# Evolution Payroll<sup>®</sup> User Guide v 3.4



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2



Evolution Payroll Getting Started	7
System Requirements	7
Security Settings	8
User or Group Security Rights	8
D/B/D/T Level Security Restrictions	8
Logging into Evolution Payroll	9
The Dashboard	. 13
Header	. 13
Menu Bar	. 14
Payroll Today	. 14
Agenda	. 14
Published Reports	. 15
Analysis	. 15
Navigating Evolution Payroll	. 18
Client and Company Selector	. 18
Hot Keys	. 21
New Terminology	. 21
The Menu Bar	. 23
The Company Menu	
The Employees Menu	
Security Settings	
Adding New Employees	
Employees – Basics screen	
Employees – Personal screen	
Employees – Pay screen	
Employees – Federal screen	
Employees – State screen	
Employees – Local screen	. 37
Employees – Child Support screen	. 38
Employees – Direct Deposit screen	. 38
Employees – Scheduled E/Ds screen	. 39
Employees – Delivery screen	. 43
Effective Dating Dynamic Fields	. 50
Security Settings	. 50
Editing information	. 51
To delete an Effective Date record:	. 52



Deleting an Employee	52
Employees Menu - Appendix	53
The Payrolls Menu	75
Security Settings	75
The Payrolls Menu	
Creating a Scheduled Payroll	80
Creating an Unscheduled Payroll	87
Check Batch Settings screen	88
Payrolls - Batch Checks Screen	89
Manual Tax screen	
Fed Overrides screen	92
State	
Overrides screen	
Local	
Overrides screen	
Payroll – Options screen	
Payroll – Review screen	
Calculation Results screen	
Pre-Processing and Submitting the Payroll	
Editing / Completing a Payroll	
Viewing the Results Screen	
Security Settings	
Copying a Payroll	100
Copying a payroll in Card view	100
Copying a Payroll in Table view	100
Adding Additional Checks	101
Adding Check Lines	102
Refreshing Scheduled E/Ds for Individual Checks	103
Refreshing Scheduled E/Ds for Batches	103
Blocking Scheduled E/Ds from a Payroll	104
Manual Checks	104
Creating a new batch	104
Adding to an existing batch	105
Creating Third Party Checks	106
Creating Third Party Checks in a new batch	106
Adding Third Party Checks to an existing batch	109
Voiding Checks	110

Evo	lution®
	Payroll

Voiding a check by creating a new payroll	111
Voiding a check by editing a waiting payroll	113
Deleting Batches	114
Redistributing Labor Allocation	114
The Payrolls Menu - Appendix	116
Payrolls - Check Batch Settings screen	116
Payrolls - Payroll Settings screen	117
Payrolls - Batch Checks Screen	117
Payrolls - Add Checks screen	117
Payrolls – Manual Tax screen	120
Payrolls – Fed Overrides screen	120
Payrolls – State Overrides screen	121
Payrolls – Options screen	121
Payrolls – Review screen	121
Payrolls - Time Clock Import tab	122
Payrolls – Calculation Results screen	122
The Reports Menu	123
Defined Reports	123
Published Reports	127
Ad Hoc Reporting	128
Security Settings	128
Setting up the Report	128
Adding a New Ad Hoc Report	129
Editing an Existing Ad Hoc Report	130
Running an Ad Hoc Report	131
Ad Hoc Report Restrictions	132
The Reports Menu - Appendix	133
Reports – Defined Reports	133
Reports – Published Reports	134
The Task Queue	135
Viewing/Downloading Reports	137



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6



# **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+

**Note:** You must be using Evolution Classic version 16.47 or higher to use the Ad Hoc Reporting features. If you are a SaaS customer, these upgrades will be done for you.



### 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.

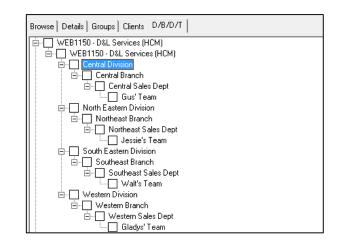
### D/B/D/T Level Security Restrictions

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



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 Cove	er Letter Notes   Tax 0	Cover Letter Notes	Invoice Notes	VMR Confidentiality Notice	Terms of Use	External Logins
Default Check Format * Pressure Seal Letter Greatland (Ne Misc Check Format * Pressure Seal Letter Greatland (Ne Auto Save * 3 (\$) Mins AR Export Directory		EFTPS Bank I Anexsys Bank of Ar Batch Prov Use PreNote Yes In Prenote Days 5	nerica vider C No	Trust Impound Type * Tax Impound Type * Direct Deposit Impound Type Billing Impound Type * Workers Comp Impound Type Block DD Impound Type C Yes	Intern ACH	▼ ▼ nal Check ▼
	employees *	Prohibit Offil     Bank Check     Wells Farg     Citibank     Wells Farg     Citibank     Wells Farg     Wells Cast     C BBI     C Union Ban     C User defin      Block Nega     TOA Description	o o/Keybank niers k of California ed tive Checks From		N/A	5,000,000 Transfer

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.

Evolutio		
Secure User Login		
User Name	Provide Security Validation Quantum 1.1	Annuar 11
Ren	- Select Question -	Regired
	Question 2 *	Answer 2 *
	- Select Question -	Regired
	Question 3 *	Answer 3 *
	- Salect Question -	Regard .

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.

Forgot Password
Provide Security Validation Answer these questions to verify your con- Question 1 Text
Guestion 2 Text Question 3 Text
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 Isantorre	Set Your Password Minimum length must not be loss than 2 characters. New Password
	Confirm Password
	Set Paseword

- 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.

T

											Logged in as: Sally   Settings   Logout
F\/	olutio	n®									Logged in as. Jany   Jennings   Logod
				Have you heard a	about the new Evol	lution solution for HR?			Client	0001 - Fantasy World	•
	Payr	OII					t	2 3 4 5	Company	0001A - Fantasy World	•
Dashboard	Payroll Toda Regular Payroll 04/13/20 Regular Payroll 04/19/20	016 - 1 016 - 1			Processed Processed	Agenda		19, 2016-Tuesday, April 26,	2016		
₿¥	Regular Payroll 04/19/20	016 - 2			Pending	Date	Time	Event			
Company	<b>*</b>	•		<b>.</b> P	1						
Employees Payrolls Q	06/24/2015 - 1 06/24/2015 - 1 06/24/2015 - 1 06/24/2015 - 1	04/02/2015 04/20/2015 04/20/2015 09/10/2015	04/02/2015 04/20/2015 04/20/2015 09/10/2015	04/02/2015 04/20/2015 04/20/2015 09/10/2015	04/02/2015 04/20/2015 04/20/2015 09/10/2015						
	Published R	eports			An	alysis					
Reports	Check Pressure Seal LE Invoice (S257) (S257) Inactive Employee Repo Inactive Employee Repo Inactive Employee Repo ACA Rule Of Parity Test ACA Rule Of Parity Test ACA Rule Of Parity Test GL Export (S348)	ort 13 (S2731) ort 13 (S2731) ort 13 (S2731) (S2834) (S2834) (S2834)	7) (S1757)		<			Check Date: 12//07 SW Tare: 54562 Safet Tares: 55554 = 2 Safet Tares: 55,411.07 = 242	014-1, Period   18 % 13 %		208/2014 Week #50 Taree: 30.00 = 0.09 % w/ot \$16,386.40 = 73.44 %
		sk Queue mpleted: 0 Unread: 0	Pending: 0								Evolution®

### Header

In the Header at the top of the screen, far left, is the company's logo. The center section displays up to five Announcements/Messages selected by the company. Click the numbers to view one of the five messages.

				Logged in as: Sally   Settings   Logo	out
Evolution®	Remember our offices will be closed on January 1st.		Client	0001 - Fantasy World	Ŧ
Payroll	1 (2)	3 4 5	Company	0001A - Fantasy World	*

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

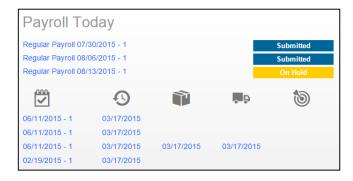


### Menu Bar

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.



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
~ P	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)	

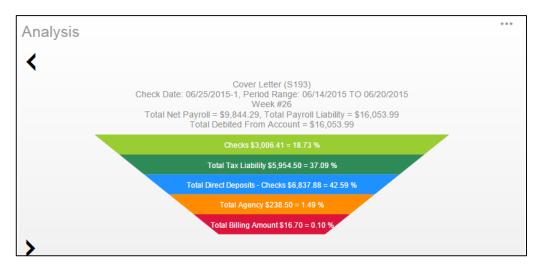
### Analysis

The tile on the bottom right of the Dashboard screen displays a graphical representation of the Cover Letter Report

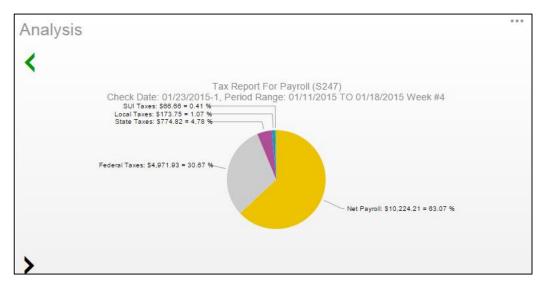
(S193) and Tax Report for Payroll (S247) reports. Users can click the left  $\square$  or right  $\square$  arrow to scroll to the next view.

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 (\$193)	Print Frequency* Every Scheduled Pay	Priority to Print *
Report Print Name * Cover Letter #Name: Cover Letter #Ticket: #Author: Dimitry Shapovalov #Date: #Description: This report is the cover letter	Week Number	Month Duplexing
Options		
-Output ASCII file name	A	dd to existing file
Favorite Hide for Remotes F P Override Report Mail Box	rint with Adjustment Payrolls Only	isplay on Dashboard
Preport Parameters		💌 🔊

**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

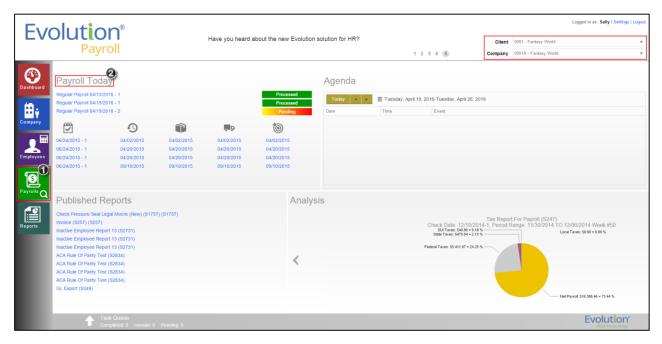
Navigate within Evolution Payroll using buttons, symbols, or by clicking within the fields themselves. When adding information, press the **TAB** key to advance to each of the applicable fields in the order in which they should be completed. When tabbing, the next screen will open when the **TAB** key 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 company-specific information.

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

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



#### The Employee Menu

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



	0,2									
earch for Employee	Export to Excel						P	review		
EE# T	Last Name T	First Name 🛛 🕇	SSN/EIN T	State 🔻	Zip Code 🛛 🕈	Status T	ΤĒ	Goldie Greenburg		
1	Lewis	AI	884-77-3311	NY	10066	Active	^	Last Name:	First Name:	
2	Smith	Bill	996-55-1172	MA	10022	Active		Greenburg	Goldie	
3	Greenburg	Goldie	982-44-3369	NY	10044	Active		SSN/EIN:		
4	Soffer	Harry	778-22-1133	VT	05401	Active		982-44-3369		
5	Pinkmans	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		951 Smith Street		
8	Clark	Willie	996-44-1332	VT	05401	Active		Ithaca, NY 10044		
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				

*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.

Employees + 🖬 🖾	. ©	)								
Personal Labor Defaults	3-Gree	nburg, Goldie	MIL	Last Name *			Current Hire Date *		Original Hire Date	
ACA		Goldie	HLL.	Greenburg		s		<b>=</b>	Chightan Fille Date	
Pay		Address 1 *				Hire Status	Termination Date		Rehire Eligible *	
Federal	\$	951 Smith Street				e S		011	Yes	*
State	ohic	Address 2				Ť	Employment Type *			
Local	grap						N/A			*
Child Support	Demographics	City * Ithaca		State *	Zip Code * 10044		On Call From		On Call To	
Direct Deposit	ã									
Scheduled E/Ds		County		Phone	Extension		Healthcare Coverage *			
Delivery		Email					No ER Paid Ins/Not Eligible			v
Time Off Accrual		Cillan					Dependent Coverage *		Benefit Eligible	
		Birth Date Gender*		Ethnicity *	Tribe	Benefits	No	*		
Employee Portal		02/17/2004 III Female		Black Or African Am +		ene	Group Term Policy			
Notes							GTL Hours		GTL Rate	
Previous Next										

#### **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:

	Last Name 🏾 🕇	First Name	т	SSN/EIN	т	State	T	Zip Code	т	Status	Ŧ	Goldie Greenburg		
1	Lewis	AI		884-77-3311		NY		10066		Active	^	Last Name:	First Name:	
2	Smith	Bill		996-55-1172		MA		10022		Active		Greenburg	Goldie	
3	Greenburg	Goldie		982-44-3369		NY		10044		Active		SSN/EIN:		
4	Soffer	Harry		778-22-1133		VT		05401		Active		982-44-3369		
5	Pinkmans	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		951 Smith Street		
8	Clark	Willie		996-44-1332		VT		05401		Active		Ithaca, NY 10044		
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	-			

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



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

Search for Emp	bloyee Export to Excel					
EE # 🔻 🔻	Last Name 🛛 🔻	First Name 🛛 🔻	SSN/EIN T	State	T Zip Code	▼ Status ▼
4	Soffer	Harry	778-22-1133	VT	Show items with value that:	Active
7	Goodman	Saul	302-66-5889	VT	Is equal to 🔹	Active
8	Clark	Willie	996-44-1332	VT	VT	Active
10	Bigole	Susan	963-88-1122	VT	And 🔻	Active
12	Kirk	Jim	213-64-5663	VT	Is equal to 🔻	Active
13	Ramagopul	Yani	615-46-1065	VT		Active
14	Hamerhill	Bryce	514-05-4105	VT		Active
15	Any	Body	000-00-0000	VT	Filter Clear	Active
16	Golden	Larz	651-96-5106	VT	05401	Active
17	Scott	Bloomenfield	635-21-0651	VT	05401	Active

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:

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

**Sorting** – 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.

EE # 🍸	Zip Code 🛛 🍸	First Name 🖵	Last Name 🔉	State 🔻	Status 🍸
1	10066	AI	Lewis	NY	Active
2	10022	Bill	Smith	MA	Active
3	10044	Goldie	Greenburg	NY	Active
4	05401	Harry	Soffer	VT	Active
5	10011	Jessie	Pinkman	NY	Active
6	88855	Selma	Bichon	MA	Active
7	05401	Saul	Goodman	VT	Active
8	05401	Willie	Clark	VT	Active
9	10012	Walter	White	NY	Active
10	05401	Susan	Bigole	VT	Active
11	11234	Simon	Simon	NY	Active
12	05401	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 the CTRL key + E	Export grid to Excel (this only works in Grid view)
Press ALT + Insert	Insert / add a record (row) into a table (instead of clicking the Add button.)
Press ALT + Delete	Delete record (row) from a table (instead of clicking the Delete button.)
Press the ALT key + the Right Arrow key	Scroll right to next employee record or check line
Press the ALT key + the Left Arrow key	Scroll left to previous employee record or check line

### 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 Dashboard Company Payrols Payrols Reports	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 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	Barks     -       Current Nile Date     Original Nile Date       120202013     Immarkon Date       Termination Date     Reine Eligible       Immarkon Date     Reine Eligible       Immarkon Date     Reine Eligible       Immarkon Date     Reine Eligible       Immarkon Date     Immarkon Date       Immarkon Date     Reine Eligible       Immarkon Date     Immarkon Date       Immarkon Date     Immarkon	Many of the screens in the application are divided into sections. These sections have headings that separate the information pertaining to the sections.
Flyout tabs	Other         Ed. Cable Englighter News         Owne (Jam         News (Jam <th>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.</th>	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 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		Name				Company Code	
		BDazzled Design Ltd.				BDazz1	
Organizational Levels		D.B.A				EIN	
ED Codes						00000000	
States		Address 1				Customer Service Team	
		11 Spring Lane				Customer Service	
		Address 2				Customer Service Representative	
		City	State	Zip Code		Email	
Previous Next		Williston	vt	05495		Jjanson@Bdazz.Com	
		Phone	Fax			Payroll	
						123456789	
		Name				Tax	
		Linda Mills			-	123456789	
	ess	Address 1				Workers' Compensation	
	ddre	7 Spring Lane			-	¥ 123456789	
	IA	Address 2			-	123456789 Workers' Compensation 123456789 123456789 133456780	
	Legal Address				c	<sup>III</sup> 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	n Division
<ul> <li>Northeast Branch</li> <li>Northeast Sales Dept</li> </ul>	Number	No East
Jessie's Team	Description	North Eastern Division
Western Division	Home State	VT
Western Sales Dept	Override EE Rate #	
Gladys' Team	Override Pay Rate	
Central Division	Payroll Bank Account #	302875106
<ul> <li>Central Sales Dept</li> </ul>	Tax Bank Account #	000000000
Gus' Team South Eastern Division	Billing Bank Account #	302875106
✓ Southeast Branch	DD Bank Account #	
<ul> <li>Southeast Sales Dept Walt's Team</li> </ul>		



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

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

### 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.

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

#### **Company - States Screen**

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

D Codes         Massachusetts         MA         12345729         1000000000000000000000000000000000000	
Not         Not <th></th>	
Next         Nate         Nate <th< td=""><td>Ra</td></th<>	Ra
New York         NW         NW         New York City Non-Res.           Pennsylvania         PA	
Permay/vania         PA Vermont         VT         State Tax Exempt         MCT Mobility Tax           1         1 - 5 of 5 items         1	0.0
Vermont         VT         sul beingt         1	0.0
Image: Next         Image: Subscript of Strems         Subscript of Strems         Rate           Nv:Re-employment         0.00075         NV-SUI         0.04025	3 of 3 item
Tax. Name         Rate           NY-Re-employment         0.00075           NY-SUI         0.04025	
NY-SUI 0.04025	
1 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.

### Security Settings

Security settings must be set to enable Dynamic field editing.

- 1. Go to the Admin Security Users.
- 2. Select the user from the list.
- 3. Click the **Details** tab.
- 4. Click the **User Rights** button.
- 5. Click the Functions button.
- 6. Enable the following rights:
  - Ability to update as of another date
  - Ability to change tax exemptions
- 7. Click Save.

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.

stem templates: SB templates:	-	Save
	^	🗙 Cancel
Ability to access VMR (Enabled) [FROM GROUP]		· · · · · · · ·
Ability to adjust shortfalls (Enabled) [FROM GROUP]		
Ability to adjust taxes (Enabled) [FROM GROUP]		🗮 Undo
Ability to administrate queue (Enabled) [FROM GROUP]		
Ability to approve benefits enrollment (Enabled) [FROM GROUP]		
Ability to change quarter lock date (Enabled) [FROM GROUP]		😹 Show top
Ability to change tax exemptions (Enabled) [FROM GROUP]		
🕂 Ability to copy payroll (Enabled) [FROM GROUP]		Show on top
🕂 Ability to create and edit EvoX map files (Enabled) [FROM GROUP]		📱 Menus
🕂 Ability to create backdated payrolls (Enabled) [FROM GROUP]		De
🕂 Ability to create Manual ACH (Enabled) [FROM GROUP]		Screens
🕂 Ability to define benefits enrollment (Enabled) [FROM GROUP]		🖶 Functions
🕂 Ability to delete client (Enabled) [FROM GROUP]		
🕂 Ability to Delete Processed Payrolls (Enabled) [FROM GROUP]		
🕂 Ability to delete VMR Mail Boxes (Enabled) [FROM GROUP]		Devel Disk
Ability to delete/alternate processed tax returns (Enabled) [FROM GROUP]		AS Reset Right
🕂 Ability to directly process payrolls (Enabled) [FROM GROUP]		
🕂 Ability to edit data dictionary (Enabled) [FROM GROUP]		
🕂 Ability to edit payroll bank account register (Enabled) [FROM GROUP]		
🕂 Ability to edit RW library (Enabled) [FROM GROUP]		
🕂 Ability to export using EvoX (Enabled) [FROM GROUP]		
🕂 Ability to globally update pay rates (Enabled) [FROM GROUP]		
🕂 Ability to import using EvoX (Enabled) [FROM GROUP]		
🕂 Ability to login into EvoClock from Evolution (Enabled) [FROM GROUP]		
🕂 Ability to manually correct OASDI & Medicare (Enabled) [FROM GROUP]		
🕂 Ability to mark payrolls as completed (Enabled) [FROM GROUP]		
🕂 Ability to pay liabilities w/o funds (Enabled) [FROM GROUP]		
🕂 Ability to pre-process by batch (Enabled) [FROM GROUP]		
🕂 Ability to print unprocessed manual checks (Enabled) [FROM GROUP]		
Ability to put a Client On or Off Read Only Mode (Enabled) [FROM USER]		
+ Ability to reprint payroll reports (Enabled) [FROM GROUP]		
+ Ability to reprint processed misc checks (Enabled) [FROM GROUP]		
Ability to reprint processed payroll checks (Enabled) [FROM GROUP]		
Ability to rollback tax payments (Enabled) [FROM GROUP]		
Ability to see and edit EE HR documents (Enabled) [FROM GROUP]		
Ability to see hidden tables (Enabled) (FROM GROUP)		
·····✦ Ability to set effective period for locals (Enabled) (FROM GROUP) ·····✦ Ability to submit payroll (Enabled) (FROM GROUP)		
• · · · · · · ·		
·····✦ Ability to undelete records (Enabled) [FROM GROUP] ·····✦ Ability to unlock a company with a 'high'' credit hold (Enabled) [FROM GROUP]		
Ability to unlock a company with a inigni credit hold (Enabled) (FROM GROUP)		
Adility to unmask sensitive data on reports (Enabled) [FROM GROUP] 🖶 Ability to unvoid voided check (Enabled) [FROM GROUP]		
Ability to update ACA fields as of another date (Enabled) [FROM USER]		
Ability to update ALA fields as of another date (Enabled) [FROM GROUP]		
ADMINY TO Update as of another date (Enabled) [FROM GROUP]		
T Ability to use online client (chabled) (chowlid hour)	~	



- 👿	<u>s</u> o															
arch for Em	ployee Export to Excel	]											Preview	v		
E# T	Last Name	T First	Name	т	SSN/EIN	T	State	T	Zip Code	T	Status	T	Go	oldie Greenburg		
1	Lewis		AI		884-77-3311		NY		10066		Active	<u>^</u>	Las	at Namo:	First Name:	
2	Smith		Bill		996-55-1172		MA		10022		Active		Gr	eenburg	Goldie	
3	Greenburg	(	Soldie		982-44-3369		NY		10044		Active			N/EIN:		
4	Soffer		Harry		778-22-1133		VT		05401		Active			2-44-3369		
5	Pinkmans	J	essie		885-66-9974		NY		10011		Active		Sta	tive		
6	Bichon	5	Selma		998-84-4112		MA		88855		Active			dress:		
7	Goodman		Saul		302-66-5889		VT		05401		Active		95	1 Smith Street		
8	Clark	1	Willie		996-44-1332		VT		05401		Active		lth	aca, NY 10044		
9	White	N 1	Valter		000-33-1122		NY		10012		Active					
10	Bigole	5	Susan		963-88-1122		VT		05401		Active					
11	Simon	5	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	E	Bryce		514-05-4105		VT		05451		Active					
15	Any		Body		000-00-0000		VT		05602		Active					

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

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

Employees <b>+                                    </b>	Q	)								
Personal Labor Defaults ACA	3-Gree	nburg, Goldie • • SSN * • EIN * • 922443366 First Name *	ML	Last Name *			Current Hire Date *		Original Hire Date	
Pay Federal		Goldle Address 1 * 951 Smith Street		Greenburg		Hire Status	02/17/2003 Termination Date		Rehire Eligible *	Ш
State	aphics	Address 2				Hire	Employment Type *	=	Yes	*
Child Support Direct Deposit	Demographics	City * Ithaca		State * NY v	Zip Code * 10044		On Call From		On Call To	
Scheduled E/Ds Delivery		County Email		Phone	Extension		Healthcare Coverage * No ER Paid Ins/Not Eligible			Ŧ
Time Off Accrual Employee Portal		Birth Date Gender* 02/17/2004 III Female	×	Ethnicity * Black Or African Am +	Tribe	efits	Dependent Coverage * No Group Term Policy	٣	Benefit Eligible	
Notes							GTL Hours		GTL Rate	
Previous Next										

**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.

Evo	oluti	on®	Ha	ppy Independence Day						as: Sally   Settings   Logout
	Pa	yroll	114	pp maapanaanaa bay	o on a				WEB1150 - D&L Services (HCM)	*
	14	yron					1 2 (3) 4 5	Company	WEB1150 - D&L Services (HCM)	*
Dashboard	Employ	ees 🔍 🕓								
₩¥	Search for Employ							Preview		
Company	EE # T	Last Name T	First Name 🛛 🕇	SSNEIN T	State T	Zip Code 🛛 🔻	Status T	Goldie Greenb	urg	3
	1	Lewis	AI	884-77-3311	NY	10066	Active	Last Name:	First Name:	I
	2	Smith	Bill	996-55-1172	MA	10022	Active	Greenburg	Goldie	I
Employees	3	Greenburg	Goldie	982-44-3369	NY	10044	Active	SSN/EIN:		I
	4	Soffer	Harry	778-22-1133	VT	05401	Active	982-44-3369		I
	5	Pinkmans	Jessie	885-66-9974	NY	10011	Active	Status: Active		I
Payrolls Q	6	Bichon	Selma	998-84-4112	MA	88855	Active	Address:		I
Payrolls O	7	Goodman	Saul	302-66-5889	VT	05401	Active	951 Smith Stree		I
	8	Clark	Wille	996-44-1332	VT	05401	Active	Ithaca, NY 1004	14	I
	9	White	Walter	000-33-1122	NY	10012	Active			I
	10	Bigole	Susan	963-88-1122	VT	05401	Active			I
Reports	11	Simon	Simon	627-13-3647	NY	11234	Active			I
	12	Kirk	Jim	213-64-5663	VT	05602	Active			I
	13	Ramagopul	Yani	615-46-1065	VT	05401	Active			I
	14	Hamerhill	Bryce	514-05-4105	VT	05451	Active			I
	15	Any	Body	000-00-0000	VT	05602	Active _			I
	H A Page	1 of 2 (> (H)					1 - 15 of 17 items			
		Task Queue Completed 0 Unread: 0							F	volution

- 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 the security function "Apply EE Quick Entry in WebClient" is disabled.

Add Employ	vee ×
Ô	Let's start by checking the ID of the EE you want to add to see if it already exists in the system
<b>S</b>	Add Method 🐵 Basic 💿 Advanced
	@SSN @EIN 123-45-6789
	Cheok ID Cancel

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

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



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

### **Employees - Basics screen**

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

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



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

- 1. Complete the required and applicable fields on the <u>Employee Basics screen</u>. 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 Employ	-			
Personal		●SSN * ◎EIN *	Employee Type *	EE Code *	Time Clock #		Status *		
Labor Defaults		456-13-2465	W-2 *	15			Active		*
ACA		First Name *	M.I.	Last Name *			Current Hire Date *	Original Hire Date	
						22		11	1
Pay		Address 1 *				Statu	Termination Date	Rehire Eligible *	
Federal	s					Hire S		Yes	
State	hic	Address 2				ī			
Local	grag						NA		
Child Support	Demographics	City *		State *	Zip Code *		On Call From	On Call To	
Direct Deposit	ã								1
-		County		Phone	Extension		Healthcare Coverage *		
Scheduled E/Ds		Email					No ER Paid Ins/Not Eligible		
Delivery		Email					Dependent Coverage *	Benefit Eligible	
Time Off Accrual		Birth Date	Gender *	Ethnicity *	Tribe	42		*	1
Employee Portal		Diriti Date		Not Applicable v	The	nefits	Group Term Policy		
Notes						B	croup rent Policy		
INDIES							GTL Hours	GTL Rate	
							one man	GIERale	

- 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, Al 🔹						1 - Lewis, Al
	Worker's Compensation			Division	Branch	Department	Team
	- Select Worker's Compensation -	Ψ		Western Division	Western Branch	Western Sales Dept	Gladys' Team
_	dor			North Eastern Division			
atio	- Select Job -	*		<ul> <li>Northeast Branch</li> </ul>			
Ĕ	Union			A Northeast Sales Dept			
Salary Information	- Select Union -	Ŧ	æ	Jessie's Team			
Z a_	Pay Group		Level	<ul> <li>Western Division</li> </ul>			
Sali	- Select Pay Group -	*	nal	<ul> <li>Western Branch</li> </ul>			
	General Ledger Tag		Organizational	<ul> <li>Western Sales Dept</li> </ul>			
			aniz	Gladys' Team			
			Drg	Central Division     Central Branch			
	Tipped Directly * No		Ŭ	Central Sales Dept			
		٣		Gus' Team			
	Ignore FICA on Cleanup Payroll *			<ul> <li>South Eastern Division</li> </ul>			
	No	٣		<ul> <li>Southeast Branch</li> </ul>			
	Combine Returns On This EE *			<ul> <li>Southeast Sales Dept</li> </ul>			
-	Yes	۳		Walt's Team			
Reporting	Generate Second Check *						
oda	No	*					
œ	Deductions To Take First *						
	Child Support, Garnishment	*					
	Second Check Template						
	- Select Second Check Template -	*					
	Include In Analytics *						
	Yes	*					

- 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 <u>Employee – Employee – screen</u>.

H X	1-Lewis	s, Al 🔹			
Personal		ACA Status * Part Time	*	ACA Standard Hours	
Labor Defaults		ACA Coverage	÷	Applicable Section 4980H	
ACA		- Select ACA Coverage -	٠	- Select Applicable Section -	
Pay Federal	ACA	ACA Benefit - Select ACA Benefit -	*	Lowest Cost Benefit - Select Lowest Cost - *	
State		ACA Policy Origin B. Employer-Sponsored Coverage		Ŧ	
Local Child Support		Benefits Eligible * No			
Direct Deposit		140	•		
Scheduled E/Ds Delivery					
Time Off Accrual					
Employee Portal Notes					
Notes					
evious Next					

### **Employees - Pay screen**

The <u>Employees – Pay screen</u> 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.

Personal		Pay Frequency * Weekly	• 8	Raise Date	田	Raise Rate		4	Add	Delete					
Labor Defaults		Salary Amount	date	Raise Amount		Pay Frequency *				Primary *	T Ra	te Numi	ber*- T	Rate Amount *	т
ACA		\$2,500.00	d Upd	2		Weekly *				Yes			1	\$0.00	
Pay		Std Hours	anne	Raise %					Jobs	Number			Code		
Shifts		40.00	Pla						- Se	elect Jobs Number -	٠	윧	- Select Code -	*	
Piecework		Average Hours		New Hire Report *						Grade Position		Col	Description		
Federal	5	0.00		Completed		*				elect Pay Grade Positio	n - 🔻	Workers Comp			
State	nati	Rate Number		FLSA Exempt *			Overrides			Grade elect Pay Grade -		Vort	State		
	for	1		No			arrid		- Se	siect Pay Grade -	•	~			
Local	alary Information	Rate Amount * \$0.00	5	Position			00			Division	Branch		Department	Team	
Child Support	Sala		Ositio	- Select Position -	-	*				Western Division	Western Br	anch	Western Sales Dr	Gladys' Team	
Direct Deposit		Wage Limit	đ	Effective Date		19 on File *				<ul> <li>North Eastern D</li> </ul>	ivision.				
Scheduled E/Ds		Limit Frequency		1	m	Yes *				<ul> <li>Northeast Bra</li> </ul>					
Delivery		Annual	*	High Comp		Corp Officer *				<ul> <li>Northeast !</li> </ul>	Sales Dept				
Time Off Accrual		Annualized		No	*	No *			ø	Jessie's					
Employee Portal		Amanzea							Level	<ul> <li>Western Division</li> </ul>					
Notes		Calc Annual							7	✓ Western Bran	ich				
Notes		\$130,000.00													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 section</u> 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.

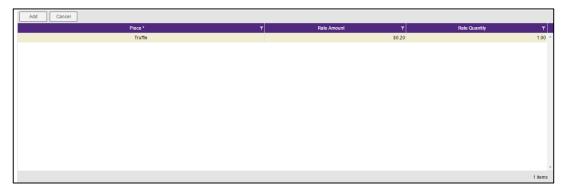
Shift' T	Shift Rate	T	Shit %	T	Detault	T
Extra Shift	\$25.000		1.30%		No	
Shitt	\$546.000		65.00%		No	
						2 items

- 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.
- 2. Press the **TAB** key or click the **Next** button when you complete entering information on this screen. **Result:** The Employees Piecework screen opens.

#### Piecework Sub-menu

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

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





- 1. 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 * Distribute Both		Add Delete						
	Auto Labor Distribution E/D Group		Percentage *	Organizational Level	्र	Job 🔺	<u>,</u>	Workers Comp	<b>.</b>
Settings	401k Match v		90	Div1/NY Branch/Department Name Field/null				8810	*
Sett			10	Div1/NY Branch/Department Name Field/null		job #1		8810	
		Allocation	Table 4000						Ŧ
			Total: 100%						
								2	items

- 1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the Employees Pay screen ALD section 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.

	Marital Status *	Exemptions * 0			Type * W-2	v	Residential State * NY	*		Distribution Code	
E	Tax Type * None v	Value		£	First Name				1099R	Tax Amt Determined * Total * No * No	Ŧ
Taxation	FUI Rate Credit		Eorm	W2 Form	Middle Name				10	Pension Plan * None	*
	Override Fed Minimum Wage		CIW	Ž Ž	Last Name						
	Federal Tax Status *			1	Name Suffix						
Statuses	OASDI Exempt *		Ŧ		Deceased *		Statutory EE *				
Tax St	No Medicare Exempt *		* 000	sgn	No	*	No Deferred Comp *	۳			
Ш	No		* Cott	S	No ····································	*	No	•			
ses	FULExempt* No		*	3		Ŧ					
Statuses	OASDI Exempt*		Ŧ								
ER Tax	Medicare Exempt * 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																	Edit E	ffective Perio
	State * v	T	SUI*		т	SDI	٦	7	H	iome *	T			Marital Status *			7	Tax Exemptions	
4	NY		NY			NY				Yes			\$	Single/Head of Housel	nold			0	
	County				Method					State Tax				SDI Exempt			Тах Туре		
				_	Take None				S	Include		Ŧ	s	Include			None	*	
	Salary Type			atior	To State				tatt	SDI Exempt			-	SUI Exempt		ides	Minimum Wa	ge	
	N/A			Droc	- Select To State -				ax S	Include		*	ax S	Include		erric			
	Calc SUI Taxable	1099 Wages		Recip					-	SUI Exempt			ERT			õ			
	Work At Home	Tax	Code						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.

State         T         SUI         T         SDI         T         Home*         T         Mathal Status*         T         Tax Exemptions           NY         NY         NY         Ves         SingleHead of Household         0           Contry         Method         State Tax         SDE xempt         Tax Exemptions         0           Salary Type         Tax Exemptions         SDE xempt         SDE xempt         Include         SDE xempt         None           Calc SUI Taxable 1009 Wages         - Selec To State         SDE xempt         SUE xempt         SUE xempt         SUE xempt	d Delete										Edit Eff	fective Period
County     Method     State Tax     SDE kempt     Tax Type       Include     Take None     Include     Include     Include     Mone       Salary Type     To State     SDE kempt     SUE kempt     SUE kempt     SUE kempt       N/A     Operation     State     Include     Include     Include     Include	State * •	T SUI*	T SDI	I T		Home *	T	Marital Status *		T Ta	ax Exemptions	
Take None     Take None     Include     Include </th <th>NY</th> <th>NY</th> <th>N</th> <th>۹Y</th> <th></th> <th>Yes</th> <th></th> <th>Single/Head of Househo</th> <th>ld</th> <th></th> <th>0</th> <th></th>	NY	NY	N	۹Y		Yes		Single/Head of Househo	ld		0	
Salary Type up To State State State Minimum Wage Include Include Minimum Wage	County		Method			State Tax		SDI Exempt		Тах Туре		
Salary Type     OF     To State     If     SDE Exempt     If     SUE Exempt     SUE Exempt       NVA     V     -select To State - v     X     Include     v     Include     v			_ Take None		• v	Include		on Include	*	None	•	
NA • e • · · · · · · · · · · · · · · · ·	Salary Type		To State		statu	SDI Exempt		2	des	Minimum Wage	9	
	N/A	*	- Select To State -	*					-			
	Calc SUI Taxable 1	Taxable 1099 Wages	Seci					EX	0			
Work At Home Tax Code Include	Work At Home	e Tax Code				Include		ш				
No v	No	<b>v</b>										

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.
- Click the Next button
   Result: The Employees Child Support screen opens.

## Employees - Child Support screen

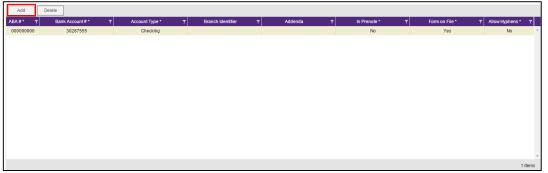
Add	Delete	•												
Priority *	T	Case #	T	State Origin	T	Medical Eligible *	T	Agency 🔻	Arrears *	T	FIPS	T	Custom Field	T
1		111223365		Vt		Not Applicable		Office Of Child Support	No					*
2		22233666		NY		Not Applicable		Office Of Child Support	No					
														-
														2 items

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.



 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.
- Press the TAB key or click the Next button.
   Result: The Employees Scheduled E/Ds screen opens.

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

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

1. Go to the Client – E/Ds – Scheduled Defaults screen.

👫 Browse 🔚 🛅 Details 🛛 🙆 Taxation 🛛 🕵 Limits 🕅	🚡 Pension & Benefits 🛛 🛅 Scheduled	Defaults 🔒 State Taxation 🕼 Local Taxation
Scheduled Defaults  Yes  No  Auto Enlist on New Hire	Block 1st Week of Month Yes No Block 2nd Week of Month	Maximum Average Amount E/D Group Maximum Average Hours E/D Group
© Yes C No	C Yes @ No	Max Avg Hourly Wage Rate
Calculation Method*	Block 3rd Week of Month C Yes   No	Threshold E/D Group*
500 Frequency*	Block 4th Week of Month*	401k Wages  Threshold Amount
Every Pay  Month # Which Payrols	Block 5th Week of Month* C Yes I No	Use Pension Limit
None  All Default Agency Blue Cross Blue Shield of Vermont	C Yes C No	Funding code
Blue Cross Blue Shield of Vermont	C Yes ( No	
Priority	Always Pay/Deduct Current Payroll	

### 2. Select Yes in the **Auto Enlist on New Hire** field.

This setting only applies to new employees being created (not existing employees or re-hired employees). Note that the setting for the auto-creation of Scheduled E/Ds for new hires is at the Client level, as this is where Scheduled E/Ds are set up.

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

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

Code D1 Priority Calculate Usi Method de Calcul	Direct Deposit - Partial 1 hedule Limits Thresholds	Description Direct Deposit - P Calculation Link	Fixed	Always Pay/Deduct	25		02/17/2015		
D1 Priority Calculate Usi Method de Calcula	ng	Direct Deposit - P Calculation Link	artial 1	Always Pay/Deduct					
Priority Calculate Usi Method de Calcul	ng	Calculation Link	artial 1				Deductions to Zero		
Calculate Us Method de Calcul				No		Ŧ	No		٣
Method de Calcul				Deduct Whole Check			Take Home Pay		
Method de Calcul		- Select E/D Group	)- <del>v</del>	No		Ŧ			
Calcul	fined for this E/D			Send To					
			Ŧ	Direct Deposit					٣
	ation Method	Amount S		Direct Deposit	Account				
Fixed		25.00		30287555				٣	+
E/D G		Amount %		Reference to D	isplay on Check				
- Sel	ect E/D Group - 🔻								
D3	Direct Deposit - Net		None				02/17/2015		
D4	Child Support		Fixed		50		03/01/2015		5 i
Code * 🔺	T Description *	T							
D1	, Becompaction		Calculation Method *	T Amour	nts 🔻	Amount %	▼ Starting *	T End	lina
	Direct Deposit - Partial 1		Calculation Method *	▼ Amour		Amount %	▼ Starting * 02/17/2015	▼ End	ling
D3	Direct Deposit - Partial 1 Direct Deposit - Net		Calculation Method * Fixed None		nt \$ T 25	Amount %	02/17/2015	▼ End	ling
D3 D4	Direct Deposit - Partial 1 Direct Deposit - Net Child Support		Fixed	2		Amount %		▼ End	ling
	Direct Deposit - Net		Fixed None	2	25	Amount %	02/17/2015 02/17/2015	▼ End	ling

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.

resholds						
1	Description		Always Pay/Deduct		Deductions to Zero	
Ŧ	Direct Deposit - Partial 1		No	*	No	*
	Calculation Link		Deduct Whole Check		Take Home Pay	
		*	No	*		
			Send To			
			Direct Deposit			*
	Amount \$		Direct Deposit Account			
*	25.00		30287555			 +
	Amount %		Reference to Display on Check			
*						
	•	Description     Direct Deposit - Partial 1     Calculation Link     Amount 5     25:00     Amount %		Description     Direct Deposit - Partial 1     Deduct While Check     Calculation Link     Calculation Link     Calculation Link     V     Calculation Link     v     Amount 5     2 5 00     Amount 5     Reference to Display on Check	Description     Alkays PayDeauct     Direct Deposit - Partial 1     No     Calculation Link     Calculation Link     No     Calculation Link     No     Send To     Direct Deposit     Answrt 5     Direct Deposit	

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



Always	Pay/Deduct	Deductions to Zero	
No		No	Ŧ
Deduct	Whole Check	Take Home Pay	
No			
Send T	0		
Agen	су		•
	Agency Name		
	Health Insurance Admin	•	
	Reference to Display on Check		

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

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

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

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

- <u>Direct Deposit</u> when Direct Deposit is selected in the Send To field, a dropdown field opens below, where the user selects an account number, or clicks the **plus** sign to add a new account number.
- 2. Click the **Schedule** tab when this screen is complete. Complete all of the applicable fields.

4	D1		Direct De	eposit - Partial 1		Fixed	25		02/17/2015		
Basic	Sche	dule	Limits	Thresholds							
	Starting					Payrolls Affected			Block Based On		
	02/17/2015				ts	All	*	Ks.	Custom Defined	Ŧ	
Effectiv	Ending				ffec	Frequency		Bloc	Weeks blocked		
Ef					A	Every Pay	*		0 1 0 2 0 3 0 4 0 5		

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



ED Group		ED Group	Amount ED Group	
- Select E/D Group -	*	- Select E/D Group -	- Select E/D Group -	,
Pay Period %		Pay Period %	Hours EO Group	
E			E - Select E/D Group -	
Pay Period 5		Pay Period \$	Hourly Rate	
		nju	Man	
		2 EE Amual S		
		Client Annual S		

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

Basic	Schedule Limits Thresholds				
	Action			E/D Group	
	None	*	sp	- Select E/D Group -	*
	Remaining		Thresholds	Amount \$	
Targets	Balance Taken		Thre	Use Pension Limit	
	Amount \$				

- 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				6			
	City *	State *		Zip Code *	res	City	State	Zip Code
	Burlington	OH	*	12234	Add			•
Primary Address	County		Country Burlington		Payroll Override Address	County		
1 A	Email				õ	Phone 1	Extension	Print Voucher
ima	Scookingham@lsystemsllc.Com				yroll			Yes v
đ	Phone 1			Extension	Ра	Phone 2	Extension	
	(093) 222-2222							
	Phone 2			Extension		Phone 3	Extension	
	Phone 3			Extension				
	Payroll Check Mail Box		EE Electron	ic Return Mail Box		Password for VIV	/IR Deliveries	
œ	Tax Returns	•	Tax Return:	s	Ψ.			
VMR	EE Report Mail Box		2nd EE Rep	ort 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.
- 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.

Add	Delete											Overrio	les					
Active *	▼ Type*	T	Balance *	T	Used * 🔻 🔻	Accrued *	т	Effective Date	٣	Accrual Max	T	Rate	: 1	Ro	llover Type	T	Rollover Da	le 🔻
Yes	Time Off Acrual		30.00		20.00	50.00												1
	Accrual Date +	T	Accrued		Accrued Capped	Used		1	lote			Check Date		Run #	Che	ck#		
	07/21/2015		50.00			0.00		Man	ual Adj:								*	
	07/21/2015		0.00			20.00		Man	ual Adj:									
Recent History																2	items	
																2	items	

- Click the Add button to add a new Time off Accrual plan as needed, or click the Delete button to delete a TOA. For detailed information about the fields on this screen, refer to the 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 pres adjustment. Adjustment reason (28 char max):	as Cancel if 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     Verifiancess     Pull Access     Pull Access     Pull Access     Poll Access & Tom Of     Poll Access & Tom Access &	User Name Filex     Password     Email filex@evolutiorpayroll.com     Benefiles Email ritks@evolutiorpayroll.com       Name     Type     Aslgred       Name     Year     Aslgred       Client Services     Personal Info     Image: Service Services       Training & Docume     Personal Info     Image: Service Service Services	Name         Ype         Assigned         Assigned         Its:/// mail/index/payroll.com         Benefits Email/index/payroll.com           Name         Type         Assigned         Its:// mail/index/payroll.com         Its:// mail/index/payroll.com         Its:// mail/index/payroll.com           ClientServices         Time Off         Its:// mail/index/payroll.com         Its:// mail/index/payroll.com         Its:// mail/index/payroll.com           Taking & Docume         Personal Info         Its:// mail/index/payroll.com         Its:// mail/index/payroll.com         Its:// mail/index/payroll.com	EE Info *	Time Off *	Benefits *		Form on File		Format
User Name     Password     Email     Benafits Email       Rize     Image: Second minipage of the second mini	User Name     Password     Email     Beenfite Email       Rice     Image: State S	Unter Name     Password     Email     Beenefits Email       Risz     Image: Comparison of the Second of the S		<ul> <li>Full Access</li> </ul>	Full Access	*	S <sup>D</sup> No	*	Both
Name         Type         Assigned           Client Services         Personal Info         Image: Client Services           Client_Services         Time Off         Image: Client Services	Ubblick Account         Type         Assigned           Neme         Type         Assigned           Client Services         Personal Info         Image: Client Services           Client Services         Time Off         Image: Client Services           Training & Docume         Personal Info         Image: Client Services	Ditableck Account       Name     Type     Assigned       Client Services     Personal Info     Image: Client Services       Client Services     Time Off     Image: Client Services       Taining & Docume     Personal Info     Image: Client Services	User Name	Password			Email Email		
Name         Type         Ansigned           Client Sarvices         Personal Info         Ø           Client_Sarvices         Trans Off         Ø           Training & Docume         Personal Info         Image: Client Sarvices	Name         Type         Axsigned           Client Sarvices         Personal Info         Ø           Client_Services         Time Off         Ø           Training & Docume         Personal Info         I	Name     Type     Assigned       Client Services     Personal Info     Ø       Client_Services     Time Off     Ø       Training & Docume     Personal Info     Image: Client Services	Rlax			0	on rflax@evolutionpayroll.com		rflax@evolutionpayroll.com
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Training & Docume     Personal Info       Training & Docume     Time Off	Training & Backmint Training in Backmint Training	The second	Client_Services	Time Off	2				
Training_&_Docume Time Off	Training_&_Docume Time Off	Training_6_Docume Time Off	Training & Docume	Personal Info					
			Training_&_Docume	Time Off					
Training & Docume Personal Info									

### **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**

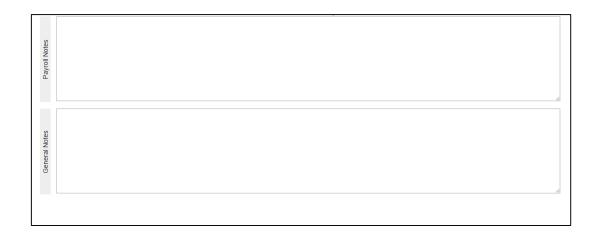
### **Payroll Notes**

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	d.	Chec	k Details				
E Code - Name 3-Ron Flax 13 Spring Lane Williston, PA 1: Federal Taxable Wages OASDI Taxable Wages Medicare Taxable Wages Gross Amount	(3	7.41)		DEDUCTIONS Health Insurance Child Support Dental Insurance Deductions SubTotal:	\$0.00         OASD           \$100.00         Medica           \$28.59         LOCAI           \$128.59         LOCAI	nre Tax L TAXES: stown Boro LST	(\$1.77) (\$0.41) \$1.00 (\$1.18)
Check Settings	Federal	State	SUI	Local	Options	Actions	
Add	Delete					Calculat	te
E/D Code * - 1	Description	▼ Hrs/Pcs	▼ Pay Rate	T Amount T	Rate #		
D02	Health Insurance			\$0.00		Send To Pa	ayroll
D05	Child Support			\$100.00			
D17	Dental Insurance			\$28.59			

- 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 Exempti Single	ions 9 Jes	Fed Type None  OASDI Medicare EIC Backup Withholding				Calculate Send To Payroll
EE EIC						

- 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.

Check Settings							
Earnings/Deduction	is I	Federal	State	SUI	Local	Options	Actions
Ne	State w York nsylvania	Abr NY PA 2 items	Settings for: New Marital Status Single/Head of House Tax at Supplement Additional Ta O SUI SUI SUI SUI SUI	Exemptions	State Type September 2010 None	Y	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 Amour sep juine o	r: State (PA) PA-EE SU t	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.



Check \$	Settings							
Earning	s/Deductions	Federal	5	State	SUI	Local	Options	Actions
OVR	New York City New York	Local Name  County-Abbottstown Boro LS Non-Res. Do Not Use-New Y Citly ResNew York Citly Rir MCT-MCT Mobility Tax	ork C	Settings for: Block this Amount Sep	Adams County-Abbo Local Tax	ttstown Boro LST		Calculate Send To Payroll
			4 nems					

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 Ch	neck					Calculate
Update Scheduled I	E/D Balance					Send To Payroll
Update Year to Date T	otals					
Update Tax & Deduction	on Shortages					
Lock Calculations for t	his 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.

Send this Che	ck to Payroll		Choose a Payroll for this check	×
BDazzled Des	ign Ltd.		07/02/2014	
EE	Name	Net Amount	05/18/2015	Save/Return
3	Ron, Flax 13 Spring Lane	\$500.00	₿ 05/24/2015	
	Williston, PA 12345		Batch 2 - Weekly - 01/01/1900 to 01/01/1900	<b></b>
		_	New Batch	
Options set fo	or this Check		06/01/2015	
Manual Check #			07/14/2015	
Updates:		,		7
	Year To Date Totals		07/15/2015	
Tau Calaulatiana			08/03/2015	Go To Payroll
Tax Calculations	are not locked in. 🖬		08/05/2015	
	Change Options		Now Pauroli	

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** sutton in the header.

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

- <u>Change Date</u> date/s any changes were made this is the default sorting order.
- Operation performed
- Field changed



- Old Value
- <u>New Value</u>, and
- <u>User</u> who made the change.

Rec			_	(	EE (nbr = 2)									
All	Personal	Labor Defaults	ACA	Pay	Federal	State	Local	Child Support	Direct Deposit	Scheduled E/Ds	Delivery	Employee Portal	Notes	
Change D	ate 🔻	T Operatio	on	y F	ield	Ţ	Old Value		T Nev	v Value	Ţ	User		
04/04/201	6 16:26:21 PM	Update		A	CA_SUS		1		P			Unknown Use	r [267]	
04/03/201	6 16:26:18 PM	Update		A	CA_SUS		P		1			Unknown Use	r [267]	
02/24/2010	6 16:35:21 PM	Update		С	O_JONBR				8			Unknown Use	r [244]	
02/24/2010	6 16:35:20 PM	Update		С	URRETERMIN	ATION			2/4/2	2016		TJ Offline [24	4]	
02/17/2010	6 15:31:56 PM	Update		С	O_BRH_NBR				2			Unknown Use	r [267]	
02/17/2010	6 15:31:56 PM	Update		С	O_DIVN NBR				1			Unknown Use	r [267]	
02/17/201	6 15:31:56 PM	Update		С	O_DEPARTM	ENT_NBR			1			Unknown Use	r [276]	
02/17/201	6 15:31:56 PM	Update		С	O_DIVISION_I	NBR			1			Unknown Use	r [276]	
02/17/201	6 15:31:56 PM	Update		С	O_TEAM_NB	R			3			Unknown Use	r [276]	
02/17/201	6 15:31:56 PM	Update		С	O_BRANCH_N	NBR			2			Unknown Use	r [276]	
12/17/2011	6 15:31:56 PM	Undate		0		ENT NRR			1			Linknown Liea	r (276)	

**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.

# Effective Dating Dynamic Fields

Dynamic fields are dependent upon the dates they were entered or changed. Effective dating enables service bureaus and their clients to edit and audit changes to dynamic fields in Evolution Payroll.

# Security Settings

Security settings must be set to enable Dynamic field editing.

- Go to the Admin Security Users.
- 2. Select the user from the list.
- 3. Click the **Details** tab.
- 4. Click the **User Rights** button.
- 5. Click the Functions button.
- 6. Enable the following rights:
  - Ability to update as of another date
  - Ability to change tax exemptions
- 7. Click Save.



Fields that can be effective dated have

labels displayed as a hyperlink – **Example** <u>FirstName</u>\*, which can be clicked to view the dates any changes to that field became effective.

First Name *	<u>M.I.</u>	Last Name *
Lisa	L	Chen



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

Add Delete	Begin Effective Date 03/29/2016	End Effective Date	First Name * Lisa		Last Name * Chen		M.I.	
Begin Effective Date	Er	nd Effective Date		First Name		Last Name		M.I.
01/01/1900	03	3/28/2016		Lisa		Chen		
03/29/2016	12	2/30/9999		Lisa		Chen		L

## Editing information

To edit dynamic fields,

Personal	Pay Frequency * Weekly	-	Raise Date	00	Raise Rate			Add	D	elete						Edit Effecti	ve Period(s)	
Labor Defaults	Salary Amount	date	Raise Amount		Pay Frequency *				Prim	iary *	٣		Rate Nu	mber *	т	Rate Amount *	т	
ACA	\$1,500.00	5	Pcaise Amount		Weekly	*		4	2	Yes				1		\$0.00	^	
Pay Pay	Std Hours	Due	Raise %					Jo	bs Numbe	H				Code				
Shifts		E.						-1	Select Job	s Number -			8	- Select C	ode -			
Piecework	Average Hours							Pa	y Grade P	osition			Con	Descriptio	n			
Federal	0.00		New Hire Report * Completed *					-1	Select Pay	Grade Post	tion -	- + 2						
2	Rate Number						Se		y Grade				fork	State				
State	1		FLSA Exempt *				PE	-1	Select Pay Grade -      *				5					
Local	Rate Amount *					*	ose		Divisio			ranch		Departm		Team		
Child Support	\$0.00	Lion	Position							BDazzled Design		BDazzled Design			ed Design	BDazzled Design		
Direct Deposit	Wage Limit	ISO	- Select Position -			*			61/16	mad pasign		DUMUTED	Cerigi	50,78423	eorseargin	position peakly		
Scheduled E/Ds			Effective Date		19 on File *			and	BDazzled Design Retail Division									
Delivery	Limit Frequency						Yes	٠		1	BDazzled Design Retail - Williston							
	Annual *		High Comp		Corp Officer *			COD	BDazzled Design Sales-Marketing     BDazzled Design Retail New Eng     BDazzled Design Mid-Atlantic									
Employee Portal	Annualized		No *		No	*		22										
Notes	Annoanzeo							60	6	DDamind D							~	
	Calc Annual																1 items	
	\$78,000.00																	
	010,000.00																	
Previous Next																		

 Click the Edit Effective Period(s) button (available on screens that support dynamic fields.) Result: The Effective Periods screen opens.

Add Delete	Begin Effective Date 01/01/1900	End Effective Date 12/30/9999	Prima Yes	ary * •	Rat 1	le Number *	Rate Amou \$0.0000	unt *
Begin Effective Date	End Eff	ective Date		Primary		Rate Number		Rate Amount
01/01/1900	9999		Yes		1		\$0.00	

- 2. Click the **Add** button.
- 3. Change the **Begin Effective Date**.
- 4. Make other changes as applicable.
- 5. Click Save.



## To delete an Effective Date record:

- 1. Click the Field hyperlink to display the Effective Periods screen for the applicable field.
- 2. Highlight the row to be deleted.
- 3. Click the **Delete** button.

# Deleting an Employee

Employees can be deleted, as long as they do not have any payroll history and are not part of a pending payroll. To delete an employee

mploy <b>⊢ ፹</b>		9													
earch for Emplo	yee											Preview			
EE# T	LastName	т	First Name	Ţ	SSNEIN	т	State	т	Zip Code	т	Status 🔻	Lisa Chen			01
01	Chen		Lisa		323-33-3333		VT		05482		Active ^	Last Name:	First Name:		
2	Glazer		JoAnne		789-45-6126		NY		01234		Active	Chen	Lisa	L	
3	Flax		Ron		112-33-4455		PA		12345		Active	SSN/EIN:			
4	Carlow		Jane		555-55-5555		VT		05401		Active	323-33-3333			
5	Timm		Robert		456-12-3987		PA		19231		Active	Status:			
6	Gorman		Renee		946-15-3152		MA		01701		Active	Active			
7	Mills		Linda		984-34-9581		МА		01701		Active	Phone:			
8	Carlow		Harriet		546-21-3879		VT		05446		Active	888-560-9976			
9	Zenlea		Stephen		788-45-1236		VT		05495		Active	Address: 125 Cottage Way			
10	Wolf		Naomi		111-22-3456		VT		05495		Active	Unit 125			
15	Oster		Michael		198-46-5797		МА		01701		Active	Shelburne, VT 05482			
20	Hard		Kristen		467-94-3156		МА		01701		Active				
25	Conte		Barbara		034-73-5641		VT		05495		Active				
30	Leake		Roger		458-37-8654		NY		01701		Active				

- 1. Highlight the applicable employee.
- 2. Click the Delete  $\overline{\mathbf{W}}$  button.

A confirmation screen opens asking for confirmation of the deletion.

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



7/18/2016

# **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
MI	The employee's middle initial
Last Name	The employee's last name
Address 1	The first line of the employee's address.
Address 2	The second line of the employee's address.
City	The city name of the employee's address
State	The state name of the employee's address
Zip Code	The employee's zip code
County	The county in which the employee lives
Phone	The employee's phone number
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.
Job	Job associated with the Workers' Comp Code selected.
Pay section	
Frequency	How often the employee's paycheck is processed.
Salary Amount	Salary earned per pay period
Rate 1	The primary rate number
Rate 2	The second rate number if the employee has two positions with the company doing two different jobs.
Rate 3	The third rate number if the employee has three positions with the company doing three different jobs.
Taxation section	
Fed Marital Status	Marital status for federal tax purposes
Fed Exemptions	Number of exemptions for the employee
State Marital Status	Marital status for state tax purposes
State Exemptions	Number of state exemptions for the employee
State	State to which the employee pays taxes
SDI	State to which the employer pays Disability taxes on behalf of the employee.
SUI	State to which the employer pays Unemployment taxes on behalf of the employee.



Field / Button	Description
VMR section	
Payroll Check Mailbox	Select the mailbox for the employee as needed to override the company settings.
EE Report Mailbox	
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
MI	The employee's middle initial
Last Name	The employee's last name
Address 1	The first line of the employee's address.
Address 2	The second line of the employee's address.
City	The city name of the employee's address
State	The state name of the employee's address
Zip Code	The employee's zip code
County	The county in which the employee lives
Phone	The employee's phone number
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
Salary Information section	
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.
Reporting section	
Tipped Directly	If any of the employee's wages were from being tipped directly, click the link to establish an effective date, if applicable.
Ignore FICA on Cleanup Payroll	If at any time, the FICA is to be ignored for an employee when running a cleanup payroll, click the link to establish an effective date, if applicable.
Combine Returns on this EE	If at any time, returns are to be combined for this employee, click the link to establish an effective date, if applicable.
Generate Second Check	Default is No. Select Yes to generate a second check for the employee for reporting purposes.
Deductions to take First	Select the deductions to be taken first, if applicable.
Second Check Template	In the case of the generation of a second check, select the second check's template, if applicable.
Include in Analytics	Default is Yes. Change to No if the information for this employee is not to be included in the Analytics module, if applicable.

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

Field / Button	Description
ACA section	
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.



Field / Button	Description
ACA section	
Benefits Eligible	This field defaults to whatever was set as the default on the Company - General - Company Info – WComp & Benefits tab.
Reporting section	
Form on File	Is there a consent form on file for the employee to allow electronic publishing of the 1095 form(s)?
ACA Format	Select the form format that will be created for the employee. None, Both, or Paper
Form Type	<ul> <li>New employees are assigned the default field that is assigned at the Company level. This can be overridden using this field.</li> <li>Right-click and select Copy to to copy to other employees.</li> </ul>
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 <b>NO</b> , if this is not the employee's primary wage at the company.
Rate Number column heading	If a standard wage, the new line should have a Rate Number of 2 or more.
Rate Amount column heading	Enter the amount of the new rate.
Overrides – Job section	
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 <b>Add</b> button. The piece is listed in the dropdown list.
Rate Amt	Rate for the piece. The rate is listed in the dropdown list
Rate Qty	The rate quantity is pulled from Evolution, where it was originally set up at the Client level.

## Auto Labor Distribution Sub-menu

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



## Employees - Federal screen

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



## 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 <b>Healthcare Coverage</b> field value on the Employees – Basics screen.
Agency	Child Support Agency responsible for collecting the money for payment.



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

## Employees - Direct Deposit screen

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	<ul> <li>Select which calculation method will be used to calculate payroll deductions for the Scheduled E/D. There are three options:</li> <li>1. Use the calculation method that has been defined for the E/D</li> <li>2. Use the calculation method defined at the Company Benefit level</li> </ul>

Field / Button	Description
	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.
<b>Note:</b> Earnings must be set up as a me 401(k)s.	ember of an E/D Group, which simplifies the calculation of earnings such as
Always Pay / Deduct	<ul> <li>Offers flexibility to override E/D, similar to Blocking Week 1 - 5</li> <li><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.</li> <li><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.</li> <li>If there are insufficient earnings for the deduction, the Scheduled E/D is processed based on the selection in the Deductions to Zero field.</li> <li><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.</li> </ul>
Important: to ensure that the remain Deducts Shortfall field on the Client -	der of the deduction is taken out of a subsequent pay cycle, the Make Up E/Ds - Details tab must be set to Yes.
Deductions to Zero	Defaults to the Deductions to Zero Default field on the Client - E/Ds - Scheduled Defaults tab. It can be overridden here by E/D, by employee, and instructs how much of a deduction should be taken if there is not enough to take the entire amount. This does not turn Shortfall / Deduction not Taken makeup on or off. It only tells the system whether or not to take partial amounts for deductions.
	<ul> <li>Yes - the entire amount is deducted, until the check is zero. If there is shortfall it may be either a portion of or the total amount of the Scheduled E/D.</li> <li><u>No</u> - a deduction is taken only when there are sufficient funds to take the whole deduction. If there are insufficient wages, the created shortfall is always the total amount of the Scheduled E/D. If there is a pre-existing shortfall, it takes the shortfall amount only when there are sufficient wages to take the whole amount. When there is a deduction and a pre-existing shortfall, and there are sufficient wages to take the shortfall, and there are sufficient wages to take the shortfall, but not all of the deduction, Evolution takes the shortfall, but not the deduction.</li> </ul>



Field / Button	Description
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 <b>Minimum E/D Group</b> 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 <sup>nd</sup> EE Report Mailbox	
Password for VMR Deliveries	VMR Password
Payroll Override Address section	Address to send payroll checks for the employee if they are going to a different address than the W-2.

## Employees - Time off Accrual screen

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

## Employees - 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	No- employees will not see any of their personal information in the Employee PortalRead-only- employees can view their payroll information but will not be able to request edits in the Employee PortalFull Access- 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 <u>Full Access</u> - 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 <b>Notes flyout tab</b> 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 <b>Net Amount</b> 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 any additional values from being deducted from this check.         Select to block the EE OASDI 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	
Exemptions	Classic.
Tax at 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	Select to block any additional values from being deducted from this check.         Select to block the EE OASDI from being deducted from this check.         Select to block the EE Medicare from being deducted from this check.         Select to block the EE IIC from being deducted from this check.         Complete if there are any overrides to add to this check.         This information is pre-filled using the settings established in Evolution Classic.         Select to block any of these from being deducted from the check.         Select to block any of these from being deducted from the check.         Select to block any of these from being deducted from the check.         Select ti f any type of state tax should be overridden.         Enter an override amount if applicable for the state highlighted in the left (if more than one is listed)         Select to block the selected local tax from being deducted from the
Local tab	
Block this Local Tax	-
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.

## Security Settings

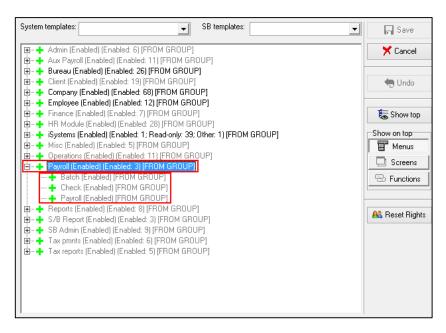
The following security settings must be enabled for a user to submit a payroll in Evolution Payroll. If the Payroll Menu options in Evolution Classic are disabled, the Payroll Menu button is not displayed as a menu option on the Evolution Payroll dashboard.

- 1. Go to the Admin Security Users.
- 2. Select the user from the list.
- 3. Click the **Details** tab.
- 4. Click the **User Rights** button.
- 5. Click the **Menu** button.
- 6. Enable the **Payroll** menu as well as
  - <u>Batch</u> If this is disabled, in Evolution Payroll:
    - The Payroll Batches screen is not displayed to the user.
    - The Payroll Summary View screen is not displayed to the user.
    - The Payroll Summary Detail View screen is not displayed to the user.
    - The Payroll Detail View screen is accessible to the user.
    - The Block E/Ds button is disabled.
    - Users can still View or Edit payrolls.
    - Symbols for View / Edit will be displayed in the Payroll Card and Grid View.
  - <u>Check</u> If this is disabled, in Evolution Payroll:
    - The Payroll Detail View screen is accessible to the user.
    - The Payroll Summary Detail View screen is not displayed to the user.
    - The Payroll Summary View screen is not displayed to the user.
    - Users can still View or Edit payrolls.
    - Symbols for View / Edit will be displayed in the Payroll Card and Grid View.
  - <u>Payroll</u> If this is disabled, in Evolution Payroll:
    - The Payroll Menu button is not displayed as a menu option on the Evolution Payroll dashboard.
    - The information in the Payroll Today section on the Evolution Payroll dashboard will be read-only (no hyperlinks).

Note: If the Payroll – Batch AND Payroll – Check Security Rights are disabled, in Evolution Payroll:

- Users can view the Payroll Card and Grid Views.
- Users can create a new payroll (+ sign at top left of screen).
- Users can create/start a scheduled payroll (+ sign in the card).
- After creating or starting a Payroll, users will not see any batch or check details. o
  - The Batches and Check icon screens are disabled.
  - The Totals and Finish icon screens are enabled.
  - The Block E/Ds icon is enabled.





- 7. Click Save.
- 8. Click the **Functions** button.
- 9. Enable the following rights:
  - "Ability to directly process payrolls"
  - "Ability to mark payrolls as completed"
  - "Ability to submit payrolls"





10. Click Save.

### Security settings for blocking options

There are four items that can be blocked from payrolls – ACH, Billing, Liabilities, and Deposits - both on the Payroll Settings screen, and the Payroll Finish screen. An additional security setting must be enabled for a user to have the ability to block these from the payroll.

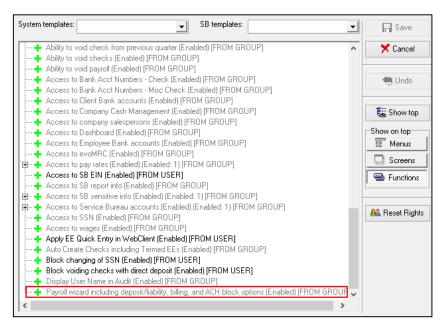
		Payrol	Settings		← Hide
Check Date*		Run #*			
04/27/2016		12			
Payroll Type				Actual Call In Date	
Regular			*		Ⅲ
Agency Checks Checks ACH Billing Liabilitie Deposite	15	ents		Time Off Accrual	

	Agency Payments	Time Off Accrual
	Checks	Accruals Only
	Reports	
ocks	ACH Billing	
B	Billing	
	Liabilities	
	Deposits	
Den	roll Chash Comments	
Pay	roll Check Comments	
Pay	roll Check Comments	

- 1. Go to the Admin Security Users.
- 2. Select the user from the list.
- 3. Click the **Details** tab.
- 4. Click the **User Rights** button.



- 5. Click the **Functions** button.
- 6. Enable "Payroll wizard including deposit/liability, billing, and ACH block options"



7. Click Save.

## The Payrolls Menu

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

There are eight 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.
Backdated	Payroll has been backdated
Requires Mgr Approval	Payroll requires manager approval prior to processing.

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

<b>8</b>	yroll Timeline							
Ехро	t to Excel							
	Check Date +	Y Run #	Y Payroll Type	Created On	T Due On	▼ Current Status	▼ Preprocessed On	٢
	03/17/2016		Regular		03/14/2016	Not Started		
	03/22/2016	1	Misc Check Adjustment	03/22/2016		Processed	03/22/2016	
	03/22/2016	2	Qtr End Tax Adjustment			Processed		
	03/22/2016	3	Misc Check Adjustment	03/22/2016		Processed	03/22/2016	
	03/24/2016	1	Regular	03/24/2016	03/21/2016	Processed	03/24/2016	
	03/28/2016	1	Misc Check Adjustment	03/28/2016		Pending	03/28/2016	
	03/31/2016		Regular		03/28/2016	Not Started		
	04/07/2016	1	Regular	03/24/2016	04/04/2016	Void		
	04/07/2016	2	Reversal			Processed		
	04/14/2016	1	Regular	03/25/2016	04/11/2016	Processed		
	04/21/2016	1	Regular	03/25/2016	04/18/2016	Processed		
	04/28/2016	2	Regular		04/25/2016	Pending		
	04/28/2016	1	Regular			Pending		
	05/05/2016		Regular		05/02/2016	Not Started		
	05/12/2016	1	Regular	03/28/2016	05/09/2016	Processed		

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

Symbol	Description
6€	View – visible only on processed payrolls, click to view details of the payroll including batches, check lines, etc.
Ē	Copy – visible on processed payrolls only, enabling them to be copied for processing.
6	Payroll Results – click to view details about payrolls with a status of Processed (P) and Void (V).
	Edit – visible on payrolls that have been started, but not processed. Click to make changes, add a new batch, filter the information differently, or add new checks.
+	Add – click to add a new batch to scheduled payrolls, or to add a new payroll.
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.
	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.

yroll Timeline					
05/19/2016 - 1	Processed	01/12/2015 - 2	On Hold	07/21/2016	Not Due
Vieskly	054082016-05142016	Weekty	12/25/2014 - 12/01/2014	Monkly	67/16/2016 - 67/16/2016
					<b>–</b>
Submitted on: 04012016 11:27 AM	84 <b>9</b>	Submitted on: 01/12/2015 01:52 PM	<b>66</b>	Submit by \$7782316	T
12/01/2014 - 1	Processed	Ø1/14/2015 - 1	Submitted	07/28/2016	Not Due
Weekly	12/21/2014 - 12/28/2014	Weekdy	01/04/2015 - 01/11/2015	Monkly	07/17/2016 - 07/23/2016
					<b>–</b>
Submitted on: 12/24/2014 10:55 Abl	64 🖷	Submitted on: 01/12/2015 11:24 AM	<b>B C</b>	Submit by \$7252016	<b>.</b> .
484-09/18/2014 - 1	Past Due	100/18/2014 - 1	Pest Dar	08/04/2015	Not Due
B-Westy B-Westy	06212014-06212014 06252015-07.042015	B-Westly B-Westly	08/21/2014 - 08/21/2014 06/28/2015 - 07/04/2015	Monkly	67040016-07000016
	New Batch		New Batch		<b>–</b>
			<b>B</b> C	Submit by 36/01/2016	

Click the large **plus + sign** in the header to create a new payroll. **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**

Payr		Timeline	0											
Payro	il 12	/04/2015 - 1									Batches	→ 🚔 —	→ 📰 —	→ Einish
<b>→</b>	хс	heck Batch -5 - Settings												+
Payroll Settings	Creation Options	Start Date* 11/22/2015 Frequency Weekly Employee Types All Employee Filter Select Template	Π	End Date* 11/28/2015	v v Select EEs	Clock Import Options	Time Clock Source File Choose file File Format CSV - Comma Separated Values Date Field Format 2 Digt Form (War (mm)ddyy) Employee Synchrosization Custom #	•••	x	Create Checks			# 1	Payroll Notes
	de	Template -Select Template- Checks per EE 1 Calculate Scheduled ED Standard Hoars Salary Pay Payroll Defaults Time Off Requests	5	Check Types Regular	v	Time Clo	Organizational Synchronization Full DEOT Job Codes Apply Org Level	•						

- 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**

Payroll 05	5/05/201	6 - 1	Batch 1 : 04/24/2016	8 - 04/3	0/2016	Regular   -999986	349   1 of 1		$\underset{\text{Batches}}{\texttt{Batches}} \longrightarrow \bigotimes_{\text{Checks}} \longrightarrow \underset{\text{Totals}}{\texttt{Fig}} -$	→ BB
	Export	to Excel	Reset Columns Add Cl	heck	Delete Check	Search Checks	Group By: Company Number		Summary 👻	÷ •
••••••	Туре	EE Code	Name	Seq	Total Hrs	Gross Pay	E01 Amt Salary	E02 Hrs Regular	E02 Amt Regular	ime (
<u> </u>	R	1	🖬 Lewis, Al	1	40.00	\$2,500.00	\$2,500.00	40.00	\$0.00	Time Clock Im
Batch 1 Weekly	R	2	Smith, Bill	1	40.00	\$2,100.00	\$1,500.00	40.00	\$600.00	mport
	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	Pinkmans, 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	1
	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	
				Totals	440.00	\$15,060.00	\$6,800.00	440.00	\$8,260.00	
$\mathbf{v}$									17 items	

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

eqular			•	Find and Select the Employees to use when creating checks. One check will be created for each Employee you select.						
					creation Options ard Hours: No Pay: No		Use this Tem Select	plate		¥
Search fo	or employee	e(S)								
<ul> <li>EI</li> </ul>	Е# т	Last Name 🛛 🔻	First Name	• <b>T</b>	Middle Initial	T	Status	T	Organizatio	T
1		Lewis	AI				Active		West > WB >> WS	5 ·
2		Smith	Bill				Active		So East > SB >> S	s
3		Greenburg	Goldie				Active		West > WB >> WS	s
<b>4</b>		Soffer	Harry				Active		Central > CB >> S	
5		Pinkman	Jessie				Active		West > WB >> WS	s
•		n	~ '						16 it	ems

#### **Summary Detail View**

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

2	Add Check De	elete Check					Summary Detail *	
1	E/D Code	Description	Hrs/Pcs	Rate Of Pay	Amount	Rate Number	Agency	•
• 7	III D3	Direct Deposit - Net						^
		Child Support			\$50.00		Office Of Child Support	
- 1	■ D7	Child Support - 2			\$21.00		Office Of Child Support	
	⋒ D6	Health Insurance			\$0.00			
	Total Hrs: 40.0	0554 - R, Batch: 1, Employee: Lew 00 , Total Amount: \$2,404.00	vis, Al [1]					
	Total Hrs: 40.0	1554 - R, Batch: 1, Employee: Lew 00 , Total Amount: \$2,404.00 Ine Delete Check Line Health Insurance	vis, AI [1]		\$25.00			
	Total Hrs: 40.0 Add Check Li	00 , Total Amount: \$2,404.00 ine Delete Check Line	vis, AI [1]	\$0.00	\$25.00 \$2,500.00	4		l
	Total Hrs: 40.0 Add Check Li D6 •	00 , Total Amount: \$2,404.00 Delete Check Line Health Insurance	vis, AI [1] 40.00			4 4		
	Total Hrs: 40.0 Add Check Li D6 ▼	00 , Total Amount: \$2,404.00 ine Delete Check Line Health Insurance Salary			\$2,500.00			
	Total Hrs: 40.0 Add Check Li D6 • E01 E02	00 . Total Amount: \$2,404.00 Delete Check Line Health Insurance Salary Regular			\$2,500.00			
	Total Hrs: 40.0 Add Check Li D6 • E01 E02 E02 E01	00. Total Amount \$2,404.00 Ine Delete Check Line Health Insurance Salary Regular Direct Deposit - Partial 1			\$2,500.00		Office Of Child Support	

- 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.

yroll 11	/19/2015 - 1	Batch 1 : 11/29/2015 - 12	2/05/2015	Regular	-99999554   1	of 2		Batches	Checks -	+ H		E E E E E E E E E E E E E E E E E E E
	Add Check D	elete Check						S	ummary Detail			• •
	E/D Code	Description	His/Pcs	Rate Of Pay	Amount	Rate Number	Agency					Time Clock Import
	111 D6	Health Insurance			\$0.00							CK I
11 Iy	🗎 D3	Direct Deposit - Net										mpo
·		Child Support			\$50.00		Office Of Child Support					2
	■ D1	Direct Deposit - Partial 1										
	Add Check L	ine Cancel Check Line Child Support - 2			\$21.00		Office Of Child Support				ч	
				\$0.00			Office Of Child Support				41	
					\$2,500.00	-1						
		Salary									9.1	
	E02	Regular	40.00	\$0.00	\$0.00	-1					н	
	⊜ D1	Regular Direct Deposit - Partial 1	40.00								1	
	■ D1	Regular Direct Deposit - Partial 1 Direct Deposit - Net	40.00		\$0.00						1	
	⊜ D1	Regular Direct Deposit - Partial 1	40.00				Office Of Child Support					
	■ D1	Regular Direct Deposit - Partial 1 Direct Deposit - Net	40.00		\$0.00		Office Of Child Support					
	<ul> <li>➡ D1</li> <li>➡ D3</li> <li>➡ D4</li> </ul>	Regular Direct Deposit - Partial 1 Direct Deposit - Net			\$0.00		Office Of Child Support					

- 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.

Payroli 10	0/01/2015 - 1 Batch 1 : 0	09/20/2015 - 09/26/2015			Batcher	$\rightarrow \bigotimes_{\text{Checks}} \longrightarrow \bigoplus_{\text{Totals}} \longrightarrow \underset{\text{Fin}}{\blacksquare}$
+	Create New Check	4 9 - White, Walter		heck Serial # Check Type Sequence 99999454 Regular 1 of 1 [Recalculate Check]		Detail     Time Clock Import
All Batches	Check Lines Manual Tax	Add Delete	T Description	r HrsPcs T Pay Rate	T Amount T	Rate # T
Batch 1 Weekly	Fed Overrides State Overrides	ED Cosa - E02 Basic Labor Defaults	Regular Local Tax Overrides	40.00	\$25.00 \$1,000.00	1 (P) : \$25.00
Batch 2 Weekly	Local Overrides Options	Rate Number	Hours/Pcs	State	SUI	
	Review	1 (P) : \$25.00 Rate Of Pay	v 40.00 Piece	- Select Work Address	* - Select -	Ŧ
		25.00 Agency	- Select	+ Use Default	•	
	Previous Next	Select	• Health Insurance		\$200.00	
		,			4200.00	
×						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	$\underset{Batches}{\boxed{\bullet}} \longrightarrow \underset{Checks}{\boxed{\bullet}} \longrightarrow \underset{T}{\boxed{\bullet}}$	otals	Finish
Batch 1 Weekly	Create New Check Check Lines Manual Tax	Check Strill / Check Trip Sequence Recalculate ALD     Check Strill / Check Trip Sequence Check ALD     Check			Payroll Notes     Time Clock Import
	Fed Overrides State Overrides Local Overrides Options Review	1 Federal			Employee
~	Previous Next	, 5 Rems			Notes

- 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 - 12/05/2015		Batches	$\rightarrow \bigotimes_{Checks}$ —	→ III	→ B	
Create New Creats Create New Creats Manual Tax Manual Manual Tax Manual Manual Tax Manual Manual Tax Manual Manual Tax Manual Manual Manua	Check See See Type Nore Tax Frequency Weekly Tax at Supplemental Rate	Federal Tax     Employee Overrides     Additional Values     EE 0ASD		Detail	*	Frayrow notes     Time Clock Import	Davroll Motae

- 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

Payroll 11/19/2015 - 1 Batch 1 : 11/	129/2015 - 12/05/2015	$\underset{\text{Batches}}{\textcircled{\text{Batches}}} \longrightarrow \underset{\text{Checks}}{\textcircled{\text{Checks}}} \longrightarrow \underset{\text{Totals}}{\fbox{\text{Totals}}} \longrightarrow \underset{\text{Finish}}{\fbox{\text{Min}}}$
Crate New Cluck Crate New Cluc	Vitit     State     Aar     Settings for:     New York - NY     Deskt     Pure/kor       Vitit     State     Aar     Settings for:     New York - NY     Settings for:     New York - NY       New York     NY     State Type     Image: Construction of the settings for:     New York - NY     State Type       No     Tax at Supplemental Rate     State State State     State State State State     State St	Detail Three Clock Import
Pervisas Net	r 1 Jams	Employee Notes

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

### Local Overrides screen

Payroll 11	/19/2015 - 1 Batch 1 : 11/	29/2015 - 12/05/2015	Batches	→ 🚉 —	→ 🖩 –	→ Binish
+	Create New Check	1 - Lewis, Al - 1 of 2     Chris Secial		Detail	•	<ul> <li>Payroll Notes</li> <li>Time Clock Import</li> </ul>
Batch 1 Weekly	Manual Tax Fed Overrides State Overrides Local Overrides Options	New York City Res New York City Res.     EE     Constraints for rew York City Res New York City Res.     EE     Constraints     Con				nport
	Review Previous Next	1 Rens				Employee Notes
		1 49893				

- 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			8 ish
Batch 1 Weekby	Create New Check Check Lines Manual Tax Fed Overides State Overides Local Overides Option Review	Blocks	I - Lewis, AI - 1 of 2  Deted Depends Scheduled EDD Except DDD Scheduled EDD Except DDD Scheduled EDD From Agency W Update Scheduled EDD Balance	Check Serial # Check. Trips Sequences Recalculate Oheck Preview ALD Comments for This Check Only		Detail	↓ Time Clock Import	Payroll Notes     Employee
~	Previous Next	Options						yee Notes

- 1. Complete the applicable fields. For detailed information about the fields on this screen, refer to the Payrolls Options Screen section 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				Batches	→ 🚉 —	→ 📰 —	→ 🔛
+ <	Create New Check	1 - Lewis, Al - 1 of 2		ack Type Sequence Recalculate gular 1 of 2 Check ALD			Detail	*	<ul> <li>Payroll Notes</li> <li>Time Clock Import</li> </ul>
Batch 1 Weekky	Check Links Manual Tax Fed Overrides State Overrides Local Overrides Options Review	Check Calculations Pedret Taxabi Vispes 0:450 Taxabi Vispes 0:450 Taxabi Vispes Gross Amount Net Amount Lock Tax Calculations	50.00         EAPAINADS:           50.00         Salary           50.00         Earnings SubTofact           50.00         50.00           50.00         Earnings SubTofact	DEDUCTIONS 12,001 (0) CMS Seguri 2 13,000 (0) CMS Seguri 2 Health Instruction Deductions Sull'Itat	FEDERAL TAVES: 150 80 121 80 135 80 196 90				Employ
	Previous Next								ree Notes

- 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	Iota	II Gross	Pay: \$144	50.00				_	Iotai	Taxes: \$	\$106300.47			
Weekly		E/D Coo	e 🔺	Description	Hrs/Pcs	A	nount			Descriptio	× חנ	Amount	Count	
		⊿ D1		Direct Deposit -	Parti	0.00	\$200.00	~	-	Federal G	Gross Wages		\$14,208.60	
		E/D Def	ail For: D1 - I	Direct Deposit - Pa	irtial 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	0.00	\$25.00			S	1	AI Lewis	0.00	\$2,475.00
		R	s	4	Harry Soffer	0.00	\$150.00			s	10	Susan Bigole	0.00	\$350.00
		R	s	8	Willie Clark	0.00	\$25.00			S	11	Simon Simon	0.00	\$350.00
	s.								Taxes	s	2	Bill Smith	0.00	\$1,495.00
	Totals								Tax	s	3	Goldie Greenburg	0.00	\$2,785.00
										S	4	Harry Soffer	0.00	\$1,000.00
							~			s	5	Jessie Pinkman	0.00	\$600.00
							3 items							11 item
						0.00	0100.00			<b>F</b> 1 1 <b>T</b>			00 500 70	
		<ul> <li>D2</li> <li>D3</li> </ul>		Direct Deposit -		0.00	\$100.00 \$6.537.88	~		Federal T	ax axable Wages		\$2,539.70 \$14.208.60	
$\mathbf{v}$		» D3		Direct Debosit -	Net	0.00	36.537.88 9 items			rederal I	axable vvades		\$14.208.60	43

**Note:** if something needs to be edited, click the 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.

05/19/2016 - 1	Processed	01/12/2015 - 2	On Hold	07/21/2016	Not Due
Viewkly	05082016-05142016	Weekty	12/25/2014 - 12/01/2014	Monthly	07/10/2016 - 07/16/201
Submitted on: 64012016 11:27 AM	84 🛢	Submitted on: 01/12/2015 01:52 PM	*	Submit by \$7/18/2016	+
12/31/2014 - 1	Processed	<b>01/14/2015 - 1</b>	Submitted	07/28/2016	Not Due
Weekty	12/21/2014 - 12/28/2014	Weekty	01/04/2015 - 01/11/2015	theoty	67/12016-0723201
Submitted on: 12/24/2014 10:55 AM	84 <b>9</b> 5	Submitted on: 01/12/2015 11:24 AM	•3	Submit by 87252016	+
09/18/2014 - 1	Pesi Dut	100/09/18/2014 - 1	Pesi Dat	08/04/2016	Not Due
B-Weekly B-Weekly	06212014-08212014 06252015-07/042015	Builtenity Builtenity	08/21/2014 - 08/21/2014 08/28/2015 - 07/04/2015	Weekly	67242016 - 6730201



	Payroll Settings		🗲 Hide
Check Date	Run #	Calendar Options	
07/30/2015	1		•
Payroll Type		Actual Call In Date	
Regular	•		
Agency Payme © Checks © Reports © ACH Billing Liabilities Deposits Payroll Check Comme		Time Off Accrual Accruals Only	
			^
			~

- 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**

	<b>X</b> 🕺 (	3	Pending											
oll 1:	2/18/2015 - 1										Batches	• 🚔 —	→ 📰 —	→ Bini
х	Check Batch -8 - Settings													_
	Start Date*		End Date*				Time Clock Source File							
	12/27/2015	8	1/2/2016				Choose file		х					
	Frequency						File Format							
	Weekly					S	CSV - Comma Separated Values	*					<b>_</b>	
2	Employee Types					Clock Import Options	Date Field Format							
ation Options	All					ţ	2 Digit Year (mm/dd/yy)	*						
0	Employee Filter			Sele	t EEs	bor	Employee Synchronization							
atio	Select Template					E	Custom #	*		Create Checks				
Cre	Template					loc	Organizational Synchronization							
	Select Template					Time	Full DBDT	*						
	Checks per EE		Check Types			Ē	Job Codes							
	1		Regular				Do Not Import Job Codes	*						
	Calculate Scheduled EDs						Apply Org Level							
	Standard Hours						From File	*						
m	Salary Pay													
Include	Payroll Defaults													
2	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

Payroll 05	5/05/20	16 - 1	Batch 1 : 04/24/2010	6 - 04/3	0/2016	Regular   -99998	849   1 of 1		$\overbrace{\texttt{Batches}}^{\texttt{Batches}} \longrightarrow \bigotimes_{\texttt{Checks}}^{\texttt{Aab}} \longrightarrow \bigoplus_{\texttt{Totals}}^{\texttt{Batches}} -$	→ B
-	Expor	t to Excel	Reset Columns Add C	heck	Delete Check	Search Checks	Group By: Company Number		Summary +	+ +
·	Туре	EE Code	Name	Seq	Total Hrs	Gross Pay	E01 Amt Salary	E02 Hrs Regular	E02 Amt Regular	ime (
^	R	1	Lewis, Al	1	40.00	\$2,500.00	\$2,500.00	40.00	\$0.00	Time Clock I
Batch 1 Weekly	R	2	Smith, Bill	1	40.00	\$2,100.00	\$1,500.00	40.00	\$600.00	ne Clock Import
	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	Pinkmans, 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	ş
	R	8	Clark, Willie	1	40.00	\$3,120.00		40.00	\$3,120.00	Employee Notes
	R	9	White, Walter	1	40.00	\$1,000.00		40.00	\$1,000.00	Votes
	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	
				Totals	440.00	\$15,060.00	\$6,800.00	440.00	\$8,260.00	
$\sim$									17 items	

This screen offers three different viewing options, based upon the level of detail required by the user. The view is selected from the dropdown list in the far right of the Navigation Bar. For detailed information about the fields on this screen, refer to the <u>Payrolls – Batch Checks screen section</u> in 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.
  - Click the Create Check(s) for Selected EEs button.

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

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



select	a Check Ty	pe			d Select the Emplo reated for each Er		n creating checks. One check
Regula	ar		•	will be c	reated for each Li	npioyee you selec	<i>a</i> .
					reation Options		
				Standa	ard Hours: No	Use this Ten	nplate
				Salary	Pay: No	Select	•
Sear	ch for empl	oyee(s)					
	EE#	▼ Last Name	▼ First Nam	e 🔻	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>P</b> <sup>1</sup>	~ ·				0 5 1 00 0
							16 items

#### Summary Detail View

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

										_
Add Check D	elete Check						Summary Det	ail 🔻		t
 E/D Code	Description	Hrs/Pcs	Rate Of Pay	Amount	Rate Number	Agency				THE COMPANY INPOLY
III D3	Direct Deposit - Net								^	
	Child Support			\$50.00		Office Of Child Support				and and
■ D7	Child Support - 2			\$21.00		Office Of Child Support				
🗎 D6	Health Insurance			\$0.00						
D6 🔻	Health Insurance			\$25.00						
			50.00							
≘ E01	Salary	40.00	\$0.00	\$2,500.00	4					
€01 E02	Salary Regular	40.00	\$0.00 \$0.00		न न				1	
€01 E02 €D1	Salary Regular Direct Deposit - Partial 1	40.00		\$2,500.00					ł	
€01 E02	Salary Regular Direct Deposit - Partial 1 Direct Deposit - Net	40.00		\$2,500.00		Office Of Old Sussor			1	
<ul> <li>■ E01</li> <li>E02</li> <li>■ D1</li> <li>■ D3</li> </ul>	Salary Regular Direct Deposit - Partial 1	40.00		\$2,500.00 \$0.00		Office Of Child Support Office Of Child Support			l	

- 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	Delete Check					Summary Detail +	
E/D Code	Description	Hs/Pcs	Rate Of Pay	Amount	Rate Number	Agency	
111 D6	Health Insurance			\$0.00			
iii D3	Direct Deposit - Net						
	Child Support			\$50.00		Office Of Child Support	
■ D1	Direct Deposit - Partial 1						
Total Hrs: 40	19554 - R, Batch: 1, Employee: Lew LOD Total Amount: \$2,404.00 Line Cancel Check Line	wis, Al [1]					
Total Hrs: 40 Add Check	L00 Total Amount: \$2,404.00 Line Cancel Check Line	wis, Al [1]					
Total Hrs: 40 Add Check	Line Cancel Check Line Child Support - 2	wis, AI [1]		\$21.00		Office Of Child Support	
Add Check	L00 Total Amount: \$2,404.00 Line Cancel Check Line Child Support - 2 Salary		\$0.00	\$2,500.00	4	Office Of Child Support	
Add Check	L00 Total Amount: \$2,404.00 Line Cancel Check Line Child Support - 2 Salary Regular	wis, AI [1] 40.00	\$0.00 \$0.00		4 -1	Office Of Child Support	
Add Check	L00 Total Amount: \$2,404.00 Line Cancel Check Line Child Support - 2 Salary			\$2,500.00		Office Of Child Support	
Add Check	L00 Total Amount: \$2,404.00 Line Cancel Check Line Child Support - 2 Salary Regular			\$2,500.00		Office Of Child Support	
Add Check	L00 Total Amount: \$2,404.00 Line 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.

Ven	v Check	<	1 - Lewis, Al - 1 of 1		• >	Check Serial # -99999640	Check Type Regular	Sequence 1 of 1	Recalculate Check	Preview ALD	Detail	•	
έL	ines		Add Delete										
al	Tax		E/D Code * + 7	T Description +	T	Hrs/Pcs	T	Pay Rate	• <b>T</b>	Amount T	Rate #	T	
/el	rides		E02	Regular			40.00		\$0.00	\$0.00	1 (P)	: \$0.00 *	
lve	rrides	•	A E01	Salary					\$0.00	\$2,500.00	1 (P)	: \$0.00	
lve	rrides	•	🗎 D1	Direct Deposit - Partial 1									
lior	IS .	•	🗎 D3	Direct Deposit - Net									
vie	*		⋒ D4	Child Support						\$50.00			
		•	☐ D6	Health Insurance						\$25.00			
				Child Support - 2						\$21.00			
	Next												
	Next												7 items

- 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	I/19/2015 - 1 Batch 1 : 11	29/2015 - 12/05/2015	$\fbox{\begin{tabular}{lllllllllllllllllllllllllllllllllll$
Batch 1 Weekly	Create New Check Check Lines Manual Tax Fed Overrides	I - Lewis, Al - 1 of 2     Check Streid # Check Type Streamers     Plecalization     Preview Check       Add States     Add Locals     # Calculate Overside Taxes       Tore     Description     Amount       1     Federal     Calculate Overside States       2     OxSDI     OxSDI	Detal
	State Overrides           Local Overrides           Options           Review	2 UNSUL CONSULT CONSULTA CONSULT	<ul> <li>Employee volues</li> </ul>
$\sim$		5 items	

- 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 : 1	1/29/2015 - 12/05/2015	Batches			→ B	sh
Batch 1 Weekby	Create New Orack Oneck Lines Manual Tax Fed Overides Lead Overides Options Review Previous Next	I-Lewvis, Al - 1 of 2     Check Senial * Check Trys Sequence Segnessize     Recalculate Regular     Perview Check       Ford Tax Frequency Weaky     *     Ford Tax Employee Overlides Additional Yales EE Medicare     Perview ALD       Tax at Supplemental Rate     *     *		Detail	•	. Time Clock Import	↓ Payro≣ Notes ↓ 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 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/	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 Stere Deeck Create Stere Deech See Deechden See Deechden Geo Overden Geo Overden	I - Lewis, Al - 1 of 2     *     Cack Serial C Creck Type Seguence     Recirculate     ALD     Creck Newe     Creck Newe	
Casilions Capitons Review Previous Next	1 Rens	↓ Employee 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 11/1	9/2015 - 1 Batch 1 :	11/29/2015 - 12/05/2015		$\operatornamewithlimits{\textcircled{\sc line }}_{Batches} \longrightarrow \operatornamewithlimits{\rightleftarrows}_{Checks} \longrightarrow \operatornamewithlimits{\fbox{\sc line }}_{Totals} \longrightarrow \operatornamewithlimits{\operatornamewithlimits{\fbox{\sc line }}}_{Finish}$
Batch 1 Ready	Create New Check Oteck Lines Mercual Tae Fed Oventdes State Oventdes Local Oventdes Review	Constant Constan	Check Streid & Check Tryst Streaments Opposited Regular 1612 Commants for This Check Only Commants for This Check Only	Detail • Formation Detail • Time Cool Import
~	Previous Next	80		3

- 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> <u>section</u> in the Appendix at the end of this chapter.

								Detail	<del>(</del>
Create New Check	1 - Lewis, AI - 1 of 2		Check Serial # Check -99999554 Regu		calculate Preview Check ALD				Time Clock Import
Check Lines Manual Tas Fed Overrides State Overrides Optime Review Previous Next	Check Calculations Federa Taulai Voges OLOCT Taulai Voges OLOCT Taulai Voges Mancuer Taulai Voges Gress Annuel Het Annuel Lock Tau: Calculations	\$0.00 \$0.00 \$0.00 \$0.00 \$0.00 <b>\$0.00</b>	EARINGS Salary Euroge Sol Total	52,500.00 52,500.00	DEDUCTIONS Chill Segunt Chill Segunt - 2 Hawah Insurance Deduction Self and	PEDERAL TAX 50 80 51 80 53 80 394.80	15		sk Import

- 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	Tota	I Gros	s Pay: \$144	60.00					Tota	I Taxes: \$	\$106300.47			
Weekly		E/D C	ode 🔺	Description	Hrs/Pcs	A	mount			Descriptio	on 🔺	Amount	Co	unt
		⊿ D1		Direct Deposit -	Parti	0.00	\$200.00	~		Federal G	Gross Wages		\$14,208.60	
		E/D D	etail For: D1 -	Direct Deposit - Pa	artial 1					Tax Deta	il For: Federal Gro	ss Wages		
		Тур	Src	EE Code 🔺	Employee N	Hrs/Pcs	Amount			Src	EE Code 🔺	Employee Name	Hrs/Pcs	Amount
		R	S	1	AI Lewis	0.00	\$25.00			s	1	AI Lewis	0	.00 \$2,475.00
		R	S	4	Harry Soffer	0.00	\$150.00			s	10	Susan Bigole	0	.00 \$350.00
		R	s	8	Willie Clark	0.00	\$25.00			s	11	Simon Simon	0	.00 \$350.00
	<u>s</u>								Taxes	s	2	Bill Smith	0	.00 \$1,495.00
	Totals								Ta	s	3	Goldie Greenburg	0	.00 \$2,785.00
										s	4	Harry Soffer	0	.00 \$1,000.00
							~			s	5	Jessie Pinkman	0	.00 \$600.00
							3 items							11 item
		▶ D2		Direct Deposit -	Parti	0.00	\$100.00			Federal T	ax		\$2.539.70	
		▶ D3		Direct Deposit -		0.00	\$6.537.88	~			axable Wages		\$14.208.60	
$\sim$							9 item	IS						43

**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).

10/20	)15 - 1												Batches -	$\rightarrow \bigotimes_{Checks} \rightarrow I_{ot}$
alcu	ulation R	esults												
otal	Gross Pa	y: \$69,61	2.25						Total	Taxes: !	\$22,633.71			
	E/D Code		Description	Hrs/Pcs		Amount				Descriptio	on •	Amount	Coun	t
	D01		Checking		0.00		\$1,934.31	*		Federal G	Gross Wages		\$62,090.29	
	E/D Detail	For: D01 - C	Checking							Tax Deta	ail For: Federal Gros	s Wages		
	Туре	Src	EE Code +	Employee Name	Hrs/Pcs	Amount				Src	EE Code +	Employee Name	Hrs/Pcs	Amount
	R	S	10	Employee Direct	0.0	0	\$540.69 ^			s	10	Employee Direct De	0.	.00 \$1,848.48
	R	s	120	Employee Shifts	0.0	0	\$500.63			s	100	Employee Reciproc	0.	.00 \$570.00
	R	S	260	Employee GTL	0.0	0	\$429.12			s	110	Employee Jobs	0	.00 \$741.60
CIDIO I	R	S	30	Employee 401K	0.0	0	\$463.87		Taxes	s	120	Employee Shifts	0	.00 \$1,260.20
-									Ĕ	s	130	Employee Auto Labor	0	.00 \$2,500.00
										s	140	Employee 401K Fixed	0	.00 \$635.00
										s	150	Employee Benefit	0	.00 \$2,370.00
							4 items							46 item:

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

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

	Agency Payments	Time Off Accrual
	☑ Checks	Accruais Only
	Reports	
Blocks	☑ ACH	
B	🗷 Biling	
	Liabilities	
	Ceposits	
Pay test	roll Check Comments	

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

<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**.

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

**Note:** 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 05/21/201	5 - 1 Payroll Timeline Processed Submit by: 05/18/20	15		$ \underset{\text{Batches}}{\text{Image: Batches}} \longrightarrow \bigotimes_{\text{Checks}} $	$\longrightarrow$ $\underset{Totals}{\blacksquare} \longrightarrow$ $\underset{Finish}{\bowtie}$
Submittal Options	Time Off Accrual		This payroll has been Processed to iSystems lic	0	
Payroll Check Comments		~	05/29/2015 09:45 AM		



# 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.

## Viewing the Results Screen

## **Security Settings**

The following security settings must be enabled in Evolution Classic for a user to have access to the full features on the Results screen.

- 1. Go to the Admin Security Users screen.
- 2. Select the user from the list.
- 3. Click the **Details** tab.
- 4. Click the **Functions** button.
- 5. Enable the following functions:
  - a. Ability to reprint payroll reports.
  - b. Ability to reprint processed payroll checks
  - c. Ability to reprint processed misc checks.

**Note:** If a specific item is disabled for a user (Payroll Checks, Misc Checks, Reports (including invoice) – the corresponding checkbox on the Results screen will be disabled and the text "(No Access)" below it.

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

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



**Result:** The Results screen opens.



Payroll 05/19/2016 - 1			Batches	→ 🚉 -	→ Totals	→ Results
Details	Send to Task Queue	¥				
Processed on 04/01/2016 at 11:27 AM	Items	Options				
	Reports	Don't print banking info				
		Don't print background				
Applied Blocks	<ul> <li>Invoices</li> </ul>	Don't use VMR Settings				
	Payroll Checks	Show Time Off Balances				
Check Comments	Selected: All	As of Current Date	Ŧ			
	Misc Checks	Payroll Check Stock Letter Bottom Stub (New) - Biz Forms				
		Celler Bollom Sillo (New) - Biz Forms	Ŧ			
					Send	

The Results screen includes the following

- Date and time the payroll was processed
- <u>Any blocks</u> applied to the payroll while setting it up
- <u>Comments</u> entered for the payroll processors
- <u>On Premise Printing</u> users can reprint reports, invoices, payroll checks, or miscellaneous checks from the Results screen. Users can select one or more individual payroll and/or miscellaneous checks to reprint.
- <u>Send to</u> reprinted reports, invoices and/or checks can be sent through the Task Queue or via VMR if applicable. Select the location from the dropdown list.

#### **Reprinting Reports and Invoices**

1. In the Items section of the Results screen, select the checkbox (es) next to the items to be reprinted.

Send to	Task Queue 🔹	
Items		Options
	Reports	Don't print banking info Don't print background
	Invoices	Don't use VMR Settings
✓	Payroll Checks Selected: All	Show Time Off Balances As of Current Date
	Misc Checks	Payroll Check Stock Letter Bottom Stub (New) - Biz Forms
		Send

- 2. Select the applicable options for the reports and/or invoices being reprinted.
  - a. Don't print banking info
  - b. Don't print background
  - c. Don't use VMR settings (this option displays only when the user selects Send to: Task Queue; it does not appear when the user selects Send to: Virtual Mailroom.)
- 3. Time-off balances can be shown as of the Current Day or as of a Historical Date, using the dropdown field.
- 4. Click the **Send** button to send to the location specified in the **Send to** field. Note that the user is not printing directly to a printer.



### Reprinting Payroll Checks

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

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

Payroll Checks Selected: All	Show Time Off Balances As of Current Date	¥
Misc Checks	Payroll Check Stock Pressure Seal Legal Moore (New)	•

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

*	Serial Number 👎	Net Wages 🛛 🕇	EE Code 🍸	Employee Name
1	-99999708	\$0.00	01	Goode, Alice K.
	3216	\$663.93	02	Cat, Cheshired M.
	3221	\$635.36	03	Rabbit, White A.
	3219	\$1,460.87	04	Hatter, Mad
	3220	\$840.45	05	Hearts, Queen O.
•	3217	\$407.96	07	Dee, Tweedle F.
2	3218	\$411.75	08	Dum, Tweedle A.
•	3222	\$798.05	13	Rose, The
				8 0

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

### **Reprinting Misc Checks**

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

- 1. Select the Misc Checks option in the Items section of the Results screen.
- 2. Result: The **Selected: None** link appears below signifying that the system is applying the default: no Misc checks are selected Note that this is the opposite of the behavior with the Payroll Checks option.
- 3. Select the payroll check stock for printing the checks from the Payroll Check Stock dropdown on the right side of the screen.



- 4. To select a specific miscellaneous check(s) to reprint, rather than all checks, click the **Selected: Al** link.
- 5. Select the checkboxes for the checks to be reprinted.
- 6. Click the **Select** button.
- 7. Select the applicable options for the checks being reprinted.
  - a. Don't print banking info
  - b. Don't print background
  - c. Don't use VMR settings
- 8. Time-off balances can be shown as of the **Current Day** or as of a **Historical Date**, using the dropdown field.
- 9. Click the **Send** button to send to the location specified in the **Send to** field. Note that the user is not printing directly to a printer.

## Copying a Payroll

Payrolls can be copied directly from the Payroll Timeline screen (in either the Payroll Table view or the Payroll Card view) in Evolution Payroll. Note that void checks, or a voided check, will not be copied by the system.

## Copying a payroll in Card view

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

05/19/2016 - 1	Processed	01/12/2015 - 2	On Hold	07/21/2016	Not Due
Vieekly	05082016-05142016	Weekby	12/25/2014 - 12/01/2014	Weekly	67/16/2016 - 67/16/2016
Submitted or: 04012016 11:27 AM	84 🖷	Submitted on: 01/12/2015 01:52 PM	*	Submit by 07/18/2016	+
12/31/2014 - 1	Processed	S01/14/2015 - 1	Submitted	07/28/2016	Not Due
Weekly	12/21/2014 - 12/28/2014	Weekty	01/04/2015 - 01/11/2015	Weekly	67/172016 - 07232014
					+
Submitted on: 12/24/2014 10:55 AM	84 🜉	Submitted on: 01/12/2015 11:24 AM	∎ெ	Submit by 37252016	T
109/18/2014 - 1	Paul Dat	09/18/2014 - 1	Pest Dec	08/04/2016	Not Due
B-Weekly B-Weekly	06212014-06212014 06252015-07/042015	B-Westly B-Westly	08/21/2014 - 08/21/2014 08/28/2015 - 07/04/2015	Weekly	07042016-07002010

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

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

## Copying a Payroll in Table view

1. Go to the Payroll Timeline screen



2. Click the Table view symbol in the header.

Pay	roll Timeline						
8	S 📔 👳						888
	Check Date 🖬 🔻 🔻	Run# 🔻	Payroll Type 🛛 🔻	Created On T	Due On T	Current Status	Preprocessed On T
03	3/17/2016		Regular		03/14/2016	Not Started	
03	/22/2016	1	Misc Check Adjustment	03/22/2016		Processed	03/22/2016
03	8/22/2016	2	Otr End Tax Adjustment			Processed	
03	8/22/2016	3	Misc Check Adjustment	03/22/2016		Processed	03/22/2016
03	1/24/2016	1	Regular	03/24/2016	03/21/2016	Processed	03/24/2016
03	8/28/2016	1	Misc Check Adjustment	03/28/2016		Completed	03/28/2016
03	8/31/2016	1	Regular	03/24/2016	03/28/2016	Processed	
04	/07/2016	1	Regular	03/24/2016	04/04/2016	Processed	
04	/14/2016	1	Regular	03/25/2016	04/11/2016	Processed	
04	/21/2016	1	Regular	03/25/2016	04/18/2016	Processed	
04	/28/2016	1	Regular		04/25/2016	Pending	
05	5/05/2016	1	Regular		05/02/2016	Pending	
05	5/12/2016	1	Regular	03/28/2016	05/09/2016	Processed	
05	5/19/2016		Regular		05/16/2016	Not Started	
05	5/26/2016		Regular		05/23/2016	Not Started	

- 3. Select a payroll (row) on the screen that you want to copy.
  - The Copy Payroll 🛡 symbol is not displayed if a payroll with a status of Void or Not Started is selected.
  - You cannot copy a processed setup-run.
  - Payrolls with a status of Submitted or On Hold can be copied.
- 4. Click the **Copy Payroll** symbol in the top left of the header

## 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.

elect	a Check T	уре				d Select the Emp				ng checks. One	check
Regula	ar			•	WIII be c	reated for each	Emplo	oyee you sele	CT.		
						Creation Options ard Hours: No Pay: No		Use this Ten Select	nplate		¥
Sear	ch for emp	loyee(s)									
•	EE#	▼ Last	Name T	First Nam	e T	Middle Initial	T	Status	T	Organizatio	T
	1	Jans	on	Jennifer		L		Active			
	2	Glaze	er	JoAnne		В		Active			
	3	Flax		Ron				Active			_
	4	Carlo	W	Jane				Active			
	5	Timm	ı	Robert				Active			
	G	Corm		Danaa		D		Activo			



- 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.
- Click the Edit symbol on the payroll to be edited.
   Result: The Batch Checks screen opens.

Payroll 05	/05/201	6 - 1	Batch 1 : 04/24/2016	i - 04/30	)/2016 F	Regular   -999986	549   1 of 1		$\underset{\text{Batches}}{\textcircled{\text{Batches}}} \longrightarrow \underset{\text{Checks}}{\textcircled{\text{Checks}}}$	→ III -	→ B
	Export	to Excel F	Reset Columns Add Cl	heck	Delete Check	Search Checks	Group By: Company Number		Summary	*	+ + 2 2
	Туре	EE Code	Name	Seq	Total Hrs	Gross Pay	E01 Amt Salary	E02 Hrs Regular	E02 Amt Regular		Time (
^	R	1	Lewis, Al	1	40.00	\$2,500.00	\$2,500.00	40.00		\$0.00	Time Clock Ir
Batch 1 Weekly	R	2	Smith, Bill	1	40.00	\$2,100.00	\$1,500.00	40.00		\$600.00	c Import
	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	6	Pinkmans, 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	*
				Totals	440.00	\$15,060.00	\$6,800.00	440.00		\$8,260.00	
$\mathbf{v}$										17 items	

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

									-
Add Check	Delete Check						Summary Detail		+
E/D C	de Description	Hrs/Pcs	Rate Of Pay	Amount	Rate Number	Agency			Time Clock Import
H D	Health Insurance			\$0.00					or v
⊜ D	Direct Deposit - Net								- Party
⊜ D	Child Support			\$50.00		Office Of Child Support			1
Total Hr Add Cł	99999554 - R, Batch: 1, Employee: Lev 40.00 Total Amount: \$2,404.00 eck Line Cancel Check Line	wis, Al (1)						l	
Check: -     Total Hn	99999554 - R, Batch: 1, Employee: Lev 40.00 Total Amount: \$2,404.00 eck Line Cancel Check Line	wis, Al [1]		\$21.00		Office Of Child Susport		ļ	
Check:     Total Hn     Add Ch	99999554 - R. Batch: 1, Employee: Lev .40.00 Total Amount: \$2,404.00 eck Line Cancel Check Line Child Support - 2	wis, AI [1]	\$0.00		4	Office Of Child Support		ļ	
Check: -     Total Hn     Add Ch     B	99999554 - R. Batch: 1, Employee: Le 40,00 Total Amount: \$2,404.00 Cancel Check Line Child Support - 2 1 Salary	wis, Al [1] 40.00		\$21.00 \$2,500.00 \$0.00	-1	Office Of Child Support		ļ	
Check: -     Total Ho     Add Ct     D     D     D     D	19999554 - R. Batch: 1. Employee: Lev 40.00 Total Amount: \$2,404.00 cot Line Child Support - 2 1 Salary Regular			\$2,500.00		Office Of Child Support			
Check: -     Total Ho     Add Ch     D     D     D     E0	9999954 - R, Batch. 1, Employee: Lev 40.00 Total Amount: 52,404.00 eck Line Cancel Check Line Child Support - 2 1 Salary Regular Direct Deposit - Partial 1			\$2,500.00		Office Of Child Support			
Check: -     Total Ho     Add Ch     D     D     E02     D     D	19999554 - R. Batch: 1. Employee: Lew 40.00 Total Amount: 52,404.00 eck Line Cancel Check Line Child Support - 2 Child Support - 2 Bany Begdar Direct Deposit - Partial 1 Direct Deposit - Net			\$2,500.00		Office Of Child Support			
Check: -     Total Hr     Add Cl     D     D     E02     D     D     D     D	1999954 - R. Batch 1 Employee: Lev 4000 Total Amount 52,40,40 Child Support - 2 1 Salary Regular Direct Deposit - Partial 1 Direct Deposit - Partial 1 Child Support			\$2,500.00 \$0.00					

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



## Refreshing Scheduled E/Ds for Individual Checks

The Refresh Scheduled E/Ds button can be used to refresh E/Ds on selected Payroll screens, for example, after making changes to a check line for an individual pending check to revert all the Scheduled E/Ds in the check line to the values originally set up on the **Employee – Scheduled E/Ds** screen before doing the final processing for a check.

	11.04/17/2010	- 04/23/2016						Batches	→ 🛃 — Checks	→ 📰>
Create New Check	<	2 - Smith, Bill - 1 d	of 1	Check Seria	# Check Type Sequence Regular 1 of 1		review Refresh ALD Scheduled E/Ds		Detail	•
atch 1 Meekly Fed Overrides	Add	Delete E/D Code * +	T Desa	iption 🛌 🔻 🔻	HrsiPcs	T	Pay Rate T	Amount <b>Y</b>	Rate #	Ŧ
State Overrides Local Overrides	Basi	E02 Ic Labor Defaults	F Local Tax Override	tegular 25		40.00	\$15.00	\$600.00	1 (	P):\$15.00
Options	F	tate Number		Hours/Pcs		State		SUI		
		1 (P): \$15.00	*	40.00		Select	• •	Select	*	
Review		1 (P): \$15.00								
	F	Rate Of Pay		Piece		Work Addre	ess			
	F			Piece Select	٠	Work Addre Use Defau				
	F	Rate Of Pay			٠					

This feature can also be performed for check Batches.

After a user clicks the Refresh Scheduled E/Ds button, the payroll is locked from any adjustments while the refresh process is executing; it displays a "Refreshing E/Ds – Please wait" message. The Payroll hotkeys also do not work while the system is locked for the refreshing task.

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

# Refreshing Scheduled E/Ds for Batches

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

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

Pi	ayroll 05/05/2016 -	•1		$\boxed[Betches]{} \longrightarrow @ [Betches]{} \longrightarrow [Betches]{}$
↑ Payroll Settings	-	Check Batch 1	04/24/2016-04/30/2016 Weekly Houty & Salary 17 Checks	
		🗑 (ED)	ID: 76	

2. Select the Batch for which to refresh the scheduled E/Ds



3. Click Refresh the E/Ds 💷 symbol for this Batch

## Blocking Scheduled E/Ds from a Payroll

One or more Scheduled E/Ds can be blocked from a specific payroll.

- 1. Go to the Payroll Payroll Timeline screen.
- 2. Click the Table view symbol in the header.
- 3. Select a payroll and click the Block Scheduled E/Ds 🗐 symbol in the top left of the header **Result:** The Block Scheduled E/Ds screen is displayed.
- 4. Select all the Scheduled E/Ds to block from the payroll.
- 5. Select which batches from which the Scheduled E/Ds should be blocked.
- 6. Click Apply

**Result:** The system displays a confirmation message "Are you sure you want to block the Scheduled E/Ds from the selected Batches? The selected batches will be refreshed and any previously applied blocks will be overwritten.

7. Click Yes.

Result: The system displays a screen asking if you want to include Manual Checks.

- 8. Click **Yes** to include manual checks or No.
  - If **Yes**, the system performs the Block Scheduled E/Ds function including refreshing the Scheduled E/Ds for all (regular and manual) checks.
  - If **No**, the system performs the Block Scheduled E/Ds function for regular checks only and excludes manual checks.

Note that this is a difference/improvement over Evolution Classic where if there were manual checks there were two Block Scheduled E/D buttons – Block Scheduled E/Ds & Block Scheduled E/Ds with manual.

## 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
- Click the Plus sign on the Batch Checks screen to create a new batch.
   Result: the Check Batch Settings screen opens.



AUG CHECK	Delete Check					Summary Detail 🔹	
E/D Code	Description	Hrs/Pcs	Rate Of Pay	Amount	Rate Number	Аделсу	
iii D6	Health Insurance			\$0.00			•
■ D3	Direct Deposit - Net						
⊟ D4	Child Support			\$50.00		Office Of Child Support	
■ D1	Direct Deposit - Partial 1						
<ul> <li>Check: -99999</li> <li>Total Hrs: 40.0</li> </ul>	9554 - R, Batch: 1, Employee: Lew 00	vis, Al [1]					
<ul> <li>Check: -99999</li> <li>Total Hrs: 40.0</li> </ul>	9554 - R, Batch: 1, Employee: Lew 00 Total Amount: \$2,404.00	vis, Al [1]					
Check: .999995     Total Hrs: 40.     Add Check L	9554 - R, Batch: 1, Employee: Lew 00 Total Amount: \$2,404.00	wis, AI [1]		\$21.00		Office Of Child Support	
Check: -99999     Total Hrs: 40.     Add Check L	9554 - R. Batch: 1, Employee: Lew 00 Total Amount: \$2,404.00 Line Cancel Check Line	wis, AI [1]	\$0.00	\$21.00 \$2,500.00	4	Office Of Child Support	
Check: .999995     Total Hrs: 40.     Add Check L	9554 - R. Batch: 1, Employee: Lew 00 Total Amount: 52,404.00 Line Cancel Check Line Child Support - 2	wis, AI [1] 40.00			न न	Office Of Child Support	
Check: -99999     Total Hrs: 40.     Add Check L     D7     E01	9554 - R. Batch: 1, Employee: Lew 00 Total Amount: \$2,404.00 Line Cancel Check Line Child Support - 2 Salary			\$2,500.00		Office Of Child Support	
Check: -99995     Total Hrs: 40.     Add Check L     D7     E01     E02	9554 - R. Batch: 1, Employee. Lew outer Amount: 52,404.00 Child Support - 2 Salary Regular			\$2,500.00		Office Of Child Support	
	9554 - R. Batch: 1, Employee: Lew 00 Total Amount \$2,404.00 Cancel Check Line Child Support - 2 Salary Regular Direct Deposit - Partial 1			\$2,500.00		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 🗹 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 Manua	a Check Ty al	pe	•	will be c	reated for each		when creating cheo select.	ks. One check
					creation Options	Use this	Template	
					Pay: No	Selec		Ŧ
Sear	ch for emplo							
	EE#	▼ Last Name	▼ First Name	T	Middle Initial	▼ Status	▼ Organ	izatio 🍸
	1	Lewis	AI			Active	West >	• WB >> WS
	2	Smith	Bill			Active	So Eas	st > SB >> S
1	3	Greenburg	Goldie			Active	West >	WB >> WS
	4	Soffer	Harry			Active	Centra	> CB >> S
	5	Pinkman	Jessie			Active	West >	WB >> WS
	-	<b>D</b> <sup>1</sup>					0.5	16 items
				80	lect EEs			

- 4. Select Manual from the Check Types dropdown list.
- 5. Select the employees in the checkboxes who are to receive a manual check.
- Click Select EEs
   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 Checks				
Select a Check Type	¥	Find and Select the Emplo will be created for each E	oyees to use when creating mployee you select.	checks. One check
		Check Creation Options Standard Hours: No Salary Pay: No	Use this Template Select	٣
EE# Y Last Name 0000000002 Smith	Y First Name Bill	e <b>Y</b> Update Ba Yes	alance Check # 1445	*
	Creat	te 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 Third Party Checks in a new batch

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



4.

хс				
x c	Check Batch -2 - Settings			
	Start Date		End Date	
	6/7/2015	Ħ	6/13/2015	8
	Frequency			
	Weekly			
	Employee Types			
S	All			
ptio	Employee Filter			Selected: 2
Creation Options	Select Template			*
atio	Template			
Ce	-Select Template-			
	Checks per EE		Check Types	
	1		3rd Party	*
	Update Scheduled E/Ds Balan	ce		
	No			
	Calculate Scheduled EDs			
	Standard Hours			
	Salary Pay			
Include	Payroll Defaults			
P	Time Off Requests			
	C Time On Nequesia			

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

**Result:** A Check Batch Settings screen opens, showing the employee selected to receive the check. Select any additional employees if applicable and click the **Done** button.

Check	k Batch -2	- Settings						
Sean	ch for empl	loyee(s)						
Dura		ader and drop it here to group by	that a base					ø°
Diag a		Last Name	Tirst Name	T Middle Initial	▼ Status	T D80T		
	1	Lewis	AI		Active	West > WB >> WS >>> GT	*	
	2	Smith	Bill		Active	So East > SB >> SES >>> WT		
8	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		

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

Result: the Batch Checks screen opens.

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

roll 05/	05/201	0-1	Batch 1 : 04/24/2016	5 - 04/31	J/2016 F	Regular   -9999864	19   1 0 1 1		$\mathbf{c}^{\ast}_{Batches} \longrightarrow \mathbf{c}^{\ast}_{Checks} -$	Totals	• Fi
- 1	Export	to Excel	Reset Columns Add C	heck	Delete Check	Search Checks	Group By: Company Number		Summary	•	t
	Туре	EE Code	Name	Seq	Total Hrs	Gross Pay	E01 Amt Salary	E02 Hrs Regular	E02 Amt Regular		Time (
	R	1	Lewis, Al	1	40.00	\$2,500.00	\$2,500.00	40.00		\$0.00	Clock
h 1 kiy	R	2	Smith, Bill	1	40.00	\$2,100.00	\$1,500.00	40.00		\$600.00	Import
	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	Pinkmans, 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 -	
				Totals	440.00	\$15,060.00	\$6,800.00	440.00		\$8,260.00	

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



Select a	a Check Ty rty	ре		Find and Select the Em will be created for each		n creating checks. One check ct.
			C	Check Creation Options Standard Hours: No Salary Pay: No	Use this Ter Select	mplate 🗸
Sear	ch for empl	oyee(s)				
	EE #	▼ 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
-	~		~ ·			• • • • • •
						16 items

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

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

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

Add Checks				×
Select a Check Type 3rd Party	•	Find and Select the Employees will be created for each Employ	to use when creating checks. One chec ee you select.	:k
		Check Creation Options Standard Hours: No Salary Pay: No	Use this Template Select 🔻	
EE # Y Last Name 000000002 Smith	Y First Name Bill	Y Update Balance No	Check #	*
			1 item	IS
	Create	Check(s) for Selected EEs		

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



+	Dele	te Sear	ch Checks	Group	By: Company N	lumber			
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 Third Party Checks to an existing batch

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

elect	a Check Ty	pe		Find and Select the Emplo will be created for each E		creating checks. One check t.
3rd Pa	arty		•			
				Check Creation Options		
				Standard Hours: No	Use this Tem	plate
				Salary Pay: No	Select	*
Sear	rch for emplo	oyee(s)				
	EE#	▼ Last Name	▼ First Name	e 🔻 Middle Initial	▼ Status	▼ Organizatio ▼
	1	Lewis	AI		Active	West > WB >> WS 🔺
	2	Smith	Bill		Active	So East > SB >> S
_	2	Smith Greenburg	Bill Goldie		Active	So East > SB >> S West > WB >> WS
	3	Greenburg	Goldie		Active	West > WB >> WS
	3 4	Greenburg Soffer	Goldie Harry		Active	West > WB >> WS           Central > CB >> S
	3 4	Greenburg Soffer Pinkman	Goldie Harry Jessie		Active Active Active	West > WB >> WS           Central > CB >> S
	3 4	Greenburg Soffer Pinkman	Goldie Harry Jessie		Active Active Active	West > WB >> WS Central > CB >> S West > WB >> WS

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

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

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



Add Chec	ks					×
Select a Ch 3rd Party	eck Type	•	Find and Select the Employ will be created for each Emp		eating checks. One check	t
			Check Creation Options Standard Hours: No Salary Pay: No	Use this Templa Select	te •	
EE # 7		First Name           Bill	Yes	ance Ch 14	<b>leck#</b> 45	*
						÷
					1 items	;
		Create	e Check(s) for Selected Ef	Es		

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

- 8. Click the **Create Checks** button
- 9. Continue the payroll process as usual.

#### Notes

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

# Voiding Checks

In addition to the security rights required to work on payrolls, 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	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	80	Submit by 01/15/2015	+
12/31/2014 - 1	Processed	Aller and the state	Submitted	01/21/2015	Not Due
		101/14/2015 - 1		Weekty	01/11/2015 - 01/18/2015
Weekty	12/21/2014 - 12/28/2014	Weekly	01/04/2015 - 01/11/2015	mancy	01/11/2010 - 01/16/2010
Submitted on: 12/24/2014 10:55 AM	<b>60</b>		*	Bubmit by: 01/19/2015	+
12/24/2014 12:20 PM	~	Submitted on: 01/12/2015 11:24 AM	~	01/13/2019	•
01/21/2015 - 1	Pending	01/15/2015 - 1	Past Due	01/26/2015	Not Due
Weekly	01/11/2015 - 01/18/2015	Weekty	01/04/2015 - 01/11/2015	Weekty	01/08/2015 - 01/14/2015
	New Batch	weeky	New Batch		
	_			-	
Submit by: 01/19/2015	6		ß	Submit by: or.cb/doils	- +

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		<b></b>
Agency Payn S Checks		Time Off Accrual	
Payroll Check Comm	ent		<u>`</u>

- 3. Complete the required and applicable fields.
- 4. Click **Save H** 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.
- 7. Complete the required fields and click **Create Checks**.

Payr		Timeline	©	Pending	-									
Payro	ii 12	18/2015 - 1									Batches	→ 🚑 –	→ 📰 –	→ 🔀
<b>→</b>	хс	heck Batch -8 - Settings												+
Payroll S		Start Date* 12/27/2015		End Date* 1/2/2016			Time Clock Source File Choose file	•••	x				==	Payroll N
lettings		Frequency					File Format						•	lotes
s		Weekly				S	CSV - Comma Separated Values	*					-	5
	S	Employee Types				Options	Date Field Format							
	Creation Options	All				t	2 Digit Year (mm/dd/yy)	*						
	Ē	Employee Filter			Select EEs	ě	Employee Synchronization							
	atio	Select Template			×	E ×	Custom #	*		Create Checks				
	Cre	Template				Clock	Organizational Synchronization							
		Select Template				0	Full DBDT	*						
		Checks per EE		Check Types		Ē	Job Codes							
		1		Regular			Do Not Import Job Codes	*						
		Calculate Scheduled EDs	5				Apply Org Level							
		Standard Hours					From File	*						
		Salary Pay												
	Include	Payroll Defaults												
	<u>I</u>	Time Off Requests												
		<ul> <li>Time On Requests</li> </ul>												

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

Result: The Add Checks screen opens.

Check #         E ID         Within this check date range         With Status of           All         8/4/2015         9/3/0/2015         Any         Find           Che         Y         Run #         Y         EE ID         Y         Employee Na         Y         Gross         Y         Net         Y           08/27/2015         1         1         Lewis, Al         -99999528         S0.00         S0.00         Outstanding           08/27/2015         1         1         Lewis, Al         -99999522         S0.00         S0.00         Outstanding           08/27/2015         1         1         Lewis, Al         -99999523         S0.00         S0.00         Outstanding           08/27/2015         1         1         Lewis, Al         -99999533         S0.00         S0.00         Outstanding           08/27/2015         1         1         Lewis, Al         -99999498         S0.00         S0.00         Outstanding           09/17/2015         1         1         Lewis, Al         -99999492         S0.00         S0.00         Outstanding	Select a Che	ck Type			e check as a n			I. You can then create a neck.
08/27/2015         1         1         Lewis, AI         -99999528         \$0.00         \$0.00         Outstanding           08/27/2015         1         1         Lewis, AI         -99999522         \$0.00         \$0.00         Outstanding           08/27/2015         1         Lewis, AI         -99999523         \$0.00         \$0.00         Outstanding           09/17/2015         1         Lewis, AI         -99999498         \$0.00         \$0.00         Outstanding							Find	)
08/27/2015         1         Lewis, AI         -99999522         \$0.00         \$0.00         Outstanding           08/27/2015         1         1         Lewis, AI         -99999513         \$0.00         \$0.00         Outstanding           09/17/2015         1         Lewis, AI         -999999408         \$0.00         \$0.00         Outstanding	Che T	Run #	T EE ID	Employee Na	Che 🍸	Gross T	Net T	Status T
08/27/2015         1         1         Lewis, AI         -99999413         \$0.00         \$0.00         Outstanding           09/17/2015         1         1         Lewis, AI         -99999498         \$0.00         \$0.00         Outstanding	08/27/2015	1	1	Lewis, Al	-99999528	\$0.00	\$0.00	Outstanding
09/17/2015 1 1 Lewis, Al -9999498 \$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 -99999492 \$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	09/24/2015	1	1	Lewis, Al	-99999481	\$2,500.00	\$0.00	Outstanding
00/00/045 4 0 0/04/ Millio 00/00000 00 00 00 00 00 00 00 00 00 00	00/20/2015	4	n	Clark Willia	00000630	CO 00	£0.00	Outstanding 107 items

- 9. Select **Void** for the Check Type.
- 10. Enter search criteria to find the check to void
- 11. 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.

- 12. Highlight the check line to be voided.
- 13. 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.

14. 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.

···· [	_	1.0		_						1 1
L	Export	to Excel	Reset Columns Add C	heck D	Delete Check	Search Checks	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	\$2,100.00	\$1,500.00	40.00	s	600.00
	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	Pinkmans, Jessie	1	40.00	\$600.00		40.00	s	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	s	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	s	350.00 -
				Totals	440.00	\$15,060.00	\$6,800.00	440.00	\$8,7	260.00

- 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.

Void			▼ Negative	check as a re	versal of your	selected Che	eck.
		Nithin this che 8/4/2015	ck date range	With Any	Status of	Find	]
Che T	Run # 🍸	EE ID 🕎	Employee Na 🝸	Che T	Gross T	Net 🕎	Status 🝸
08/27/2015 1	1	1	Lewis, Al	-99999528	\$0.00	\$0.00	Outstanding
08/27/2015 1	1	1	Lewis, Al	-99999522	\$0.00	\$0.00	Outstanding
08/27/2015 1	1	1	Lewis, Al	-99999513	\$0.00	\$0.00	Outstanding
09/17/2015 1	1	1	Lewis, Al	-99999498	\$0.00	\$0.00	Outstanding
09/17/2015 1	1	1	Lewis, Al	-99999492	\$0.00	\$0.00	Outstanding
09/24/2015 1	1	1	Lewis, Al	-99999481	\$2,500.00	\$0.00	Outstanding
00/20/2015	1	0	Clark Millia	00000630	eo oo	eo oo	Outstanding 107 items

- 5. Select **Void** for the Check Type.
- 6. Enter search criteria to find the check to void
- 7. Click the **Find** button to display a list of checks that fit the criteria selected.
- 8. Highlight the check line to be voided.
- 9. Click Create Void Check for Selected Check.
- 10. **Result:** user is brought back to the Batch Checks Screen. The Check Type for the voided check is now **V** and the selected check is highlighted.



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

11. Process the payroll as usual.

# **Deleting Batches**

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

Result: the Batch Checks Screen opens.

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

Pa	iyroll Timeli	ne 🛛 🖸	Pending
Pay	yroll 01/08/2016	- 1	
	+	Check Batch 1	12/28/2015–01/03/2016 Weekly Hourly & Salary 4 Checks
		Ŵ	ID: 12

Click Delete I in the left-hand corner of the Check Batch.
 Result: a message will open asking if you are sure you want to delete this batch > click Yes.
 The batch is deleted, and the batch sequence number is updated accordingly.

## **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.



								Batche	is Checks	Harak →
									Detail	· •
Check Lines	1	2 - Smith, Bill - 1	of 1 *		# Check Type Sequence	Redistribute				<b>T</b>
Check Lines Manual Tax	`			-99999682	Regular 1 of 1	Allocation	D			
Fed Overrides		E/D Code * •	T Di	escription •	▼ Hrs/Pcs	T	Pay Rate 🛛 🗡	Amount T		т
State Overrides	-	E02		Regular		40.00	\$0.00	\$0.00	1 (P) :	\$0.00
Local Overrides	Ba	asic Labor Defaults	Local Tax Overrid	ies						
Options		Rate Number		Hours/Pcs		State		SUI		
Review		1 (P): \$0.00	*	40.00			,	•	*	
Review		Rate Of Pay		Piece		Work Ad				
		0.00		Select	•	Use De	fault	,		
		Agency								
Previous Next		- Select -	*							
	,	■ E01		Salary			\$0.00	\$1,500.00	1 (P) :	\$0.00
		■ D3	Dir	ect Deposit - Net				\$1,181.31		
		☐ D6	н	lealth 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.

(i)	Redistribute Allocations						×
You	d below are the allocations for your selected E can adjust values on the existing allocations o nal allocations 🎧 can be modified but not ren	r 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 EWestern Branch Western Sales E	ept 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 <b>Completed</b> , the Taxes section will be blank.					
Description	Lists the taxable wages and taxes totals					
Amount	Lists the total amounts of taxable wages and taxes					
Count	The number of checks included in the total amounts of taxable wages and taxes					



# 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. Refer to the Appendix at the end of this chapter for a list of available reports that can be generated in Evolution Payroll.

Defined Reports	Published Rep	orts	Ad H	oc Reports
Search For Report Report Name Payroll Register By Co (S109)	Ţ	Report #	T	Payroll Register By Co Choose options for this report
Payroll Register (S109) Earnings And Deductions (S181)		109		Configure Report 🔶
Delivery Label (S184)		184		
Delivery Instructions (S187) Tip Credit (S189)		187 189		
Cover Letter (S193)		193		
Direct Deposit (S211) Check Reconciliation (S214)		211 214		
Pension Works Report (S215) 401K Report (S215)		215 215		
Workers Compensation (S217)		217		
Taxable Wages For Payroll By Ck Date (S236)		236		
Tax Report For Payroll (S247)		247		
Portrait Input Worksheet (\$262)		282 1 - 15 of 32	items	

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

Result: The Report Generation screen opens.



Reports List     Option	ns for Payroll Register (R	(W)						
Payroll Filter	EE Filter	Org Filter	Misc Options	Run Report				
ect the date range to use for yo	our report. All payrolls within your range will b	e selected. You can fine tune your s	election by checking only the pays	olls you want to include.				
rting Date		Ending Date		Include				
01/2015	8	12/14/2015		8		l	Apply	
	Check Date	T Run #	т	Processed Date	т	Status	T Type	
0	12/14/2015	44515				Pending	Regular	
0	12/13/2015	1				Pending	Regular	
1	12/13/2015	2				Pending	Regular	
)	12/09/2015	1				Past Due	Regular	
)	12/01/2015	1				Pending	Regular	
1	11/25/2015	1				Past Due	Regular	
1	11/11/2015	1		12/11/2015		Past Due	Regular	
0	10/14/2015	1		12/11/2015		Past Due	Regular	
0	09/30/2015	1				Past Due	Regular	
	09/16/2015					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 Rep	orts	Ad H	loc Reports
Search For Report         Report Name         Payroll Register By Co (S109)         Payroll Register (S109)         Earnings And Deductions (S181)         Delivery Label (S184)         Delivery Label (S184)         Delivery Instructions (S187)         Tip Credit (S189)         Cover Letter (S193)         Direct Deposit (S211)         Check Reconciliation (S214)         Pension Works Report (S215)         401K Report (S215)         Workers Compensation (S217)	7	Report # 109 109 181 184 187 189 193 211 214 215 215 217	<b>Y</b>	Payroll Register By Co Choose options for this report Configure Report →
Taxable Wages For Payroll By Ck Date (S238)		236		
Tax Report For Payroll (S247) Portrait Input Worksheet (S262)		247 262		
Image: Page 1     of 3     Image: Page 1		1 - 15 of 32	items	



Payroll	Filter	EE Filter		0	rg Filter		M	isc Options		Run Report	
Select the date to include.	range to use for your i	report. All payro	olls within your	range wi	l be selected.	You can	fine tune	your selection by	checking	only the payrolls y	ou wan
Starting Date		Ending Dat	e		Inclu	de					_
01/01/2015	1	01/16/20	15		III AI	Payrolls		*		Apply	
	Check Date	T	Run #	т	Processed	Date	T	Status	т	Туре	т
	01/13/2015		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

Defi	ned Reports	Published	Reports	Ad-Hoc Reports			
🔶 Rep	orts List Options for	Payroll Register (F	RW)				
	Payroll Filter	EE Filter	Org Filter	Misc Options	Run Report		
	e organizational level that you want ction is made, your results will inclu						
Team			*				
	Division		Branch		Department	Team	
	⊿ Div1						
			⊿ NY Branch		# Department Name Field		
					Department Name Field		
						Team2	
					⊿ Test 2Nd Dept		
8							
			⊿ NH Branch				
					*		
			+ VT Branch				
			✓ Branch 23				
					a 1		
•							
			∡ New Branch 01				
-					J DEPT 1		
						Team 1	

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.



Def	fined Repo	Publishe rts	ed Reports		Ad-Hoc Reports		
🗲 Re	eports List Options	ofor Payroll Register	(RW)				
	Payroll Filter	EE Filter	Org	Filter	Misc Options	Run Report	
Parameters	nal options available for this re Show only Summary for Show Home DBDT for e Include Memos in Total: Include Pieces from Pie Break Employee Betwee Include Taxable Memos Deductions as Taxes Show Shift Differentials Bold EE Name, Check I Hide SSN, State, Frequ Swap Check Date and Show Employees with Y	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	ĺ	Grouping & Sorting	Group Level Department Group Type Summary Detail Group Sort Group Code Detail Sort Employee Last Name SUI Summarize SUI	* * * *	
	Show Cobra Credit		-				

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

Defined Repor	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 can as follows: 15 1.			e it. With options set: Include Memos in Totals Include Pieces from Piecework in To Break Employee Between Pages Deductions as Taxes Hide SN, 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 Published Reports screen opens.
- 3. Select a payroll and the report for which to view a preview.

bl	ished R	en	orts	Defined Repo	orts	Ad-Hoc Reports			
		99	0110						
arch	for Report							I	
	Check Date	T	Run # 🍸	Check Period	Report # ▲ 🔻	Report Name	Туре	T	Preview 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.



# Ad Hoc Reporting

Evolution Payroll contains an Ad Hoc Reporting feature, similar to Evolution Classic. Users can add a new Ad Hoc report, edit an existing Ad Hoc report, and run an Ad Hoc report.

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

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

Similar to Evolution Classic there are three general categories of Ad Hoc Reports:

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

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

#### **Security Settings**

Users must be granted security rights access to Ad Hoc reports in Evolution Classic to use Ad Hoc reports in Evolution Payroll.

- 1. Go to SB Admin Security SB Templates.
- 2. Select the template used.
- 3. Scroll down to Reports, and click the small **plus sign** to the left.

4. Verify there is a green plus sign to the left of Ad Hoc Reports. If there is a red minus sign, right-click on the **Minus-sign** and select Enabled.

#### Setting up the Report

The report must be added at the Service Bureau level, so it is available at the report level in Evolution Classic.

- 1. Go to the Bureau Company Default Reports Details tab.
- 2. Click the **plus sign** in the toolbar to create a new record.
- 3. Select System in the Level field dropdown list.
- 4. Select the report to be added in the Report field dropdown list.
- 5. Click the check mark and the commit button in the toolbar to post and commit changes



# Adding a New Ad Hoc Report

- 1. Click the **Reports** menu to open. **Result:** The Published Reports screen opens.
- 2. Click **Ad Hoc Reports** in the header.

Ad Hoc Reports	Defined Repor	rts	Publis	shed Reports
Search for Report				Ad Hoc - Employee
Report Name	<del>т</del>	Report #	Ţ	Choose options for this report
Ad Hoc - Employee (S1134)		1134	^	
Ad Hoc - Payroll (S1132)		1132		Edit Report 🔶
Employee Address Report (S1134)		1134	$\sim$	Run Report →
		1 - 3 of	3 items	

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

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

Ac	I Hoc Reports ■ 🖬 🗙	Defined Reports	Published Reports
	Reports List Report Name * New Report Name	Configure Rep	ort 🍝
New Report	Select Adhoc Report Template Ad Hoc - Company (S1153)	Ŧ	

6. Click the Configure Report button.



Ad	Hoc Re	Defined ports	Reports Pul	blished Reports				
← F	teports List Opt	tions for BDazzled Co	ompany Test Repo	ort (S1153)				
	Columns	Sorting						
	Column ID	T Column Title	<b>▼</b> Hidden	▼ Size	T		Column Type	
	COL1	Team Code	No		^	₽	Team	Ŧ
	COL2	Department	No	80		Column Property	Column Title Team Code	
						In Pl	Column Size	
						ulo	Column Size	
List of Columns							Hidden Column	
of Co							Column Values (Select ONLY 1 Column value )	per column)
List o							FIELD DISPLAY NAME	т
						Column Values	Address1	^
						N UC	Address2	
					~	olun	Billing Cl Bank Acct Nbr	
					2 items	0	City	47 Norma
	Add Fields Dele	ete Fields		Move U	D Move Down			47 items
	Dele			white o				Apply Changes Cancel Changes

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

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

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

# Editing an Existing Ad Hoc Report

- Click the **Reports** menu to open.
   **Result:** The Published Reports screen opens.
- 2. Click Ad Hoc Reports in the header.

Ad Hoc Reports	Defined Repo	rts	Publis	hed Reports
Search for Report				Ad Hoc - Employee
Report Name 🔺	т	Report #	T	Choose options for this report
Ad Hoc - Employee (S1134)		1134	^	
Ad Hoc - Payroll (S1132)		1132		Edit Report 🔶
Employee Address Report (S1134)		1134	~	Run Report 🔶
		1 - 3 of	3 items	

- 3. Select the Ad Hoc report from the list that is to be edited.
- 4. Click Edit Report.



- 5. Make any changes to the report parameters.
- 6. Click Apply Changes.
- 7. Click the **Save** symbol in the header.

# Running an Ad Hoc Report

- 1. Click the **Reports** menu to open. **Result:** The Published Reports screen opens.
- 2. Click **Ad Hoc Reports** in the header.

Ad Hoc Reports	Defined Repo	rts	Pub	lis	hed Reports
Search for Report					Ad Hoc - Employee
Report Name 🔺	т	Report #	Т		Choose options for this report
Ad Hoc - Employee (S1134)		1134			
Ad Hoc - Payroll (S1132)		1132			Edit Report 🔶
Employee Address Report (S1134)		1134		~	Run Report 🔶
		1 - 3 of	3 items		

- 3. Select the Ad Hoc report from the list (in this example the Employee report template is selected.
- 4. Click the **Run Report** button.

**Result:** The system displays the Configure Report screen, with four tabs: Columns, Employee Filter Misc, and Run Report.

	Hoc R	leports	Defined Reports	Published Re	eports						
+	Reports List	Dptions for Ad H	oc - Employee	Run Report							
List of Columns	Column ID COL1 COL2 COL3	▼ Column Custom Las Nam First Nam	Employee Code No		Size 5 10 1	•	Column Property	Column S 5 I Hidder Print T Column F Examples	e Itile Employee Code Size 1 Column ext Instead of Abbreviation	• 	
	Add Fields	Delete Fields			Move Up	3 items Move Down	Column Values		Address1 Address2 Auto Labor CI Ed Group Auto Pay Shift	148 items Ity Changes Cancel Changes	

- 5. Click each tab to set up all of the report parameters.
- 6. When complete, click the **Run this Report** button on the Run Report tab.



Ad Hoc Reports	Defined Reports	Published Reports	
← Reports List Options for A	d Hoc - Employee		
Columns Employee F	ïlter Misc	Run Report	
Depending on your filters and options, this rep You will find an entry in the task queue for you		you run this report a task will be placed in the queue to generate it. e report from the queue entry.	
Your current report definition is set as follows:			
Report Number : 1134		Columns: 3 Columns added to report	
Employee: All Employees Included.			
With options set:			
Print ASCII Result			
Print Column Headers			
File Type : Delimited			
Delimiter : ,			
Qualifier : "			
Sort By :			
0 Current Status Code			
Run this Report			

**Result:** The system displays a confirmation message at the top right of the screen that your report task has been added to the queue.



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



# Ad Hoc Report Restrictions

Note the following restrictions concerning Ad Hoc reports:

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

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

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

# The Reports Menu - Appendix

#### **Reports - Defined Reports**

Report	Report
401(K) Report (S215)	HR EEO-4 Headcount Report (S566)
ACA Eligibility Analysis Report (S2713)	HR EEO Ethnic ID Report (S467)
ACA FTE Report (S2711)	HR EEO Standard Report (S450)
ACA Rule Of Parity Test Report (S2834)	HR Emergency Listing by Emergency
ACA Status Audit Report (S3085)	Contact Report (S452)
Birthday Report (S457)	HR Employee Review Report (S850)
Certified Payroll Report (S518)	HR Mailing Labels (S449)
Check Reconciliation Report (S214)	HR OSHA 300 Report (S462)
Check Stub Detail Report (S2590)	HR OSHA 300A Report (S567)
Compensation Detail Report (S601)	HR OSHA 301 Report (S451)
Cover Letter Report (S193)	HR OSHA Injury Report By Cost (465)
Cover Letter With Tax Report (S1082)	HR OSHA Injury Report by Home Dept. (S453)
Direct Deposit Report (S211)	HR OSHA Report By Body Part Code (S466)
Employee Audit Report (S1075)	HR OSHA Report by Injury Code (S464)
Employee Change Listing Report (S539)	HR OSHA Report By Status (S568)
Employee Change Listing Report (New) (S1075)	HR Personnel Report (S463)
Employee HR Date Report (S457)	HR Veterans Report (S714)
Employee Profiles Report (S263)	HR Workers Compensation Code Report (S454)
GL Export Report (S348)	Inactive Employees Report (S2731)
General Ledger Report (S183)	Individual Earnings Report (S431)
HR Alert (\$759)	Input Worksheet (S351)
HR EEO-1 Report (S455)	Job Costing Report (S229)
HR EEO-1 Section D Employment Data Report (S1537)	Labor Distribution Report (New) (\$1077)



Report	Report
New Hire Pending Report (S292)	Tax Notices Report (\$341)
New Job Costing Report (S554)	Tax Report for Payroll (S247)
Payroll Register Report (S109)	Taxable Wages for Payroll Report (S236)
Period Summary Report (S404)	Time Off Register Report with Hours (\$920)
Personnel Register (S344)	Workers' Compensation Report (S217)
Portrait Input Worksheet (S262)	

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.	S193, S257, S356, 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 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.

Y         Last Name         Y         First Name         Y         State         Y         Zip Code         Y         Status         Y         Al Lewis           Lewis         A1         NY         10060         Active         Last Name         Last Name         Last Name         Last Name         Lewis         Last Name         Lewis         Last Name         Lewis         Last Name         Lewis         Lewis         Last Name         Lewis         Lewis </th <th>First Name: Al</th>	First Name: Al
Smith         Bill         MA         10022         Active         East Name           Greenburg         Goldie         NY         10044         Active         SINEIX	
Greenburg Goldie NY 10044 Active SSNEIN	AL
Soffer Harry VT 05401 Active 884-77-3311	
Pinkman Jessie NY 10011 Active Status: Active	
Bichon Selma MA 88855 Active	
Goodman Saul VI 05401 Acave 963 Main Str	et
Clark Willie VT 05401 Active Brooklyn, NY	10066
White Walter NY 10012 Active	
D Bigole Susan VT 05401 Active	
I Simon Simon NY 11234 Active	
1 - 11 of 11 items 🖒	
· · · · · · · · · · · · · · · · · · ·	



My Task Queue	R			Logged in as: Sally   Settin
Search for Task		Results Log		
Run Report Direct Deposit #211 Sefinished Successfully - Today 4:58 PM	ID: 223	CO# WEB1150 . Cover Letter #193	4 X X	🗸 page 1 of 1
Run Report Cover Letter #193 Sinished Successfully · Today 4:52 PM	ID: 222	#WEB1150 D&L Services (H	ICM) CO#	WEB1150 . Cover Letter #193
Run Report Payroll Register #109 Finished Successfully - Today 4:41 PM	ID: 221		Check Period F Week Nu	Range : 05/08/2016 TO 05/14/2016
Preprocess Payrolls WEB1150 Pr:4/28/2016 - 1 Finished Successfully - Today 4:27 PM	ID: 220	I am the cover letter notes. There is Have a nice day!	quite a lot of room here.	
Preprocess Payrolls WEB1150 Pr:4/28/2016 - 1 Sinished Successfully - Today 4:25 PM	ID: 219			
Preprocess Payrolls 0001A Pr:6/8/2016 - 1 Finished with Exceptions - Today 4:18 Ph	ID: 218	Payroll Totals:	# Checks	
Process Payrolls 0001A Pr.5/25/2016 - 1 Finished with Exceptions · Today 4:13 Ph	ID: 217 M	Total Regular Checks Total Direct Deposits Total Manual Checks Total 3rd Party Checks Total Void Checks Total Void Checks Total COBRA Checks Total Net Payroll	3 12 0 0 0 0 0 0 11 Items	0.00 0.00 0.00 0.00 0.00 0.00 0.00
		Total Billing Impound Total Agency Checks Total Agency Checks DD Total Agency Checks Void Total Tax Deposit Checks Ta:	2 0 x deposit to be made by ISystems	39 23 238 50 0 00 0 00
	- 11	Sum of Checks		277.73
	-	Total of Checks Printed Total Tax Liability	13 Items	6011.39

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

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



Dv	Task Task	T Status	▼ Last Update ▼	Summary	T Current State
924395	Process Payrolls	Finished with Exceptions	01/14/2015 4:09PM	BDazz1 Pr:1/19/2015-1	Finished
924391	Preprocess Payrolls	Finished Successfully	01/14/2015 4:08PM	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 Payrolls	Finished Successfully	01/12/2015 1:43PM	BDazz1 Pr:1/12/2015 - 2	Finished
Page	1 of 2 • H			01/14/2018 4/08PM RDatzled Det	1 - 5 of 10 items
ask: Proces	•	l l	. 7		Finished with Exceptions 01/14/2015 4:09PI
Posulte	Expentions				
date/time computer nam user name	Exceptions         Log           ery method is not setup correctly : 2015-01-14, 16:09:37, 77ms e: INLPWA03 : SVSTEM <admin> tem : Windews NT New kuid 9200</admin>				
Deliv date/time computer nam user name operating sys system langu system up tin program up tir processors physical mem	ery method is not setup correctly : 2015-01-14, 18:09:37, 77ms : : INLPWA03 : SYSTEM <admin> : SYSTEM <admin> : SYSTEM <admin> : Boy 100 : English : : : : : : : : : : : : : : : : : : :</admin></admin></admin>	5Hz			
Deliv date/time computer nam operating sys system langu system up tin program up tin processors physical mem free disk spac display mode process id allocated men executable	ery method is not setup correctly : 2015-01-14, 18:09:37, 77ms ie : INLFPWA03 : SYSTEM <admin> : SYSTEM <admin> : SYSTEM <admin> : SYSTEM setup <a href="https://www.setup">https://www.setup</a> : System <a href="https://www.setup">https://www.setup"&gt;https://www.setup"/www.setup"&gt;https://www.setup"/www.setup"&gt;https://www.setup"/www.setup"//www.setup"/&gt; https://www.setup"//www.setup"///www.setup"///www.setup"///www.setup"///www.setup"///www.setup"///www.setup"///www.setup"///www.setup"///www.setup"///www.setup"///www.setup"///www.setup"//ww</a></admin></admin></admin>	3Hz			

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

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

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

\* Saving can only be applied to the active tab.

## Viewing/Downloading Reports

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