Evolution Payroll[®] User Guide v 3.1



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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

For non-SaaS (Software as a Service) customers, in order to be able to use the new features included in Evolution Payroll Release 3.0, you must have Evolution Classic Version 16.36 or higher installed. If you are a SaaS customer, these upgrades will be done for you.

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.

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.

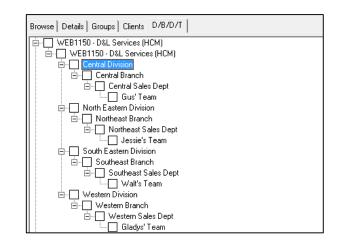
DBDT Level Security Restrictions

The Organization (D/B/D/T) Level Security in Evolution Payroll is controlled by the D/B/D/T level restrictions set in Evolution Classic, on the **Admin – Security – Users – DBDT tab** for the user's profile. Those settings affect three areas in Evolution Payroll:

- 1. Employees will not be visible to a user if s/he is part of a D/B/D/T level to which the user does not have permission to view.
- 2. The D/B/D/T level will not be available for selection throughout the application if the user does not have permission to view it.
- 3. Checks will not be visible to a user if they belong to an employee who belongs to a D/B/D/T level that is blocked from the user.

Note: Pay Rates will also be hidden as part of the employee belonging to a D/B/D/T level that is blocked.





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

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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.

General Info Flags & Settings Cover Letter Notes Tax Cov	ver Letter Notes Invoice Notes	VMR Confidentiality Notice Terms	of Use External Logins
Default Check Format* Pressure Seal Letter Greatland (New) Misc Check Format* Pressure Seal Letter Greatland (New) Auto Save* 3 Mins AR Export Directory	EFTPS Bank Format C Anexsys C Bank of America Batch Provider Use PreNote C Yes No In Prenote Days 5	Trust Impound Type * Tax Impound Type * Direct Deposit Impound Type * Billing Impound Type * Workers Comp Impound Type * Block DD Impound Type chang C Yes	D
MICR Vertical Adjustment ●	Prohibit Offline Bank Check Wells Fargo Citibank Wells Fargo/Keybank Wells Cashiers BBI Union Bank of California User defined Block Negative Checks From TOA Descriptions on Check Days Prior To Check Date for Ban		5,000,000.00

Once security requirements have been established in Evolution,

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

The first time a use logs in, enter the Username and Password assigned to them by the service bureau.

2. Click Sign In.

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

- 3. Click **OK**.
- 4. Select Questions 1, 2, and 3 from the dropdown lists and provide answers to the questions.

evolution [®]				
Secure User Login				
	Provide Security Validation			
User Name	Question 1 *	Answer 1 *		
Rflax	- Select Question - 🔹	Required		
	Question 2 *	Answer 2 *		
	- Select Question -	Required		
	Question 3 *	Answer 3 *		
	- Select Question - *	Required		
		Birro		



- 5. 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.

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 your center
ubmit your user name to start.	
oer Name	Question 1 Tert
	Guestion 2 Text
	Question 3 Text
(and the second s	Support 3 Tell
Bubmit	
	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 Isantiarre	Set Your Password Minimum length must not be less than 2 characters. New Password
	Confirm Password
	Set Password

- 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.

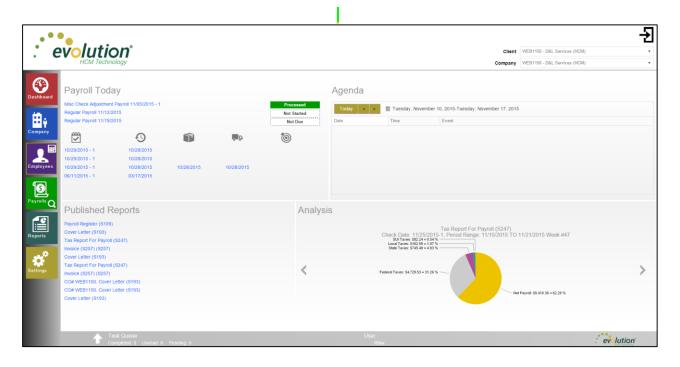
Note: If the service bureau has not entered anything in the Terms of Use tab, nothing needs to be accepted by the users.

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.

Agenda			
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)	

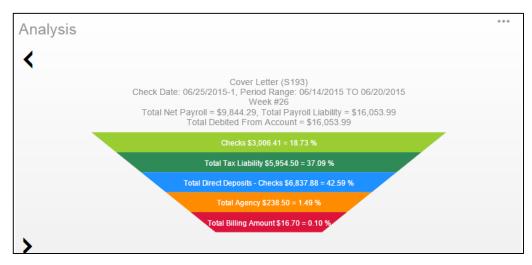
Analysis

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.

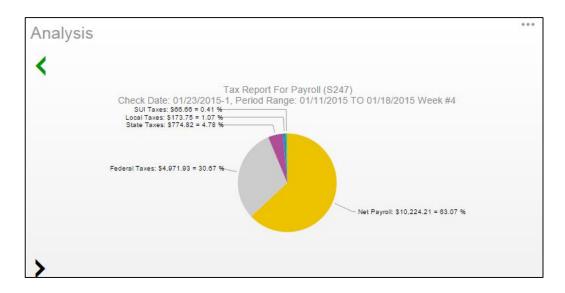
The Analysis tile always shows data for the last processed payroll and is updated when next payroll is processed. For the graphs to be displayed, the reports must be properly configured to display on the dashboard.

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*	Week Number Month
Cover Letter	
#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
	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.



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.

Client and Company Selector

Select the client and company from the dropdown menus in the upper right corner of the screen to view companyspecific information. When the Dashboard first opens, the default client shown is the one with the lowest Internal Client Number. The client and company fields are accessible in every screen within Evolution Payroll (see screen print below.)

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

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

- 1. Click the **Menu**s, or
- 2. Click the **Tile** titles

	ology							wEB1150 - D&L Services (HCM) WEB1150 - D&L Services (HCM)	
Payroll Toda	ay 🕗				Agenda				
Misc Check Adjustment Regular Payroll 11/12/2 Regular Payroll 11/19/2				Processed Not Started Not Due	Today • Date	Tuesday, November 1	0, 2015-Tuesday, November 17, Event	2015	
10/29/2015 - 1 10/29/2015 - 1 10/29/2015 - 1 10/29/2015 - 1 06/11/2015 - 1	0/28/2015 10/28/2015 10/28/2015 10/28/2015 03/17/2015	10/28/2015	10/28/2015	10					
Q Published R	Reports			Analysi	S				
Payroll Register (S109) Cover Letter (S193) Tax Report For Payroll Invoice (S257) (S257) Cover Letter (S193) Tax Report For Payroll Invoice (S257) (S257)	(S247)			<		Check Date: 11/25/2015 SUI Taxes: 1802.24 = 6.5 4 Local Taxes: 3142.59 = 107 W State Taxes: 5745.48 = 4.93 % Pederal Taxes: 54,728.53 = 31.26 %) TO 11/21/2015 Week #47	
CO# WEB1150. Cover CO# WEB1150. Cover Cover Letter (S193)								∑ Net Payrolt \$9,410.36 = 62.20 %	



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. This is the Table View. Click the active button to access the Form View, which lists the menu items within the Employee menu.

for Employe	ree						F	Preview		
т	Last Name 1	First Name	T SSN/EIN	▼ State ▼	Zip Code 🛛 🔻	Status	7	Goldie Greenburg		
	Lewis	AI	884-77-3311	NY	10066	Active	^	Last Name:	First Name:	
	Smith	Bill	996-55-1172	MA	10022	Active		Greenburg	Goldie	
	Greenburg	Goldie	982-44-3369	NY	10044	Active		SSN/EIN:		
	Soffer	Harry	778-22-1133	VT	05401	Active		982-44-3369		
	Pinkman	Jessie	885-66-9974	NY	10011	Active		Status: Active		
	Bichon	Selma	998-84-4112	MA	88855	Active		Address:		
	Goodman	Saul	302-66-5889	VT	05401	Active		951 Smith Street Ithaca, NY 10044		
	Clark	Willie	996-44-1332	VT	05401	Active		Itnaca, NY 10044		
	White	Walter	000-33-1122	NY	10012	Active				
	Bigole	Susan	963-88-1122	VT	05401	Active				
	Simon	Simon	627-13-3647	NY	11234	Active				
	Kirk	Jim	213-64-5663	VT	05602	Active				
	Ramagopul	Yani	615-46-1065	VT	05401	Active				
						4.17				
	Hamerhill CES	Bryce	514-05-4105	VT	05451	Active 1 - 14 of 14	- items			
] ¢ F	ees G	otdie 🔹 🗸	Smith, Bill Gree	nburg, Goldie	Soffer, Harry Pinka	1 - 14 of 14 i man, Jessie Bich	non, Selm	a Goodman, Saul	Clark, Willie W	
Personal	ees G	olde V K	0	nburg, Goldie		1 - 14 of 14 i man, Jessie Bich		a Goodman, Saul	Clark, Willie Wł	ite, Walter
Personal ibor Defau	ees	olde • • • • • • • • • • • • •	Smith, Bill Gree mployee Type * W2 *	nburg, Goldie	Soffer, Harry Pinka	1 - 14 of 14 i man, Jessie Bict	non, Selm Status * Active			ite, Walter
Personal abor Defau	ees G	oldio	Smith, Bill Gree	nburg, Goldie	Soffer, Harry Pinka	1 - 14 of 14) man, Jessie Bich	non, Selm Status *	Date *	Clark, Willie W?	ite, Walter
Personal ibor Defau	CC Solutions Sol	odie ↓ ↓ * ©EIN * 5 Eme* te to 1*	Smith, Bill Gree mployee Type * W2 *	nburg, Goldie	Soffer, Harry Pinka	1 - 14 of 14) man, Jessie Bich	non, Selm Status * Active Current Hire	Date *	Original Hire [ite, Walter late
Personal abor Defau	ees	aldia	Smith, Bill Gree mployee Type * W2 *	nburg, Goldie	Soffer, Harry Pinka	1 - 14 of 14) man, Jessie Bich	on, Selm Status * Active Current Hire 02/17/2003	Date *	Original Hire [ite, Walter late
Personal abor Defau ACA Pay	ees	aldia	Smith, Bill Gree mployee Type * W2 *	nburg, Goldie	Soffer, Harry Pinka	1 - 14 of 141	hon, Selm Status * Active Current Hire Cu2/17/2003 Termination Employmen	Date *	Original Hire [ite, Walter late
Personal abor Defau ACA Pay Federal	ees	aldia	Smith, Bill Gree mployee Type * W2 *	nburg, Goldie 3 EE Code ' Last Name ' Greenburg	Soffer, Harry Pink Time Clock #	1 - 14 of 141	non, Selm Status * Active Current Hire 02/17/2003 Termination Employmen N/A	Date *	Original Hire [Rehire Eligible Yes	ite, Walter late
Personal abor Defau ACA Pay Federal State	ees	odde	Smith, Bill Gree mployee Type * W2 *	nburg, Goldie Ecode * 3 Last Name * (Greenburg	Soffer, Harry Pinka	1 - 14 of 141	hon, Selm Status * Active Current Hire Cu2/17/2003 Termination Employmen	Date *	Original Hire I Rehire Eligible Yes On Call To	ite, Walter late
Personal abor Defau ACA Pay Federal State Local	Cees Sciencentury, of Address State Stat	adde	Smith, Bill Gree mployee Type * W2 *	nburg, Goldie Ecode * 3 Last Name * (Greenburg	Soffer, Harry Pink Time Olock # Zip Code *	1 - 14 of 141	non, Selm Status * Active Current Hire 02/17/2003 Termination Employmen N/A On Call From	Date *	Original Hire [Rehire Eligible Yes	ite, Walter late
Personal abor Defau ACA Pay Federal State Local hild Suppo inect Depo	Cees Societaria Carrier Societaria Carrier	adde	Smith, Bill Gree mployee Type * W2 *	nburg, Goldie s EE Cote * J Lat Name * Creenburg	Soffer, Harry Pinka Time Clock # Zip Code * +	1 - 14 of 141	non, Selm Status * Active Current Hire 02/17/2003 Termination Employmen N/A On Call From Healthcare (Date * 1 Date 1 t Type * 1 m Coverage *	Original Hire I Rehire Eligible Yes On Call To	ite, Walter late
Personal abor Defau ACA Pay Federal State Local hild Suppo irrect Depo heduled E	ees Somering Construction Somering Construc	odde	Smith, Bill Gree mployee Type * W2 *	nburg, Goldie s EE Cote * J Lat Name * Creenburg	Soffer, Harry Pinka Time Clock # Zip Code * +	1 - 14 of 141	non, Selm Status * Active Current Hire 02/17/2003 Termination Employmen N/A On Call From Healthcare (No ER Pail	Date * 1 Date * 1 I trype * 1 Coverage * 1 I tryplet Eigible	Criginal Hire I Rehire Eligible Yes On Call To	ite, Walter ute
Personal abor Defau ACA Pay Federal State Local hild Suppo irroct Depo heduled E Delivery	ees Sourcestrag. a 3.Greentrag. a 3.Greentr	addio	Smith, Bill Gree mployee Type * W2 • M1	nburg, Goldie E code * 3 Lant Name * Greenburg State * NY Phone	Soffer, Harry Pinko Time Clack # Zip Code * 10044 Extension	1 - 14 of 14	non, Selm Status * Active 02/17/2003 Termination Employmen N/A On Call From N/A On Call From No ER Pain Dependent (Date *	Ciginal Hee E Rahire Eligibit Yes On Call To Benefit Eligibi	ite, Walter ute
Personal abor Defau ACA Pay Federal State Local hild Suppo inect Depo heduled E Delivery re Off Acc	Cees Something of Addee add Something of Something of	oldie	Smith, Bill Gree imployee Type * *2 * M.L	nburg, Goldie BEEcote* 3 Lat Name* Creenburg State* NY Phone Ethnichy*	Soffer, Harry Pinka Time Clock # 21p Code * 10044 Extension Tribe	1 - 14 of 14	non, Selm Status * Active 02/17/2003 Termination N/A On Call From No ER Pair Dependent (No	Date *	Criginal Hire I Rehire Eligible Yes On Call To	ite, Walter ute
Personal abor Defau ACA Pay Federal State Local hild Suppo irroct Depo heduled E Delivery	Ceess Sourcesstand ass ass ass ass ass ass ass as	oldie	Smith, Bill Gree mployee Type * W2 • M1	nburg, Goldie E code * 3 Lant Name * Greenburg State * NY Phone	Soffer, Harry Pinka Time Clock # 21p Code * 10044 Extension Tribe	1 - 14 of 141	non, Selm Status * Active 02/17/2003 Termination Employmen N/A On Call From N/A On Call From No ER Pain Dependent (Date *	Ciginal Hee E Rahire Eligibit Yes On Call To Benefit Eligibi	ite, Walter ute

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:



arch for Emplo	/ee								Preview		
E# 7	Last Name	T First Name	Ţ	State	T Zip Code	Ţ	Status	Ţ	Goldie Greenburg		
1	Lewis	AI		NY	10066		Active	*	Last Name:	First Name:	
2	Smith	Bill		MA	10022		Active		Greenburg	Goldie	
3	Greenburg	Goldi	•	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	Walte		NY	10012		Active				
10	Bigole	Susar		VT	05401		Active				
11	Simon	Simor		NY	11234		Active				
12	Miller	Mary		VT	05401		Active	*			
							1 - 12 of 12 ite	ms උ			

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

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

Search for Emp	oloyee								
EE# 🝸	Last Name	T First N	ame 🍸	State	T	Zip Code	Ţ	Status	Ţ
4	Soffer	H	larry	VT	Show items	with value that:		Active	
7	Goodman	:	Saul	VT	Is equal to	•		Active	
8	Clark	١	Villie	VT	vt			Active	
10	Bigole	s	usan	VT	And 🔻			Active	
12	Miller	1	lary	VT	Anu 🔻			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 En	nployee				
EE#	T Last Name T	First Name 🍸	State 🝸	Zip Code 🛛 🝸	Status 🍸
1	Lewis	AI	NY	10066	Active
2	Smith	Bill	MA	10022	Active
3	Green	Goldie	ND.	10044	Active
4	Soffer	Harny	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

1/4/2016



Sorting – similar 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 Em	ployee				
EE# Ţ	Zip Code	T First Name T	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	Mary	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	Dashboard Dishboard	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 ACA Pay Federal State Local Child Support Direct Deposit Direct Deposit Scheduled E/Ds Delivery Time Off Accrual Employee Portal 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	Parks * Active * Active * Council Hire Case Council Hire Case Council Hire Case Council Hire Case Tammission Case Functionment Type Functionment Type Con Call From Con Call From	Many of the screens in the application are divided into sections. These sections have headings that separate the information pertaining to the sections.
Tabs	Output El Carlo, Engligue None Parto Line Manuel Ite Teo Davailes El Name Manuel None Con Unit Manuel None Con Unit Manuel None <	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 Reports menu lets the user see reports that have been published to Evolution Payroll from VMR, as well as process additional reports as needed.

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



The Company Menu

Company information, including settings and rules established by the company can be viewed in the Company menu. The fields' values are taken from corresponding fields in 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.

Company						
Basics Organizational Levels ED Codes States		Name BDazzled Design Ltd. D.B.A Address 1 11 Spring Lane Address 2				Company Code BDazzi EN 000000000 Customer Service Team Customer Service Customer Service
Previous Next		City Williston	State VT	Zip Code 05495		Email Jjanson@Bdazz.Com
Pievious		Yviiiiston Phone	Fax	05495		Payroll 123456789
		Name				Tax
		Linda Mills			nts	123456789
	22	Address 1			Bank Accounts	Workers' Compensation
	line line	7 Spring Lane			Ac	123456789
	Legal Address	Address 2			ank	Billing
	ege				æ	123456789
	-	City	State	Zip Code		Direct Deposit
		Williston	VT	05495		123456789

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
 Northeast Branch Northeast Sales Dept 	Number	No East
Jessie's Team	Description	North Eastern Division
Western Division Western Branch	Home State	VT
Western Sales Dept	Override EE Rate #	
Gladys' Team	Override Pay Rate	
Central Division Central Branch	Payroll Bank Account #	302875106
Central Sales Dept	Tax Bank Account #	000000000
Gus' Team ∡ South Eastern Division	Billing Bank Account #	302875106
 Southeast Branch 	DD Bank Account #	
 Southeast Sales Dept Walt's Team 		



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

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

Company - E/D Codes Screen

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

											Defaul	t	
Code	T Description	T	Rate	T	Rate #	T	OT Rate	T	Start D	T	Amount	T	
M1	ACA Hours												,
E4	Sick										1	0.00	
E3	Vacation										1	1.00	
E02	Regular												
E01	Salary												
D7	Child Support -	2											
D6	Health Insurance	е											
D5	Garnishment												
D4	Child Support												
D3	Direct Deposit - N	let											
D2	Direct Deposit - Par	tial 2											
D1	Direct Deposit - Par	tial 1											
(>	
												2 item	

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 Vermont 1	AK MA PA VT 1 - 5 of 5 items	EN 12345755 SD EN 12345725 State Tax Exampt Stul Exampt SUI Rates		Tax Name New York City Res. New York City Non-Res. MCT Mobility Tax 1	Rate 0.0025 0.0011 1 - 3 of 3 items
			Tax Name NY-Re-employment NY-SUI 1	Rate 0.00075 0.04025 1 - 2 of 2 items		



Appendix - Company Menu

Company Basics screen

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



Field / Button	Description
Billing	The billing bank account number.
Direct Deposit	The direct deposit bank account number.

Company - Organization Levels screen Company - States Screen

Field / Button	Description
Number	The number of the organization level displayed.
Description	The description of the organization level displayed.
Home State	The home state of the organization level displayed.
Override EE Rate #	The employee rate number override, if applicable.
Override Pay Rate	The pay rate amount if applicable.
Payroll Bank Account #	Payroll bank account number for the organization level displayed.
Tax Rate Account #	Tax rate account number for the organization level displayed.
Billing Bank Account #	Billing bank account number for the organization level displayed.
DD Bank Account #	Direct deposit account number for the organization level displayed.
Code	Assigned at the System level, these are the E/D Codes the company has selected to use.
Description	Description of the E/D Code
Rate	Rate at which the earning or deduction is added or subtracted
Rate #	Rate Number for the rate that translates to the employees' rate number
OT Rate	Rate at which overtime is applied
Default section	
Start Date	Default Start Date for all company employees with this set up as a Scheduled E/D. Can be changed at the Employee level.
Amount	Default Amount for all company employees with this set up as a Scheduled E/D. Can be changed at the Employee level.
Rate	Default Rate for all company employees with this set up as a Scheduled E/D. Can be changed at the Employee level.



Company - States Screen

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

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.

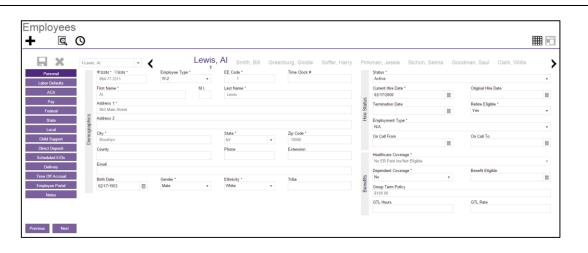
The following is the first screen that opens when the Employees menu is accessed. The default for this screen is to show only employees with a status of Active.

Search for	Employee									Preview		
EE #	T Last Name T	First Name 1	T SSNEIN	T State	т	Zip Code	T I	Status	T	Al Lewis		
1	Lewis	AI	884-77-3311	NY		10066		Active	-	Last Name:	First Name:	
2	Smith	Bill	996-55-1172	MA		10022		Active		Lewis	AI	
3	Greenburg	Goldie	982-44-3369	NY		10044		Active		SSIVEIN:		
4	Soffer	Harry	778-22-1133	VT		05401		Active		884-77-3311		
6	Pinkman	Jessie	885-66-9974	NY		10011		Active		Status: Active		
6	Bichon	Selma	998-84-4112	MA		88855		Active		Address:		
7	Goodman	Saul	302-66-5889	VT		05401		Active		963 Main Street		
8	Clark	Willie	996-44-1332	VT		05401		Active		Brooklyn, NY 10066		
9	White	Walter	000-33-1122	NY		10012		Active				
10	Bigole	Susan	963-88-1122	VT		05401		Active				
11	Simon	Simon	627-13-3647	NY		11234		Active				
12	Kirk	Jim	213-64-5663	VT		05602		Active				
13	Ramagopul	Yani	615-46-1055	VT		05401		Active				
14	Hamerhill	Bryce	514-05-4105	VT		05451		Active				
15	Any	Body	000-00-0000	VT		05602		Active	-			
(H) (H)	Page 1 of 2 (+)(+)							1 - 15 of 18 ite	ems			

The two buttons in the header, far right are used to toggle between the **Table view** (above) and the **Employee view** (below.)

The buttons in the header, far left, are used to + add a new employee, \square show audit history, and \bigcirc sign in to SwipeClock directly.

Note: The SwipeClock sign on button will be available on all of the screens in the Employees menu, as well as the screens in the Payroll menu.





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

Adding New Employees

To add a new employee in Evolution Payroll,

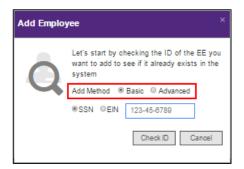
- 1. Select and open the client and company from the dropdown list above the heading on the right-hand side of the screen.
- 2. Click the **Employees** Menu to open.

If there are employees already set up with this company, they appear in the list on the left-hand side of the screen.

	HCM Te	tion [®]							WEB1150 - D&L Services (HCM) WEB1150 - D&L Services (HCM)	
ard	Employ	vees 🔍 🕓								
	Search for Empl	oyee						Preview		
w I	EE # T	Last Name T	First Name T	SSNEIN	T State T	Zip Code 🛛 🔻	Status T	AI Lewis		1
	1	Lewis	Al	884-77-3311	NY	10066	Active	Last Name:	First Name:	
	2	Smith	Bill	996-55-1172	MA	10022	Active	Lewis	Al	
	3	Greenburg	Goldie	982-44-3369	NY	10044	Active	SSNEIN:		
	4	Soffer	Harry	778-22-1133	VT	05401	Active	884-77-3311		
	5	Pinkman	Jessie	885-66-9974	NY	10011	Active	Status: Active		
	6	Bichon	Selma	998-84-4112	MA	88855	Active	Address:		
a	7	Goodman	Saul	302-66-5889	VT	05401	Active	963 Main Street		
	8	Clark	Wille	996-44-1332	VT	05401	Active	Brooklyn, NY 10	066	
	9	White	Walter	000-33-1122	NY	10012	Active			
	10	Bigole	Susan	963-88-1122	VT	05401	Active			
	11	Simon	Simon	627-13-3647	NY	11234	Active			
	12	Kirk	Jim	213-64-5663	VT	05602	Active			
	13	Ramagopul	Yani	615-46-1065	VT	05401	Active			
	14	Hamerhill	Bryce	514-05-4105	VT	05451	Active			
	15	Any	Body	000-00-0000	VT	05602	Active _			
	He Page	e 1 of 2 🕞 🖂					1 - 15 of 18 items			

- 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.





- 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.

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

X								Ne	w Employee						
Basics		SSN* CEIN*		Employee Type	·	EE Code *		Time	Clock #		Status *		Current Hir	e Date *	
Local		123-45-9876		W-2	*	15					Active	•			
ACA		First Name *			M.I.	Last Name *				S	Organizational Level *		Employme	nt Type *	
										Status	- Select Team -	,	N/A		•
Support		Address 1 *								03	Worker's Compensation		Job		
Deposit											- Select Worker's Compensat	ition - 🔻	- Select J	ob -	
uled E/Ds	nographics	Address 2									Frequency *		Salary Am	ount	
Off Accrual	grap							12250			Weekly		canal from		
kotes		City *				State *	*	Zip (Code *	Pay	Rate 1 *	Rate 2		Rate 3	
	De	County				Phone			nsion		\$0.00				
		County				Phone		Exte	nsion		Fed Marital Status *	Fed Exemp	tions *		
		Email									Single *	0			
Next										5	State *	SDI		SUI *	
and the second s		Birth Date		Gender *		Ethnicity *		Tribe		axation	VT *	VT		VT	
			m	N/A		Not Applicable				La	State Marital Status *		State Exer	mptions *	
		Healthcare Coverage				Dependent Cove	rane *		Benefit Eligible		- Select Marital Status -	*			
	offts	No ER Paid Ins/Not				No	*		m		Payroll Check Mail Box		EE Elector	nic Return Mail Box	
	Benef										- Select Mail Box -	٠	- Select A		*
	5									MR	EE Report Mail Box		2nd FF Re	port Mail Box	
										5	- Select Mail Box -		- Select N		

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 the Appendix at the end of this chapter.
- 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.



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 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.

						New Emplo	yee				
Personal		●SSN * ©EIN *	Employee Type *		EE Code *	Time Clock #			Status *		
Labor Defaults		456-13-2465	W-2	Ŧ	15				Active		*
ACA		First Name *		VI.I.	Last Name *				Current Hire Date *	Original Hire Date	~
Pay		Address 1 *					1	R	11		1
Federal		Address 1					Ctot	S	Termination Date	Rehire Eligible * Yes	
State	lics	Address 2					City of the second s	HITE	Employment Type *		
Local	Demographics								NA		*
Child Support	boun	City *			State *	Zip Code *			On Call From	On Call To	
Direct Deposit	ã				Phone	Extension					目
Scheduled E/Ds		County			Phone	Extension			Healthcare Coverage *		
Delivery		Email							No ER Paid Ins/Not Eligible		•
-									Dependent Coverage *	Benefit Eligible	
Time Off Accrual		Birth Date	Gender *		Ethnicity *	Tribe	offe	nefits	No v		8
Employee Portal			N/A	Ŧ	Not Applicable v		0	Ben	Group Term Policy		
Notes									GTL Hours	GTL Rate	

- 3. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the <u>Employees Personal screen</u> in the Appendix at the end of this chapter.
- 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

1-Lewis		- <	Lewis, Al	Smith	, Bill Greenburg, Goldie		inkman, Jessie	Bichon, Selma Goo	dman, Saul Clark, Willie
	Worker's Compensatio				Division	Branch		Department	Team
	- Select Worker's Cor	mpensation -	•		Western Division	Western Branch		Western Sales Dept	Gladys' Team
-	Job				A North Eastern Division				
tior	- Select Job -		*		Northeast Branch				
E S	Union				 Northeast Sales Dept 				
Info	- Select Union -		*		Jessie's Team				
Salary Information	Pay Group			Lev	 Western Division 				
Sal	- Select Pay Group -		*	Organizational Level	 Western Branch 				
	General Ledger Tag			atio	 Western Sales Dept 				
				aniz	Gladys' Team				
				big	Central Branch				
				0	Central Sales Dept				
					Gus' Team				
					South Eastern Division				
					Southeast Branch				
					Southeast Sales Dept				
					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</u> section in the Appendix at the end of this chapter.
- Press the TAB key or click the Next button when you complete entering information on this screen.
 Result: The Employees Pay screen opens.



Employees - ACA screen

The ACA screen in Evolution Payroll contains the same fields as the ACA tab in Evolution Classic, located on the Employee – Employee – screen.

Part Time ACA Coverage ACA Coverage Select Ack Coverage - Select Ack Coverage - Select Ack Benefit Select A	ACA Status *	1	ACA Standard Hours			
- Select ACA Coverage -		•				
ACA Benefit Lowest Cost Benefit - Select ACA Benefit - Select ACA Benefit - Select Lowest Cost - • ACA Policy Origin B. Employer Sponsord Coverage • • •	ACA Coverage		Applicable Section 4980H			
- Select ACA Benefit -	- Select ACA Coverage -	*	- Select Applicable Section -	*		
ACA Policy Otgin B. Employer Sponsored Coverage	ACA Benefit		Lowest Cost Benefit			
B. Employer-Sponsored Coverage v Benefits Eligible *	- Select ACA Benefit -	*	- Select Lowest Cost -	*		
Benefits Eligible *						
	B. Employer-Sponsored Coverage			*		
No T	Benefits Eligible *					
	No	*				

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.

	Pay Frequency * Weekly *	92	Raise Date	Raise Rate			Add	Delete					
	Salary Amount	Updates	Raise Amount	Pay Frequency *				Primary *	Y R	ate Numi	ber* T	Rate Amount *	T
	\$2,500.00	pe		Weekly	۳		•	Yes			1	\$0.00	
	Std Hours	Planned	Raise %					Number			Code		
	40.00	P					- Se	elect Jobs Number -		d	- Select Code -	*	
	Average Hours		New Hire Report *				Pay	Grade Position		Cor	Description		
2	0.00		Completed		*		- Se	elect Pay Grade Positio	n - 🔻	SIB			
Salary Information	Rate Number					ŝ	Pay	Grade		Workers Comp	State		
	1		FLSA Exempt *			Overrides	- Se	elect Pay Grade -		3			
	Rate Amount *				٠	ven							
aily	\$0.00	osition	Position			0		Division	Branch		Department	Team	
20	Wage Limit	osit	- Select Position -		τ.			Western Division	Western E	Iranch	Western Sales Dr	Gladys' Team	
	ringe cann	а.	Effective Date	19 on File *				A North Eastern Di	vision				
	Limit Frequency		m	Yes	*			 Northeast Bra 	nch				
	Annual		High Comp	Corp Officer *				A Northeast S	Sales Dept				
			No v	No	*		-	Jessie's	Team				
	Annualized						Level	 Western Division 					
							lle	 Western Bran 	ch				-
	Calc Annual												2 items
	\$130,000.00												

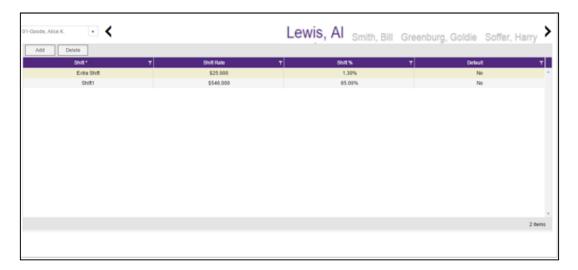
- 1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the Employees Pay screen section in the Appendix at the end of this chapter.
- 2. If there are any overrides, click the **Add** button to add the required information.
- Press the TAB 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.

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



- 1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the Employees Pay screen Shifts section in the Appendix at the end of this chapter.
- 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-Levis, Al 💌 🗶	Lewis, AI Smith, Bill Greenburg, Go	Idie Soffer, Harry Pinkman, Jessie
Add Delete		
Piece *	Rate Amt T	Rate Qty 🔻 🔻
Piece2	\$45.00	66.00 ^
Piece1	\$123.00	453.00
		2 items



- 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 the Appendix at the end of this chapter.
- 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.

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

	Labor Distribution Options *			Add Delete	01		
	Distribute Both	*		Percentage *	Organizational Level	Job ⊾ T	Workers Comp 🔻
2	Auto Labor Distribution E/D Group			90		JOD T	8810
- comingo	401k Match	٣		10	Div1/NY Branch/Department Name Field/null Div1/NY Branch/Department Name Field/null	job #1	8810
				10	bit inter branch/beparanent name i ferantan	J00 // 1	0010
			_				
			atior				
			lloca				
			Allocation				
			Alloca				
			Alloca				
			Alloca				
			Alloca				
			Alloc				
			Alloc	Total: 100%			
			Alloc	Total: 100%			2 litems

- 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 the Appendix at the end of this chapter.
- 2. Press the TAB key or click the Next button when you complete entering information on this screen.

Employees - Federal screen

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

-Lewi	is, Al 💌 🗶				Lewis, Al Smith, Bill	Green	iburg, Goldie Soffer, Harry	Pinkman, Jessie Bichor	n, Selm
	undefined * undefined *			undefined *	undefined *		undefined		
	Single v 0			W-2 v	NY v				
	undefined * undefined			undefined		œ	undefined *	undefined *	
Taxation	None v					1099R	No v	No	*
	undefined		W2 Form	undefined			undefined *		
							None		*
	undefined		3	undefined					
				undefined					
	undefined *								
ax Statuses		•							
tati	undefined *			undefined *	undefined * No v				
×	No	*	s	N0 ¥	NO T				
-	undefined *		ting	undefined *	undefined *				
Ш	No	*	Settings	No v	No +				
			W2	undefined *					
	undefined *			No +					
Statuses	No	*							
atu	undefined *								
S	No	*							
Тах	undefined *								
н	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 the Appendix at the end of this chapter.
- 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

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

Add	Delete																
5	State * 👻 🔻 🔻	SUI *		т	SDI	۲		Hor	ne* T			Marital Status *		T	Tax Exe	mptions	٦
]	NY	NY			NY				Yes		Sing	le/Head of Househo	ld			0	
C	County			Method					State Tax			SDI Exempt			Тах Туре		
			c	Take None			Ŧ	S	Include	Ŧ	<u>s</u>	Include	*		None	Ŧ	
5	Salary Type		atio	To State			Status	SDI Exempt		Tax Status	SUI Exempt		les	Minimum Wage			
	N/A		Droc	- Select To S	State - 🔻			Tax S	Include	Ŧ	ax S	Include	Ŧ	Overrides			
	Calc SUI Taxable 1099	Wages	Recip	To State - Select To State - •				Ë	SUI Exempt		ERT			õ			
v	Nork At Home	Tax Code	ĽĽ.					ш	Include	*	ш						
	No 🔻																

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 the Appendix at the end of this chapter.
- 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

When creating a new employee in Evolution Payroll, the local taxes will either be set up automatically, the user will be prompted to attach local taxes, or local taxes will have to be added as part of the employee setup. On the Company - Taxes - Local Tax - Details tab in Evolution Classic,

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



.ewis, Al	- <					Le	wis, /	AI _{Sr}	nith, Bill	Greenburg, Go	Idie Sof	fer, Harry Pink	man, Jes	ssie Bichon,	Selm
Add	Delete														
	Local * 🔺	т	State * T		County *	т	Local	Type *	т	Tax Rate *	т	Misc Amount	T	Tax Code	т
	New York City Res.		New York	Ne	w York City Res.			EE							
	Yes	*	Include	*	Always		×	es	Yes		Ŧ				
								Overrides	None						
								õ							
															1 ite

- 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.
- 2. For detailed information about the fields on this screen, refer to the <u>Employees Local screen section</u> in the Appendix at the end of this chapter.
- 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

1-Lewis, Al	v <			Lewis, Al	Smith, Bill Gre	enbur	g, Goldi	e Sot	ffer, Harry	>
Add D	lelete									
Priority *	r Case # T	State Origin	Medical Eligible *	T Agency T	Arrears *	т	FIPS	T	Custom Field	T
1	111223365	Vt	Not Applicable	Office Of Child Support	No					*
2	22233666	NY	Not Applicable	Office Of Child Support	No					
										· ·
										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 the Appendix at the end of this chapter.
- 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

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

Add Delete				
ABA #* T Bank Account #* T Account Type * T Branch Identifier T	Addenda 🛛 🔻	In Prenote *	▼ Form on File * ▼	Allow Hyphens * 🛛 🔻
00000000 30287555 Checking		No	Yes	No 🔶
				1 Mens

- 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 <u>Employees –</u> <u>Direct Deposit screen section</u> in the Appendix at the end of this chapter.
- 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

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-Lewis,	Al	- <			L	ewis, Al Smith, Bill (Greenburg, G	oldie Soffer, Harry	Pinkman,	Jessie 📏
Ad]								
	Code* ▲ ▼	Description * Direct Deposit - Partial 1	,	alculation Method *	T	Amount \$ T	Amount %	Starting * 02/17/2015	▼ Ending	
4				Fixed		25		02/17/2015		
B	asic Schedule	Limits Thresholds								
	Code		Description Direct Deposit - Parti	al 1	AN	vays Pay/Deduct		Deductions to Zero No		
	Priority		Calculation Link			duct Whole Check	•	Take Home Pay		
	Thorny		- Select E/D Group -	*	N			Take Home Fuy		
	Calculate Using				Se	nd To				
	Method defined for	r this E/D		•	D	irect Deposit				v.
	Calculation Met	lhod	Amount S			Direct Deposit Account				
	Fixed	Ŧ	25.00			30287555			· · ·	
	E/D Group		Amount %			Reference to Display on Check				
	- Select E/D	Group - 🔻								
	50	Direct Descerit, Mat		News				0011710015		
*	D3	Direct Deposit - Net Child Support		None		50		02/17/2015		-
	1.4	Canin Annuon		r ivelu						5 items



Add Delete						
Code* ▲ 🔻 🗡	Description * T	Calculation Method *	▼ Amount\$	T Amount %	T Starting * T	Ending
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	
D6	Health Insurance	% of Gross		1	02/17/2015	
D7	Child Support - 2	Fixed	21		02/17/2015	

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 <u>Employees -</u> <u>Scheduled E/Ds screen</u> in the Appendix at the end of this chapter.

isic Schedule Limits Threshold	is						
Code	Description		Always Pay/Deduct		Deductions to Zero		
D1	 Direct Deposit - Partial 1 		No	*	No		*
Priority	Calculation Link		Deduct Whole Check		Take Home Pay		
		*	No	*			
Calculate Using			Send To				
Method defined for this E/D		*	Direct Deposit				٣
Calculation Method	Amount \$		Direct Deposit Account				
Fixed	* 25.00		30287555			· · +	-
E/D Group	Amount %		Reference to Display on Check				
	*						

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

	Deductions to Zero		
*	No		
	Take Home Pay		
Ŧ			
		*	
	-	▼ No Take Home Pay	▼ No Take Home Pay ▼

• <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	×
Deduct Whole Check No	•	Take Home Pay	
Send To Client/Company			•
Reference to Display on Check			

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

	Take Home Pay		
Ŧ			
			•
		•	+
	•		· · · · · · · · · · · · · · · · · · ·



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

Basic Schedule Limits Thresholds Starting Block Based On 02/17/2015 Image: Starting	4		D1	Direct Deposit - Partial 1		Direct Deposit - Partial 1 Fixed		2	5		02/17/2015						
02/17/2015	E	Basic	Schedul	e Limits	Threshol	lds											
CCP		S	tarting						Payrolls Affected				Block Based On				
B Ending 2 Frequency Reeks blocked		м.	02/17/2015				iii y		2 I	All	*		ks	Custom Defined		*	
		Effect	inding					ffec	Frequency			Bloc					
Every Pay • 1 2 3 4 5		Ē						A	Every Pay	*			0 1 0 2 0 3	4 5			

3. Click the Limits tab when this screen is complete. Complete all of the applicable fields.

Basio	Schedule Limits Thresholds					
	60 Group		ED Group		Amount ED Group	
	Select E/D Group - *		- Select E/D Group -	ě	- Select E.D Group -	
8	Ray Period %		Pay Period %	Merz	Hours ED Group	
Ē		2		e E	- Select E/D Oroup -	
2	Pay Period 5	Ę	Pay Period 5	- i	Hourly Rate	
		nim		Mao		
		W	EE Amual \$			
			Client Annual 5			

4. Click the **Thresholds** tab when this screen is complete. Complete all of the applicable fields.

Ba	sic	Schedule Limits Thresholds				
		Action	_		E/D Group	
		None	•	sp.	- Select E/D Group -	*
		Remaining		Thresholds	Amount \$	
-	Jets			hre		
j.	I argets	Balance Taken		·	Use Pension Limit	
		Amount 5				

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

Employees - Delivery screen

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



Address 1 *				_	Address 1		
2 Oak Road							
Address 2					Address 2		
Apt. D1				S			
City *	State		Zip Code *	res	City	State	Zip Code
Burlington	OH	*	12234	Add			•
County		Country		de /	County		
		Burlington		erri			
Email				5	Phone 1	Extension	Print Voucher
County Email Scookingham@lsystemsllc.Con	1			Payroll Override Address			Yes
Phone 1			Extension	Pa	Phone 2	Extension	
(093) 222-2222							
Phone 2			Extension		Phone 3	Extension	
Phone 3			Extension				
Payroll Check Mail Box			ic Return Mail Box		Password for VMF	R Deliveries	
Tax Returns	•	Tax Return	S	*			
EE Report Mail Box		2nd EE Rep	oort Mail Box				
Payroll Details	*	Payroll Det	ails	*			

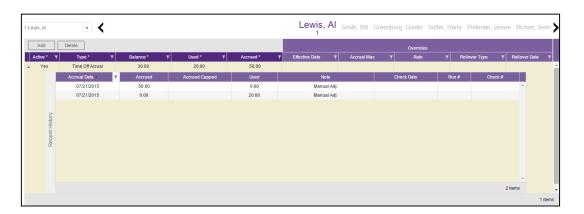
- Click in the applicable fields to add new delivery information as needed. For detailed information about the fields on this screen, refer to the Employees – Delivery screen section <u>Employees – Delivery screen</u> <u>section</u> in the Appendix at the end of this chapter.
- 2. Verify that the Primary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

Result: The Employees – Time off Accrual screen opens.

Employees - Time off Accrual screen

Depending upon your role / permissions, you may not see this menu-item. The Time off Accrual screen displays a balance of unused paid time off, as well as used and accrued time off.

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





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

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

Note: When creating a new employee using the Basic employee entry method, the Employee Portal tab does not appear as a choice in the Employee menu.

Full Access	 Full Access 	Benefits * Full Access	* 5	Form on File No	Format ▼ Both
User Name Rlax	Passwo	rd	* Settings	Email rflax@evolutionpayroll.com	Benefits Email rflax@evolutionpayroll.com
Unblock Account					
Name	Туре	Assigned			
Client Services	Personal Info		-		
Client_Services	Time Off	€			
Training & Docume	Personal Info				
Training_&_Docume	Time Off				
Training & Docume Training & Docume			÷		



Unblock Account Button

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

Group Assignments section

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

<u>Available Groups</u> - ESS Groups with a Personal Info or Time off Group Type, these groups are created on the Company- Benefits - ESS Group Assignment - Group Assignment tab in Evolution Classic.

Assigned Groups - groups to which this employee is assigned as a member.

Select the corresponding checkbox to assign or remove employees to/from various groups.

Employees - Notes screen

Payroll Notes

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

General Notes

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



Employees - Check Calculator 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.



BDazzled Design L	td.	Check	Details			
EE Code - Name 3-Ron Flax 13 Spring Lane Williston, PA 1 Federal Taxable Wages OASDI Taxable Typs Medicare Taxable Wages Gross Amount	2345 Gross (S		55	DEDUCTIONS: Health Insurance Child Support Dental Insurance Deductions SubTotat:	\$0.00 OAS \$100.00 Medi \$28.59 \$128.59 LOC Abbo	ERAL TAXES: DI Tax (\$1.77 Icare Tax (\$0.41 AL TAXES: Ittstown Boro LST \$1.0 ss SubTotal (\$1.18
Check Settings Earnings/Deductions	Federal	State	SUI	Local	Options	Actions
Add	Delete					Calculate
E/D Code * •	Description	▼ Hrs/Pcs	▼ Pay Rate	▼ Amount	TRate #	τ
D02	Health Insurance			\$0.0	10	Send To Payroll
D05	Child Support			\$100.0	10	
🗎 D17	Dental Insurance			\$28.5	9	

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

Check Settings							
Earnings/Deductions	Federal	State		SUI	Local	Options	Actions
Marital Status Single • 0 Tax Frequency Weekly • Tax at Supplemental Rate Federal Tax Employee Overrid Additional Values EE OASDI EE Medicare EE EIC	es	A set of the set of th	v				Calculate Send To Payroll

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



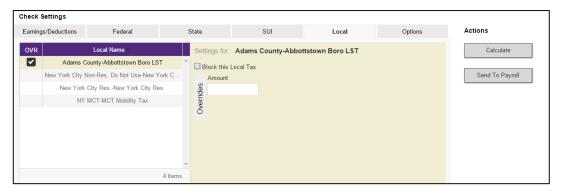
Earnings/Deduction	Fee	deral	State	SUI	Local	Options	Actions
Ne	ate York ylvania	Abr NY PA	Settings for: New Y. Marital Status Single/Head of Hous Tax at Supplemental Regular Tax B Supplemental Sup	Exemptions	State Type None	×	Calculate Send To Payroll

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

10. Click the **SUI** tab.

Check Settings						
Earnings/Deductions	Federal	State	SUI	Local	Options	Actions
OVR	SUI Name State (PA) PA-EE SUI Tax	Settings for septime v	r: State (PA) PA-EE SU	I Tax		Calculate Send To Payroll
		1 items				

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



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



Check Settings						
Earnings/Deductions	Federal	State	SUI	Local	Options	Actions
🗹 Make this a Manual Chec	k					Calculate
Enter Check #						Calculate
Update Scheduled E/D) Balance					Send To Payroll
Update Year to Date Tota	ls					
Update Tax & Deduction \$	Shortages					
Lock Calculations for this	Check					

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

EE Name Net Amount 3 Ron, Flax \$500.00 13 Spring Lane \$500.00 Willston, PA 12345 \$6/24/2015 Batch 2 - Weekly - 01/01/1900 to 01/01/1900 New Batch Options set for this Check \$6/01/2015 Manual Check # 241 Updates: Year To Date Totals Year To Date Totals 07/15/2015 08/03/2015 08/03/2015	BDazzled Desi	ign Ltd.		07/02/2014		
Options set for this Check 06/01/2015 Manual Check # 241 06/01/2015 Updates: 07/15/2015 Year To Date Totals 07/15/2015 08/03/2015 08/03/2015		Ron, Flax 13 Spring Lane		05/18/2015 (5) 05/24/2015		Save/Return
Year To Date Totals 07/15/2015	Aanual Check # 241		4	06/01/2015 07/14/2015		5
Fax Calculations are not locked in. Go To Payroll Go To Payroll					- 1	Go To Payroll

18. Select the payroll in which to include the check for processing.

Audit History

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

1	© D												
ch for Err	playee											Preview	
# T	Last Name T	First Name	T	SSNEIN	т	State	T	Zip Code	т	Status	т	Bill Smith	2
1	Lewis	AI		884-77-3311 996-55-1172		NY		10066		Active	^	Last Name: First Name: Smith Bill	
2	Greenburg	Goldie		996-55-1172 982-44-3369		NY		10022		Active		SSN/EIN:	
4	Soffer	Harry		778-22-1133		VT		05401		Active		996-55-1172	
5	Pinkman	Jessie		885-66-9974		NY		10011		Active		Status: Active	
6	Bichon	Selma		998-84-4112		MA		88855		Active		Active Address:	
7	Goodman	Saul		302-66-5889		VT		05401		Active		456 Main Street	
8	Clark	Willie		996-44-1332		VT		05401		Active		Burlington, MA 10022	
9	White	Walter		000-33-1122		NY		10012		Active			
10	Bigole	Susan		963-88-1122		VT		05401		Active			
11	Simon	Simon		627-13-3647		NY		11234		Active			
12	Kirk	Jim		213-64-5663		VT		05602		Active			
13	Ramagopul	Yani		615-46-1065		VT		05401		Active			
14	Hamerhill	Bryce		514-05-4105		VT		05451		Active			
15	Any	Body		000-00-0000		VT		05602		Active	*		



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

- date/s the changes were made
- operation performed
- field that was changed
- the old value
- the new value, and
- the user who made the change.

Record Audit Information CL_PERSON (nbr = 12) EE (nbr = 18)							
Change Date ▲ 🛛 🔻 🔻	Operation T	Field T	Old Value 🛛 🔻	New Value 🛛 🔻	User	T	
/17/2015 11:27:46 AM	Update	HOME_TAX_EE			Damon Serrantoni		
/17/2015 2:10:11 PM	Update	CUSTOM_EMPLO	BS	BS	Todd Leavitt 242		
/17/2015 3:20:10 PM	Update	STANDARD_HOURS			Todd Leavitt 242		
/17/2015 3:22:12 PM	Update	ACA_STATUS	Ν	N	Todd Leavitt 242		

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

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

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



Employees Menu - Appendix

Employees - Basics screen

Field / Button	Description
SSN	This is the employee's Social Security Number or Employee Identification Number.
EE Code	(EE Number) must be alpha or numeric, up to 9 characters, and unique to the employee.
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
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.



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.
dof	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			
EE Electronic Return Mailbox			
2nd EE Report Mailbox			

Employees - Personal screen

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
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.



Field / Button	Description
Hire Status section	
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

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.

Employees - ACA Screen (identical to the Employee – Employee – ACA tab in Evolution Classic)

Field / Button	Description
ACA Status	Previously located on the Employee – Personal screen this field has been moved to the new ACA screen. 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 considered new employees or continuing employees, full-time eligibility, etc.
ACA Coverage	Select the applicable option for this employee from the 1095-C Instructions – Line 14
ACA Benefit	Select the name of the benefit that will be used to determine the Lowest Cost Benefit for this employee.
ACA Policy Origin	Select the appropriate option for this employee for use on the 1095-B – Line 8.
Benefits Eligible	This field defaults to whatever was set as the default on the Company - General - Company Info – WComp & Benefits tab.
ACA Standard Hours	Enter the standard number of hours for salaried employees, which will be used when calculating ACA hours.
Applicable Section 4980H	Select the appropriate option for this employee from the 1095-C Instructions – Line 16.
Lowest Cost Benefit	Select the Lowest Cost Benefit to be used on the 1095-C.



Employees - Pay Screen

Field / Button	Description
Salary Information section	
Pay Frequency	How often the employee's 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.)
Average Hours	Average hours the employee works – this field is system-calculated and is not editable.
Rate Number	The rate number if not the primary rate – this is read only.
Rate Amount	The rate for the rate number above.
Wage Limit	Wage limit used for Workers' Comp billing and impounds
Limit Frequency	If there is a wage limit, to what period is the limit applied?
Annualized	If there is a wage limit for a period other than annual, what is the annualized total amount of the limit?
Calc Annual	The system automatically calculates the annualized salary or pay based on the value in Salary Amount times pay frequency or the value in Rate Amount times the pay frequency times standard hours.
Planned Updates section	The following fields are informational only, and do not affect pay amounts now or in the future.
Raise Date	The date a future raise takes effect.
Raise Amount	The potential amount of the future raise. Use this for salaried or hourly employees. If there is a value in this field, leave the Raise Rate field empty.
Raise %	The potential percentage of the future raise. Use this for salaried or hourly employees.
Raise Rate	The hourly rate of the potential raise.
Pay Frequency	The frequency the employee will be paid after the future raise.
Position section	These fields in this section used to be on the Positions screen.



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



Piecework Sub-menu

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

Auto Labor Distribution Sub-menu

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



Employees - Federal screen

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.
	• If a value is entered, the amount is used as the rate for minimum wage makeup calculations.
	• The value may be overridden if a State Minimum Wage override is entered on the Employee - States - Overrides tab. In that case, 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.
	• If no overrides are entered, standard system logic is applied in the calculation (taking the higher of the Federal or State Minimum Wage rate at the system level). Right-click on the field and select 'Copy To' to copy the information.
EE Tax Statuses section	The default values in this section are dependent upon whether the employee is W-2 or 1099.
Federal Tax Status	This is the employees' tax status. Select from the dropdown list whether the employee's tax is to be included, blocked or exempted.
OASDI Exempt	Whether or not the employee is exempt from paying OASDI
Medicare Exempt	Whether or not the employee is exempt from paying Medicare
ER Tax Statuses section	The default values in this section are dependent upon whether the employee is W-2 or 1099.
FUI Exempt	Whether or not the employer is exempt from paying FUI for this employee
OASDI Exempt	Whether or not the employer is exempt from paying OASDI for this employee
Medicare Exempt	Whether or not the employer is exempt from paying Medicare for this employee



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	
Deceased	Status is designated on the Form W-2 as deceased
Statutory Employee	Status is designated on the Form W-2 as statutory
Legal Rep	Is there a Legal Rep designated on the Form W-2?
Deferred Comp	Are these earnings designated as deferred compensation on the Form W-2?
Pension	Are these earnings from a Pension plan?
1099-R section	
Distribution Code	If a pension distribution was taken, this is the distribution code reported on the 1099-R.
Tax Amount Determined	Was there a tax amount determined and reported on the 1099-R?
Total	Was the distribution a total distribution of all assets in the pension plan?
Pension Plan	The type of pension plan reported on the 1099-R
1099-R section	
Distribution Code	If a pension distribution was taken, this is the distribution code reported on the 1099-R.
Tax Amount Determined	Was there a tax amount determined and reported on the 1099-R?
Total	Was the distribution a total distribution of all assets in the pension plan?
Pension Plan	The type of pension plan reported on the 1099-R



Employees - State screen

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



Employees - Local screen

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

Field / Button	Description
Priority	Priority in order of all Scheduled E/Ds – Child Support usually has number 1 priority over all other E/Ds.
Case #	Case number assigned by the Child Support agency
State Origin	The state in which the Child Support Order originated.
Medical Eligible	This field is pre-filled from the Healthcare Coverage field value on the Employees – Basics screen.



Field / Button	Description
Agency	Child Support Agency responsible for collecting the money for payment.
Arrears	Change to Yes if Child Support payments are in arrears on this case.
FIPS	Five-digit Federal Information Processing Standard (FIPS) code (FIPS 6-4) that identifies counties and county equivalents in the United States.
Custom Field	If the company has established a custom field to help with tracking.

Employees - Direct Deposit screen

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



Employees - Scheduled E/Ds screen

Field / Button	Description
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	 Select which calculation method will be used to calculate payroll deductions for the Scheduled E/D. There are three options: 1. Use the calculation method that has been defined for the E/D 2. Use the calculation method defined at the Company Benefit level 3. Use the calculation method defined at the Employee Benefit level
Calculation Method	Method used to calculate deductions from payrolls. Select the method from the dropdown list. <u>Amount \$</u> - If the Calculation Method selected is a fixed dollar amount enter that amount. <u>Amount %</u> - If the Calculation Method selected is based on a percentage enter the percentage amount.
E/D Group	Select an E/D Group if the Scheduled E/D is included in an E/D Group.

Note: Earnings must be set up as a member of an E/D Group, which simplifies the calculation of earnings such as 401(k)s.

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 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



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.
	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. <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.
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) <u>No</u> - deducts a portion of the check
Send To*	Select Agency or Client, Company, or Direct Deposit
Reference to Display on Check	If being sent to Agency or Client/Company on behalf of the employee
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



Field / Button	Description
Limits tab	
E/D Group	E/D Group to which the minimum Scheduled E/D belongs (same as Minimum E/D Group field on the Employee – Scheduled E/Ds – Advanced tab)
Pay Period %	Minimum percentage (if the deduction is quoted as a percentage) to be taken per pay period.
Pay Period \$	Minimum dollar amount (if the deduction is quoted as an amount) to be taken per pay period.
EE Annual \$	Maximum dollar amount the employee is allowed to contribute per year
Client Annual \$	Maximum dollar amount the client can contribute per year for the employee
Maximum Averages section	
Amount E/D Group	This information is used for special Union dues calculations.
Hours E/D Group	
Hourly Rate	
Thresholds tab	
Action	These fields refer to the goal amounts at which deductions stop – the same information entered on the Employee – Scheduled E/Ds Advanced
Remaining	tab in Evolution.
Balance Taken	
Amount \$	
Thresholds section	
E/D Group	



Employees - Delivery screen

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

Employees - Time off Accrual screen

Field / Button	Description
Active	Whether or not the TOA plan is currently active for the employee
Туре	What type of TOA plan it is – PTO, Sick, Vacation, etc
Balance	Tab over to the Accrued field to enter first. The balance will fill in automatically, after which, enter time used and the balance will be adjusted.
Used	How much of the accrued time has been used
Accrued	Enter manually
Effective Date	Date the Accrued amount begins
Accrual Max	Maximum set by the company that an employee can earn in a pre- defined period
Rate	Rate at which the time off accrues per pay period
Rollover Type	If the company plan allows for a rollover, on which type of accrual is rollover allowed?
Rollover Date	Date on which rollover occurs



Employees - Employee Portal screen

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

Field / Button	Description
Access Section	For access to the Employee Portal, the Access Level for EE Info must be Read Only or Full Access. The Time Off and Benefits Access Levels work independently.
EE Info	<u>No</u> - employees will not see any of their personal information in the Employee Portal <u>Read-only</u> - employees can view their payroll information but will not be able to request edits in the Employee Portal
	<u>Full Access</u> - employees can see and request edits to their payroll and W- 4 information.
Time Off	<u>No</u> - employees do not see any of their time off information in the Employee Portal
	<u>Read-only</u> - employees can view their time off information but will not be able to request edits in the Employee Portal
	Full Access - employees can see and request edits to their time off information
Benefits	<u>No</u> - employees do not see any of their benefits information in the Employee Portal
	<u>Read-only</u> - employees can view their benefits information but will not be able to make elections in the Employee Portal
	<u>Full Access</u> - employees can see and request edits to their benefits elections in the Employee Portal (during Open Enrollment and/or a Qualifying Event Enrollment.)
User Name	The employees' user name in the Employee Portal.
Password	The employees' password in the Employee Portal.
Unblock Account button	If a user's Evolution Payroll account is blocked because they incorrectly answered their security questions three times, a user with access can unblock the account using this button.
Group Assignments section	Pre-filled based on the setup in Evolution Classic on the Company - Benefits - ESS Group Assignment screen.
Name	Name of the group/s to which the employee has been assigned.
Туре	Type of group/s to which the employee has been assigned. (Pre-filled based on the setup in Evolution Classic.
Assigned checkbox	Designates whether the employee is assigned to the group.
Settings section	
Forms on file	Are the annual return forms on file?



Field / Button	Description
Email	Email address for account notifications
Format	Format of the returns; electronic, paper, or both
Benefits Email	Email address for benefits notifications

Employees - Notes screen

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

Employees - Check Calculator Shortcut Button

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



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



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



The Payrolls Menu

Payrolls are processed quickly and easily through Evolution Payroll. This section covers creating both scheduled and unscheduled payrolls. Each will be discussed in detail.

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.

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

Pa ക	yroll Timeline							
	Check Date • 7	Run #	T Payroll Type T	Created On	T Due On	T Current Status	Preprocessed On	
	10/22/2015		Regular		10/19/2015	Not Started		
8	10/28/2015	1	Misc Check Adjustment	10/28/2015		Processed	10/28/2015	
8	10/28/2015	5	Qtr End Tax Adjustment			Processed		
	10/29/2015	1	Regular	10/28/2015	10/26/2015	Processed	10/28/2015	
8	10/30/2015	1	Misc Check Adjustment	10/28/2015		Processed	10/28/2015	
	11/05/2015	1	Misc Check Adjustment	11/09/2015	11/02/2015	Processed		
	11/12/2015	1	Regular	11/16/2015	11/09/2015	Processed		
	11/18/2015	1	Regular	11/13/2015		Processed	11/13/2015	
	11/18/2015	2	Regular	11/13/2015	11/30/2015	Processed		
	11/19/2015		Regular		11/12/2015	RequiredMgrApproval		
	11/20/2015	1	Regular	11/13/2015	11/16/2015	Processed		
	11/25/2015	1	Regular	11/09/2015	11/20/2015	Processed		
	12/24/2015	2	Regular	12/01/2015	12/21/2015	Processed		
	12/24/2015	1	Regular	11/13/2015	12/07/2015	Processed	11/13/2015	
	12/31/2015	1	Regular	11/13/2015	12/14/2015	Processed		
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Several symbols are visible on various screens in the Payrolls menu, described in the table that follows.

Symbol	Description
66	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.



Symbol	Description
Ŵ	Delete – click to delete previous changes. Also, to delete a batch.
×	Cancel Changes – click to cancel changes made to a screen or payroll.
o °	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.
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.



Creating a Scheduled Payroll

The Payrolls – Timeline screen is the first screen to open when clicking the Payroll menu. To create a payroll in Evolution Payroll,

1. Click the **Payrolls** menu.

Pa ╋	vroll Timeline					■
	12/29/2014 - 1	Processed	01/12/2015 - 2	On Hold	01/19/2015	Not Due
	Weekty	12/11/2014 - 12/17/2014	Weekty	12/25/2014 - 12/01/2014	Washty	01/01/2015 - 01/07/2015
	Submitted on: 12/22/2014 10:17 AM	*	Submitted on: 01/12/2015 01:52 PM	*	Submit by: orinis/2016	+
	12/31/2014 - 1	Processed	1/14/2015 - 1	Submitted	01/21/2015	Not Due
1	Weekby	12/21/2014 - 12/28/2014	Weekty	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	66	Bubmit by: 01/19/2015	+ ′
	01/21/2015 - 1	Pending	01/15/2015 - 1	Past Due	01/26/2015	Not Due
	Weekby	01/11/2015 - 01/18/2015 New Batch	Weekty	01/04/2015 - 01/11/2015 New Batch	Washty	01/08/2015 - 01/14/2015
	Submit by: 01/19/2015	ß	Submit by: 01/12/2015	ß	T Submit by: 01/22/2015	+

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.

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

Check Batch Settings Screen

	Timeline	0											
roll 13	2/04/2015 - 1									Batches →	Checks -	→ III -	
Х	Check Batch -5 - Settings												
	Start Date*		End Date*			Time Clock Source File							
	11/22/2015		11/28/2015			Choose file		х					
	Frequency					File Format						•	
	Weekly			*	5	CSV - Comma Separated Values	*					_	
22	Employee Types				Clock Import Options	Date Field Format							
Options	All			*	ğ	2 Digit Year (mm/dd/yy)	*						
õ	Employee Filter			Select EEs	port	Employee Synchronization							
Creation	Select Template			Ŧ	E	Custom #	*		Create Checks				
Crei	Template				loc.	Organizational Synchronization							
	Select Template			Ŧ	9	Full DBDT	٠						
	Checks per EE		Check Types		Time	Job Codes							
	1		Regular				•						
	Calculate Scheduled EDs					Apply Org Level							
	Standard Hours						•						
m	Salary Pay												
Include	Payroll Defaults												
LI C	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 the Appendix at the end of this chapter.
- 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

Add Ct	seck Delet	Check Search Che	cka	Group	By: Company Number			Summary v
Type	EE Code	Name	Seq	Total His	Gross Pay	E01 Amt Salary	E02 Hrs Regular	E02 Amt Regular
R	1	Lewis, Al	1	40.00	\$2,500.00	2,500.00	40.00	\$0.00
R	2	Smith, Bill	1	40.00	\$1,500.00	\$1,500.00	40.00	\$0.00
R	3	Greenburg, Goldie	1	40.00	\$2,800.00	\$2,800.00	40.00	\$0.00
R	4	Soffer, Harry	1	40.00	\$1,000.00		40.00	\$1,000.00
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

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

Summary View

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

- To add or edit a column
 - 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.
- 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.



elect	a Check Typ	De				I Select the Emplo reated for each En		creating checks. One che	eck
Regul	ar			•	be ci	reated for each En	npioyee you selec	a.	
						reation Options			
				🗆 Sta	anda	rd Hours: No	Use this Ten	iplate	
				🗆 Sa	lary	Pay: No	Select	,	Ŧ
Sear	ch for emplo	yee(s) Last Name	▼ First	Name	T	Middle Initial	▼ Status	▼ Organizatio	T
	1	Lewis	AI				Active	West > WB >> WS.	
	2	Smith	Bill				Active	So East > SB >> S	
	3	Greenburg	Gold	е			Active	West > WB >> WS.	
	4	Soffer	Harry				Active	Central > CB >> S.	
	5	Pinkman	Jessi	е			Active	West > WB >> WS.	
	-	D ¹	~ 1					0 5 1 00 0	
								16 ite	ms

Summary Detail View

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

yroll 1	1/19/2015 - 1	Batch 1 : 11/29/2015 - 12	2/05/2015	Regular	-99999554 1	of 2	$ \underbrace{ {\rm Cond} }_{{\rm Batches}} \longrightarrow \underbrace{ {\rm Conds} }_{{\rm Conds}} \longrightarrow \underbrace{ {\rm Conds} }_{{\rm Conds}} $	→	Finis
+	Add Check	elete Check					Summary Detail 🔹		Time Clock In
•	E/D Code	Description	Hrs/Pcs	Rate Of Pay	Amount	Rate Number	Agency		Time Clock Import
	HI D3	Direct Deposit - Net						^	ock li
tch 1 rekly		Child Support			\$50.00		Office Of Child Support		mpoi
	■ D7	Child Support - 2			\$21.00		Office Of Child Support		1
	€ D6	Health Insurance			\$0.00				
	D6 v	ine Delete Check Line Health Insurance			\$25.00				
	D6 🔻	Health Insurance			\$25.00				
	■ E01	Salary		\$0.00	\$2,500.00	-1			
	E02	Regular	40.00	\$0.00	\$0.00	-1			
	🗎 D1	Direct Deposit - Partial 1							
	🗎 D3	Direct Deposit - Net							
		Child Support			\$50.00		Office Of Child Support		
	■ D7	Child Support - 2			\$21.00		Office Of Child Support		
	III D/								
		Totals	440.00		\$13,884.10				

- 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.



	/19/2015 - 1	Batch 1 : 11/29/2015 - 12	2/05/2015	Regular	-99999554 1	of 2		a \rightarrow a a b	→ III Tota	s —	→ Fir
1	Add Check De	lete Check						Summary De	tail 🔹		t
	E/D Code	Description	His/Pcs	Rate Of Pay	Amount	Rate Number	Agency				Time Clock Import
	111 D6	Health Insurance			\$0.00						0CK
Ľ	i D3	Direct Deposit - Net									Impo
	⊞ D4	Child Support			\$50.00		Office Of Child Support				a
	■ D1	Direct Deposit - Partial 1									
	Add Check L	ine Cancel Check Line									
	Add Check Li	ine Cancel Check Line									
	⊜ D7	Child Support - 2			\$21.00		Office Of Child Support			1	
				\$0.00	\$2,500.00	-1	Office Of Child Support			ł	
	D7 ■ E01 E02	Child Support - 2 Salary Regular	40.00	\$0.00 \$0.00		4	Office Of Child Support			l	
	⊜ D7 ⊜ E01	Child Support - 2 Salary	40.00		\$2,500.00		Office Of Child Support			1	
	D7 ■ E01 E02	Child Support - 2 Salary Regular	40.00		\$2,500.00		Office Of Child Support			1	
	 □ D7 □ E01 E02 □ D1 	Child Support - 2 Salary Regular Direct Deposit - Partial 1	40.00		\$2,500.00		Office Of Child Support Office Of Child Support			1	
	← D7 ← E01 E02 ← D1 ← D3	Child Support - 2 Salary Regular Direct Deposit - Partial 1 Direct Deposit - Net	40.00		\$2,500.00 \$0.00						
		Child Support - 2 Salary Regular Direct Deposit - Partial 1 Direct Deposit - Net	40.00		\$2,500.00 \$0.00						

- 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 : 09	1/20/2015 - 09/26/2015					Batches		→ Binish
All	Create New Check Check Lines	9 - White, Walter Add Delete	• >	Check Serial≢ Check Type S -99999454 Regular	equence 1 of 1 Recalculate Check			Detail +	 Notes/Instructions Time Clock Import
Batch 1 Weekly	Manual Tax Fed Overrides State Overrides	E/D Code • • • • •	Description = Regular ax Overrides	Y HitsPos	Pay Rate 40.00	¥ Am: \$25.00	st,000.00	Rato # Y	riport
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	* - S	elect		
	Previous Next	25.00 Agency Select	- Select	•	Use Default	•			
		>	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 these screens, refer to refer to the <u>Payrolls – Check Lines Screen section</u> in the Appendix at the end of this chapter.
- 2. Click the Payroll Manual Tax menu item.
- 3. Press the **TAB** key or click the **Next** button when you complete entering information on this screen.



Manual Tax screen

Click the **Manual Tax** tab to override a tax for the check if applicable. The 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</u> in the Appendix at the end of this chapter.

Payroll 1	1/19/2015 - 1 Batch 1 :	11/29/2015 - 12/05/2015						Batches	→ 🚔 –	→ III -	→ Einish
Batch 1 Weakly	Create New Check Orack Lines Fed Overfides Stato Overfides Local Overfides Options Review Previous Next	Add States Add States Add States Add Locat Add States Add Locat Beckup Withholding	- 1 of 2 · Josefyllo	Sarial # Check Type Sequence Recail 8554 Regular 1 of 2	ALD Amount	Coptions	f Calculate Overide Tax f Recipiocate SU i Disable Shortfalls	85	Deal	٠	Payrol Notes Employee Notes Time Clock Import
					5 item	5					
\sim											

- 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 the Appendix at the end of this chapter.

Payroll 11/19/2015 - 1 Batch 1 : 11/29/2015 - 12/08	5/2015		Batches	Checks - Totals	→ Pini	h
Create New Check Patch 1 Create New Check Cre	wis, Al + 1 of 2 * > .999	Pederal Tax Employee Overdes Additional Values EE CASO EE CASO EE E Modicare E EIC E E AdSD	Det	all 🔹	Time Clock Import	↓ Payroli Notes
Redew Previous Next		ER Fu				Employee Notes

- 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</u> in the Appendix at the end of this chapter.
- 2. Click the Payroll Local Overrides tab.

Local Overrides screen

Payroll 11/19/2015 - 1 Batch 1 : 11	/29/2015 - 12/05/2015	$\underset{\text{Batches}}{\text{Image}} \longrightarrow \bigotimes_{\text{Checks}} \longrightarrow \underset{\text{Totals}}{\text{Image}} \longrightarrow \underset{\text{Finish}}{\text{Image}}$
Create New Check	Check Serial # Check Trye Sequence Recalculate Preview ALD	Detail
Total 1 Monal Tax Tax Overdea State Overdea Local Overdea Option Farview	OVR Lead Name Trpe Settings for New York City Res New York City Res. New York City Res New York City Res. EE Block this Local Tax Anount	tes Endoyee Note
Previous Next	- 1 Jens	er kötes

- 3. Complete the applicable fields.
- 4. 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 11	/19/2015 - 1 Batch 1 :	11/29	9/2015 - 12/05/2015		Batches	→ 🛃 ·	→ 🖬 –		nish
Batch 1 Virekty	Create New Check Check Lines Manual Tax Fed Ovenides Local Ovenides Local Ovenides	Blocks	Scheduled E/Ds Except DD Scheduled E/Ds Except Pension	Check Serial # Check Type Sequence Recalculate J9999554 Regular 1x12 Check ALD Comments for This Check Only		Detail	Ŧ	Time Clock Import	Payroll Notes
~	Review Previous Next	Options	Schedded EDD Fran Agency Update Schedded E/D Balance						Employee Notes

- 1. Complete the applicable fields. For detailed information about the fields on this screen, refer to the <u>Payrolls Options Screen section</u> in the Appendix at the end of this chapter.
- 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 the Appendix at the end of this chapter.

Payroll 11	//19/2015 - 1 Batch 1 : 1	1/29/2015 - 12/05/2015				a \rightarrow a a b		→ B
∔	Create New Check	1 - Lewis, Al - 1 of 2	• Check Serial 1 -99999554	# Check Type Sequence Recalculate Preview Regular 1 of 2 Check ALD		Detail	•	Time Clock Import
Satch 1 Weekly	Check Lines Manual Tax Fed Overrides State Overrides Local Overrides Options Review	Check Calculations Prevent Taxabe Wages 0.450 Tranabe Wages 0.450 Tranabe Wages Gross Amount Net Amount Lack Tax Calculations	50.00 EARNINGS: 50.00 Seary 50.00 Earnings SubTotal: 50.00 50.00	DEDUCTIONS \$2,560.00 Chall Support 2 \$2,560.00 Chall Support 2 Health Insurance Deductions SubTetat	PEDERAL TAXES 550 00 517 80 525 00 596 00			Import
	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> <u>Results section</u> in the Appendix at the end of this chapter.

Batch 1	Total	Gross P	ay: \$1446	50.00					Tota	I Taxes: \$	\$106300.47			
Weekly		E/D Code	*	Description	Hrs/Pcs		Amount			Descriptio	n 🔺	Amount	Coun	t
	-	D1		Direct Deposit - I	Parti	0.00	\$200.0	• ~		Federal G	ross Wages		\$14,208.60	
		E/D Deta	il For: D1 - D	Direct 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	AI Lewis	0.0	\$25.00			s	1	AI Lewis	0.0	0 \$2,475.00
		R	s	4	Harry Soffer	0.0	\$150.00			s	10	Susan Bigole	0.0	0 \$350.00
		R	s	8	Willie Clark	0.0	\$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								Tau	s	3	Goldie Greenburg	0.0	\$2,785.00
										s	4	Harry Soffer	0.0	0 \$1,000.00
							~	1		s	5	Jessie Pinkman	0.0	\$600.00
							3 items							11 items
		D2		Direct Deposit - I		0.00	\$100.0			 Federal T 			\$2,539.70	
\mathbf{v}		D3		Direct Deposit - I	Net	0.00	\$6.537.8 9 iter			Federal T	axable Wages		\$14.208.60	43 it

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	Weekty	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	.
12/01/2014 - 1	Processed	S01/14/2015 - 1	Submitted	01/21/2015	Not Due
Weekty	12/21/2014 - 12/28/2014	Weekty	01/04/2015 - 01/11/2015	Weekby	01/11/2015 - 01/18/2015
Submitted on: 12/24/2014 10:55 Abl	*	Submitted on: 01/12/2015 11:24 AM	86	Submit by: 01/19/2015	+
01/21/2015 - 1	Pending	01/15/2015 - 1	Past Due	01/26/2015	Not Due
Week/y	01/11/2015 - 01/18/2015 New Batch	Weekly	01/04/2015 - 01/11/2015 New Batch	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 Pay Checks Reports ACH Billing Liabilities Deposits		Time Off Accrual Accruals Only	
Payroll Check Com	ment		^

- 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 the Appendix at the end of this chapter.
- 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

Pay		Timeline	0	Pending	-								
Payr	oll 12	18/2015 - 1									$\underset{\text{Batches}}{\textcircled{\text{Batches}}} \longrightarrow \underset{\text{Checks}}{\textcircled{\text{Checks}}} -$	→ 📰 P	inish
→	хс	heck Batch -8 - Settings											+
Pa		Start Date*		End Date*			Time Clock Source File						Payroll Notes
Payroll		12/27/2015		1/2/2016			Choose file		х				TOIL
Settir		Frequency					File Format					•	Note
ngs		Weekly			*	2	CSV - Comma Separated Values	*				_	3
	22	Employee Types				Clock Import Options	Date Field Format						
	Options	All				to	2 Digit Year (mm/dd/yy)	*					
	0 L	Employee Filter			Select EE	bou	Employee Synchronization						
	Creation	Select Template				Ē	Custom #	*		Create Checks			
	Cle	Template				Clock	Organizational Synchronization						
		Select Template				Time	Full DBDT	*					
		Checks per EE		Check Types		Ē	Job Codes						
		1		Regular	*		Do Not Import Job Codes	*					
		Calculate Scheduled ED:					Apply Org Level						
		Standard Hours					From File	*					
	Ð	Salary Pay											
	Include	Payroll Defaults											
	<u>n</u>	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 the Appendix at the end of this chapter.
- 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

Add Ch	ock Delete	Check Search Cho	cka.	Group	By: Company Number			Summary +
Туре	EE Code	Name	Seq	Total Hrs	Gross Pay	E01 Amt Salary	E02 Hrs Regular	E02 Amt Regular
R	1	Lewis, Al	1	40.00	\$2,500.00	2,500.00	40.00	\$0.00
R	2	Smith, Bill	1	40.00	\$1,500.00	\$1,500.00	40.00	\$0.00
R	3	Greenburg, Goldie	1	40.00	\$2,800.00	\$2,800.00	40.00	\$0.00
R	4	Soffer, Harry	1	40.00	\$1,000,00		40.00	\$1,000.00
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

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 the Appendix at the end of this chapter.

Summary View

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

- To add or edit a column
 - 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.

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.



elect	a Check Ty	ре				creating checks. One check
Regula	ar		٣	will be created for each	Employee you select	
			(Check Creation Options Standard Hours: No	Use this Tem	
			l	Salary Pay: No	Select	Ŧ
	rch for emplo					
	EE#	▼ Last Name	▼ First Name	▼ 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 F 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.

	Add Check	Delete Check					Summary Det	tail 🔻		•
	E/D Code	Description	Hrs/Pcs	Rate Of Pay	Amount	Rate Number	Agency			
_	III D3	Direct Deposit - Net							^	
1		Child Support			\$50.00		Office Of Child Support			1
- 1	■ D7	Child Support - 2			\$21.00		Office Of Child Support			
		Health Insurance			\$0.00					
	Total Hrs: 40 Add Check	19554 - R, Batch: 1, Employee: Lew 1.00 , Total Amount: \$2,404.00 Line Delete Check Line								
	Total Hrs: 40 Add Check	L00 , Total Amount: \$2,404.00 Line Delete Check Line								
	Total Hrs: 40 Add Check D6 •	L00 , Total Amount: \$2,404.00 Line Delete Check Line Health Insurance			\$25.00				ł.	
	Total Hrs: 40 Add Check D6 • E01	L00 , Total Amount: \$2,404.00 Line Delete Check Line Health Insurance Salary		\$0.00	\$2,500.00	4			ł	
	Total Hrs: 40 Add Check D6 • E01 E02	L00 , Total Amount: \$2,404.00 Line Delete Check Line Health Insurance Salary Regular	40.00	\$0.00 \$0.00		न न			l	
	Total Hrs: 40 Add Check D6 • E01 E02 E02	L00 , Total Amount: \$2,404.00 Line Delete Check Line Health Insurance Salary			\$2,500.00				l	
	Total Hrs: 40 Add Check D6 • E01 E02	L00 , Total Amount: \$2,404.00 Line Delete Check Line Health Insurance Salary Regular			\$2,500.00				l	
	Total Hrs: 40 Add Check D6 • E01 E02 E02	100 , Total Amount: \$2,404.00 Line Delete Check Line Health Insurance Salary Regular Direct Deposit - Partial 1			\$2,500.00		Office Of Dild Support		l	
	Total Hrs: 40 Add Check D6 • E01 E02 D1 E02	00. Total Amount \$2,404.00 Delete Check Line Health Insurance Salary Regular Direct Deposit - Net			\$2,500.00 \$0.00		Office Of Child Support Office Of Child Support			
	Total Hrs: 40 Add Check □ D6 ▼ □ E01 □ E02 □ D1 □ D3 □ D4	100 Total Amount: \$2,404.00 Line Delete Check Line Health Insurance Salary Regular Direct Deposit - Net Child Support			\$2,500.00 \$0.00 \$50.00					

- 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.



Add Check [Jelete Check					Summary Detail	
E/D Code	Description	Hes/Pcs	Rate Of Pay	Amount	Rate Number	Agency	
III D6	Health Insurance			\$0.00		ritore't	
iii D3	Direct Deposit - Net						
i D4	Child Support			\$50.00		Office Of Child Support	
■ D1	Direct Deposit - Partial 1						
Total Hrs: 40	9554 - R. Batch: 1, Employee: Lew 00_Total Amount: \$2,404.00 Line Cancel Check Line	vis, Al [1]					I
Total Hrs: 40	00 Total Amount: \$2,404.00	vis, Al (1)					I
Add Check	00 Total Amount: \$2,404.00	vis, Al [1]		\$21.00		Office Of Child Support	ļ
Total Hrs: 40 Add Check	00 Total Amount: \$2,404.00 Line Cancel Check Line		\$0.00	\$2,500.00	4	Office Of Child Support	
Add Check	00 Total Amount: \$2,404.00 Line Cancel Check Line Child Support - 2	vis, Al [1] 40.00			4 4	Office Of Child Support	
Add Check	00 Total Amount: \$2,404.00 Line Cancel Check Line Child Support - 2 Salary			\$2,500.00		Office Of Child Support	
Total Hrs: 40 Add Check	00 Total Amount: \$2,404.00 Cancel Check Line Child Support - 2 Salary Regular			\$2,500.00		Office Of Child Support	
Total Hrs: 40 Add Check D7 E01 E02 D1	00 otal Amount: \$2,404.00 Cancel Check Line Child Support - 2 Salary Regular Direct Deposit - Partial 1			\$2,500.00		Office Of Child Support	

- 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.

Fed Oversides E02 Regular State Oversides Image: E01 Salary	Hrs/Pcs T 40.00	Pay Rate T	Amount T	
Member law E/D Code* Y Description Y Fed Overrides E02 Regular Stata Stata		Pay Rate T	Amount T	
State Overrides E01 Salary	40.00		, unount	Rate # T
		\$0.00	\$0.00	1 (P) : \$0.00 ^
		\$0.00	\$2,500.00	1 (P) : \$0.00
Local Overrides				
Options				
Review			\$50.00	
→			\$25.00	
► D7 Child Support - 2			\$21.00	

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



Manual Tax screen

Click the **Manual Tax** tab to override a tax for the check if applicable. The 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 the Appendix at the end of this chapter.

Payroll 11/19/201	15 - 1 Batch 1 : 11/29	/2015 - 12/05/2015		Checks	Totals	→ Einish	
Batch 1 Weekly	Manual Tax Fed Ovenides State Ovenides Local Ovenides Options Review	Add States Add Locah 1 Lewis, Al - 1 of 2 3999555 Regitar 1 of Locah Preview Add States Add Locah 1 of Federal Amout 2 oASD States 3 Medicare States 4 DC States 5 Backup Witholding States	Def	al	×	mport	Payroll Notes
~		- 5 Roms					

- 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 <u>Payrolls – Fed Overrides screen section</u> in the Appendix at the end of this chapter.

Payroll 11/19/2015 - 1 Batch 1 :	11/29/2015 - 12/05/2015	$\fbox{\begin{tabular}{lllllllllllllllllllllllllllllllllll$
Crate New Check Check Lines Check Lines Check Lines Manual Tax Fed Checklos State Overdos State Overdos State Overdos Review Previous Next	I - Lewis, Al - 1 of 2 Check Stettal # Check Type Sequence Jess Status Regular (1 d2 0 Mark Regular (1 d2 0 Mark Perview Dack Fed Type Nore Tas figure(Weekly Weekly Tas at Supplemental Rate Federal Tas 0 Epolyce Overrises 0 E Modicare 0 E R Colson 0 E R Put Perview Dack Perview Dack	

- 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 Payrolls State Overrides screen section in the Appendix at the end of this chapter.
- 2. Click the Payroll Local Overrides tab.

Local Overrides screen

Payroll 11/19/2015 - 1 Batch 1 : 11/2	29/2015 - 12/05/2015	Batches	→ 🚵 —	→ 🗰 — Totals	→ Fini	sh
Ceata New Deack Reach 1 Reach 1 Ceata New Deack Ceata	1 - Lewis, Al - 1 of 2 Proving AlD Creck Setal # Check Trye Sequence Recalculate Creck Proving ALD Creck Creck Setal # Check Trye Sequence Check Proving ALD Creck Creck Creck Proving ALD Creck Creck Creck Creck Proving ALD Creck Creck		Detail	v	Time Clock Import	↓ Payroll Notes ↓ Employee Notes
Previous Next	- 1 Xens					e Notes
~						

- 3. Complete the applicable fields.
- 4. 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 11/19	/2015 - 1 Batch 1 :	11/29	9/2015 - 12/05/2015		Batch	Checks -	→ III -	→ þ	inish
And	Create New Check Oreck Lines Marcuil Tra Fed Overdes State Overdes Local Overdes Roview Pervice Next	Options Blocks	1 - Lewis, Al - 1 of 2 Dest Deposit Dest Deposit Except Net Auto Estabution Consults Only Scheduled EDD: Except Panalon Scheduled EDD: Except Panalon Scheduled EDD: Except Panalon Scheduled EDD: Except Panalon	Check Serial # Check Type Seguence Recalculate Deck Serial # Check Type Seguence Check ALD		 et all	٠	Time Clock Import	+
$\mathbf{\vee}$									

- 1. Complete the applicable fields. For detailed information about the fields on this screen, refer to the <u>Payrolls Options screen section</u> in the Appendix at the end of this chapter.
- 2. Click the **Review** tab to review [unprocessed] payroll checks with overrides, to verify for accuracy before submitting to payroll.

Payroll - Review screen

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

Payroll 11/	19/2015 - 1 Batch 1 : 1	1/29/2015 - 12/05/2015						Batches	→ 🚔 —	→ III -	→ B
+	Create New Check	1 - Lewis, Al - 1 of 2 Check Calculations		heck Serial # Check Type Se 99999554 Regular 1		calculate Preview Check ALD			Detail	Ŧ	Time Clock Import
Batch 1 Weekly	Annual Tax Annual Tax Fed Overrides State Overrides Local Overrides Options Review	Check Lacolations Perior Taxate Wages 0.450 Taxate Wages 0.450 Taxate Taya Medican Taxate Wages Gress Amount Net Amount Lock Tax Calculations	50.00 EARNINGS: 50.00 Sulary 50.00 Earnings SubT 50.00 50.00	otač	52,500.00 52,500.00	DEDUCTIONS Chall Support Chall Support - 2 Health Insurance Deductions SubTotal	FEDERAL TAXES 550 00 521 00 535 00 596 00				mport
	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> <u>Results screen</u> in the Appendix at the end of this chapter.

Batch 1	Total	Gross I	Pay: \$144	50.00					Tota	I Taxes: \$	\$106300.47			
Weekly		E/D Cod) 🔺	Description	Hrs/Pcs		Amount			Descriptio	n 🔺	Amount	Count	
	-	D1		Direct Deposit -	Parti	0.00	\$200.0	• ~		Federal G	ross Wages		\$14,208.60	
		E/D Deta	ail For: D1 - I	Direct 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	0.0	0 \$25.00			s	1	AI Lewis	0.00	\$2,475.00
		R	s	4	Harry Soffer	0.0	D \$150.00			s	10	Susan Bigole	0.00	\$350.00
		R	s	8	Willie Clark	0.0	0 \$25.00			s	11	Simon Simon	0.00	\$350.00
	<u>s</u>								Taxes	s	2	Bill Smith	0.00	\$1,495.00
	Totals								Tay	s	3	Goldie Greenburg	0.00	\$2,785.00
										s	4	Harry Soffer	0.00	\$1,000.00
								1		s	5	Jessie Pinkman	0.00	\$600.00
							3 items							11 items
	•	D2		Direct Deposit -	Parti	0.00	\$100.0	۰ 🗸		Federal T	ax		\$2,539.70	
		D3		Direct Deposit -	Vet	0.00	\$6.537.8			Federal T	axable Wages		\$14.208.60	
\mathbf{v}							9 ite	ns						43 it

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).



11/10/:	2015 - 1												ø –	→ 🚔 —	+ 🖬 -
													Batches	Checks	Totals
Cal	culation R	esults													
Tot	al Gross Pa	y: \$69,61	2.25					т	Fotal	Taxes:	\$22,633.71				
	E/D Code		Description	Hrs/Pcs		Amount				Descriptio	on 🔺	Amount	Count		
	# D01		Checking		0.00		\$1,934.31	^	-	Federal G	Gross Wages		\$62,090.29		46
	E/D Detail	For: D01 - C	hecking							Tax Deta	ail For: Federal Gross	Wages			
	Туре	Src	EE Code +	Employee Name	Hrs/Pcs	Amount				Src	EE Code +	Employee Name	Hrs/Pcs	Amount	
	R	S	10	Employee Direct	0	00	\$540.69 ^			s	10	Employee Direct De	0.0	JO \$1,4	848.48 _
	R	s	120	Employee Shifts	0.	00	\$500.63			s	100	Employee Reciproc	0.0	J0 \$4	570.00
	R	S	260	Employee GTL	0.	00	\$429.12			s	110	Employee Jobs	0.0	10 \$	741.60
Totals	R	S	30	Employee 401K	0	00	\$463.87		Taxes	s	120	Employee Shifts	0.0	10 \$1,2	260.20
÷									μ.	s	130	Employee Auto Labor	0.0	10 \$2,5	500.00
										s	140	Employee 401K Fixed	0.0	10 \$1	635.00
										s	150	Employee Benefit	0.0	10 \$2,3	370.00 🛫
							4 items							4	6 items
	D02		Savings		0.00		\$300.00			Federal T			\$13.311.26		45

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

4. Finally, click **Finish** in the header.

Result: the Submittal Options screen opens.

Submittal Options	
Agency Payments	Time Off Accrual
Checks	Accruais Only
Reports	
🛱 🔲 Billing	
Liabilities	
Deposits	
Payroll Check Comments	
	0.1 TO
Submit for Review	Submit Payroll

- 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**.

Note: The Manager Approval requirements established in Evolution Classic apply in Evolution Payroll. If a payroll requires manager approval, the payroll goes into the Approve Payroll queue in the Evolution Classic Operations tab. If a payroll does not require manager approval, the payroll goes into the Process Payroll queue in the Evolution Classic Operations tab.



Payroll 05/21/2015	- 1 Payroll Timeline						8
H X M Pro	Submit by: 05/18/201	5		C° Batches	Checks	\rightarrow $\underset{\text{Totals}}{\blacksquare} \rightarrow$	Finish
Submittal Options							
Agency Payments	Time Off Accrual						
Checks	Accruals Only						
Reports							
ACH Billing							
Billing							
Liabilities			This payroll has been Processed to				
Deposits			iSystems IIc	4 9			
			05/29/2015 09:45 AM	-			
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.

egular		• W	ill be created for each I		creating checks. One check
			heck Creation Options Standard Hours: No Salary Pay: No	Use this Temp Select	olate •
Search for empl	oyee(s)				
EE #	▼ Last Name	▼ First Name	▼ Middle Initial	▼ Status	T Organizatio T
1	Janson	Jennifer	L	Active	
2	Glazer	JoAnne	В	Active	
3	Flax	Ron		Active	
□ 4	Carlow	Jane		Active	
5	Timm	Robert		Active	
- e	Cormon	Danaa	D	Activo	
					12 items

- 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 C	heck Delet	e Check Search Che	cks .	Group	By: Company Number			Summary
Туре	EE Code	Name	Seq	Total Hrs	Gross Pay	E01 Amt Salary	E02 Hrs Regular	E02 Amt Regular
R	1	Lewis, Al	1	40.00	\$2,500.00	2,500.00	40.00	\$0.00
R	2	Smith, Bill	1	40.00	\$1,500.00	\$1,500.00	40.00	\$0.00
R	3	Greenburg, Goldie	1	40.00	\$2,800.00	\$2,800.00	40.00	\$0.00
R	4	Soffer, Harry	1	40.00	\$1,000.00		40.00	\$1,000.00
R	5	Pinkman, Jessie	1	40.00	\$600.00		40.00	\$600.00
R	6	Bichon, Selma	1	40.00	\$640.00		40.00	\$540.00
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	\$360.00 -

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

2	Add Check De	lete Check						Summary Detail	•
	E/D Code	Description	Hrs/Pcs	Rate Of Pay	Amount	Rate Number	Agency		A miles
- 7	111 D6	Health Insurance			\$0.00				
	🗎 D3	Direct Deposit - Net							- Province
- 1		Child Support			\$50.00		Office Of Child Support		
		Direct Deposit - Partial 1							
	⊜ D7	Child Support - 2			\$21.00		Office Of Child Support		Ш
		Child Support - 2			\$21.00		Office Of Child Support		11
	■ E01	Salary		\$0.00	\$2,500.00	-1			
		Regular	40.00	\$0.00	\$0.00	-1			-
	E02	Regular	40.00						
	E02	Direct Deposit - Partial 1	40.00						
			40.00						
	⊜ D1	Direct Deposit - Partial 1	40.00		\$50.00		Office Of Child Support		
	■ D1	Direct Deposit - Partial 1 Direct Deposit - Net			\$50.00		Office Of Child Support		Ţ

- 5. Select an E/D Code from the dropdown list.
- 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 I** symbol.
- Click the Plus sign on the Batch Checks screen to create a new batch.
 Result: the Check Batch Settings screen opens.

	Delete Check					Summary Detail	*
E/D Code	Description	Hrs/Pcs	Rate Of Pay	Amount	Rate Number	Адиясу	
iii D6	Health Insurance			\$0.00			
🗎 D3	Direct Deposit - Net						
	Child Support			\$50.00		Office Of Child Support	
■ D1	Direct Deposit - Partial 1						
Total Hrs: 40	99554 - R, Batch: 1, Employee: Lew 0.00 Total Amount: \$2,404.00	mio, Ai [1]					
Total Hrs: 40 Add Check	0.00 Total Amount: \$2,404.00	mo, Ar [1]		F74.00			
Add Check	Concerner Concer	mo, m [1]	\$0.00	\$21.00	4	Office Of Child Support	
Add Check	0.00 Total Amount: \$2,404.00 t Line Cancel Check Line Child Support - 2 Salary		\$0.00	\$2,500.00	4	Office Of Child Support	
Add Check	Cancel Check Line Child Support - 2 Salary Regular	40.00			-1 -1	Office Of Child Support	
Add Check	0.00 Total Amount: \$2,404.00 t Line Cancel Check Line Child Support - 2 Salary			\$2,500.00		Office Of Child Support	
Total Hrs: 40 Add Check D7 E01 E02 D1	0.00 Total Amount: \$2,404.00 Ethic Cancel Check Line Child Support - 2 Salary Regular Direct Deposit - Partial 1			\$2,500.00		Office Of Child Support Office Of Child Support	

- 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

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



elect Manua	a Check Typ al	pe	v	Find and Select the Emplo will be created for each Er		creating checks. One check t.
				Check Creation Options Standard Hours: No Salary Pay: No	Use this Tem Select	plate v
Sear	rch for emplo					
	EE#	▼ Last Name	▼ First Name	▼ 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
1		Soffer	Harry		Active	Central > CB >> S
•	4				Active	West > WB >> WS
	4 5	Pinkman	Jessie		Active	West Work Wo
		Pinkman	Jessie		Active	· · · · · · · · · · · · · · · · · · ·
						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.
- 6. Click Select EEs
 Result: A Confirmation screen opens listing the check(s) to be created.
- 7. Click in the **Check#** column and give the check(s) a number.
- 8. Click the **Create Check(s) for Selected EEs** button.

Add Check	(S				
Select a Che Manual	ck Type	*	Find and Select the Employee will be created for each Emplo	s to use when creating checks. O yee you select.	ne check
			Check Creation Options Standard Hours: No Salary Pay: No	Use this Template Select-	¥
EE # ▼ 000000002	Last Name Smith	▼ First Name Bill	Yes	check# 1445	*
					▼ 1 items
		Creat	e Check(s) for Selected EEs		



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** *symbol*.
- Click the Plus sign on the Batch Checks screen to create a new batch.
 Result: the Payroll Settings screen opens.

×	Check Batch -2 - Settings		
Davroll Cattions	Start Date	End Date	
	6/7/2015	6/13/2015	=
	Frequency		
	Weekly		
	Employee Types		
SUG	All		
Options	Employee Filter		Selected: 2
C L	Select Template		
Creation	Template		
Cre	-Select Template		
	Checks per EE	Check Types	
	1	3rd Party	•
	Update Scheduled E/Ds Balance		
	No *		
	Calculate Scheduled EDs		
	Standard Hours		
۵			
Include	Payroll Defaults		
<u>P</u>	Time Off Requests		
	- Time on requests		

3. Select the **Employee(s)** to receive 3rd 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.



yroll 11	1/20/2	2015 - 1						a $\rightarrow a$ a a a a a a a a a	→ Intais —	→ B
х	Check	Batch -2 - 9	Settings							
	Searc	h for employ	ee(s)							
D	rag a i	column head	er and drop it here to group by that	t column					o°	
	•	EE Ø	/ Last Name	T First Name	Y Middle Initial	▼ Status	т ввот т			
		1	Lewis	AI		Active	West > WB >> WS >>> GT	*		
		2	Smith	Bill		Active	So East > SB >> SES >>> WT			
		3	Greenburg	Goldie		Active	West > WB >> WS >>> GT			
		4	Soffer	Harry		Active	Central > CB >> SC >>> GGS			
	8	5	Pinkman	Jessie		Active	West > WB >> WS >>> GT			
		6	Bichon	Selma		Active	So East > SB >> SES >>> WT		DONE	
		7	Goodman	Saul		Active	Central > CB >> SC >>> GGS			
		8	Clark	Willie		Active	Central > CB >> SC >>> GGS			
		9	White	Walter		Active	West > WB >> WS >>> GT			
		10	Bigole	Susan		Active	Central > CB >> SC >>> GGS			
								v		
	H)(Page	1 of 2 ())				14 items			

- 5. Select the **Check Type** 3rd 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

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
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
			1	40.00		40.00	\$350.00

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

elect a Brd Pa	a Check Type rty	9			mployees to use when ch Employee you select	creating checks. One check
				Check Creation Option Standard Hours: No Salary Pay: No	ns Use this Tem Select	plate v
Searc	ch for employ	ee(s)				
	EE# T	Last Name	▼ First Name	Y 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
	^	B ¹	<u>.</u>		* *	16 items
				Select EEs		

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- 10. Select **3rd 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 Check	(S				×
Select a Che 3rd Party	ck Type	•	Find and Select the Employees will be created for each Employ		s. One check
			Check Creation Options Standard Hours: No Salary Pay: No	Use this Template Select	Ŧ
EE# T		First Name	e Y Update Balance No	e Check#	▲ ▲
					▼ 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 3rd Party check is listed with a "3".
- 15. Click the **Create Checks** button

	Dele	te Sear	ch Checks	Group	By: Company N	umber			
All Batches	Туре	EE Code	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
Batches	3	13	Lewis, Al	1	40.00	40.00	\$800.00		
Batch 1	3	14	Greenburg, Goldie	1	40.00			40.00	\$600.00
Weekly									
Batch 2 Weekly									
Batch 3 Weekly									
Batch 4									
Weekly									

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 **I** 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.

Select a Check Type 3rd Party Find and Select the Employees to use when creating checks. On will be created for each Employee you select. Check Creation Options Standard Hours: No Use this Template Search for employee(s) -Select- EE # Y Last Name Y 1 Lewis Al 2 Smith Bill 3 Greenburg Goldie	
Standard Hours: No Use this Template Salary Pay: No -Select Search for employee(s) First Name Middle Initial Y Status Y Organizatio 1 Lewis Al Active West>WB >> 2 Smith Bill Active So East>SB :	e check
EE # Y Last Name Y First Name Y Middle Initial Y Status Y Organizatio 1 Lewis AI Active West > WB >> Vest > WB >> So East > SB => So East > SB =	Ŧ
I Lewis AI Active West>WB>> 2 Smith Bill Active So East>SB 3	
2 Smith Bill Active So East>SB	
4 Soffer Harry Active Central > CB >	
5 Pinkman Jessie Active West > W8 >>	
Acuve west >>>>	vvs
	6 items

- 4. Select **3**rd **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 Check	(S						×
Select a Che 3rd Party	ck Type	•	Find and Select will be created t				ks. One check
			Check Creation Standard Hour Salary Pay: No	s: No	Use this Ten Select	nplate	v
EE # 🔻 🔻	Last Name	Y First Name	т	Update Balance		Check #	
00000002	Smith	Bill		Yes		1445	*
							1 items
		Create	e Check(s) for S	Selected EEs			



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

Voiding Checks

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

- 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.

12/29/2014 - 1	Processed	01/12/2015 - 2	On Hold	01/19/2015	Not Due
Weekly	12/11/2014 - 12/17/2014	Weekby	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	66	D Submit by:	+
12/31/2014 - 1	Processed	444		01/21/2015	Net Due
		1/14/2015 - 1	Submitted		
Weekby	12/21/2014 - 12/25/2014	Weekty	01/04/2015 - 01/11/2015	Weekty	01/11/2015 - 01/18/2015
Submitted on:	*			Submit by: 01/19/2015	–
12/24/2014 10:55 AM	00	Submitted on: 01/12/2015 11:24 AM	*	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	Weekby	01/04/2015 - 01/11/2015	Weekby	01/08/2015 - 01/14/2015



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	Ŧ				
Agency Payments Time Off Accrual 2 Checks Accruals Only 3 Accruals Only 4 Billing Liabilities 1 Deposits Deposits					
Payroll Check Comm	ent				

- 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.
- 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	Q	Pending									
Pay	roll 12	/18/2015 - 1									Batches →	$\underset{Checks}{\longrightarrow}\longrightarrow\underset{Totals}{\longrightarrow}$	→ Einish
→	хс	heck Batch -8 - Settings											+
Payroll Settings		Start Date*		End Date*			Time Clock Source File						Payroll Note
TOIL C		12/27/2015		1/2/2016			Choose file		х				10
3ettir		Frequency					File Format						dote
SB		Weekly			*	SL	CSV - Comma Separated Values	*					L
	S	Employee Types				Clock Import Options	Date Field Format						
	Creation Options	All			*	0 E	2 Digit Year (mm/dd/yy)	*					
	0 4	Employee Filter			Select E	Es de	Employee Synchronization						
	atic	Select Template			*		Custom #	*		Create Checks			
	Cre	Template				ĕ	Organizational Synchronization						
		Select Template			*	Time	Full DBDT	*					
		Checks per EE		Check Types		Ē	Job Codes						
		1		Regular	*		Do Not Import Job Codes	•					
		Calculate Scheduled ED	ls .				Apply Org Level						
		Standard Hours					From File	*					
	m	Salary Pay											
	Include	Payroll Defaults											
	<u>n</u>	Time Off Requests											
		- Time On Requests											

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



Select a Che Void	ck Type					i need to void. ir selected Che	You can then create a eck.
Check# All	EE ID All	Within this che 8/4/2015	eck date range	With An	n Status of	Find	
Che T	Run #	y EE ID y	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
00/20/2045	4	0	Clark Willia	00000630	eo oo	£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.



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	
м	2	Smith, Bill	2	0.00			1
R	2	Smith, Bill	1	40.00	\$1,500.00	40.00	
R	3	Greenburg, Goldie	1	40.00	\$2,800.00	40.00	
R	4	Soffer, Harry	1	40.00		40.00	S
R	5	Pinkman, Jessie	1	40.00		40.00	1
R	6	Bichon, Selma	1	40.00		40.00	1
R	7	Goodman, Saul	1	40.00		40.00	:
R	8	Clark, Willie	1	40.00		40.00	\$3
R	9	White, Walter	1	40.00		40.00	\$1
R	10	Bigole, Susan	1	40.00		40.00	
			Totals	535.00	\$6,800.00	535.00	\$1

- 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	ск Туре					r selected Ch	You can then create a eck.
Check# All	EE ID All	Within this che 8/4/2015	eck date range	With An	Status of	Find	
Che T	Run #	r ee id 🕎	Employee Na 🍸	Che T	Gross T	Net 🝸	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 Willia	00000630	eo oo	eo oo	Outstanding
			Create Void Che	ck for Select	ed Check		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.

Pa L	ayroll Timeli X	ne X	S	Pending
Pa	ayroll 01/08/2016	- 1		
↑ Payroll Settings		Check Batch	1	12/28/2015–01/03/2016 Weekly Hourly & Salary 4 Checks
		Ū		ID: 12

Redistributing Labor Allocation

After a payroll has been processed the labor allocation sometimes needs adjustment for reporting purposes. Evolution Payroll supports the redistribute labor allocation process similarly to the Redistribute D/B/D/T process in Evolution Classic.

To redistribute labor allocation in Evolution Payroll,

- 1. Go to the Payrolls Payroll Timeline screen.
- 2. Click the **Table View** button on the far right-hand side of the header.
- 3. Highlight the processed payroll that requires adjustment from the grid and click the **View** symbol on the far left-hand side of the header.
- 4. Select the **Detail** view from the dropdown list.



					6	Detail v
Check Lines	2 - Smith, Bill - 1 of		Check Type Sequence Redistribute Preview Regular 1 of 1 Allocation ALD		Ľ	Jeran Y
Manual Tax Fed Overrides	E/D Code * +	Description	T His/Pcs T Pay Ra	te T Amo	ount T	Rate # T
State Overrides	⊿ E02	Regular	40.00	\$0.00	\$0.00	1 (P) : \$0.00
Local Overrides	Basic Labor Defaults I	Local Tax Overrides				
Options	Rate Number	Hours/Pcs	State	SUI		
Review	1 (P): \$0.00	▼ 40.00		*		*
TVL TPL P	Rate Of Pay	Piece	Work Address			
	0.00	- Select	* Use Default	*		
	Agency					
Previous Next	Select	Y				
	→	Salary		\$0.00	\$1,500.00	1 (P) : \$0.00
	►	Direct Deposit - Net			\$1,181.31	
	▶	Health Insurance			\$5.00	

5. Click the **Redistribute Allocation** button.

Note: To have access to the **Redistribute Allocation** button and its functionality, you must be running Evolution Classic version 16.36 or higher.

Result: The Redistribute Allocations screen is displayed for the selected E/D Code. Users can modify the existing labor allocations or add a new allocation.

Redistribute Allocations						×
Listed below are the allocations for your selected E You can adjust values on the existing allocations of Original allocations \bigcap can be modified but not ren	or create additional allocations	as needed.				
Add Delete						
Organizational Level	Workers Comp	Job Code	Hours	Amount	Line Item Date	
Central Division/Central Branch/Central Sa			40	\$1,000.00		^
- Select Team -						
Division Branch Department	Team					
- Select Team -						
North Eas Northeast Branc Northeast Sales	Dept Jessie's Team					
Western E Western Branch Western Sales E	Dept Gladys' Team					
Central Di Central Branch Central Sales De	ept Gus' Team					
South Eas Southeast Branc Southeast Sales	Dept Walt's Team					-
Totals			40.00	\$1,000.00		
					2 items	Ċ
	Apply	Cancel				

- 6. Click the **Add** button to change the allocation by selecting from the dropdown field that opens. Original allocations can be modified but not removed.
- 7. Click **Apply** to save changes.



The Payrolls Menu - Appendix

Payrolls - Check Batch Settings screen

Field / Button	Description
Creation Options section	
Start Date	The beginning of the Payroll Batch period
End Date	The end of the Payroll Batch period
Frequency	The Payroll frequency
Employee Types	The employee types to include in the payroll
Employee Filter – Select EEs	Click to select specific employees to include in the payroll
Template	The Payroll Template to use for this payroll, if any.
Checks per EE	The number of checks per employee
Check Types	The type of checks for this payroll
Include section	
Standard hours	Select to use Standard Hours in the payroll
Salary Pay	Select to use Salary Pay in the payroll
Payroll Defaults	Select to use Payroll Defaults in the payroll
Time Off Requests	Select to use Time Off Requests in the payroll
Time Clock Import Options section	
Time Clock Source File	The source file of time clock data being used for the payroll.
File Format	The format of the source file
Date Field Format	The format of the date in the source file.
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"
Calendar options	Choose whether to add a new payroll date, change a payroll date, or ignore the payroll calendar. Defaults to Ignore when selected.
Payroll Type	The type of payroll to be processed
Blocks	Select each item to be blocked on this payroll
Actual Call In Date	The date the payroll was called in
Time Off Accrual	Select to allow Time Off Accrual to show in the payroll
Accruals Only	Select to allow the payroll to Accrue time off, but not use show in the payroll.
Payroll Check Comment	The text to be displayed on checks.

Payrolls - Batch Checks Screen

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

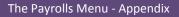
Payrolls - Add Checks screen

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



Payrolls - Check Lines - Basics tab

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

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 plus 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 - Manual Tax screen

Field / Button	Description
Add States button	Click to add states to override that are not already displayed. States displayed are what was set up on the Employee – States – Employee screen.
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

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



Payrolls - State Overrides screen

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

Payrolls - Options screen

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

Payrolls - Review screen

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



Payrolls - Time Clock Import tab

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

Payrolls - Calculation Results screen

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



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.

efined Reports	Published Reports	Ad-Ho	oc Reports	
Search For Report			Payroll Register (RV	V)
Report Name	· · · · · · · · · · · · · · · · · · ·		Choose options for this report	
Payroll Register (RW) (S109)		109		
General Ledger (RW) (S183)		183	Configure Report ->	
Cover Letter(RW) (S193)		193		
Direct Deposit Report (RW) (S211)		211		
Check Reconciliation (RW) (S214)		214		
401K Report (RW) (S215)		215		
Workers Comp Report (RW) (S217)		217		
Job Costing (RW) (S229)		229		
Taxable Wages For Payroll (S236)		236		
Tax Report For Payroll (S247)		247		
Portrait Input Worksheet (S262)		262		
Employee Profiles (RW) (S263)		263		
New Hire Pending Report (S292)		292		
Tax Notices (S341)		341		
Personnel Register (S344)		344	*	
Page 1 of 5 ()		1 - 15 of 63 item	ns	

- 1. Select the report from the table on the left-hand side of the screen.
- 2. Click the **Configure Report** ← button to establish or edit the parameters for the report selected.

Result: The Report Generation screen opens.



- Reports List Option	s for Payroll Register (D1M/1					
Option	s for Fayton Register ((())			_		
Payroll Filter	EE Filter	Org Filter	Misc Options	Run Report			
ect the date range to use for yo	ur report. All payrolls within your range wil	be selected. You can fine tune you	r selection by checking only the payro	ils you want to include.			
rting Date /01/2015	11	Ending Date 12/14/2015		include		Apply	
101/2015	8	12/14/2015		-		Арру	
	Check Date	T Run #	T	Processed Date	▼ Status	T Type	
	12/14/2015	4451	5		Pending	Regular	
	12/13/2015	1			Pending	Regular	
1	12/13/2015	2			Pending	Regular	
1	12/09/2015	1			Past Due	Regular	
	12/01/2015	1			Pending	Regular	
	11/25/2015	1			Past Due	Regular	
	11/11/2015	1		12/11/2015	Past Due	Regular	
	10/14/2015	1		12/11/2015	Past Due	Regular	
					Past Due	Regular	
8	09/30/2015	1			Past Due	regular	

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

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.

Defined Reports	Published Reports	Ad-Hoc F	Reports
Search For Report			Payroll Register (RW)
Report Name		Report # ▲ T	Choose options for this report
Payroll Register (RW) (S109)		109 ^	Configure Report
General Ledger (RW) (S183) Cover Letter(RW) (S193)		183	
Direct Deposit Report (RW) (S211)		211	
Check Reconciliation (RW) (S214)		211	
401K Report (RW) (S215)		214	
Workers Comp Report (RW) (S217)		213	
Job Costing (RW) (S229)		229	
Taxable Wages For Payroll (S236)		236	
Tax Report For Payroll (S247)		247	
Portrait Input Worksheet (\$262)		262	
Employee Profiles (RW) (S263)		263	
New Hire Pending Report (S292)		292	
Tax Notices (S341)		341	
Personnel Register (S344)		344	
Image Page 1 of 5 Image		1 - 15 of 63 items	



Payroll F	Filter	EE	Filter	(Drg Filter	N	lisc Options		Run Report	
Select the date r to include.	ange to use for yo	ur report. Al	l payrolls within yo	ur range w	ill be selected. You ca	n fine tun	e your selection by c	hecking	only the payrolls yo	ou want
Starting Date		End	Ing Date		Include			_		_
01/01/2015		01	/16/2015		All Payrol	s	*		Apply	
	Check Date	т	Run #	Ŧ	Processed Date	T	Status	T	Туре	т
	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. Click the **Configure Report** button.
- 3. On the **Payroll Filter** tab select the Starting Date and Ending Date to filter the payrolls to a specific date range (optional), or use the **Include** dropdown list to select from displaying All Payrolls or Processed Payrolls only.
- 4. Click **Apply** to return a list of payrolls based on the filters selected.
- 5. Select the payroll(s) for which to run the report.

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

- 6. Click the **EE Filter** tab to select or deselect employees from the report.
- 7. Click the **Org Filter** tab to filter by organization (D/B/D/T) level

Def	fined Repo	Published	d Reports Ad-	Hoc Reports			
← Re	ports List Options	for Payroll Register (RW)				
	Payroll Filter	EE Filter	Org Filter	Misc Options	Run Report		
		ou want to use for this report. Fine tune will include all organization levels for thi					
	Division		Branch		Department	Team	
	⊿ Div1						
			⊿ NY Branch				
					Department Name Field		
						Team2	
					⊿ Test 2Nd Dept	reamz	
8					a rest and popt		
			▲ NH Branch				
			+ VT Branch				
			✓ Branch 23				
					a 1		
			✓ New Branch 01				
					⊿ Branch 1 Dept 114		
					⊿ DEPT 1		
8					A DEPT 1	Team 1	
						ream 1	

8. Click the Misc. Options tab to update parameters specific to this report.

This screen offers instructions for running the report, as well as grouping and sorting methods to choose from.



Payroll Filter EE Filter Org Filter Misc Options Run Report Additional options available for this report: Show only Summary for Multiple check dates Show only Summary for Multiple check dates Show only Summary for Multiple check dates Show Home DBDT for each Employee Show Home DBDT for each Employee Include Pieces from Piecework in Totals Summary Detail Image: Summary Detail Break Employee Between Pages Include Taxable Memos in Totals Group Sort Group Code Image: Summary Detail Deductions as Taxes Bold EE Name, Check Number, and Net Check SUI Summarize SUI Image: Summarize SUI	De	fined Repo	Publishe rts	ed Reports		Ad-Hoc Reports	
Additional options available for this report:	← R	eports List Options	ofor Payroll Register	- (RW)			
Show only Summary for Multiple check dates Show Home DBDT for each Employee Include Memos in Totals Show Home DBDT for each Employee Include Pleces from Plecework in Totals Break Employee Between Pages Include Taxable Memos in Totals Deductions as Taxes Show Shift Differentials Bold EE Name, Check Number, and Net Check Hide SSN, State, Frequency, and Salary		Payroll Filter	EE Filter	Org Filter		Misc Options	Run Report
Show Employees with YTD Earnings		Show only Summary fo Show Home DBDT for of Include Memos in Total Include Pieces from Pi Break Employee Betwe Include Taxable Memor Deductions as Taxes Show Shift Differentials Bold EE Name, Check Hide SSN, State, Frequ Swap Check Date and I	r Multiple check dates sach Employee s s exework in Totals en Pages s in Totals Number, and Net Check ency, and Salary Net Check	Î	<u>مە</u>	Department Group Type Summary Detail Group Sort Group Code Datail Sort Employee Last Name SUI	•

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

Defined Repo	Publishe rts	d Reports	Ad-Hoc Reports		
← Reports List Options	for Payroll Register	(RW)			
Payroll Filter	EE Filter	Org Filter	Misc Options	Run Report	
	teue for your generated report. You ca as follows: 15 1.			⇒ It. With options set: Include Memos in Totals Include Pieces from Piecework in To Break Employee Between Pages Deductions as Taxes Hide SSN, State, Frequency, and Sal etc	
Run this Report				SUI: Summarize SUI	

- 10. Click **Run This Report**.
- 11. Click the **Task Queue** symbol once the report is generated to view and print the report.



Published Reports

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

- 1. Click the **Reports** Menu to open.
- 2. **Result:** The Defined Reports screen opens.
- 3. Click **Published Reports** in the header.
- 4. Select a payroll and the report for which to view a preview.

D	ished Re	ports							
arch	for Report							[Preview Report
	Check Date T	Run # 🍸	Check Period	Report # 🔺	T	Report Name 🔻	Туре	T	Treview Report
	08/31/2016	2	09/30/2018 - 10/06/2018	S257		Invoice (S257)	Report	*	
	08/31/2016	2	09/30/2018 - 10/06/2018	S2731		Inactive Employee Report 13	Report		
	08/31/2016	2	09/30/2018 - 10/06/2018	S2834		ACA Rule Of Parity Test	Report		
	08/31/2016	2	09/30/2018 - 10/06/2018	S348		GL Export	ASCIIFile		
	12/23/2015	1222	06/12/2016 - 07/29/2017	S1757		Check Pressure Seal Legal Moore (New) (S1757)	PRCheck		
	12/23/2015	1222	06/12/2016 - 07/29/2017	S257		Invoice (S257)	Report		
	12/23/2015	1222	06/12/2016 - 07/29/2017	S2731		Inactive Employee Report 13	Report		
	12/23/2015	1222	06/12/2016 - 07/29/2017	S2731		Inactive Employee Report 13	Report		
	12/23/2015	1222	06/12/2016 - 07/29/2017	S2731		Inactive Employee Report 13	Report		
	12/23/2015	1222	06/12/2016 - 07/29/2017	S2834		ACA Rule Of Parity Test	Report		
	12/23/2015	1222	06/12/2016 - 07/29/2017	S2834		ACA Rule Of Parity Test	Report		
	12/23/2015	1222	06/12/2016 - 07/29/2017	S2834		ACA Rule Of Parity Test	Report		
	12/23/2015	1222	06/12/2016 - 07/29/2017	S2834		ACA Rule Of Parity Test	Report		
	12/23/2015	1222	06/12/2016 - 07/29/2017	S348		GL Export	ASCIIFile		
	06/24/2015	1	06/14/2015 - 06/20/2015	S193		CO# 0001A. Cover Letter(RW)	Report	-	

To preview, 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. Click the **Preview Report** button to open a full-sized preview on a new screen.
- 3. 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.

4. 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.

- 5. Print as normal from the **File** menu in the Windows Menu bar.
- 6. Click the **Reports List button** to return to the screen listing the Published Reports.



The Reports Menu - Appendix

Reports - Defined Reports

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
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.

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



Reports - Published Reports

Column Name	Description	Example
Check Date	The date of the payroll from which the report was generated. For Tax Returns, this is the last date entered on the tax return screen when tax returns are processed.	1/20/2015 – Check Date 12/31/2014 – Tax Return Date
Run #	The payroll run from which the report was created. Tax Returns will show a run number of 0	1, 2, 3, etc 0
Check Period	The batch period of the payroll for which this report was generated. Tax Returns will not display a batch period.	1/10/2014 – 1/16/2015
Report #	The Evolution report number for this report.	\$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



The Settings Menu

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

Personal Settings Change Password Password Requirements Current Password * Required New Password * Required We'l use these to verify your identify if you forget your password and can't log in. Question 1* What was your childhood nickname? Question 2*		Confirm Password * Required
Change Password Password Requirements Current Password * Required New Password * Required General Security Questions We'll use these to verify your identity if you forget your password and can't log in. Question 1 * What was your childhood nickname?		
Password Requirements Current Password * Required New Password * Required General Security Questions We'll use these to verify your identity if you forget your password and can't log in. Cuestion 1 * What was your childhood nickname?		
Current Password * Required New Password * Required General Security Questions We'll use these to verify your identity if you forget your password and can't log in. Cuestion 1 * What was your childhood nickname?		
Required lew Password * Required General Security Questions Ve'll use these to verify your identity if you forget your password and can't log in. Juestion 1 * What was your childhood nickname?		
lew Password * Required General Security Questions Ve'll use these to verify your identity if you forget your password and can't log in. Auestion 1 * What was your childhood nickname?		
Required General Security Questions Ve'll use these to verify your identity if you forget your password and can't log in. Auestion 1 * What was your childhood nickname?		
General Security Questions We'll use these to verify your identity if you forget your password and can't log in. Question 1 * What was your childhood nickname?		Required
Ve'll use these to verify your identity if you forget your password and can't log in. Juestion 1 * What was your childhood nickname?		
	*	Answer 1 * Required
	· ·	
		Answer 2 * Required
What is your father's middle name?	*	
Question 3 *		Answer 3 *
What is your grandmother's first name?	*	Required
Extra Security Questions		
We'll use these to further verify your identity when you log in.		
Question 1 *		Answer 1 *
- Select Question -	*	Required
Question 2 *		Answer 2 *
- Select Question -	*	Required

- 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	 Monday, May 25, 2015 - Friday, 				Day Work Week Month
	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					
10:00 Aw					
11:00 AM					
TT.00 Aim					
12:00 PM					
12.02.					
1:00 PM					
2:00 PM					
3:00 PM					•
C Sho	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 Employ						Preview		
EE# Ţ	Last Name 🍸		T State T	Zip Code 🍸	Status 🔻	Allecting		
1	Lewis	AI	NY	10066	Active	Last Name:	First Name:	
2	Smith	Bill	MA	10022	Active	Lewis	AI	
3	Greenburg	Goldie	NY	10044	Active	SSN/EIN:		
4	Soffer	Harry	VT	05401	Active	884-77-3311		
5	Pinkman	Jessie	NY	10011	Active	Status: Active		
6	Bichon	Selma	MA	88855	Active	Address:		
7	Goodman	Saul	VT	05401	Active	963 Main Str	eet	
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	-		
					1 - 11 of 11 items 💍			



ID +	Task	Status	Last Update	Summary	Current State
0924305	Process Payrolla	Finished with Exceptions	01/14/2015 4:09PM	BDazz1 Pr:1/19/2015-1	Fitished
6924391	Preprocesa Payrola	Finished Successfully	01/14/2015 4:08PM	BDats1 Pr:1/19/2015-1	Finished
6004382	Run Report	C Finished Successfully	01/14/2015 4:04PM	BOazz1, Payroll Register	Finished
6924378	Run Report	Finished Successfully	01/14/2015 4:02PM	BDazz1. Workers' Compensation	Finished
6919790	Preprocess PayroRs	C 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.

) v	Task		→ Status		Last Update 💦 🔻 🔻	Summary	T Current State
924395	Process Payrol	5	9 Finished with Exception	ns	01/14/2015 4:09PM	BDazz1 Pr:1/19/2015-1	Finished
924391	Preprocess Pay	rolls	Finished Successfully		01/14/2015 4:06PM	BDazz1 Pr:1/19/2015-1	Finished
924382	Run Report		Finished Successfully		01/14/2015 4:04PM	BDazz1. Payroll Register	Finished
924376	Run Report		Finished Successfully		01/14/2015 4:02PM	BDazz1. Workers' Compensation	Finished
919790	Preprocess Pay	rolls	Finished Successfully		01/12/2015 1:43PM	BDazz1 Pr:1/12/2015 - 2	Finished
Pa	ge 1 of 2)				01/14/2015 4/06PM PDazzled De	1 - 5 of 10 items
ask: Run R Dazz1. Payro					=		Finished Successfully 01/14/2015 4:04Pl
							011120101101
Results Preview	Log						
Preview	Log BDazzled Design Ltd.			Check D	Payroll Register (S109)	8	
Preview					Date : 01/15/2015-		
review #BDazz1 :	BDazzled Design Ltd.			Check I Period Ra Week Num	Date : 01/15/2015- nge : 01/04/2015 TO 01. iber : Week #3	11/2015	
#BDazz1 .	BDazzled Design Ltd.	e Sacardy Alamber	Salary Energy 2010	Check E Period Ra Week Num Check Number	Date : 01/15/2015 nge : 01/04/2015 TO 01. iber : Week #3 Obseck Date Obseck Type	11/2015 Net Obeck	
review #BDazz1 :	BDazzled Design Ltd.	d Seconly Alamber YTD Hours Amount		Check I Period Ra Week Num	Date : 01/15/2015 nge : 01/04/2015 TO 01. iber : Week #3 Obseck Date Obseck Type	11/2015	
Employee Nam Employee Nam Earings Description 112-33-4455-3	BDazzled Design Ltd. Rate Congrt of My Hours Amount - Fas, fam	YTD Hours Amount NY NY	Deductions Current YTD Amount Description Amount 2000/00 Weekly	Check D Period Ra: Week Num Check Mamber Taxes Description 1019	Date : 01/15/2015 nge : 01/04/2015 TO 01. iber : Week 43 Check Date Check Type Current Amount 01/15/2015 Regular	11.2015 Net Owek 'TD Answit 1087:33	
Freview #BDazz1 : Employee Nem Description	BDazzled Design Ltd.	YTD Hours Amount NY NY	Deductions Current YTD Amount Description Amount 2000.00 Weekly 32 Health Insurance 120.00 380.0	Check D Period Ra Week Number Taxas Description 1019 0 Federal (S/0)	Date 01/15/2015 nge: 01/04/2015 TO 01. iber: Week #3 Ofneck Date Ofneck Type Ofneck Date Ofneck Type 01/15/2015 Regular 01/15/2015 Regular 372:76 372:76	11:2015 Net Dives 17D Amount 1007:35 1.118:28	
Employee Nam Employee Nam Earings Description 112-33-4455-3	BDazzled Design Ltd. Rate Congrt of My Hours Amount - Fas, fam	YTD Hours Amount NY NY	Deductions Current YTD Amount Description Amount 2000.00 Weekly- 32 Health Insurance 120.00 850.0 50 Child Support 100.00 800.0	Check E Period Ra Week Num Check Mamber Texes Description 1019 0 Federal (S0) 0 ASDI 7 Medicare	Data 01/15/2015 nge: 01/04/2015 TO 01. Iber: Week #3 Week #3 Ofweck Date Ofweck #3 Ofweck #3 Otris2015 Regular 312,76 114.70 20,85 114,70	11:2015 Allef Olivels YTE Amount 1:007:203 1:11:23 3:43.07 80.05	
Employee Nam Employee Nam Earings Description 112-33-4455-3	BDazzled Design Ltd. Rate Congrt of My Hours Amount - Fas, fam	YTD Hours Amount NY NY	Deductions Current YTD Amount Description Amount 2000.00 Weekly- 32 Health Insurance 120.00 850.0 50 Child Support 100.00 800.0	Check E Period Ra Week Number Description 1019 0 Federal (30) 0 ASDI 7 Madacea	Data 01/15/2015 nge: 01/04/2015 TO 01. ber: Week 93 Week 93 Oneck Date Oneck Type Current Amount Otro5/2015 Regular 372 76 114.70 20.65 144.70 20.85 104.22 104.71	11/2015 Teel Checks 1/TD Amount 1/087:05 1.118:25 344:37 80:05 312:86	
Freview #BDazz1 : Employee Nem Earings Description 112-33-4455-3	BDazzled Design Ltd. Rate Congrt of My Hours Amount - Fas, fam	YTD Hours Amount NY NY	Deductions Current YTD Amount Description Amount 2000.00 Weekly- 32 Health Insurance 120.00 850.0 50 Child Support 100.00 800.0	Check E Period Ra Week Num Check Mamber Texes Description 1019 0 Federal (S0) 0 ASDI 7 Medicare	Data 01/15/2015 nge: 01/04/2015 TO 01. Iber: Week #3 Week #3 Ofweck Date Ofweck #3 Ofweck #3 Otris2015 Regular 312,76 114.70 20,85 114,70	11:2015 Allef Olivels YTE Amount 1:007:203 1:11:23 3:43.07 80.05	
review #BDazz1 . Earnings Description Tribitionession Of Setry Check Table	BDazzled Design Ltd. Rate Congrt of My Hours Amount - Fas, fam	YTD Hours Amount NY NY	Description Current YTD Amount 2020/07 Weeking 00 101 Heatin Insurance 102 00 300 00 102 Dental Insurance 102 00 800 00 17 Dental Insurance 28.50 65.7 201 Dental Insurance 28.50 65.7	Check E Period Ra Week Nur Check Mamber Taxas Description 1 Taxas D	Data 01/15/2015 nge: 01/04/2015 TO 01. bet: Wreek #3 Check Date Oneck Type Current Amount 01/15/2015 01/15/2015 Stagelar 01/15/2015 Stagelar	11:2015 Amid Sheek YTD Amount 1007:203 1.110:23 34:437 80:05 37:28 3.00	



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

	lene				н
) v	Task	Y Status	Y Last Update Y	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
Page	1 of 2 • •			01/14/2016 4-08PM RDaveled Des	1 - 5 of 10 items
sk: Proces		1			Finished with Exceptions 01/14/2015 4:09F
		_			
Results					
Delive	Exceptions Log ery method is not setup correctly				
Delive date/time	ary method is not setup correctly : 2015-01-14, 16:09:37, 77ms				
Delive date/time computer name	ery method is not setup correctly				
Delive date/time computer name user name operating syste	ery method is not setup correctly : 2015-01-14, 16:09:37, 77ms e : INLPWA03 : SYSTEM <admin> em : Windows NT New build 9200</admin>				
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Click **Hide** in the upper right-hand corner of the screen to close the Task Queue and return to the previous screen.

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

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

* Saving can only be applied to the active tab.