

Scheduled E/Ds

Setting up a new Recurring Earning

To set up a new recurring earning start in **Employee – Scheduled E/Ds**.

1. From either the Browse Tab or by using the employee drop down boxes at the top, select the employee you are working with.
2. Click on the Browse Scheduled E/Ds tab and verify that the code you are using is not already set up on that employee.



****If the code is already set up, go directly to step #11. Do not set up the same code twice as this will result in an error and possible loss of newly added data that has not yet been committed.**

3. Click the  key or Alt-Insert to add the new E/D Code.





4. Under E/D Code, select the earning you would like to setup.
5. Under calculation method select the appropriate method for this code. In most cases, this will be Fixed.
6. Under either Amount or %, depending on the calculation method chosen, enter the amount or % that you would like the employee to receive.
7. Under frequency, select how often you would like the employee to receive this earning. If you are using Quarterly, Semi-Annual, Annual or User Entered, you will need to fill in the Month # and Which Payrolls field so the system is able to pay these earnings in the appropriate payroll(s).
8. Enter a valid Effective Start Date on this code, as it is a required red field. If you are setting this up for a future date, please make sure you change your Effective Start Date to the date you want this earning to start.

****When deciding what date to enter, remember that the system is based on Check Date, not Pay Period Dates. For example if you put the Effective Start Date as 08/22/2007 and the payroll has a pay date of 08/24/2007 with pay period dates from 08/12/2007 to 08/18/2007, the code will be brought into that payroll even though the pay period does not cover that date.**

9. Toward the bottom of the third column, in the Always Pay/Deduct field, you will want to choose either None or Current Payrolls.
 - **None** – By choosing this option, it will only pay the employee this recurring earning if they are also receiving other income.
 - **Current Payrolls** – This option will force the payment to be made to the employee regardless of whether or not they are receiving any additional compensation.
10. Click the green check  or F10 to save and the Green stack of coins  to commit these changes.
11. If the code is already set up, go directly to the Details 1 tab and review the data on this screen for accuracy. If changes are necessary, click on the field that you want to change and enter in the new data.
12. If the code was used at one point and stopped, you will see that the Effective End Date is filled in with a date. To remove this date, click in the field so that the date is highlighted and click the Delete key on your key board. This will remove the date.

13. Go to the Details 2 tab to verify the data on this screen. Again, if the data needs to be removed, click on the field and click the Delete key on your keyboard.

14. Click the green check  or F10 to save and the Green stack of coins  to commit these changes.

Setting up a new recurring Deduction

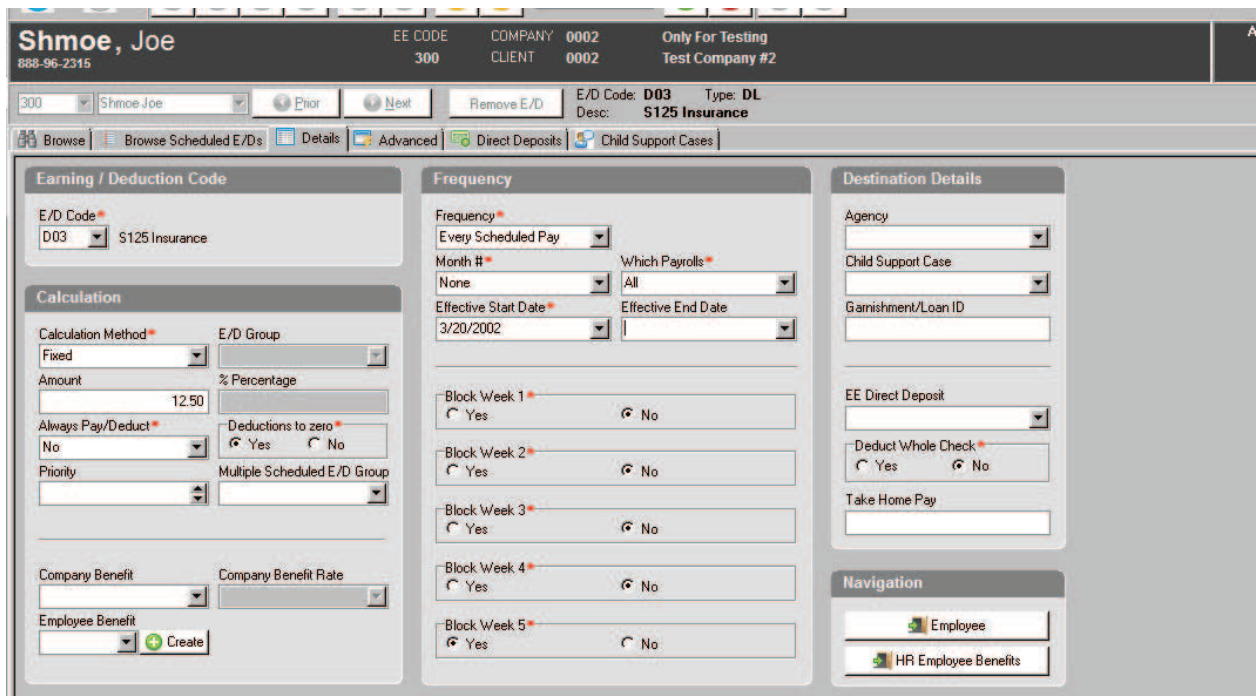
If you are setting up a pension, child support, direct deposit, or insurance deduction using the Benefit Tables, please refer to the sections that deal with those codes specifically.

To set up a new recurring deduction, start in **Employee – Scheduled E/Ds.**

1. From either the Browse Tab or by using the employee drop down boxes at the top, select the employee you are working with.
2. Click on the Browse Scheduled E/Ds tab and verify that the code you are using is not already set up on that employee.

****If the code is already set up, go directly to step #13. Do not set up the same code twice as this will result in an error and possible loss of newly added data that has not yet been committed.**

3. Click the  key or Alt-Insert to add the new E/D Code.



The screenshot displays the 'Employee – Scheduled E/Ds' screen for Joe Shmoe. The top header shows the employee's name and ID (888-96-2315), company code (0002), and client code (0002). The main area is divided into several sections: 'Earning / Deduction Code' with E/D Code D03 and Description S125 Insurance; 'Calculation' with a Fixed method and an amount of 12.50; 'Frequency' with 'Every Scheduled Pay' and 'None' for Month #; 'Destination Details' with fields for Agency, Child Support Case, and Garnishment/Loan ID; and 'EE Direct Deposit' with a dropdown menu. The 'Navigation' section at the bottom right includes buttons for 'Employee' and 'HR Employee Benefits'.

4. Under E/D Code, select the deduction you would like to setup.

5. Under calculation method select the appropriate method for this code.
6. Under either Amount or %, depending on the calculation method chosen, enter the amount or % that you would like to deduct from the employee.
7. The Frequency should default for you, but always make sure you verify that it is correct. If you are using Quarterly, Semi-Annual, Annual or User Entered, you will need to fill in the Month # and Which Payrolls field so the system is able to deduct these earnings in the appropriate payroll(s).

****The two most common frequencies are Every Pay and Every Scheduled Pay. It is important that you understand how the difference between these two options will affect how you create your payrolls.**

- **Every Pay** – This code will pull into every payroll that you create, regardless of whether it is your normally scheduled payroll or a special payroll run.
- **Every Scheduled Pay** – This code will only pull into your normally scheduled payrolls. For example, if you run payroll bi-weekly, it will only pull into the standard 26 payrolls in a year.





8. If you are setting up a code that is a calculation on other earnings and/or deductions, i.e. Pensions, you will most likely need to attach an E/D Group for the code to look at.

****In most cases, these groups will default on the deduction code so you will not be required to pull this in manually. Feel free to contact your Client Service Representative if you are unsure if you need to be using an E/D Group.**

9. In some cases the money you deduct from an employee needs to be paid to a third party organization, i.e. Child Support, Garnishment, Insurance, etc. In the Agency field, select the third party that this money needs to go to. If you do not see an option for the specific third party that you are looking for, contact your Client Service Representative for assistance.

10. Enter a valid Effective Start Date on this code, as it is a required red field. If you are setting this up for a future date, please make sure you change your Effective Start Date to the date you want this earning to start.

****When deciding what date to enter, remember that the system is based on Check Dates, not Pay Period Dates. For example if you put the Effective Start Date as 08/22/2007 and the payroll has a pay date of 08/24/2007 and pay period dates from 08/12/2007 to 08/18/2007, the code will be brought into that payroll even though the pay period does not cover that date.**

11. If you run payroll on a weekly or bi-weekly basis please be aware that there are some months in the year that you will run an extra payroll. This payroll will always occur in the 5th calendar week of a month. If you have done calculations so the deductions come out only 4 times a month for weekly payrolls or 2 times a month for bi-weekly payrolls, you will need to **mark Block Week 5** as Yes.
12. If the set up is correct, click the green check  or F10 to save and the Green stack of coins  to commit these changes.
13. If the code is already set up, go directly to the Details 1 tab and review the data on this screen for accuracy. If changes are necessary, click on the field that you want to change and enter in the new data.
14. If the code was used at one point and then stopped, you will see that the Effective End Date is filled in with a date. To remove this date, click in the field so that the date is highlighted and click the Delete key on your keyboard. This will remove the date.
15. Go to the Details 2 tab to verify the data on this screen. Again, if the data needs to be removed, click on the field and click the Delete key on your keyboard.
16. Click the green check  or F10 to save and the Green stack of coins  to commit these changes.

Stopping a recurring Earning or Deduction

Regardless of whether you need to stop a recurring earning, child support deductions, pension, insurance, direct deposit, or a miscellaneous deduction, the steps are exactly the same.

To stop a recurring deduction, etc., start in **Employee – Scheduled E/Ds**.

1. From either the Browse Tab or by using the employee drop down boxes at the top, select the employee you are working with.
2. Click on the Browse Scheduled E/Ds tab and highlight the code you need to stop.
3. Click on the Details 1 Tab

Shmoe, Joe
888-96-2315

EE CODE 300 COMPANY 0002 CLIENT 0002 Only For Testing Test Company #2

300 Shmoe Joe Prior Next Remove E/D E/D Code: D03 Type: DL Desc: S125 Insurance

Browse Browse Scheduled E/Ds Details Advanced Direct Deposits Child Support Cases

Earning / Deduction Code

E/D Code*
D03 S125 Insurance

Calculation

Calculation Method* Fixed E/D Group
Amount 12.50 % Percentage
Always Pay/Deduct* No Deductions to zero* Yes No
Priority Multiple Scheduled E/D Group

Company Benefit Company Benefit Rate
Employee Benefit Create

Frequency

Frequency* Every Scheduled Pay
Month #* None Which Payrolls* All
Effective Start Date* 3/20/2002 Effective End Date 6/10/2003

Block Week 1* Yes No
Block Week 2* Yes No
Block Week 3* Yes No
Block Week 4* Yes No
Block Week 5* Yes No

Destination Details

Agency
Child Support Case
Garnishment/Loan ID



EE Direct Deposit
Deduct Whole Check* Yes No
Take Home Pay

Navigation

Employee
HR Employee Benefits

- At the bottom of the first column you will see the field Effective End Date. Enter the Effective End Date for this code. The system will compare this date to the payroll's period dates to determine when this code needs to stop.

****When deciding what date to enter, remember that the system is based on Check Date, not Pay Period Dates. For example if you put the Effective End Date as 08/22/2007 and the payroll has a pay date of 08/24/2007 with pay period dates from 08/12/2007 to 08/18/2007, the code will be brought into that payroll even though the pay period does not cover that date.**

- Click the green check  or F10 to save and the Green stack of coins  to commit these changes.