npany Number		Summary +
Туре	EE Code	Name	Seq	Total Hrs	E01 Amt Salary	E02 Hrs Regular	E02 Amt Regular
R	1	Lewis, Al	1	40.00	\$2,500.00	40.00	\$0.00
м	2	Smith, Bill	2	0.00			\$108.28
R	2	Smith, Bill	1	40.00	\$1,500.00	40.00	\$0.00
R	3	Greenburg, Goldie	1	40.00	\$2,800.00	40.00	\$0.00
R	4	Soffer, Harry	1	40.00		40.00	\$1,000.00
R	5	Pinkman, Jessie	1	40.00		40.00	\$600.00
R	6	Bichon, Selma	1	40.00		40.00	\$640.00
R	7	Goodman, Saul	1	40.00		40.00	\$600.00
R	8	Clark, Willie	1	40.00		40.00	\$3,120.00
R	9	White, Walter	1	40.00		40.00	\$1,000.00
R	10	Bigole, Susan	1	40.00		40.00	\$350.00

- 3. Change the view from **Summary** to **Summary Detail**.
- 4. Click the **Add Check Line** button.

Payroll 10			otals	→ B
+	Add Check Delete Check Sum	mary Detail	¥.	ш <b>т</b> м <b>т</b>
~	E/D Code Description Hes/Pos Rate O/Pay Amount Rate Number Agency			otos/Ins me Clo
All Batches			Î	Notes/Instructions Time Clock Import
Batch 1 Weekly Batch 2	Check: 462 - R. Bath: 1. Employee: Bigole, Sesan [10] Total Hex. 40.00, Total Amount \$450.00			
Weekly	Check: 459 - R. Bakh: 1, Employee: Clark, Wille [8]     Total Hmount \$3,120.00		_	
	Check: 453 - R. Bakh: 1. Employee: Goodman, Saul [7]     Total Hm.unit \$550.00			
	Check: 461 - R. Bakh: 1. Employee: Greenburg, Goddle [J]     Total Hex.edu/, Total Amount \$2,215.00		_	
	Check: 450 - R. Batch: 1, Employee: Kark, Jim [12]     Totals		-	
~	Totats 440.00 \$14,999.90	48 items		

5. Select an E/D Code from the dropdown list.



Add Check	Delete Check						Summary Detai	1 v 1
E/D Code	Description	Hrs/Pcs	Rate Of Pay	Amount	Rate Number	Agency		
	- R, Batch: 1, Employee: Bichon, \$ 0.00, Total Amount: \$646.40	ielma [6]						Î
Total Hrs: 40	- R. Batch: 1, Employee: Bigole, St 0.00, Total Amount: \$450.00 KLine Delete Check Line	usan [10]						
⊜ D5	Gamishment			\$100.00		Office Of Garnishments		
iii D3	Direct Deposit - Net							
E02	Regular	40.00	\$8.75	\$350.00	1 (P):\$8.75			
		illie [8]						

6. Click **Save** in the Header.

# **Creating Manual Checks**

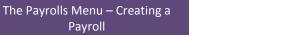
Users can create manual checks to be added to a payroll when creating a batch, or to an existing batch.

#### Creating a new batch

- 1. On the Payroll Timeline screen select a payroll with a status of Pending by clicking the **Edit** Symbol.
- Click the Plus sign on the Batch Checks screen to create a new batch.
   Result: the Check Batch Settings screen opens.

	0/22/2015 - 1		
х	Check Batch -2 - Settings		
	Start Date	End Date	
	10/11/2015	10/17/2015	
	Frequency		
	Weekly		
	Employee Types		
	All		
	Employee Filter		Select EEs
	Select Template		
	Template		
	Select Template		
	Checks per EE	Check Types	
	1	Manual	
U	pdate Scheduled E/Ds Balance		
No		•	
R C	alculate Scheduled EDs		
	Standard Hours		
	Salary Pay		
	Payroll Defaults		
Include	Time Off Requests		

- 3. Complete the required and applicable fields, making sure to select **Manual** from the Check Types dropdown list.
- 4. 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.
- 5. Click the **Create Checks** button and proceed as normal when running a payroll.





#### Adding to an existing batch

Payroll

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

elect a Manual	Check Type		¥		d Select the Emp reated for each			creating checks t.	One check
					Creation Options ard Hours: No Pay: No		Use this Tem Select	plate	¥
Search	for employe	e(s)							
	EE# 🕆	Last Name 🛛 🕇	First Nam	e T	Middle Initial	T	Status	▼ Organiza	tio 🔻
	1	Lewis	AI				Active	West > W	B >> WS
	2	Smith	Bill				Active	So East >	SB >> S
<b>v</b>	3	Greenburg	Goldie				Active	West > W	B >> WS
	4	Soffer	Harry				Active	Central >	CB >> S
	5	Pinkman	Jessie				Active	West > W	B >> WS
	î	<b>P</b> <sup>-1</sup>	0.1					0.5.1	16 items

- 4. Select Manual from the Check Types dropdown list.
- 5. Select the employees in the checkboxes who are to receive a manual check.
- Click Select EEs 6.

**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.

Add Chec	ks					3
Select a Che Manual	eck Type	v	Find and Select the Employ will be created for each Em		reating checks. One che	:k
			Check Creation Options Standard Hours: No Salary Pay: No	Use this Templ Select	ate 👻	
EE # 7		▼         First Name           Bill	Yes		<b>heck #</b> 445	*
					1 iten	₩ IS
		Creat	e Check(s) for Selected El	Es		



**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.

Notes

- 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.

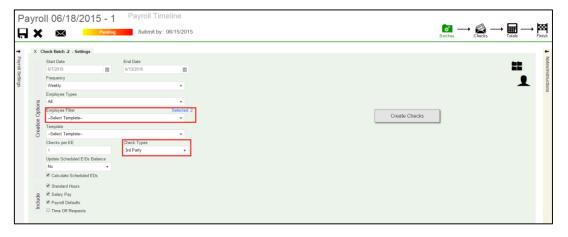
# **Creating Third Party Checks**

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 a new batch

- 1. On the Payroll Timeline screen select a payroll with a status of **Pending** by clicking the **Edit** *S* symbol.
- 2. Click the **Plus** sign on the Batch Checks screen to create a new batch.

Result: the Payroll Settings screen opens.



3. Select the **Employee(s)** to receive 3<sup>rd</sup> Party Checks

Result: A Check Batch Settings screen opens, showing the employee selected to receive the check.

4. Select any additional employees if applicable and click the **Done** button.



Payrol	II 10/2	2/2015 - 1						$\operatornamewithlimits{\textcircled{\scriptsize{\scriptsize{\scriptsize{\scriptsize{Batches}}}}}}_{\operatorname{Batches}}\longrightarrow \operatornamewithlimits{\operatornamewithlimits{\textcircled{\scriptsize{\scriptsize{\scriptsize{\scriptsize{Batches}}}}}}_{\operatorname{Checks}}\longrightarrow \operatornamewithlimits{\operatornamewithlimits{\fbox{\scriptsize{\scriptsize{\scriptsize{\scriptsize{Finish}}}}}}_{\operatorname{Totals}}\longrightarrow \operatornamewithlimits{\operatornamewithlimits{\operatornamewithlimits{\scriptsize{\scriptsize{Finish}}}}_{\operatorname{Finish}}$
<ul> <li>Payroll Settings</li> </ul>		ck Batch -3						
ettings	Drag		ader and drop it here to grou	p by that column	Y Middle Initial	▼ Status	T DEDT T	
	0	1	Lewis	AI		Active	West > WB >> WS >>> GT	<u>_</u>
		2	Smith	Bill		Active	So East > SB >> SES >>> WT	
		3	Greenburg	Goldie		Active	West > WB >> WS >>> GT	
	8	4	Soffer	Harry		Active	Central > CB >> SC >>> GGS	
	0	5	Pinkman	Jessie		Active	West > WB >> WS >>> GT	DONE
	8	6	Bichon	Selma		Active	So East > SB >> SES >>> WT	DONE
	8	7	Goodman	Saul		Active	Central > CB >> SC >>> GGS	
	0	8	Clark	Willie		Active	Central > CB >> SC >>> GGS	
	0	9	White	Walter		Active	West > WB >> WS >>> GT	
	0	10	Bigole	Susan		Active	Central > C8 >> SC >>> GGS	
		11	Simon	Simon		Active	West > WR >> W9 >>> GT	v
							16 item	5

- 5. Select the **Check Type** 3<sup>rd</sup> Party from the dropdown list on the Payroll Settings screen.
- 6. Complete the additional applicable fields.
- 7. Click the **Create Checks** button.

Result: the Batch Checks screen opens.

8. Select the batch just created to view the employee(s) selected

10/22	/2015	5-1 I	Batch 1 : 10/11/2018	5 - 10/11	7/2015 Re	egular   -99999325   1 of 1		$ \begin{array}{c} \hline \                                   $
A	dd Ch	eck Delet	e Check Search Che	cks	Group	o By: Company Number		Summary +
ту	/pe	EE Code	Name	Seq	Total Hrs	E01 Amt Salary	E02 Hrs Regular	E02 Amt Regular
	R	1	Lewis, Al	1	40.00	\$2,500.00	40.00	\$0.00
	м	2	Smith, Bill	2	0.00			\$108.28
	R	2	Smith, Bill	1	40.00	\$1,500.00	40.00	\$0.00
	R	3	Greenburg, Goldie	1	40.00	\$2,800.00	40.00	\$0.00
	R	4	Soffer, Harry	1	40.00		40.00	\$1,000.00
	R	5	Pinkman, Jessie	1	40.00		40.00	\$600.00
	R	6	Bichon, Selma	1	40.00		40.00	\$640.00
	R	7	Goodman, Saul	1	40.00		40.00	\$600.00
	R	8	Clark, Willie	1	40.00		40.00	\$3.120.00
	R	9	White, Walter	1	40.00		40.00	\$1,000.00
	R	10	Bigole, Susan	1	40.00		40.00	\$350.00
				Totals	535.00	\$6,800.00	535.00	\$9,068.28

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

rd Party	ck Type				oyees to use when mployee you selec	creating checks. One chec t.	ck
				creation Options and Hours: No Pay: No	Use this Tem Select	plate 🔻	
Search for e	employee(s)						
EE #	# 🍸 Last N	lame 🔻 Firs	t Name 🛛 🔻 🔻 🔻	Middle Initial	▼ Status	▼ Organizatio ▼	
1	Lewis	AI			Active	West > WB >> WS	^
2	Smith	Bill			Active	So East > SB >> S	
3	Green	burg Gold	lie		Active	West > WB >> WS	
4	Soffer	Harr	у		Active	Central > CB >> S	
	Pinkm	an Jess	ie		Active	West > WB >> WS	
5	PINKM	0000					



- 10. Select **3<sup>rd</sup> Party** from the Check Types dropdown list.
- 11. Select the employees in the checkboxes who are to receive a manual check.
- 12. Click Select EEs

**Result:** A Confirmation screen opens listing the check(s) to be created.

13. Click in the **Check#** column and give the check(s) a number.

Add Checks		×
Select a Check Type	Find and Select the Employees will be created for each Employ	to use when creating checks. One check
3rd Party 🔻	will be created for each Employ	ee you select.
	Check Creation Options	Use this Template
	Salary Pay: No	Select-
EE # Y Last Name Y First Name		Check#
00000002 Smith Bill	No	*
		▼ 1 items
Crea	te Check(s) for Selected EEs	

- 14. **Result:** The Batch Checks screen opens listing all checks in the batch. In the Type column, the 3<sup>rd</sup> Party check is listed with a "3".
- 15. Click the **Create Checks** button

ayro	II 06/18	3/2015	- 1	Payro	II Timelir	ne						_		_	
XF	$\times$	P	ending	Sub	mit by: 06/1	15/2015						Batches	→ 🚉 - <sub>Checks</sub>	→  III Totals	-
	Delete	Search Checks		Group	By: Company N	lumber									+
All	Type EE C	ode I	Name	Seq	Total Hrs	E09 Hrs Long Term Third Party Sick Pay	E09 Amt Long Term Third Party Sick Pay	E10 Hrs Short Term Third Party Sick Pay	E10 Amt Short Term Third Party Sick Pay						Check Lines
tches	3 1		wis, Al	1	40.00	40.00	\$800.00							Â	
atch 1 /eekly	3 14	Green	ourg, Goldie	1	40.00			40.00	\$600.00	1					Manu
tch 2															Manual Tax
tch 3															
leekly															Overrides
tch 4 eekly															rrides Check Opti
															Che
															Check Options
															ions
			Tetels	80.00		40.00	\$800.00	40.00	\$600.00					-	Review
			lotals	00.00		40.00	\$800.00	40.00	\$600.00						

16. Click the **Check Calculation** button if desired, or process the payroll as usual.



#### 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 on a batch that has already been created.
- 3. Click the **Add Check** button in the Navigation bar.

Result: The Add Checks screen opens.

Add C	hecks									)
Select a	a Check Type rty	9			d Select the Emp reated for each				ecks. One che	⊧ck
					Creation Options ard Hours: No Pay: No		Use this Ten Select	nplate	•	•
Sear	ch for employ									
	EE# 🔻	Last Name	▼ First	Name 🛛 🝸	Middle Initial	T	Status	T Orga	anizatio 1	т
	1	Lewis	AI				Active	West	t > WB >> WS	
	2	Smith	Bill				Active	So E	ast > SB >> S.	
	3	Greenburg	Goldi	е			Active	West	t > WB >> WS	
	4	Soffer	Harry				Active	Cent	ral > CB >> S	
	5	Pinkman	Jessi	е			Active	West	t > WB >> WS	
	•		0.1				• . e		·	•
									16 iter	ms
				Se	lect EEs					

- 4. Select **3**<sup>rd</sup> **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.

Add Chec	ks				
Select a Cho 3rd Party	eck Type		nd Select the Emplo created for each En	yees to use when creating nployee you select.	checks. One check
		Stan	: Creation Options dard Hours: No ry Pay: No	Use this Template Select	Ŧ
EE# T	Last Name	▼ First Name	▼ Update Ba	lance Check #	
00000002	? Smith	Bill	Yes	1445	*
					*
					1 items
		Create Chec	k(s) for Selected E	Es	



- 8. **Result:** The Batch Checks screen opens listing all checks in the batch. In the Type column, the Manual check is listed with a "3".
- 9. Click the Create Checks button
- 10. Continue the payroll process as usual.

#### Notes

- Only E/D Code types associated with 3<sup>rd</sup> 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**

In addition to the security rights required to work on payrolls, to be able to void checks, the following must also be enabled:

- Ability to Void Checks
- Ability to Void Checks from Previous Quarter (not recommended!)

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. Click the **Payrolls** menu, bringing you to the Payroll Timeline screen.

Pa ╋	vroll Timeline					
	12/29/2014 - 1	Processed	01/12/2015 - 2	On Hold	01/19/2015	Not Due 01/01/2015 - 01/07/2015
	Weekly	12/11/2014 - 12/17/2014	Weekly	12/25/2014 - 12/01/2014	many.	
	Submitted on: 12/22/2014 10:17 AM	&	Submitted on: 01/12/2015 01:52 PM	66	Submit by: 01/16/2016	+
	12/31/2014 - 1	Processed	01/14/2015 - 1	Submitted	01/21/2015	Not Due
<	Weekty	12/21/2014 - 12/28/2014	Weekby	01/04/2015 - 01/11/2015	Weekty	01/11/2015 - 01/18/2015
	Submitted on: 12/24/2014 10:55 AM	*	Submitted on: 01/12/2015 11:24 AM	*	Submit by: 01/19/2015	+
	01/21/2015 - 1	Pending	01/15/2015 - 1	Past Due	01/26/2015	Not Due
	Weskly	01/11/2015 - 01/18/2015 New Eatch	Weekty	01/04/2015 - 01/11/2015 New Batch	Weekty	01/08/2015 - 01/14/2015
	Submit by: 01/19/2015	ß	Submit by: 01/12/2015	ß	Submit by: 01/22/2016	+

Click the large **plus** + sign in the heading to create a new (unscheduled) payroll.
 **Result:** The Payroll Settings screen opens.



	Payroll Settings		🗲 Hide
Check Date	Run #	Calendar Options	
07/30/2015	1		*
Payroll Type		Actual Call In Date	
Regular	•		<b></b>
Agency Payn S Checks Checks ACH Billing Liabilities Deposits		Time Off Accrual	
Payroll Check Comm	ient		< >

- 1. Complete the required and applicable fields.
- 2. Click **Save H** in the header on the left.
- 3. Click Hide in the upper right-hand corner of the Payroll Settings screen.
- 4. Click the large **plus sign** behind where the Payroll Settings screen was, to continue. **Result:** The Check Batch Settings screen opens.
- 5. Complete the required fields and click **Create Checks**.

Pay		Timeline	ending	-										
Payr	oli 08	/12/2015 - 1									Batches	Checks	Totals	Finish
<b>→</b>	хс	heck Batch -3 - Settings												+
Pay		Start Date		End Date			Time Clock Source File							Note
Payroll Settings		8/16/2015		8/23/2015			Choose file		х				22	
Setti-		Frequency					File Format							s/Instructions
sbu		Weekly			*	5	CSV - Comma Separated Values	*					-	dior
	S	Employee Types				otion	Date Field Format							5
	Options	All				ţ	2 Digit Year (mm/dd/yy)	*						
	0	Employee Filter			Select EEs	por	Employee Synchronization							
	atio	Select Template			*	Ē	Custom #	*		Create Checks				
	Crea	Template				loci	Organizational Synchronization							
		Select Template			*	De C	Full DBDT	*						
		Checks per EE		Check Types		듵	Job Codes							
		1		Void	*		Do Not Import Job Codes	*						
		Calculate Scheduled EDs					Apply Org Level							
		Standard Hours					From File	*						
	æ	Salary Pay												
	clude	Payroll Defaults												
	Ĕ	Time Off Requests												

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



Select a Che Void	ck Type			d Select the C e check as a re			. You can then create a eck.
Check # All	EE ID All	Within this ch 8/4/2015	eck date range - 9/30/2015	With An	n Status of y	Find	)
Che T	Run #	T EE ID T	Employee Na 🝸	Che T	Gross T	Net T	Status 🝸
08/27/2015	1	1	Lewis, Al	-99999528	\$0.00	\$0.00	Outstanding
08/27/2015	1	1	Lewis, Al	-99999522	\$0.00	\$0.00	Outstanding
08/27/2015	1	1	Lewis, Al	-99999513	\$0.00	\$0.00	Outstanding
09/17/2015	1	1	Lewis, Al	-99999498	\$0.00	\$0.00	Outstanding
09/17/2015	1	1	Lewis, Al	-99999492	\$0.00	\$0.00	Outstanding
09/24/2015	1	1	Lewis, Al	-99999481	\$2,500.00	\$0.00	Outstanding
00/20/2015	4	0	Clark Millia	00000630	£0.00	£0.00	Outstanding 107 items

- 7. Select **Void** for the Check Type.
- 8. Enter search criteria to find the check to void
- 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 not recommended that checks from previous quarters be voided.

- 10. Highlight the check line to be voided.
- 11. 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.

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

#### Voiding a check by editing a waiting payroll

- 1. On the Payroll Timeline screen select a payroll with a status of Pending by clicking the **Edit** button.
- 2. Click on a batch that has already been created.



ayroll 10	0/22/201	5 - 1	Batch 1 : 10/11/201	5 - 10/17	7/2015 Re	egular   -99999325   1 of 1		$\overbrace{\text{Batches}}^{\text{Color}} \longrightarrow \bigotimes_{\text{Checks}}^{\text{Checks}} \longrightarrow \varlimsup_{\text{Totals}}^{\text{Checks}} \longrightarrow F$
•	Add C	heck Dele	te Check Search Che	ecks	Group	By: Company Number		Summary +
~	Туре	EE Code	Name	Seq	Total Hrs	E01 Amt Salary	E02 Hrs Regular	E02 Amt Regular 50.00 5108.28
atch 1	R	1	Lewis, Al	1	40.00	\$2,500.00	40.00	\$0.00
leekly	м	2	Smith, Bill	2	0.00			\$108.28
	R	2	Smith, Bill	1	40.00	\$1,500.00	40.00	\$0.00
	R	3	Greenburg, Goldie	1	40.00	\$2,800.00	40.00	\$0.00
	R	4	Soffer, Harry	1	40.00		40.00	\$1,000.00
	R	5	Pinkman, Jessie	1	40.00		40.00	\$600.00
	R	6	Bichon, Selma	1	40.00		40.00	\$640.00
	R	7	Goodman, Saul	1	40.00		40.00	\$600.00
	R	8	Clark, Willie	1	40.00		40.00	\$3,120.00
	R	9	White, Walter	1	40.00		40.00	\$1,000.00
	R	10	Bigole, Susan	1	40.00		40.00	\$350.00
				Totals	535.00	\$6,800.00	535.00	\$9,068.28
/								16 items ()

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

Result: The Add Checks screen opens.

Select a Che	ck Type					ir selected Ch	You can then create a eck.
Check# All	EE ID All	Within this ch 8/4/2015	eck date range	Witi An	n Status of y	Find	
Che T	Run #	T EE ID T	Employee Na T	Che T	Gross T	Net 🝸	Status T
08/27/2015	1	1	Lewis, Al	-99999528	\$0.00	\$0.00	Outstanding
08/27/2015	1	1	Lewis, Al	-99999522	\$0.00	\$0.00	Outstanding
08/27/2015	1	1	Lewis, Al	-99999513	\$0.00	\$0.00	Outstanding
09/17/2015	1	1	Lewis, Al	-99999498	\$0.00	\$0.00	Outstanding
09/17/2015	1	1	Lewis, Al	-99999492	\$0.00	\$0.00	Outstanding
09/24/2015	1	1	Lewis, Al	-99999481	\$2,500.00	\$0.00	Outstanding
00/20/2045	4	n	Clark Millia	00000630	eo oo	CO 00	Outstanding
							107 items

- 5. Select **Void** for the Check Type.
- 6. Enter search criteria to find the check to void
- 7. Click the **Find** button to display a list of checks that fit the criteria selected.
- 8. Highlight the check line to be voided.
- 9. Click Create Void Check for Selected Check.
- 10. **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.

11. Process the payroll as usual.



# **Deleting Batches**

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 Batches a in the upper right corner.
- 3. If there is more than one batch created, select the batch to be deleted.

	ayroll Timelin		I
Pa	yroll 08/12/2015	- 1	
		Check Batch 1	08/16/2015–08/23/2015 Weekly Hourly & Salary 13 Checks
		<b>T</b>	ID: 60

Click Delete I 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.



# 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.

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 and sent to Evolution Payroll using VMR.

# **Defined Reports**

Defined reports are the Company level reports that can be generated by the user on demand in Evolution Payroll. These reports must be set up for the company in Evolution on the Reports – Setup Reports screen. Below is list of the reports available to set up to generate in Evolution Payroll.

Report	Description
401(K) Report (S215)	Displays employee and employer 401(k) contributions. Pension loan deductions are also included
Certified Payroll Report (S518)	Sent to state or federal government agencies with all certified payrolls processed, to report payrolls for projects
Check Reconciliation (S214)	Helps reconcile all checks drawn on any bank account; company, third party, or service bureau
Cover Letter With Tax Report (S1082)	Accompanies most tax payments, providing a payment summary
Direct Deposit (S211)	Run to display all employee direct deposits in a payroll
Employee Change Listing (New) (S1075)	Employee audit report that reflects employee changes made between the last processed payroll and current processed payroll
Employee HR Date Report (S457)	Shows lists of employees with a birthday, term date or hire date within a certain month
HR Employee Review Report (S850)	Tracks employee raise and position history.
Individual Earnings Report (S431)	Shows employee payroll, earnings and deduction history based on quarter or year.
Labor Distribution (New) (S1077)	Displays year-to-date (YTD) information by D/B/D/T
New Job Costing (S554)	Shows a breakdown of the costs of each job by earnings and deductions
Payroll Register (S109)	Displays YTD information for employees



Report	Description
Portrait Input Worksheet (S262)	A worksheet to help with processing payroll for the next check date after the report is created
Workers' Compensation (S217)	Displays all money paid out for Workers' Comp claims during the period selected.

The user selects the report from the table on the left-hand side of the screen and updates the parameters for the report selected on the right side of the screen.

			Payroll	F****	EE Filter	Org Filter	Misc Option:	is Run Report	_
earch For Report			Payroll	Filter	EE Filter	Org Filter	Misc Option:	s кип кероп	
Report Name 🛛 🔻	Report # 🔺	т		te range to use for you vant to include.	r report. All payro	lls within your range will	be selected. You can fine tur	ne your selection by checking on	nly
Payroll Register By Co (S109)	109	~	payrono you .						
Payroll Register (S109)	109		Starting Date		Ending Date		Include		÷
Direct Deposit (S211)	211		01/01/2015		05/28/2015		٣	Apply	1
Check Reconciliation (S214)	214			Check Date	🔻 Run #	T Processed	IDate 🔻 Status	🝸 Туре	
Pension Works Report (S215)	215			05/28/2015	1		Pendin	ng Setup Run	
401K Report (S215)	215			05/21/2015	1	05/28	/2015 Pendin	ng Regular	
Workers Compensation (S217)	217			05/14/2015	1	05/28	/2015 Pendin	ng Regular	
Portrait Input Worksheet (S262)	262			02/26/2015	1		Pendin	ng Regular	
Personnel Register (S344)	344			02/19/2015	1	02/19	/2015 Process	ed Regular	
Period Summary Report (S404)	404	~		02/12/2015	1		Process	ed Regular	
( Page 1 of 2 ( ) ( )	1 - 10 of 17 items	Ċ		02/05/2015	1		Process	sed Regular	
				01/29/2015	1		Process	ed Regular	
				01/23/2015	1		Process	sed Regular	
				01/22/2015	2		Process	ed Regular	

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 in the Navigation section of this document.

Report Name	T	Report # ▲	T
Payroll Register By Co (S109)		109	
Payroll Register (S109)		109	Í
Direct Deposit (S211)		211	
Check Reconciliation (S214)		214	
Pension Works Report (S215)		215	
401K Report (S215)		215	
Workers Compensation (S217)		217	
Portrait Input Worksheet (S262)		262	
Personnel Register (S344)		344	
Period Summary Report (S404)		404	`

Filters and options for the reports are listed on the left side of the screen. Each tab contains parameters that can be selected when generating the report. Each report can be filtered by Payroll, Employee (EE), and Organization Level (Org). The Misc. Options tab contains parameters that are specific to the report that is being generated.



Payroll Fi	ilter	EE Fi	ter	C	rg Filter	М	isc Options		Run Report	
Select the date ra to include.	ange to use for yo	ur report. All p	ayrolls within you	r range wi	ll be selected. You ca	n fine tune	your selection by	/ checking	only the payrolls ye	ou war
Starting Date 01/01/2015		Ending	) Date 6/2015		Include III All Payroll		×		Apply	
	Check Date 🗸	T	Run #	т	Processed Date	- T	Status	T	Туре	
0	01/13/201	5	1				Processed		Regular	
1									1 - 1 of 1 items	Ċ

To generate a report from the Defined Reports screen:

- 1. Select the report from the list of the Reports.
- 2. Select the payroll(s) from the Payroll Filter
- 3. Update the Starting Date and Ending Date.
- 4. Click **Apply** to return a list of payrolls within a specific time period. Users can include all payrolls or processed payrolls only.

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

- 5. Click the **EE Filter** tab and the **Org Filter** tab if needed.
- 6. Click the **Misc. Options** tab to update parameters specific to this report.
- Click the Run Report tab and then click Run This Report.
   Result: The Run Report tab displays the selected parameters for the report prior to generating.
- 8. View and print the report from the Task Queue once the report is generated.

# **Published Reports**

The Published Reports screen offers access to reports, tax returns and ASCII files generated in Evolution and sent through the Virtual Mail Room (VMR) to Evolution Payroll.

							Pr	review
Searc	h for Report							■ 25 X ⊕
	Check Date 🔹 🔻	Run # 🔻	Check Period	Report # ▲ 🔻	Report Name	🔻 Туре	т	
•	07/09/2015	1	03/01/2015 - 03/08/2015	S109	Payroll Register	Report	~	#WZ52129 D&L Services (MCM) Backing Property Regime (SDP) Backing Property (SDP) Free States Free States (SDP) Free States Free States (SDP) Free States (SD
	07/09/2015	1	03/01/2015 - 03/08/2015	S247	Tax Report For Payroll	Report		Properties Teaching T
	07/09/2015	1	03/01/2015 - 03/08/2015	S257	Invoice (S257)	Report		Description         State
	06/25/2015	1	06/14/2015 - 06/20/2015	S1075	Employee Change Listing (New)	Report		Text VID 80 000 with VID 80 000 WIT 80 0000 WIT 80 000 WIT 80 0000 WIT 80 0000 WIT 80 00
	06/25/2015	1	06/14/2015 - 06/20/2015	S1077	Labor Distribution (New)	Report		Display         Life         Mail         Life         Mail         Life         Life <thlife< thr="">         Life         Life</thlife<>
	06/25/2015	1	06/14/2015 - 06/20/2015	S1082	Cover Letter With Tax Report	Report		антариттикана (н. 1997) (н. 1997) Року 10 619 1000 10 5000 (н. 1997) Року 10 619 1000 10 5000 (н. 1997) Року 10 619 1000 (н. 1997)
	06/25/2015	1	06/14/2015 - 06/20/2015	S1082	Cover Letter With Tax	Report		Deschart         Die Spend         2-00         with the state of the s
	06/25/2015	1	06/14/2015 - 06/20/2015	S109	Payroll Register	Report		200 F20 400 Mare 5 10 Mare 5 10
	06/25/2015	1	06/14/2015 - 06/20/2015	S181	Earnings And Deductions	Report		Mandal-J-Samag Same or A Maile Same 12 Maile Rep 102 1 Nov 10 100 1000 100 1000 1000 1000 1000 1
	06/25/2015	1	06/14/2015 - 06/20/2015	S184	Delivery Label	Report	~	new states and the states and the states and the states and the states and the states and the st
	Page 1 of 25	( ) ( H )				1 - 10 of 242 items	Ċ	✓ page 1 of 6 >



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.	\$193, \$257, \$356, etc
Report Name	The name of the report or tax return.	Cover Letter , SUI Tax Wages by Quarter, etc
Туре	The type of document displayed	Report, Tax Return

To view, save, or print a published report,

- 1. Check the box in the left-hand column of the table to select the report(s) to be viewed, saved, or printed.
- 2. Use the Resizing tools in the preview window, to zoom in or out to preview the report.
- If more than one report is selected, use the arrows at the bottom of the Preview window to navigate between reports.
- 3. Click **Save** at the top of the Preview window 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.

4. Print as normal from the File menu in the Windows Menu bar.



# The Settings Menu

The Settings Menu is where users can reset their password. The following screen opens when the user clicks the Settings Menu.

ersonal Settings		
Dhaman Daaawaad		
Change Password		
Password Requirements		
Current Password *		
Required		
lew Password *		Confirm Password *
Required		Required
General Security Questions		
Ve'll use these to verify your identity if you forget your password and can't log in.		
Duestion 1 *	_	Answer 1 *
What was your childhood nickname?	•	Required
Question 2 *		Answer 2 *
What is your father's middle name?	*	Required
Question 3 *		Answer 3 *
What is your grandmother's first name?	*	Required
Extra Security Questions		
Ve'll use these to further verify your identity when you log in.		
Ver use unese to further verify your identity when you log in:		Answer 1 *
- Select Question -		Required
Question 2 * - Select Question -		Answer 2 * Required
	*	requireu

- The user must enter the current password correctly before establishing a new password.
- The new password is entered twice and then saved by clicking Save in the upper left corner.

The user can remain in the current session after changing the password. The new password is required once the user has logged out and starts a new session.

**Note:** If the user enters their current password incorrectly three times, they will be logged out of the application and redirected to the Forgot Password screen.



### Agenda

Also in the Settings menu is the Agenda

The Agenda is also accessible in the Analysis tile on the Dashboard, by scrolling through the Report Chart Views.

Agen	Personal Setting	js			
+					
Today	<ul> <li>Monday, May 25, 2015 - Friday,</li> </ul>	May 29, 2015			Day Work Week Wonth
	Mon 5/25	Tue 5/26	Wed 5/27	Thu 5/28	Fri 5/29
all day					
7:00 AM					
8:00 AM					
9:00 AM					
10:00 AM					
11:00 AM					
12:00 PM					
1:00 PM					
2:00 PM					
3:00 PM					*
Show	w business hours				



# 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 – similar to the Task View in Evolution, 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 Evolution Payroll section of this document, or by clicking the arrow in the bottom left-hand corner of any screen in the application.

Search for Emplo	Last Name T	First Name	T State T	Zip Code	T Status T		
1	Last Name y	Al	y State y	10066		AILEWIS	
2	Smith	Bill	MA	10000	Active	Last Name: First Name: Lewis Al	
3	Greenburg	Goldie	NY	10044	Active	SSNEIN	
4	Soffer	Harry	VT	05401	Active	884-77-3311	
5	Pinkman	Jessie	NY	10011	Active	Status:	
6	Bichon	Selma	MA	88855	Active	Active	
7	Goodman	Saul	VT	05401	Active	Address: 963 Main Street	
8	Clark	Willie	VT	05401	Active	Brooklyn, NY 10066	
9	White	Walter	NY	10012	Active		
10	Bigole	Susan	VT	05401	Active		
11	Simon	Simon	NY	11234	Active	<b>.</b>	
					1 - 11 of 11 items 🖒	5	
						-	



ID =	Task Task	Status	Last Update	Summary	Current State
0924305	Process Payrolla	Finished with Exceptions	01/14/2015 4:09PM	BDazz1 Pr.1/19/2015-1	Finished
6924391	Preprocesa Payrola	Finished Successfully	01/14/2015 4:06PM	BDate1 Pr:1/19/2015-1	Finished
6904382	Run Report	Finished Successfully	01/14/2015 4:04PM	8Dazz1, Payroll Register	Finished
6924378	Run Report	Finished Successfully	01/14/2015 4:02PM	BDagt1. Workers' Compensation	Finished
6919790	Preprocess PayroRs	Finished Successfully	01/12/2015 1:45PM	BDatt1 Pr 1/12/2015 - 2	Finished

The Task View screen is read-only and displays the following information for each task listed:

- Task ID
- Task
- Status of the task and the status symbol
- The date the task was performed/updated
- Summary (title)
- Current State of the each task

The screen displays five rows of results at a time. Scroll down to view more tasks or use the arrows to move between pages.

To review the report results, select a task (row) in the grid. The report results appear in the Preview pane below the Task grid. In the screen below, the bottom portion of the screen shows a preview of *The Payroll Register (S109)*. The Status shows as **Finished Successfully** in the Preview section as well.

D v	Task T		→ Status		Last Update	Summary	Current State
924395	Process Payrolls		9 Finished with Except	tions	01/14/2015 4:09PM	BDazz1 Pr:1/19/2015-1	Finished
24391	Preprocess Payrol	ls	Finished Successful	lly	01/14/2015 4:06PM	BDazz1 Pr:1/19/2015-1	Finished
24382	Run Report		Finished Successful	ly	01/14/2015 4:04PM	BDazz1. Payroll Register	Finished
24376	Run Report		Finished Successful	lv	01/14/2015 4:02PM	BDazz1. Workers' Compensation	Finished
919790	Preprocess Payrol	ls	Finished Successful		01/12/2015 1:43PM	BDazz1 Pr:1/12/2015 - 2	Finished
ask: Run Re					<b>.</b>	01/14/2015.4/04PM ROstriet Da	1 - 5 of 10 items Finished Successfully 01/14/2015 4:04F
Results Preview	Log						
Results Preview	Log						
Preview	Log BDazzled Design Ltd.				Payroll Register (S109)		
Preview				Check D	Date : 01/15/2015-		
Preview				Check D Period Rar	Date : 01/15/2015- nge : 01/04/2015 TO 01/		
Preview	BDazzled Design Ltd.	scority Alembar	Salary Frequency	Check D	Date : 01/15/2015- nge : 01/04/2015 TO 01/	11/2015	
Preview #BDazz1 E	BDazzled Design Ltd.	коліу Амтізнг УТО Ноус Алгонті		Check D Period Rar Week Num	Date : 01/15/2015- nge : 01/04/2015 TO 01/ liber : Week #3	11/2015 Net Check	
Preview #BDazz1 E	BDazzled Design Ltd. Second S Rate Current of Rey Hous Arount	מדע	Deductions Current YTD Amo	Check D Period Rar Week Num Check Number	Date :         01/15/2015-           nge :         01/04/2015 TO 01/           aber :         Week #3           Obseck Date         Obseck Type	11/2015 Net Check	
Preview #BDazz1 E Employee Neme Earings Description	BDazzled Design Ltd. Second S Rate Current of Rey Hous Arount	YTD Hours Amount NY NY	Deductions Current YTD Amo Description Amount 2000.00 Weekly 02 Health Insurance 120.00 38	Check D Period Rar Week Num Check Number Other Number Taxies Description 1019 20 00 Federal (S10)	Date :         01/15/2015- nge :         01/04/2015 TO 01.           Uber :         Week #3         Week #3           Oheck Date         Oheck Type           Current Amount         0//15/2015           0//15/2015         Regular           0//15/2015         Regular	11:2015 Aild Dhuck TD Amount 1:007:35 1.118.29	
Preview #BDazz1 E Employee Neme Earings Descrition 112-33-4455-3-	Stazzled Design Ltd. Sociel 3 Refer House Amount of Ray House Amount Files House Amount	YTD Hours Amount NY NY	Deductions Cement VTD Amount Description Amount 2000/00 Meekigy 32 Health Insurance 120:00 380 50 Child Support 100:00 500	Check D Period Raz Week Num Otseck Aumber Ount Taxies Description 1019 80.00 Federal (SO) 00 O Federal (SO)	Date         01/15/2015-           nge:         01/04/2015 TO 01/           iber:         Week #3           Oheck Date         Oheck Type           Current Amount         Y           00/15/2015         Regular	11.2015 Tair Obusk TD Amount 1087 25 1.118 25 344 37	
Preview #BDazz1 E Employee Neme Earings Descrition 112-33-4455-3-	Stazzled Design Ltd. Sociel 3 Refer House Amount of Ray House Amount Files House Amount	YTD Hours Amount NY NY	Deductions Cement VTD Amount Description Amount 2000/00 Meekigy 32 Health Insurance 120:00 380 50 Child Support 100:00 500	Check D Period Rar Week Num Otheck Number Taxics Description 5010 Federal (S10) 20 00 Federal (S10) 20 00 ASCI 577 Madeore State NY (S1)	Data         01/15/2015           nge:         01/04/2015 TO 01.           betr:         Wreek #3           Obseck Date         Oheck Type           Current Amount         1           Dirt/5/2015         Regular           01/15/2015         Regular           01/15/2015         114,70           20.85         104.22	11.2015 Tair Ohusk TD Amount 1087:30 1.118:23 34:437 80:05 312:89	
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Preview #BDazz1 E Employee Neme Earings Descrition 112-33-4455-3-	Stazzled Design Ltd. Sociel 3 Refer House Amount of Ray House Amount Files House Amount	YTD Hours Amount NY NY	Dedustonia Current YTD Arno Description Amount YTD Arno 2000/00 Weekly 02 Health Insurance 120:00 306 05 Child Support 100:00 500 17 Dentail Insurance 28:50 81	Check D Period Rar Week Num Otheck Number Taxics Description 5010 Federal (S10) 20 00 Federal (S10) 20 00 ASCI 577 Madeore State NY (S2)	Data         01/15/2015           nge:         01/04/2015 TO 01.           betr:         Wreek #3           Obseck Date         Oheck Type           Current Amount         1           Dirt/5/2015         Regular           01/15/2015         Regular           01/15/2015         114,70           20.85         104.22	11.2015 Tair Ohusk TD Amount 1087:30 1.118:23 34:437 80:05 312:89	



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

y Task Queue					
٣	Task	→ Status	▼ Last Update ▼	Summary	Current State
24395	Process Payrolls	9 Finished with Exceptions	01/14/2015 4:09PM	BDazz1 Pr:1/19/2015-1	Finished
24391	Preprocess Payrolls	Finished Successfully	01/14/2015 4:06PM	BDazz1 Pr:1/19/2015-1	Finished
24382	Run Report	Finished Successfully	01/14/2015 4:04PM	BDazz1. Payroll Register	Finished
24376	Run Report	Finished Successfully	01/14/2015 4:02PM	BDazz1. Workers' Compensation	Finished
19790	Preprocess Payrolls	Finished Successfully	01/12/2015 1:43PM	BDazz1 Pr:1/12/2015 - 2	Finished
Pag	e 1 of 2 (F)			01/14/2015 4:08PM RDamled Desi	1 - 5 of 10 items
Task: Process Payrolls					Finished with Exceptions 01/14/2015 4:09F
Results	Exceptions Log				
date/time computer nar user name	: 2015-01-14, 16:09:37, 77ms ne : INLPWA03 : SYSTEM <admin></admin>				
date/time computer nare operating sys system lange system up ti program up ti processors	me :INLPWA03 :S'YSTEM <admin> tem :Windows NT New build 9200 uage :English me :13 days 17 hours me :1 day 17 hours :16x intel(R) Xeon(R) CPU X5690 @</admin>	3.47GHz			
date/time computer nan user name operating sy; system lang; system up ti program up ti processors physical mer free disk spa display mode process id allocated me	me : INLFVA403 :SYSTEM <admin> stem : Windows NT New build 9200 uage : English me : 153 days 17 hours :10x Intel(R) Xeon(R) CPU X5850 @ nory : 4504/8191 MB (free/total) ce : (C;) 15.27 GB : 1024x708, 32 bit :\$73a mory : 283.00 MB</admin>	3.47GHz			
date/time computer nan user name operating sys system lang; system up ti processors physical mer free disk spa display mode process id allocated me executable exec. date/ti version madExcept v	INLPVA003           SYSTEM «admin»           stem :: Windows NT New build 9200           uage :: English           it 30 add (10 add)           it 31 add (10 add)           it 31 add (10 add)           it 31 add (10 add)           it 32 it 32 add)           it 32 add)	3.47GHz			

Click **Hide** 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.