PAYROLL PARTNERS

Your Partner for Payroll Services

Evolution Help for Remote Users

Evolution Remote Software Guide

Payroll Partners is Your Partner for Payroll Services. We are committed to our clients' total payroll satisfaction. Therefore, if you need any assistance with Evolution or have any payroll-related questions please contact us.

We are an organization dedicated to providing the best customer service possible, and we are always available to help in any way we can. If you have a question about how to do something in Evolution and you can't find it in the Evolution Help for Remote Users Manual then please give us a call at (817) 226-8111 or send an e-mail to info@payrollpartners.com.

We welcome any suggestions or comments on how to make this Instruction Manual more beneficial to you. If you would like to see something added to the manual then please let us know. We appreciate your input and would be glad to update any information.

DEFINITIONS OR COMMON PHRASES

ABA

Bank Routing Number (It can not begin with a 5)

ACH

Automated Clearing House; billing and direct deposits are processed through here

Agency Checks

Checks written to third parties for child support, garnishments, 401K, insurance, etc.

Commit Changes

Yellow Sun

DBDT

Division (usually hidden), Branch, Department, Team (not used)

Direct Deposit

Employees' paychecks are electronically deposited into their checking or savings bank account

EFTPS

Electronic Federal Tax Paying System

EIC

Earned Income Credit; to be eligible, the employee must complete a Form W-5 EIC Advance Payment Certificate and meet certain income tests

E-Sheets

Excel-style spreadsheet for importing time and other data into payroll

Evolution

Payroll Software

HR

Human Resources Module in Evolution for tracking employees and benefits

OASDI

Old Age and Survivors Disability Insurance; this is the social security portion of the FICA tax

Pre-process

This is a preliminary payroll run that calculates payroll checks, but does not finalize your payroll. A pre-process is a tool designed for you to double check payrolls for accuracy before submitting them.

Refresh your screen

Blue circular arrow button located near the top of your screen by the date box

Save Changes

Green Check Mark

Scheduled E/D

A Schedule Earnings or Deduction

Swipeclock

Timekeeping software

TOA

Time off Accrual

YTD

Year to Date

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Setting up a New Employee

Before following the directions on Setting up a New Employee, please make sure the employee has not previously been entered into your company's employee records in Evolution. To double check, click on the EMPLOYEE command button and select employee. Sort your employees by EE code, last name, first name or social security number. Scroll through your entire list of employees and make sure the new employee hasn't already been entered. If you are not sure if the employee has worked for your company in the past, you will need to remove all filters so all employees' records will be visible. To do this click on the red question mark beside the EE code bar in the EMPLOYEE-Employee section. When the Filter records to view box pops up, click the CLEAR ALL button and then select OK. This will allow you to view all past and current employees' records. Then scroll through your entire list of employees and make sure the new employee hasn't already been entered.

If you have double checked to make sure the employee has never been entered into your company's employee records in Evolution then follow the directions below to set up a new hire.

1. Click on the EMPLOYEE command button and select employee.

2. Click on the plus sign at the top of your screen. This will direct you to the EE Entry tab.

3. Start filling in the blanks with your new employee's information.

4. If your company has departments set up in Evolution then don't forget to enter a department on the first column for your new hire. After entering the employee's gender, you can hit F4 on your keyboard or click on the square button to the right of the Gender drop-down arrow. When the Filter & Select D/B/D/T box pops up, highlight the correct department and then click on the SELECT button. This will put a department in the department field.

5. In the second column, enter the hire date in both the Current Hire Date and Original Hire Date fields. If the employee is ever terminated and later rehired, you should change the Current Hire Date to reflect the new hire date and you should leave the Original Hire Date as is.

There are more instructions on the next page for Setting up a New Employee.

6. On the second column, be sure the pay frequency defaulted correctly. If your company has multiple pay frequencies, click on the drop-down arrow under the Pay Frequency field and select the correct one. This is important when you create a batch for a particular pay frequency.

7. If your employee is salaried, leave the defaults for the Rate Number and Rate Amount field. The Rate Number field should default to 1 and the Rate Amount field should default to 0.00.

8. On the third column, be sure the federal/state marital status and number of dependents is filled in. If your new employee, claims Married, but Withhold at Single Rate on the W4 then select Single on EE Entry tab.

9. Below the Federal Dependents field, there is an EIC field. EIC stands for Earned Income Credit. This field should automatically default to NONE. **Unless the employee is eligible for EIC, leave the default set at NONE.** To be eligible, the employee must complete a Form W-5 EIC Advance Payment Certificate and meet certain income tests. If you have any questions about EIC give Payroll Partners a call at (817) 226-8111.

10. Save and commit all changes by clicking on the green check mark and yellow sun.

Setting up an Employee with Multiple Pay Rates

Follow the Setting up a New Employee directions on pages 1-2 in addition to the directions below if your employee has multiple pay rates.

1. Click on the EMPLOYEE command button and select pay rate info.

2. Click the Browse tab, find your employee on the right-hand side of the screen and highlight him or her.

3. Then click on the Details tab. Rate Number 1 should already be entered. Rate Number 1 is the primary rate you entered on the EE Entry tab.

4. To add a second rate, hit the plus sign at the top of your screen. In the lower right-hand corner, there is a box that says rate amount. Fill in the rate amount box.

5. Unless your company is set up to have certain departments attached to certain rates, leave the Rate Number at 2. Under the words 'Primary Rate,' be sure it reads NO. Commit your changes by clicking on the yellow sun.

Setting up a Salaried Employee with Overtime Pay

Follow the Setting up a New Employee directions on pages 1-2 in addition to the directions below if your full-time salaried employee is able to earn overtime pay. You must set up a second rate for overtime earnings.

1. On the EE Entry tab, enter the salary amount and leave the default settings for Rate Number (it should read 1) and Rate Amount (it should read 0.00).

2. Next, click on the EMPLOYEE command button and select Pay Rate Info. You will see the primary rate (Rate 1) set to 0.00. Leave this information as is.

3. Hit the plus sign at the top of your screen and in the lower right-hand corner, fill in the rate amount. The rate amount needs to be the flat pay rate amount not the time-and-a-half rate. When you enter the hours under the Overtime Hours Earnings Code in the payroll, it will calculate at the time-and-a-half rate.

4. Leave the Rate Number at 2, and under the words 'Primary Rate,' put NO. Save and commit your changes by clicking the green check mark and yellow sun.

Setting up a New Employee Claiming Exempt on his or her W4

In order for federal withholding tax to be exempt, your employees must fill out their W4 form correctly. If they write in a number of exemptions on line 5 or write an additional amount on line 6 and claim exempt on line 7 then they have filled the form out incorrectly. The employee will need to fill out a new W4 form for your records. To claim exempt, your employee must leave line 5 and line 6 on the W4 blank and write exempt on line 7.

If the W4 form is filled out correctly follow the Setting up a New Employee directions first. After the new employee has been entered into Evolution, fax a copy of the W4 to Payroll Partners at (817) 467-9994. If you are not faxing a cover sheet with the W4 then please write your company name on the W4. If the employee's W4 form is filled out correctly then your payroll processor will block the federal withholding. This means no federal taxes will be withheld from your employee's check.

If you are working on payroll and need Payroll Partners to block the federal withholding immediately, please give us a call at (817) 226-8111 after faxing the W4. We will make the change and then you can refresh (blue circular arrow) to see the change.

You can double check to make sure federal withholding was blocked by clicking on the EMPLOYEE command button and selecting employee. Once on the Browse tab, highlight your employee and click on the Federal Tax tab. Under EE Federal, it should read Block. You can also check the upcoming payroll's pre-process to ensure the employee has no federal taxes deducted from the pay check.
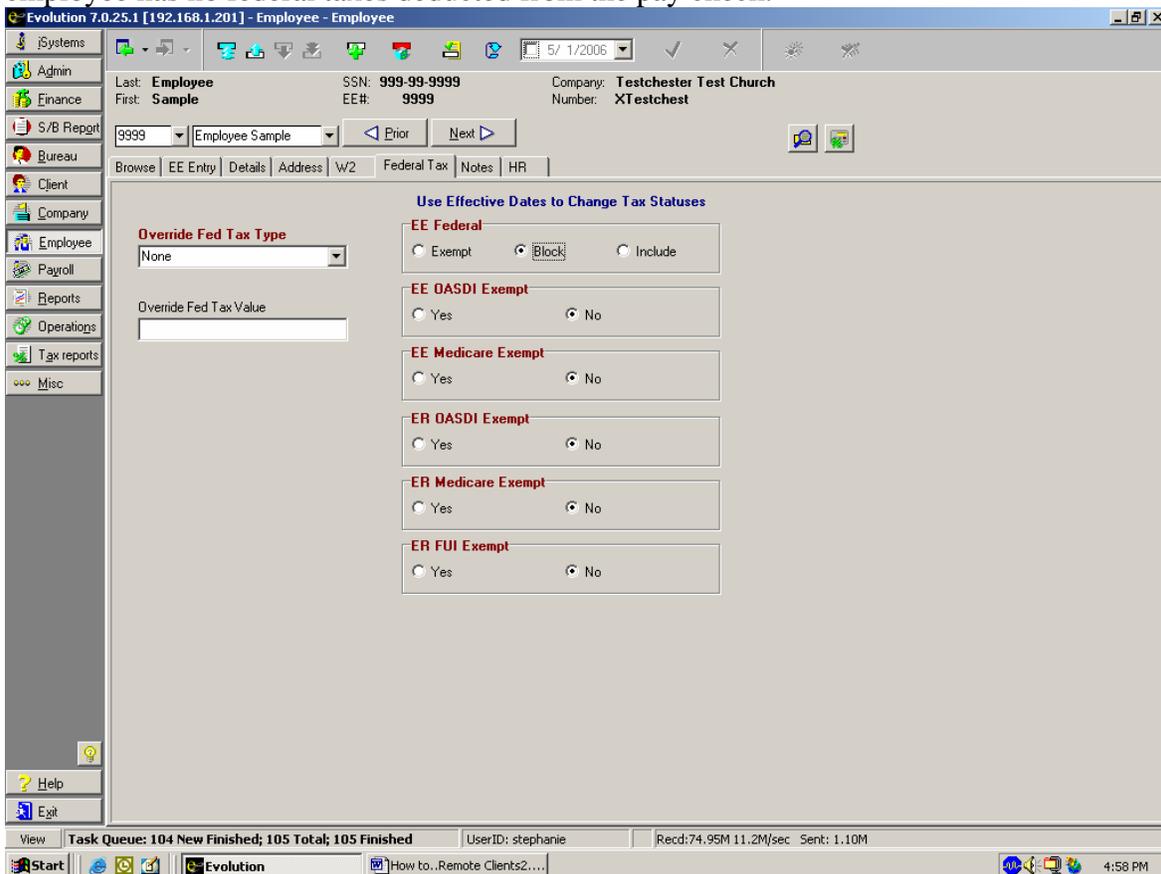
Rehiring a Terminated Employee

1. Click on the EMPLOYEE command button and select employee.

2. When on the Browse tab, click on the red question mark (middle right-hand side of your screen) beside the EE Code bar.

3. When the Filter records to view box pops up, click on the CLEAR-ALL button located in the lower left-hand corner of the pop-up box. Then click on the OK button. This will allow you to see any terminated employees.
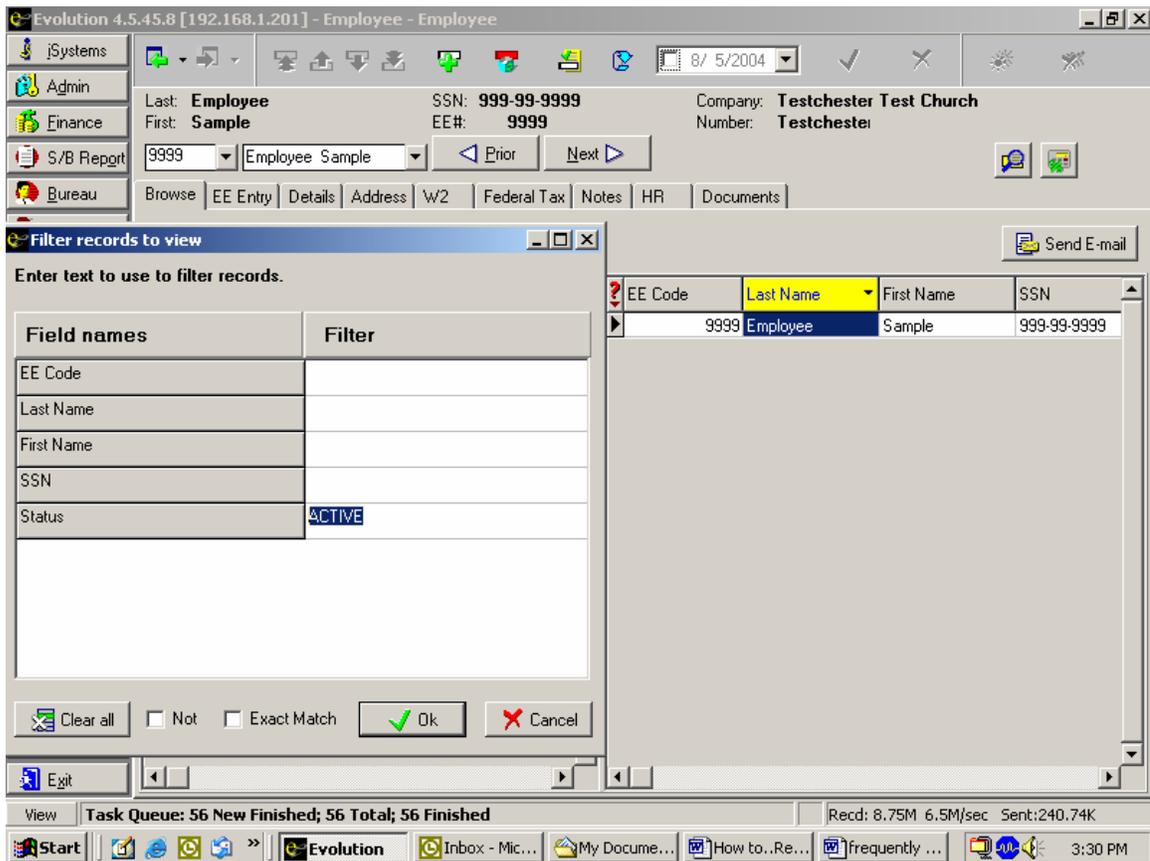
4. Highlight the terminated employee you want to rehire and double click. You will be directed to the EE Entry tab.

5. Erase the termination date, by clicking on any number under Current Termination Date and hitting delete on your keyboard. Then under Current Status Code, click the drop-down arrow and change the status to ACTIVE.

6. You will also need to change the current hire date. Please put the date the employee was rehired in the current hire date field. In the original hire date field, you should leave the original start date of your employee.

7. Lastly, save and commit your changes by clicking on the green check mark and yellow sun.

Starting a Payroll

1. Click on the PAYROLL command button and select payroll.

1. Once on the payroll tab, click on the CREATE PAYROLL button (lower right-hand side of the screen). You will then see a new payroll check date appear with your previous payrolls. If the check date is correct then click the green check mark and yellow sun to save. If the check date that appears is not correct, change the date by clicking on the drop-down arrow next to the check date at the bottom of your screen. Then save your changes by clicking on the green check mark and yellow sun.

2. Unless you are running a second payroll for the same check date make sure the payroll run number is 1.
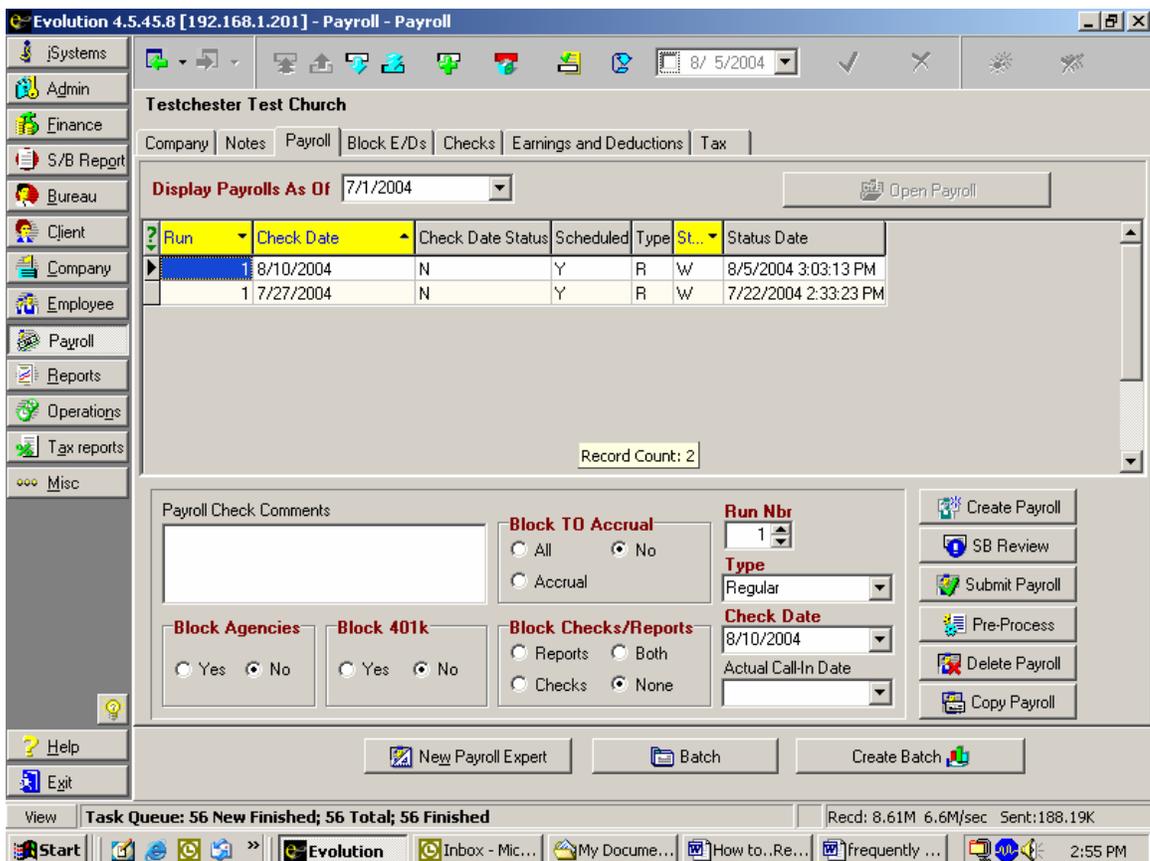
3. If you are not redirected to the Batch screen after saving, then click on the BATCH button (at the bottom of your screen). Once on the Batch tab, click the CREATE BATCH button. You will see a period of dates pop up and also your pay frequency. If the period beginning date, period ending date and the pay frequency are correct, then click the green check mark and yellow sun (and proceed to step 5).

If the frequency, period beginning date or period ending date is incorrect proceed to step 4.

4. Correct the period beginning date, period ending date or the pay frequency by clicking on the drop-down arrow to the right of each box. Once corrected, click the green check mark and yellow sun.

5. Once you have saved, a box will pop up asking you 'Would you like to auto-create checks for this batch?' Clicking on YES will bring in all of your employees for the frequency selected, and clicking on NO will not bring in anyone.

6. By clicking on the Checks tab, you will be able to see your employees.
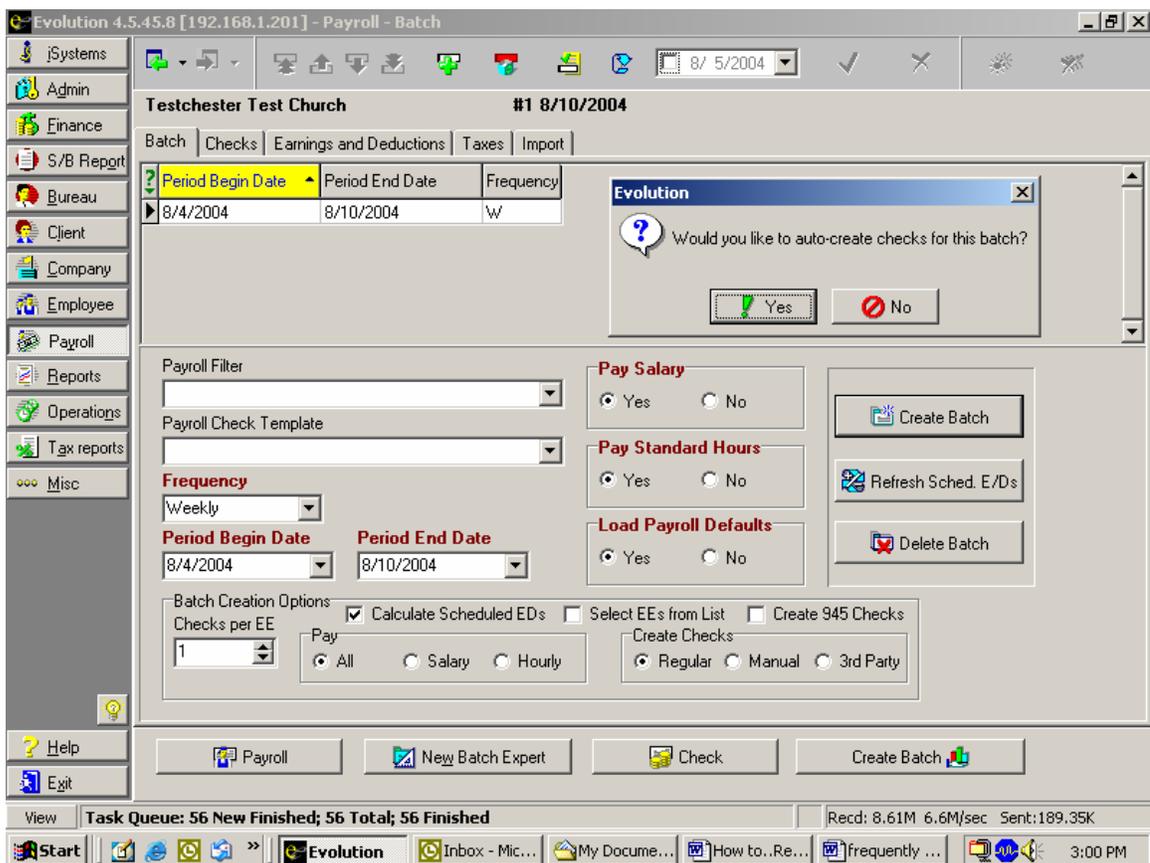
Creating a Second Batch

If you have multiple pay frequencies with the same check date you will need to create a second batch to pull the employee(s) in. For example, under check date 6/15/04 you might have one batch with a pay frequency of bi-weekly and a second batch with a pay frequency of monthly. This will allow two different batches of employees to be paid under the same check date.

Follow the Starting a Payroll instructions on pages 8-9 before following the Creating a Second Batch directions below.

1. In the payroll, go back to the Batch tab and click on the CREATE BATCH button. Adjust your period beginning date, period ending date and pay frequency. Be sure to save your new batch by clicking on the green check mark and the yellow sun.

2. After saving the second batch, a box will pop up asking you 'Would you like to auto-create checks for this batch?' Clicking on YES will bring in all your employees with that pay frequency, and clicking on NO will not bring in any of your employees.

3. By clicking on the Checks tab, you will be able to see your employees.
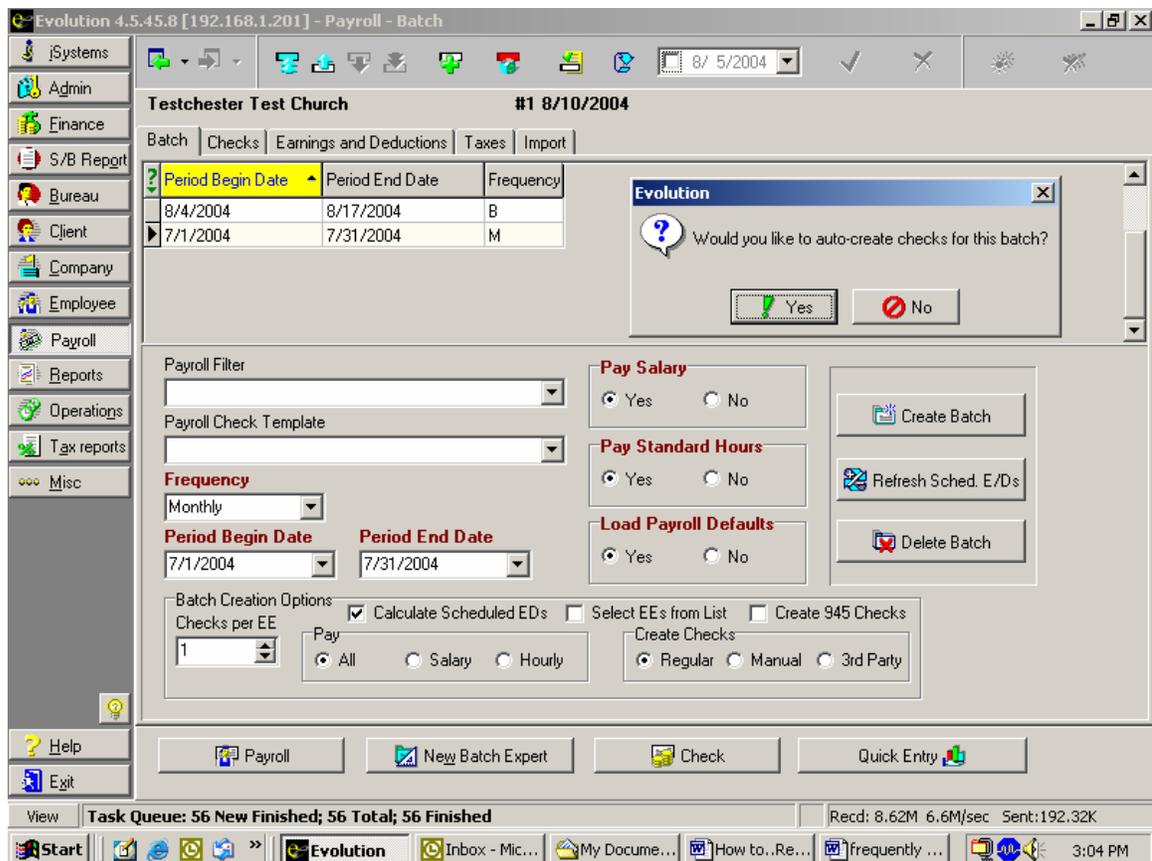
Adding an Employee into a Batch

If you have already started a payroll and need to add in a new employee, a rehire or a terminated employee with final hours you will have to pull them into the batch.

To set up a new employee please refer to the directions on Setting up a New Employee on pages 1-2 before continuing.

To rehire a terminated employee please refer to the directions on Rehiring a Terminated Employee on pages 6-7 before continuing.

There are two options for adding an employee into a batch. Please use the set of instructions you find are the most beneficial.

For the first option for Adding an Employee into a Batch, read the directions below.

1. After entering the new employee(s) and/or rehiring terminated employees, click on the PAYROLL command button and select payroll. Once your check date is highlighted, click on the BATCH button at the bottom of your screen.

2. You should be directed to the Checks tab. Double click on any employee and you will be taken to the Check Lines tab.

3. Once on the Check Lines tab, click the plus sign at the top of your screen.

4. A Payroll Expert box will pop up asking you to choose a check type. Make sure it reads Regular and click NEXT.

5. Then it will ask you to select the employee. You can sort by EE name, EE code or Social Security number. Most of the time, the easiest way to sort is by EE name. After picking the sort method, click the drop-down arrow below the sort method to select the employee and click NEXT.

There are more instructions on the next page for Adding an Employee into a Batch.
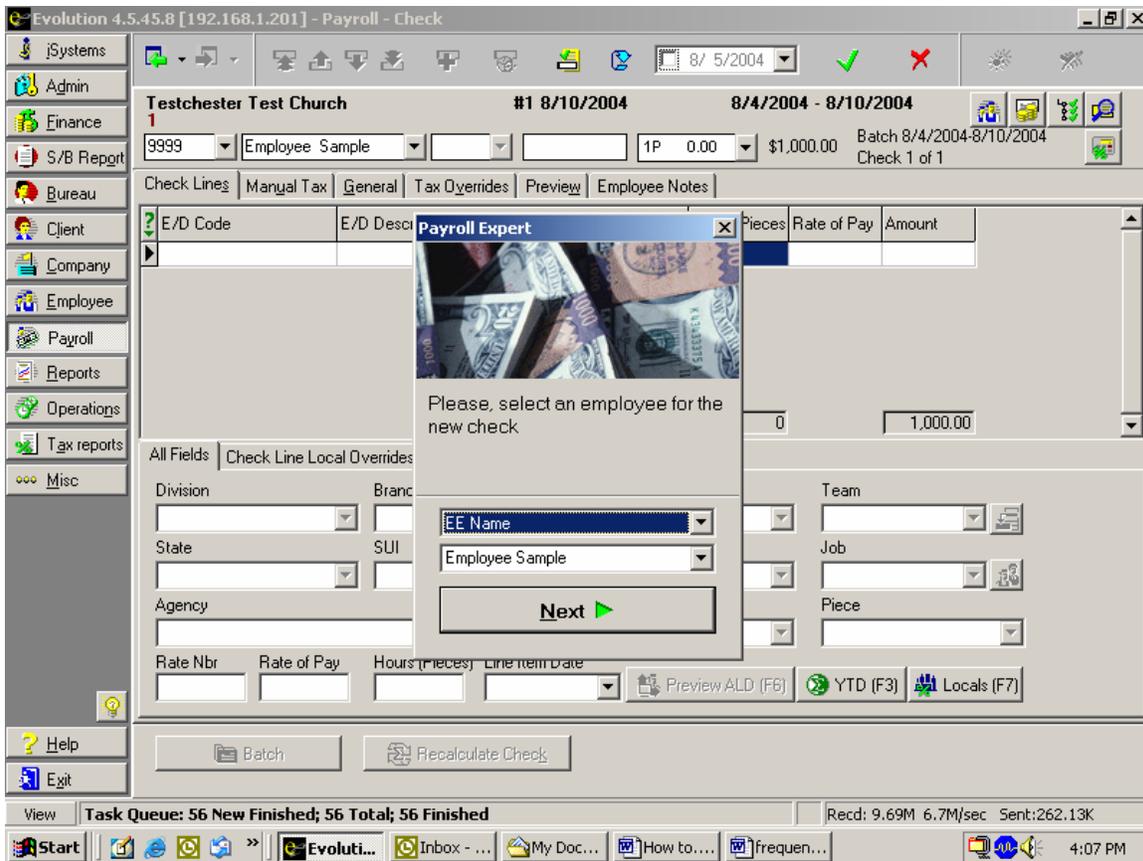
8. When it asks to select a check template, just click on NEXT. Then it will ask if you want to pay salary and either click on yes or no. Next, it will ask if you want to pay regular hours and either click on yes or no.

9. You will then be brought to the Check Lines tab. You can enter the amount and/or hours for any E/D code on the Check Lines tab or you can click on the BATCH button at the bottom of your screen. By clicking on the BATCH button, you will be redirected to the Checks tab where you can also enter the amount and/or hours for any E/D code.

10. Remember to save and commit your changes by clicking on the green check mark and yellow sun.

For the second option for Adding an Employee into a Batch, read the directions below.

1. After entering the new employee(s) and/or rehiring terminated employees, click on the PAYROLL command button and select payroll. Once your check date is highlighted, click on the BATCH button at the bottom of your screen.

2. You should be directed to the Checks tab. Click in any of the white boxes on your screen. Then hit the Insert key on your keyboard. Doing this will add blank line to your batch.
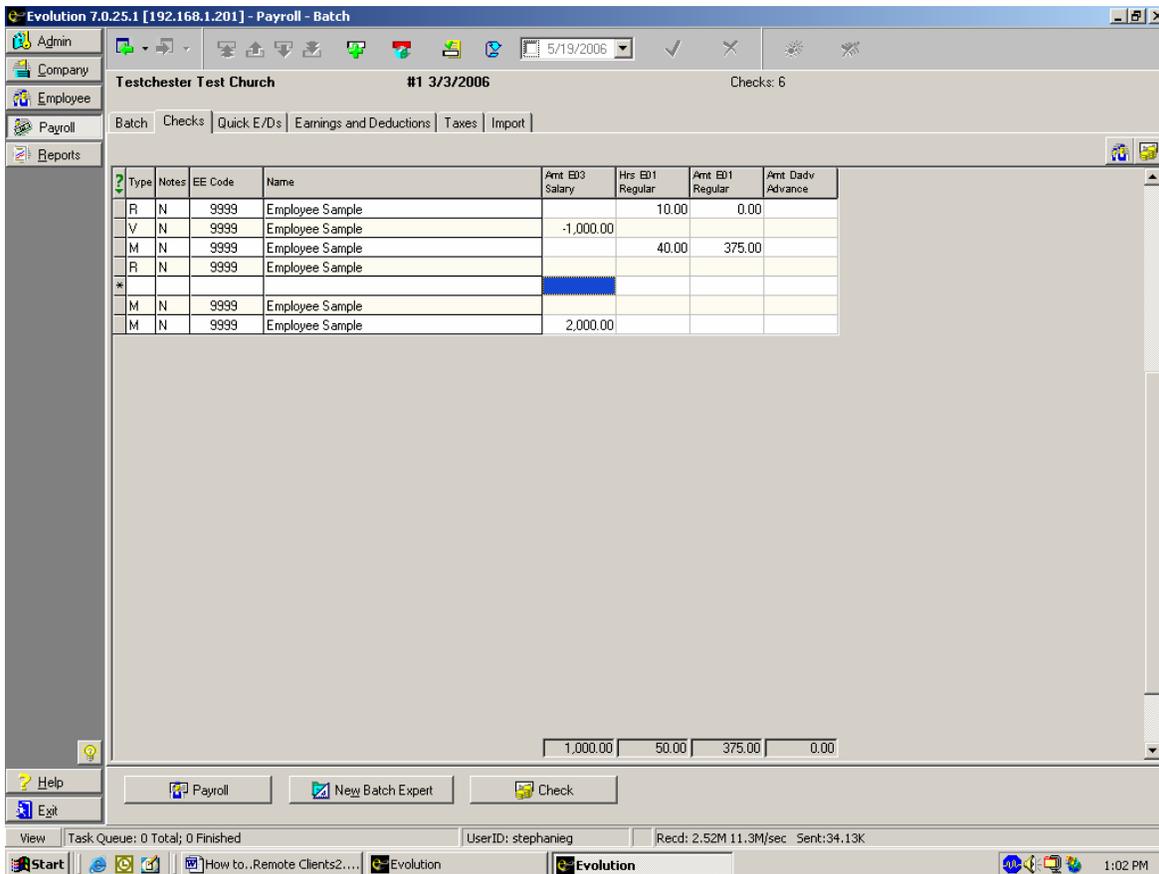
3. Stay on the blank line and click the box under the EE Code column. A drop-down arrow will appear in the box. Click the drop-down arrow and scroll down to find the employee you want to add to the batch. The employees will not be in alphabetical order. Instead, they will be sorted by EE Code. Knowing the employee's EE Code ahead of time will save you time.

4. Highlighting the correct employee will add the employee to the batch.

5. Save and commit by clicking on the green check mark and the yellow sun.

6. Then you can enter the payroll information (hours, salary, vacation, etc.) on this screen (Checks tab) by hitting the Enter key on your keyboard to scroll over to the desired column or you can double click on the employee.

7. Double clicking on the employee will direct you to the Check Lines tab, where you can enter the amount and/or hours for any Earnings or Deduction code. Save and commit all changes by clicking on the green check mark and yellow sun.

Setting up a Single Direct Deposit

Evolution considers Direct Deposits as deductions. You have to set up the bank information and then the deduction. This is a two-step process, and it must be done in this order: setting up the Direct Deposit and then setting up the Direct Deposit Scheduled E/D.

1. Click on the EMPLOYEE command button and select Scheduled E/Ds. Then click on the Browse tab to find your employee.

2. Highlight the employee and click on the Direct Deposits tab. On the Direct Deposits tab, enter the employee's ABA number (the bank routing number should start with a 0, 1, 2 or 3, bank account number and account type (checking). Under the words 'In Prenote,' put No. Save and commit your changes by clicking on the green check mark and yellow sun.
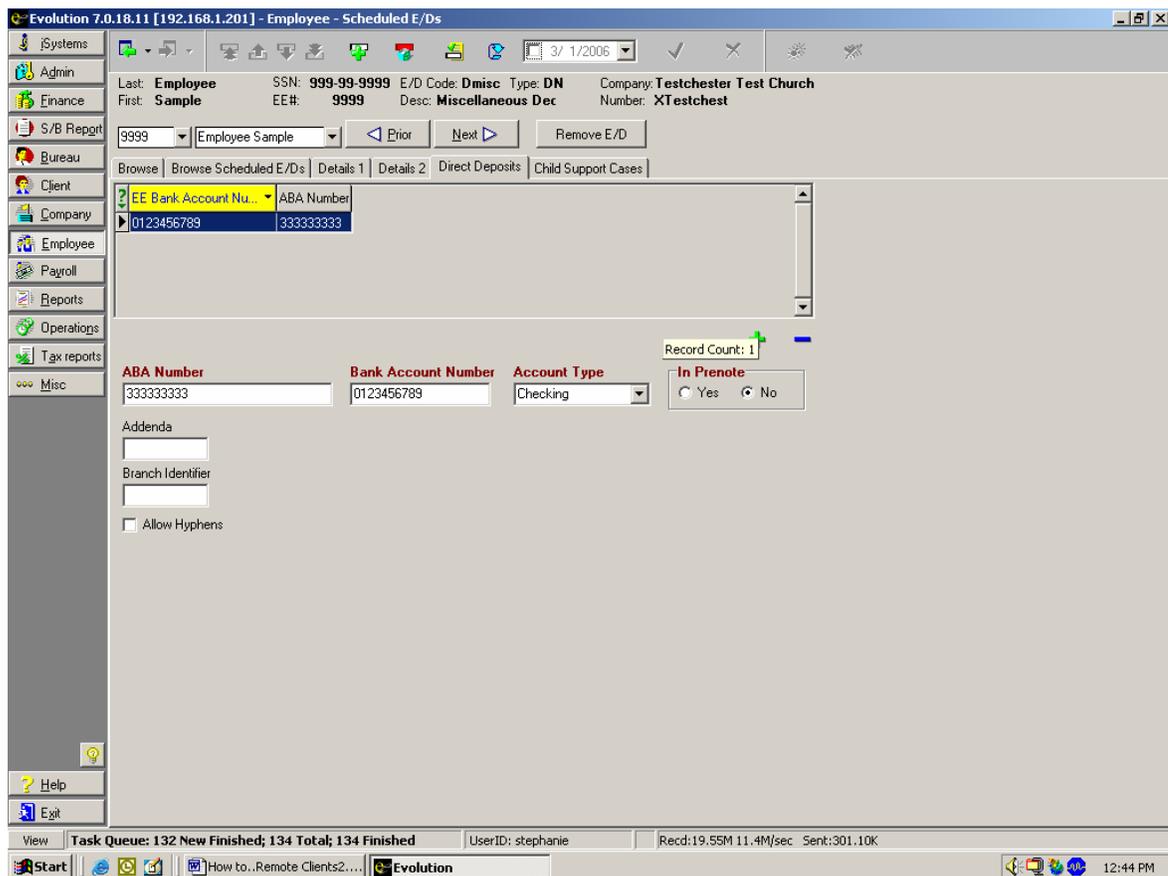
3. After entering the direct deposit information, you must set up a Scheduled E/D. Click on the Browse Scheduled E/Ds tab and make sure the employee doesn't have a Direct Deposit E/D set up. If not, hit the plus sign at the top of the screen.

4. Once on the Details 1 tab, click on the drop-down arrow under E/D code and select Direct Deposit (checking account).

5. When an employee wants to deposit the whole check into an account then it should be set up as a Direct Deposit. This is a net direct deposit and it usually is a checking account. When setting up a net Direct Deposit Scheduled E/D, make sure it has a calculation method of NONE. The system should default to NONE.

6. Under the first column, be sure to set up the scheduled deduction as follows:
    *   Evolution defaults to the following:
        o Frequency (Every Pay)
        o Month # (None)
        o Which Payrolls (All)
    *   The E/D Group field and Agency field should be left blank. Do not click the drop-down arrow.
    *   You need to type in a date under the Effective Start Date field.
    *   Leave the Effective End Date field blank. This field is to be used if the employee wants to stop the direct deposit deduction at a later time.
    *   Under the Priority Number field, enter a high number (9 or 10).
    *   Leave the Multiple Scheduled E/D Group field blank.

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7. Under the second column, be sure to set up the scheduled deduction as follows:
   - Leave the Child Support Case field blank.
   - Leave the Garnishment ID field blank.
   - Leave the Benefit Reference field blank.
   - Leave the Benefit Amount Type field blank.
   - **It is very important you tie the Scheduled E/D to the Direct Deposit.** Under the EE Direct Deposit field, click the drop-down arrow and select the direct deposit account. If there is more than one account set up, be sure you are highlighting the correct one.
   - The Deduct Whole Check field needs to read YES. The system defaults to No so be sure to change the Deduct Whole Check field to YES.
   - Leave the Take Home Pay field blank.

8. Evolution should default to NO for everything in the third column. Double check every field in the third column reads NO. The Block Week 1-5 and the Always Pay/Deduct field should all be NO.

9. After the net Direct Deposit Scheduled E/D has been set up, save and commit by clicking on the green check mark and yellow sun.

10. It is always a good idea to make a note to double check the following payroll's pre-process to ensure the Direct Deposit Scheduled E/D pulled into the payroll.

If you are setting up a Direct Deposit and the payroll has already been started you will need to refresh the Scheduled E/Ds. To do this follow the Setting up a Direct Deposit instructions and then do the following:

1. After committing your changes, you will need to refresh the Scheduled E/Ds by clicking on the PAYROLL command button.

2. A box will pop up reminding you that you have changed a Scheduled E/D for an employee. It will also ask you 'Do you want to refresh check lines in appropriate waiting payrolls?' To see your change take place in the payroll click on YES.

3. Then a Refresh check lines box will pop up. The payroll system assumes you want to refresh check lines on everyone who had a Scheduled E/D change. If there is an employee whose check lines you do not wish to refresh then deselect that person by clicking on the check mark.

4. If you want all the Scheduled E/D changes to take effect on the current payroll leave the boxes checked and click the Refresh All Except Manual button.
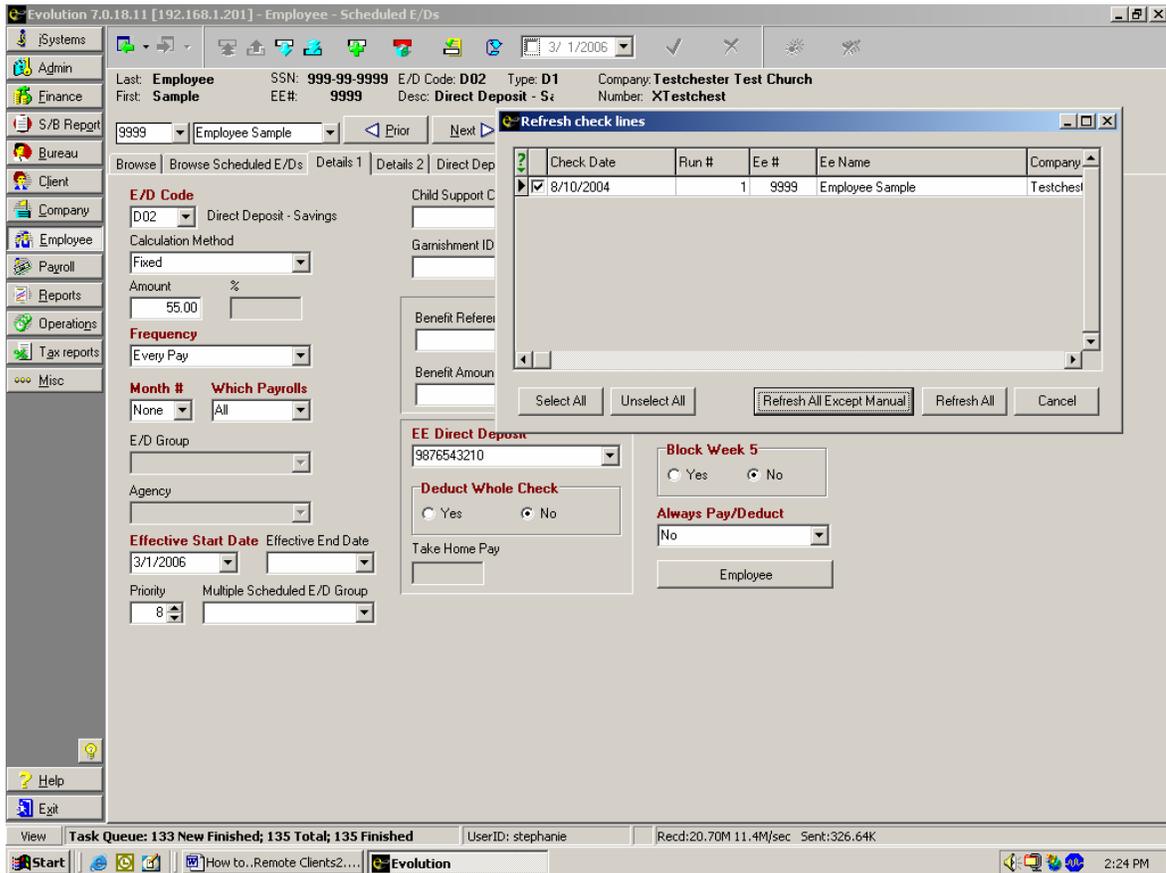
5. After refreshing, open up the current payroll and double check the check lines of the employee(s) who had a Direct Deposit addition. A red Direct Deposit line should have been added to the check lines of the employee(s).

Setting up Multiple Direct Deposits

Evolution considers Direct Deposits as deductions. You have to set up the bank information and then the deduction. This is a two-step process, and it must be done in this order: setting up the Direct Deposit accounts and then the Scheduled E/Ds.

If your employee has multiple direct deposits, you must set them up separately. Follow the instructions for Setting up a Direct Deposit on the previous four pages for a net direct deposit. Then follow the directions below to set up the partial direct deposit.

1. After setting up the first Direct Deposit (usually checking) and its Direct Deposit Scheduled E/D, click on the Direct Deposits tab. Make sure you are still on the same employee by looking at the name near the top of your screen.
2. You should see one direct deposit account already set up on the Direct Deposits tab. To add the partial/savings direct deposit account, click on the Plus Sign above the words 'In Prenote.' DO NOT CLICK ON THE PLUS SIGN AT THE TOP OF YOUR SCREEN.
3. On the Direct Deposits tab, enter the employee's ABA number (the bank routing number should start with a 0, 1, 2 or 3), bank account number and account type (usually savings). Under the words 'In Prenote,' put No. Save and commit your changes by clicking on the green check mark and yellow sun.

4. After entering the partial/savings direct deposit information, you must set up a Scheduled E/D. Click on the Browse Scheduled E/Ds tab to make sure the employee doesn't have a Savings Direct Deposit E/D set up. If not, click on the plus sign at the top of the screen.

5. Once on the Details 1 tab, click on the drop-down arrow under E/D code and select Savings Direct Deposit (savings account).

6. When an employee wants to deposit a partial check into an account, most of the time it should be set up as a Savings Direct Deposit.

7. When setting up a Savings Direct Deposit Scheduled E/D, you need to click the drop down arrow under the Calculation Method field. You should then select Fixed, % of gross or % of net. If you select Fixed then under Amount, you need to type the dollar amount. If you choose % of gross or % of net then you need to enter the percentage of the deposit.

8. Under the first column, be sure to set up the scheduled deduction as follows:
   - Evolution defaults to the following:
     - o Frequency (Every Pay)
     - o Month # (None)
     - o Which Payrolls (All)
   - The E/D Group field and the Agency field should be left blank. Do not click the drop-down arrow.
   - You need to type in a date under the Effective Start Date field.
   - Leave the Effective End Date field blank. This field is to be used if the employee wants to stop the direct deposit deduction at a later time.
   - Under the Priority Number field, enter a number less than the Direct Deposit Priority Number. It usually needs to be a 7 or 8.
   - Leave the Multiple Scheduled E/D Group field blank.

11. Under the second column, be sure to set up the scheduled deduction as follows:
   - Leave the Child Support Case field blank.
   - Leave the Garnishment ID field blank.
   - Leave the Benefit Reference field blank.
   - Leave the Benefit Amount Type field blank.
   - **It is very important you tie the Scheduled E/D to the Savings Direct Deposit.** Under the EE Direct Deposit field, click the drop-down arrow and select the savings direct deposit account. Since the employee has a Direct Deposit and a Savings Direct Deposit, look to the left of the ABA number. There should be an 'S' for the savings account and a 'C' for the checking account.
   - The Deduct Whole Check field needs to read NO because this is a partial direct deposit. The system should default to No, but double check.
   - Leave the Take Home Pay field blank.

12. Evolution should default to NO for everything in the third column. Double check every field in the third column reads NO. The Block Week 1-5 and the Always Pay/Deduct field should all be NO.
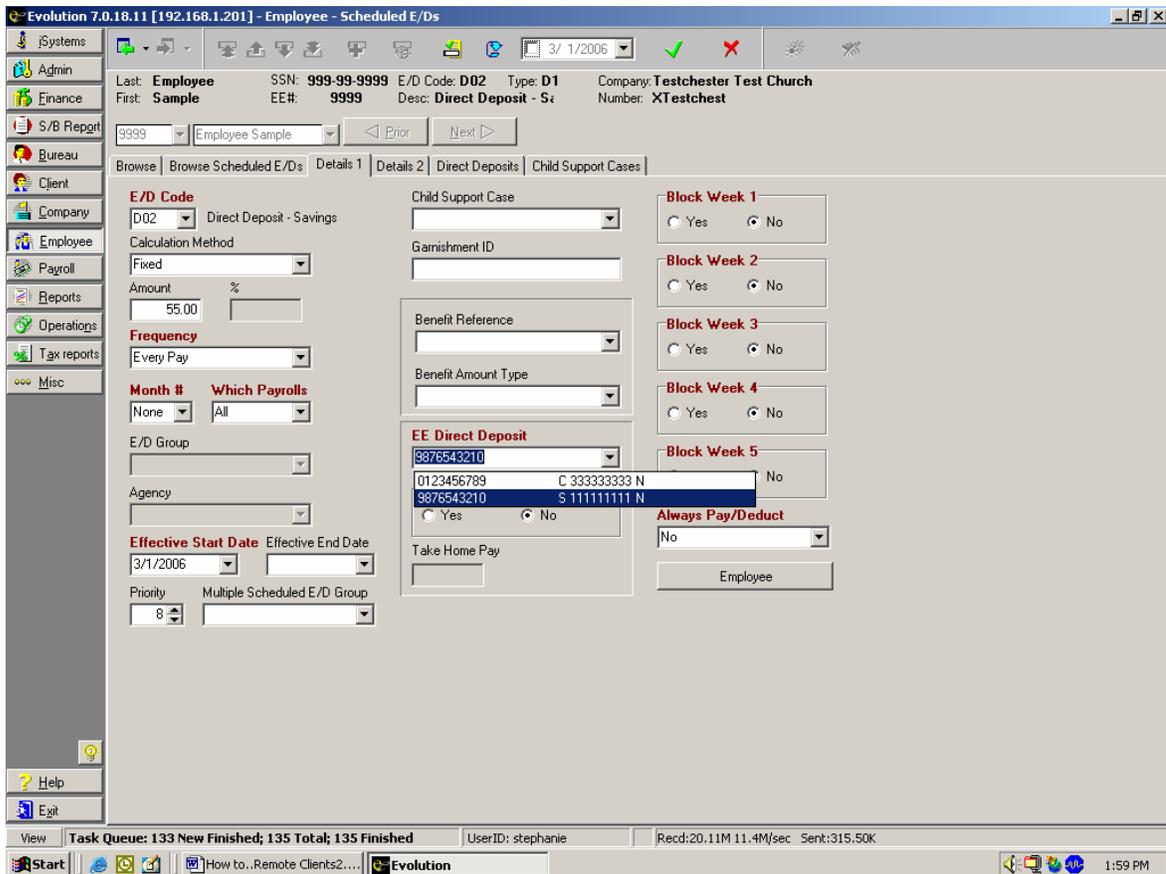
13. After the Savings (partial) Direct Deposit Scheduled E/D has been set up, save and commit by clicking on the green check mark and yellow sun.

14. It is always a good idea to make a note to double check the following payroll's pre-process to ensure the Savings Direct Deposit Scheduled E/D pulled into the payroll.

If you are setting up a Savings Direct Deposit and the payroll has already been started then you will need to refresh the Scheduled E/Ds. To do this follow the Setting up Multiple Direct Deposits instructions starting on page 17 and then do the following:

1. After saving your changes, you will need to refresh the Scheduled E/Ds by clicking on the PAYROLL command button.

2. A box will pop up reminding you that you have changed a Scheduled E/D for an employee. It will also ask you 'Do you want to refresh check lines in appropriate waiting payrolls?' To see your change take place in the payroll click on YES.

3. Then a Refresh check lines box will pop up. The payroll system assumes you want to refresh check lines on everyone who had a Scheduled E/D change. If there is an employee whose check lines you do not wish to refresh then please deselect that person by clicking on the check mark.

4. If you want all the Scheduled E/D changes to take effect on the current payroll then leave the boxes checked and click the Refresh All Except Manual button.

5. After refreshing the Scheduled E/D changes, open up the current payroll and double check the check lines of the employee(s) who had a Savings Direct Deposit addition. A red Savings Direct Deposit line should have been added to the check lines of the employee(s).
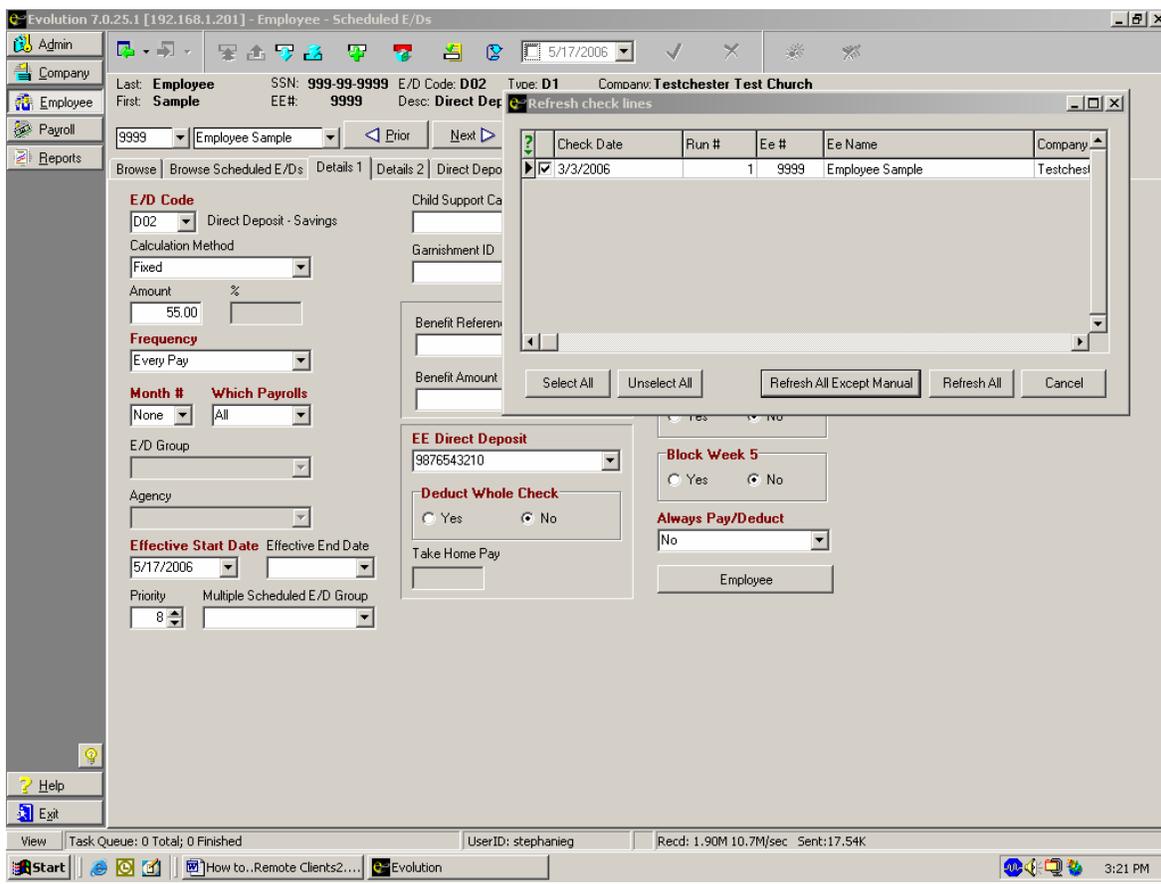
Stopping a Direct Deposit

Current Payroll Only

**Stopping an employee's Direct Deposit for one time only must be done after the payroll has been started.*

1. Click on the PAYROLL command button and select payroll.

2. Highlight the correct check date and click on the BATCH button located at the bottom of your screen.

3. Once on the Checks tab, highlight the employee's name and double click.

4. Once on the Check Lines tab, click on the General tab and under the words 'Block DD' put Yes.
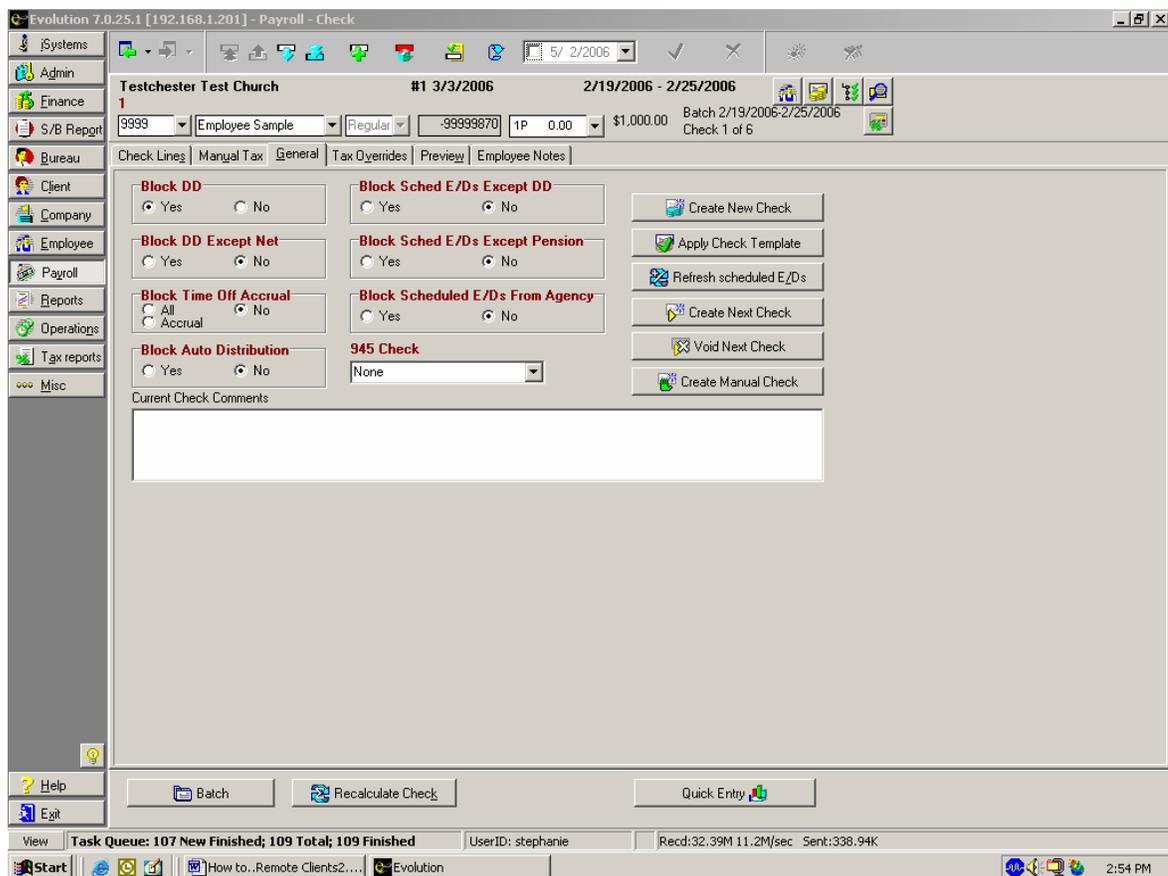
5. Save and commit all changes by clicking on the green check mark and yellow sun.

6. After committing click on the Check Lines tab and make sure the red Direct Deposit check line is gone.

Stopping a Direct Deposit

<u>Permanently</u>

1. Click on the EMPLOYEE command button and select Scheduled E/Ds.

2. Click on the Browse tab to find your employee. Once the employee is highlighted, double click. On the Browse Scheduled E/D tab, you can select either Direct Deposit or Savings Direct Deposit. Once you have the correct E/D highlighted, click on the Details 1 tab.

3. To stop the Direct Deposit or Savings Direct Deposit permanently then you need to put an effective end date on the Details 1 tab. This is located near the bottom of the first column. Be sure the end date is before your check date.

4. Save and commit your changes by clicking on the green check mark and yellow sun.

If you are permanently stopping a Direct Deposit Scheduled E/D and the payroll has already been started you will need to refresh the Scheduled E/Ds. To do this follow the Stopping a Direct Deposit permanently instructions on page 20 and then do the following.

1. After saving and committing your changes, you will need to refresh the Scheduled E/Ds by clicking on the PAYROLL command button.

2. A box will pop up reminding you that you have changed a Scheduled E/D for an employee. It will also ask you 'Do you want to refresh check lines in appropriate waiting payrolls?' To see your changes take place in the payroll click on YES.

3. Then a Refresh check lines box will pop up. The payroll system assumes you want to refresh check lines on everyone who had a Scheduled E/D change. If there is an employee whose check lines you do not wish to refresh then please deselect that person by clicking on the check mark.

4. If you want all the Scheduled E/D changes to take effect on the current payroll then leave the boxes checked and click the Refresh All Except Manual button.

5. After refreshing, open up the current payroll and double check the check lines of the employee(s) who had a Direct Deposit cancellation. The red Direct Deposit line should be gone from the employee's check lines.
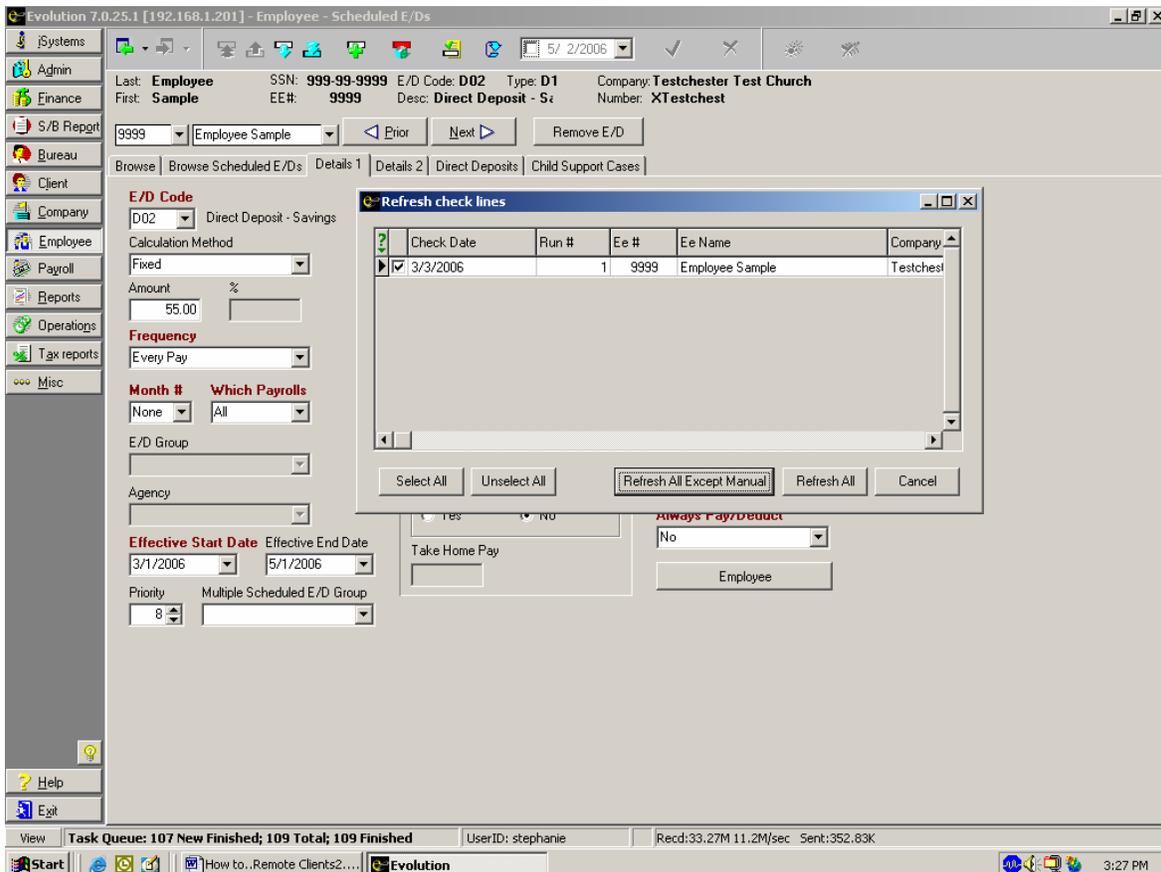
Stopping all Scheduled E/Ds

Current payroll only

1. Click on the PAYROLL command button and select payroll.

2. Highlight the current payroll and click on the BATCH button at the bottom of your screen.

3. Once on the Checks tab, double click on the employee you want to stop the Scheduled E/D earnings or deduction for.

4. After double clicking you will be redirected to the Check Lines tab.

5. Then click on the General tab. Under the words 'Block Sched E/Ds Except DD,' put Yes. This will block all Scheduled E/Ds except Direct Deposit for the employee. Commit your changes by clicking on the yellow sun.

If you don't want to block all of the Scheduled E/Ds in the current payroll follow the directions on the next page for Stopping a Scheduled E/D in the current payroll only.
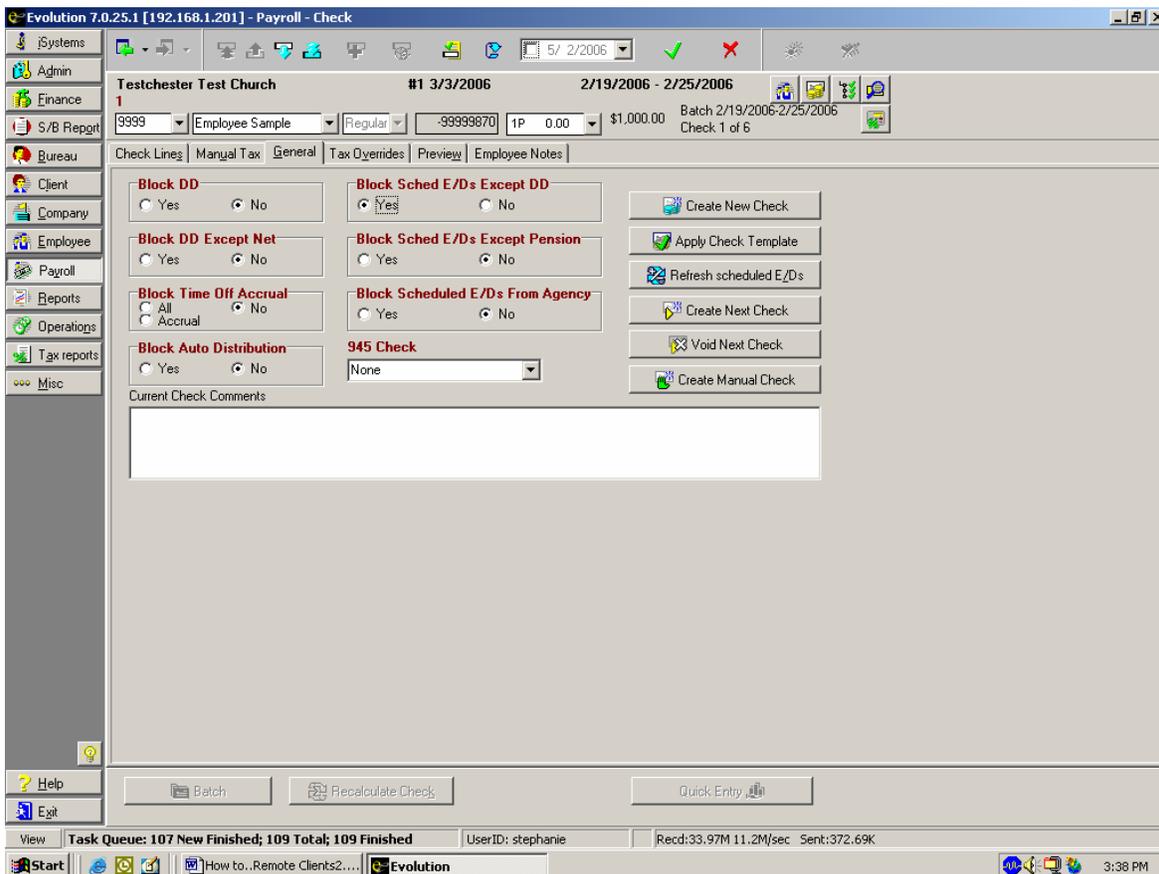
Stopping a Scheduled E/D

<u>Current payroll only</u>

Only follow the directions below if you don't want all of an employee's Scheduled E/Ds stopped in the current payroll.

1. Click on the PAYROLL command button and select payroll.

2. Highlight the current payroll and click on the BATCH button at the bottom of your screen.

3. Once on the Checks tab, double click on the employee you want to stop a Scheduled E/D earnings or deduction for.

4. On the Check Lines tab, highlight the Scheduled E/D you want to stop for one time and then hit Control----Delete on your keyboard.

5. A box will pop up asking 'Delete this check line?' and click on OK.
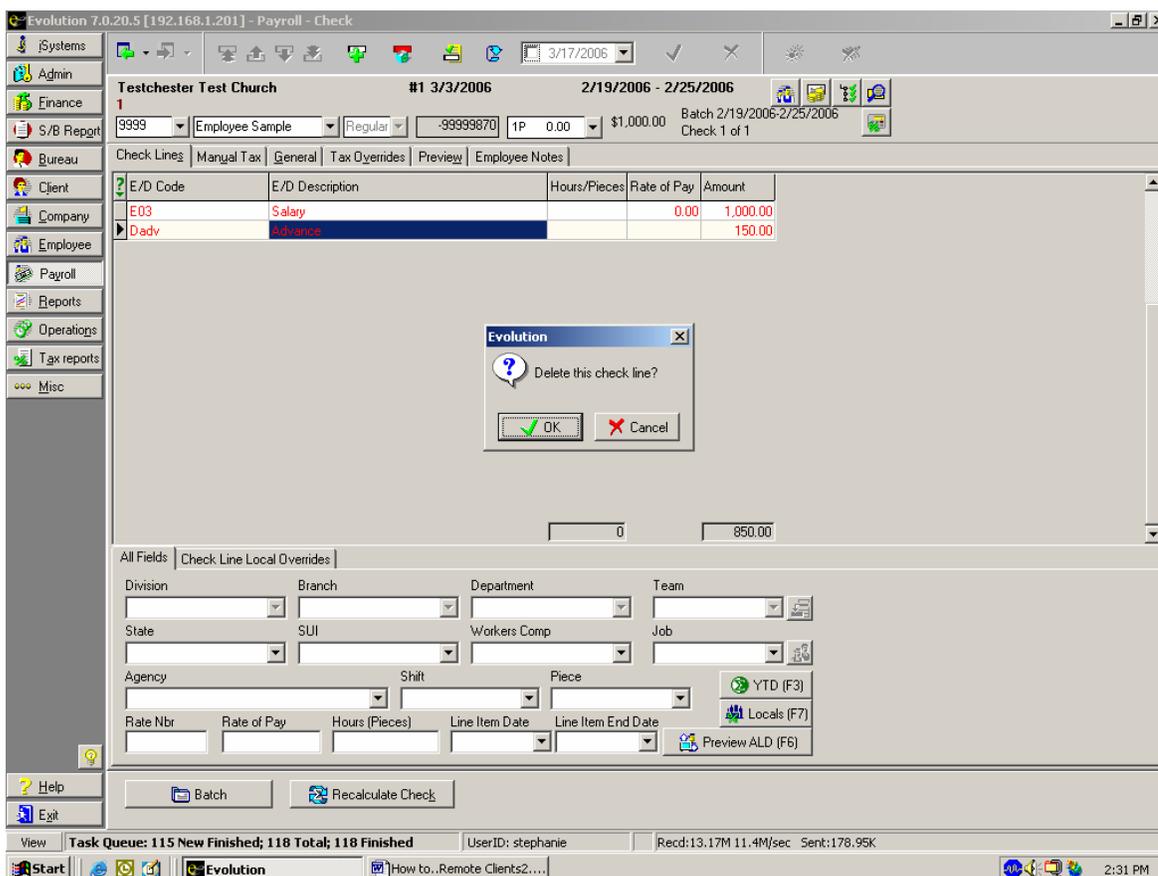
6. Commit your changes by clicking on the yellow sun. To ensure the desired Scheduled E/D was stopped, double check your pre-process or recalculate the employee's check in the payroll.

7. To recalculate the check in payroll, stay on the Check Lines tab and click on the RECALCULATE CHECK button near the bottom of your screen.

8. After the system has recalculated the check, you will be redirected to the Preview tab. Make sure the Scheduled E/D earnings or deduction you just stopped in the payroll is indeed stopped. The E/D code and amount should not appear on the Preview tab.

9. If correct, save and commit your changes by clicking on the green check mark and yellow sun.
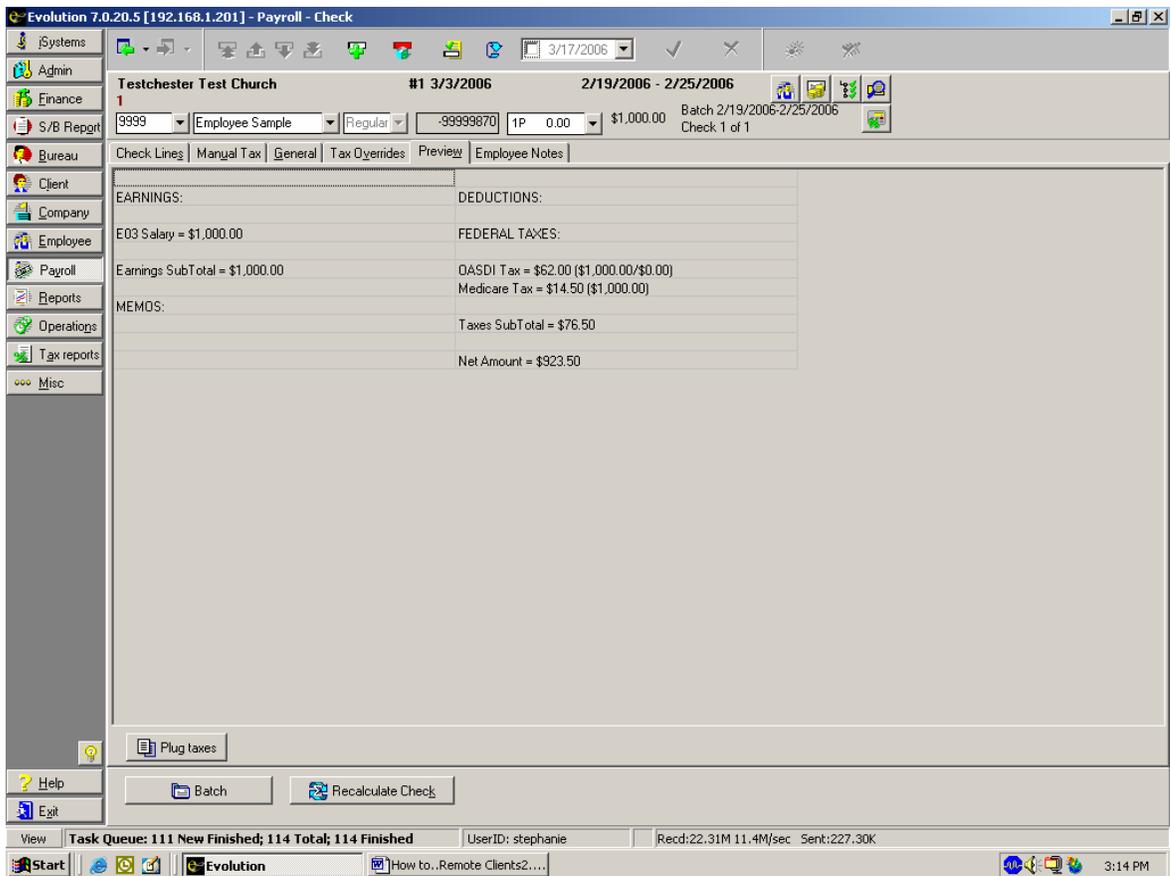
Stopping a Scheduled E/D

Permanently

1. Click on the EMPLOYEE command button and select Scheduled E/Ds.

2. Click on the Browse tab and locate the employee. Once the employee is highlighted, double click on him or her.

3. Once on the Browse Scheduled E/Ds tab, find and highlight the Scheduled E/D you want to permanently stop.

4. Then click on the Details 1 tab and put an Effective End Date. The Effective End Date is located near the bottom of the screen on the first column. Be sure the date you select is before your check date.

5. Be sure to save and commit your changes by clicking on the green check mark and the yellow sun.

If you are permanently stopping a Scheduled E/D and the payroll has already been started, you will need to refresh the Scheduled E/Ds.   To do this follow the Stopping a Scheduled E/D permanently instructions on page 25 and then do the following:

1. After commiting your changes, click on the PAYROLL command button.

2. A box will pop up reminding you that you have changed a Scheduled E/D for an employee. It will also ask you 'Do you want to refresh check lines in appropriate waiting payrolls?' To see your changes take place in the payroll click on YES.

3. Then a Refresh check lines box will pop up. The payroll system assumes you want to refresh check lines on everyone who had a Scheduled E/D change. If there is an employee whose check lines you do not wish to refresh then deselect that person by clicking on the check mark.

4. If you want all the Scheduled E/D changes to take effect on the current payroll then leave the boxes checked and click the Refresh All Except Manual button.

5. After the Scheduled E/D has been refreshed, you will be redirected to the Payroll screen.   It is important to either open the waiting payroll and recalculate the employee's check or double check your pre-process to ensure the Scheduled E/D you wanted to permanently stop is indeed stopped.

Blocking Federal Withholding

<u>Current Payroll Only</u>

Follow the directions below if the employee wants his or her federal withholding blocked for one time only.

1. Click on the PAYROLL command button and select payroll.

2. Highlight the current payroll and click on the BATCH button (bottom of screen).

3. Click on the Checks tab and double click on the employee who wants to stop federal withholding on the current payroll only.

4. Once on the Check Lines tab, click on the Tax Overrides tab.

5. Under the words 'Bock Federal' put Yes. Save and commit your changes by clicking on the green check mark and yellow sun. Then click on the RECALCULATE CHECK button. You will be redirected to the Preview tab. Be sure there are no federal taxes coming out of the employee's check. Save and commit the calculations by clicking on the green check mark and yellow sun.

Blocking Federal Withholding

<u>Permanently</u>

If an employee wants to block his or her federal withholding permanently you must get the employee to fill out a W4 form for your records.

*In order for federal withholding tax to be exempt, your employee must fill out his or her W4 form correctly. If he or she writes in a number of exemptions on line 5 or writes an additional amount on line 6 and claims exempt on line 7 then the form is filled out incorrectly. **To claim exempt, your employee must leave line 5 and line 6 on the W4 blank and write exempt on line 7.***

Once the employee has filled out a new W4 form correctly, please fax a copy to Payroll Partners at (817) 467-9994. Be sure the name of your company is on the cover letter or on the top of the W4.

After faxing the updated W4, please call your payroll processor at (817) 226-8111.

Your remote Evolution software does not allow you to block an employee's federal withholding permanently, but we will gladly block it for you so give us a call.

Remember it is always a good idea to double check your next payroll's pre-process to make sure there is no federal withholding coming out of the employee's check.

Blocking Additional Federal Withholding

Current Payroll Only

Only follow the directions below if the employee wants his or her additional federal withholding blocked for one time only.

1. Click on the PAYROLL command button and select payroll.

2. Highlight the current payroll and click on the BATCH button (bottom of screen).

3. Click on the Checks tab and then double click on the employee who wants to stop additional federal withholding on the current payroll only.

4. Once on the Check Lines tab, click on the Tax Overrides tab.

5. Under the words 'Block Additional Federal' put Yes. Save and commit your changes by clicking on the green check mark and yellow sun. Then click on the RECALCULATE CHECK button and you will be redirected to the Preview tab. Be sure there are no additional federal taxes coming out of the employee's check. Save and commit by clicking on the green check mark and yellow sun.

Blocking Additional Federal Withholding

Permanently

Only follow the directions below if the employee wants to permanently stop the additional federal withholding coming out of each pay check.

1. Click on the EMPLOYEE command button and select employee.

2. Highlight the employee and then click on the Federal Tax tab.

3. Under the words 'Override Fed Tax Type,' click on the drop-down arrow to the right and select None.
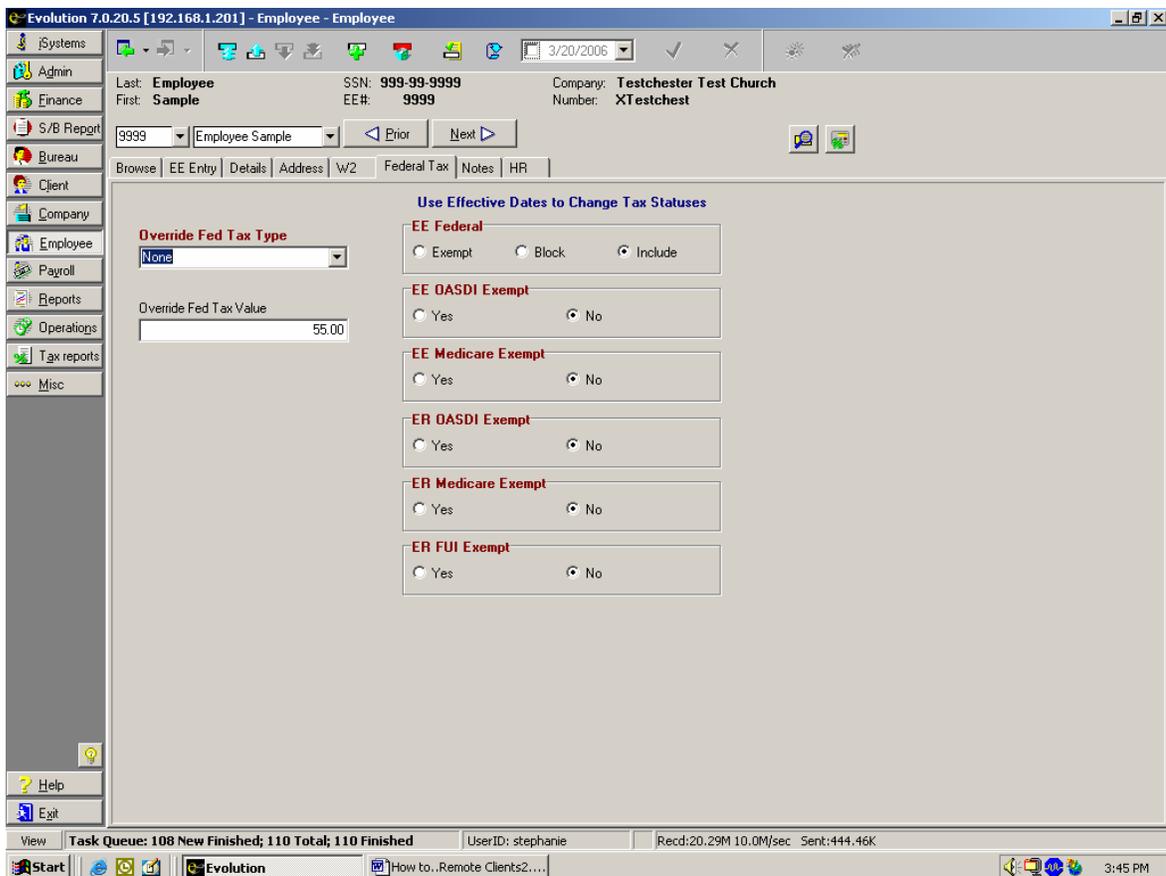
4. Then be sure to delete the additional amount or additional percent under the words 'Override Fed Tax Value.' To do this highlight the amount or percent in the box and hit the delete key on your keyboard.
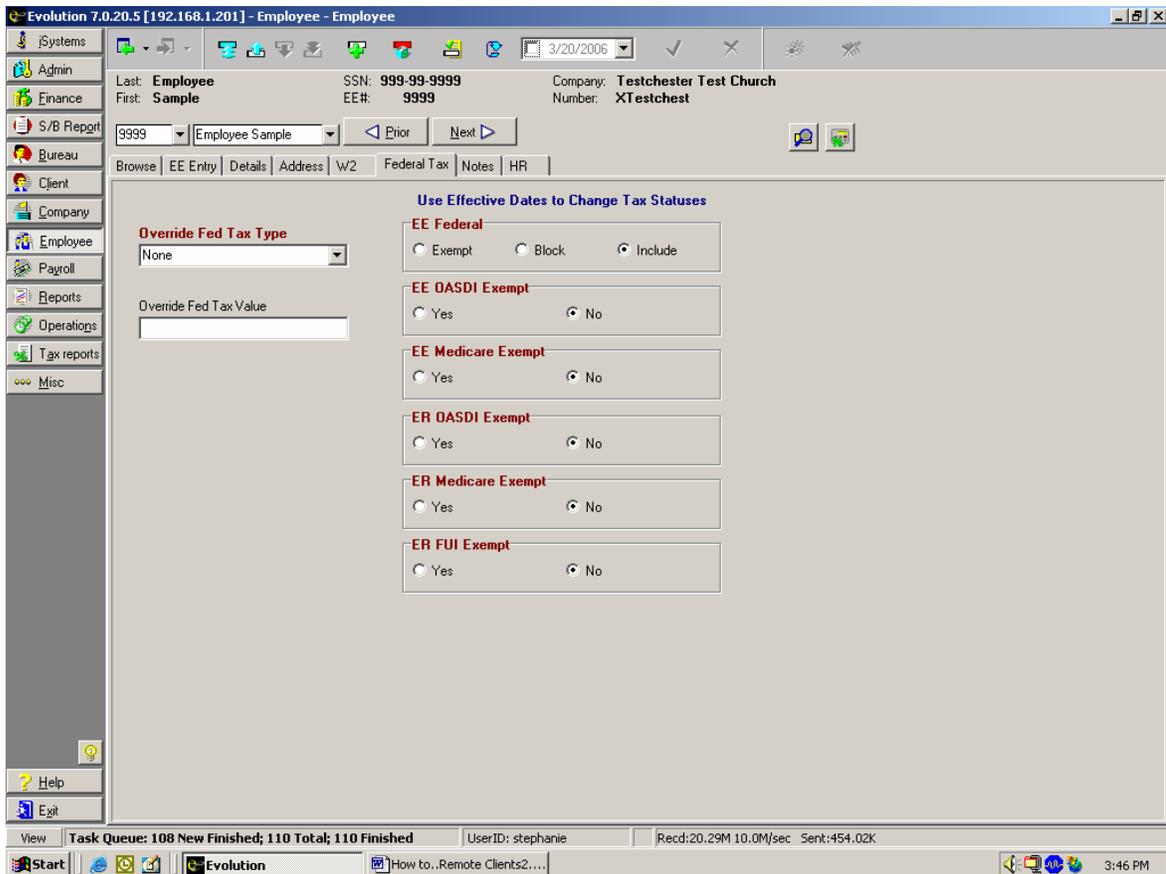
5. Save and commit your changes by clicking on the green check mark and the yellow sun.

Voiding a Check

Checks must be voided in the same quarter in which they were issued. **DO NOT VOID A CHECK FOR A PRIOR QUARTER.** If you need to void a check from a prior quarter, call Payroll Partners at (817) 226-8111.

It is important you remember to void checks in Evolution so payroll records will be correct. Voiding a check in Evolution must be done after a payroll and payroll batch has been started.

1. Click on the PAYROLL command button and select payroll.

2. Highlight the current payroll and click on the BATCH button at the bottom of your screen. You should be redirected to the Checks tab. If not, click on the Checks tab.

3. Once on the Checks tab, highlight the employee you need to void a check for and double click on the employee. You should now be on the Check Lines tab.

4. Hit the plus sign at the top of your screen and a Payroll Expert box will pop up asking you to choose the check type. Click the drop-down arrow, select Void and click NEXT.
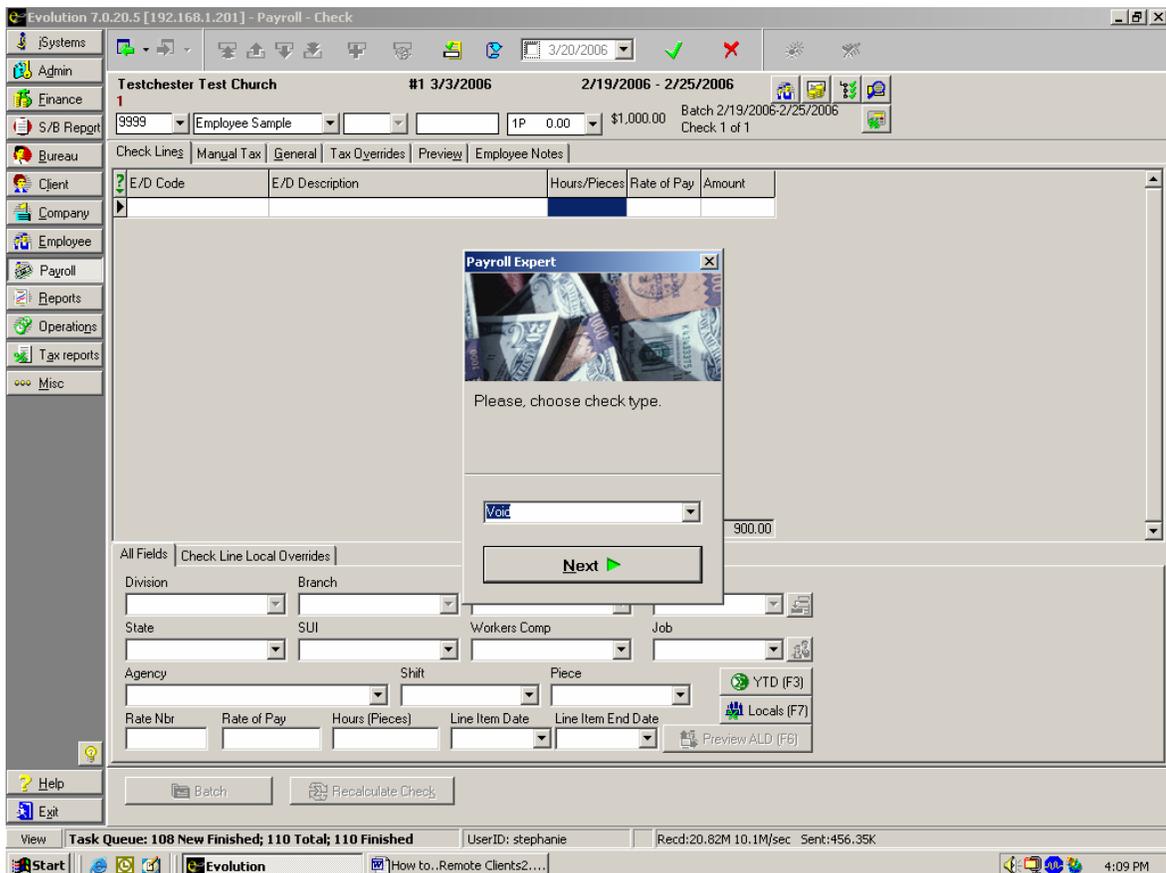
5. A Check Finder screen will pop up, and you can filter it by check serial #, check date or EE Code. If you are not sure of the check number, it defaults to filter by EE code. Since you have already selected the employee, you can hit filter. A list of past checks will come up.
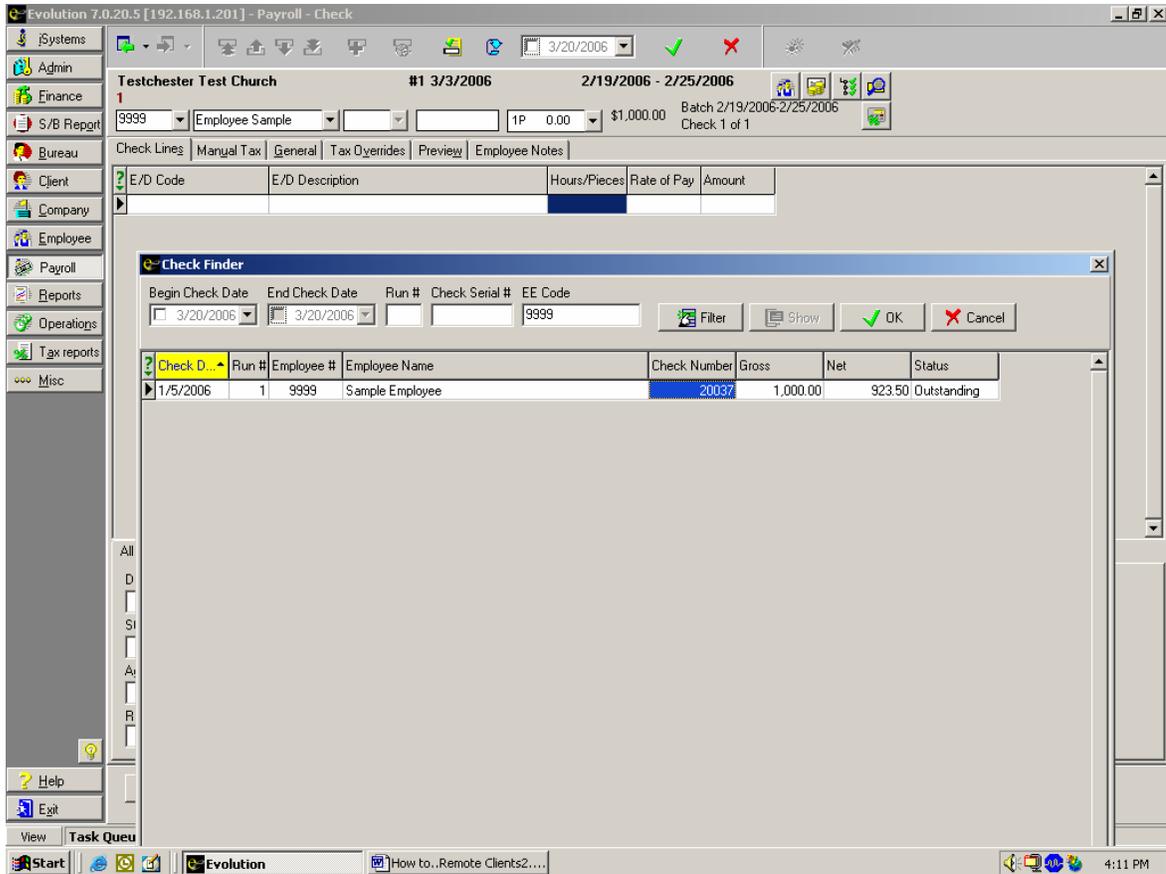
6. Highlight the check you want to void and click OK. You will then be directed back to the Check Lines tab where you can see the voided check.

7. Save and commit your changes by clicking on the green check mark and yellow sun.

Calculating a Manual Check

Follow the directions below to calculate a manual check before you start a payroll.

1. Click on the EMPLOYEE command button, and select Employee.

2. Highlight the employee you want to write a manual check for and then either hit F9 on your keyboard or click on the tax and check line calculator button (beside the magnifying glass located near the top right-hand side of the screen).

3. If there are scheduled E/Ds that show up under the E/D code that you want to delete, just highlight it and push CTRL—DELETE on your keyboard. A box will then pop up asking you 'Delete Record?' After saying Yes or No, you are ready to enter the earnings codes.
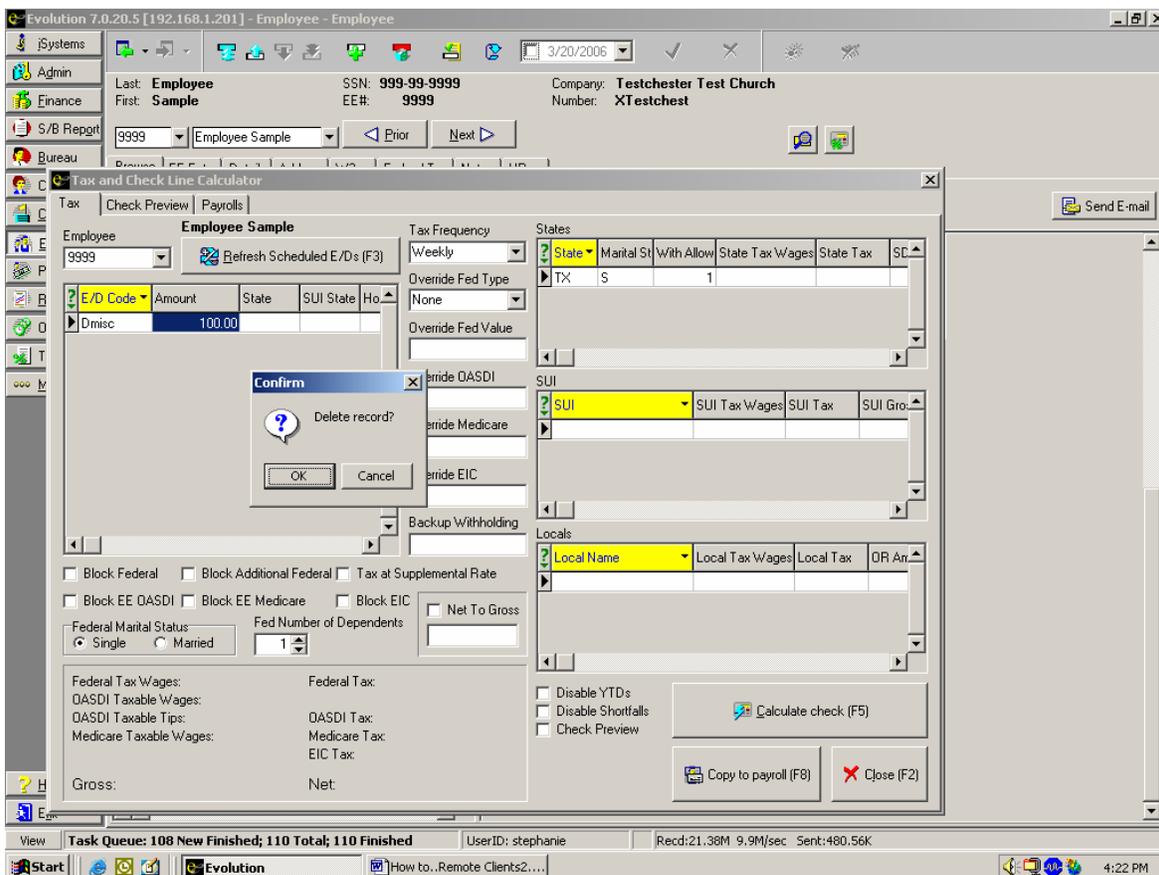
4. Under E/D code, click on the box until you see a drop-down arrow appear. By clicking on the drop-down arrow, you can select the category of pay (regular, overtime, salary, vacation, etc.). Once you have the correct earnings code selected type in the gross amount of pay under the amount column or hit Enter on your keyboard until you get to the hours column.

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5. If you choose to enter the number of hours then you do not have to enter a rate of pay. Once you calculate the check, the payroll system will use the employee's primary rate to figure the gross amount. If you want to use a different rate of pay, you can enter the rate of pay in the rate of pay column. If you are trying to calculate Overtime and you are using the Overtime Earnings Code, do not enter the time-and-a-half rate of pay. Enter the regular amount of pay and the payroll system will calculate it at time-and-a-half.

6. After entering the earnings and/or deduction codes that you need for the manual check, click on the CALCULATE CHECK button or hit F5 on your keyboard.

7. Within seconds you will see a breakdown of the taxes and the net pay. The net pay is the amount you will need to write the manual check for.

To print a copy of the manual check you just calculated, click on the Check Preview tab (at the top of your screen) and then hit F7. You can also use your mouse to right click anywhere on the screen and then select Print Results (F7). When the Print Box pops up, select the printer you want to print to and then click on OK.
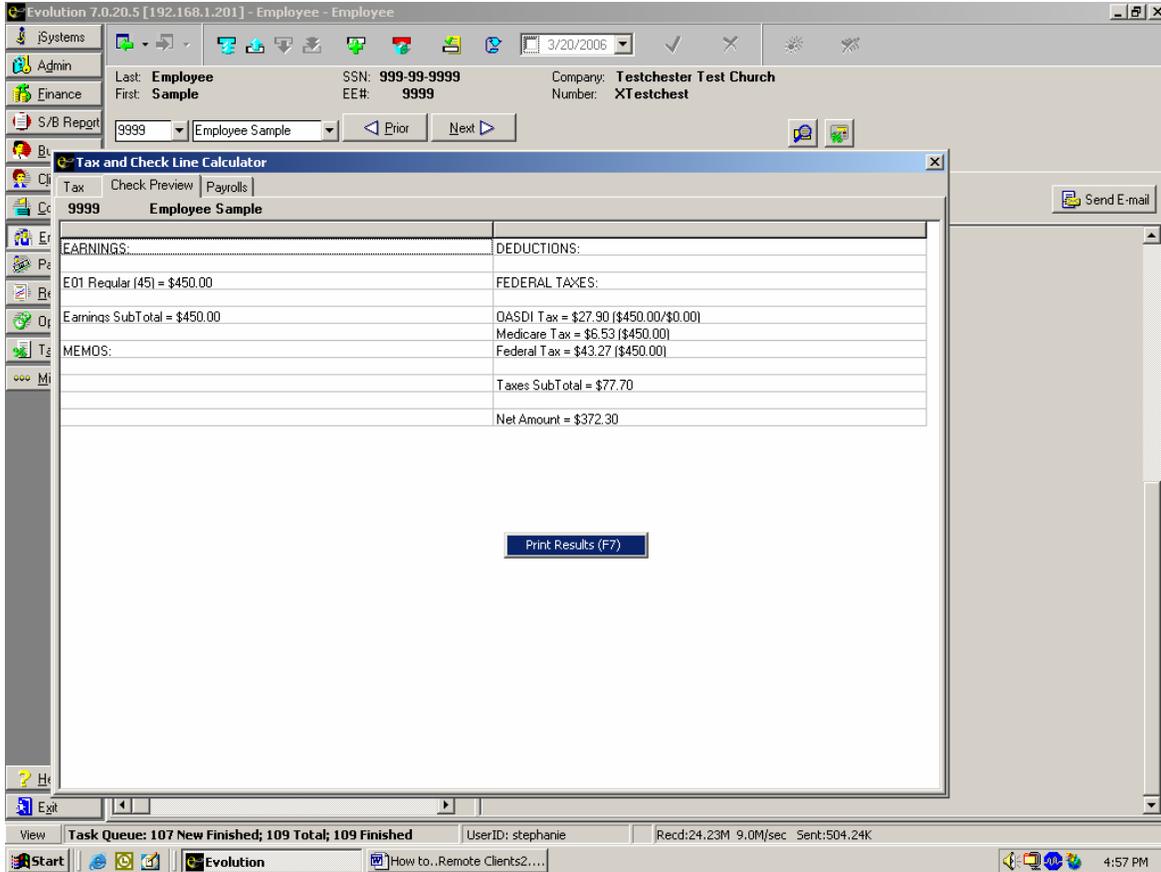
Calculating a manual check in the EE screen does not save the check. It is very important you enter the manual check into the payroll so the payroll records will be correct. Keep a copy of the manual check you calculated and refer to the Entering a Manual Check in Payroll directions.

Calculating a Manual Check

Follow the directions below to calculate a manual check after you have started a payroll.

1. Click on the PAYROLL command button and select payroll.

2. Highlight the current payroll and click on the BATCH button at the bottom of your screen.

3. Once on the Checks tab, double click on the employee you want to figure a manual check for.

4. On the Check Lines tab, hit F9 on your keyboard or click on the Tax and Check Line Calculator icon (located below the magnifying glass near the upper right-hand side of your screen).

5. If there are scheduled E/Ds that show up under the E/D code that you want to delete, just highlight it and push CTRL—DELETE on your keyboard. A box will then pop up asking you Delete Record? After saying Yes or No, you are ready to enter the earnings codes.
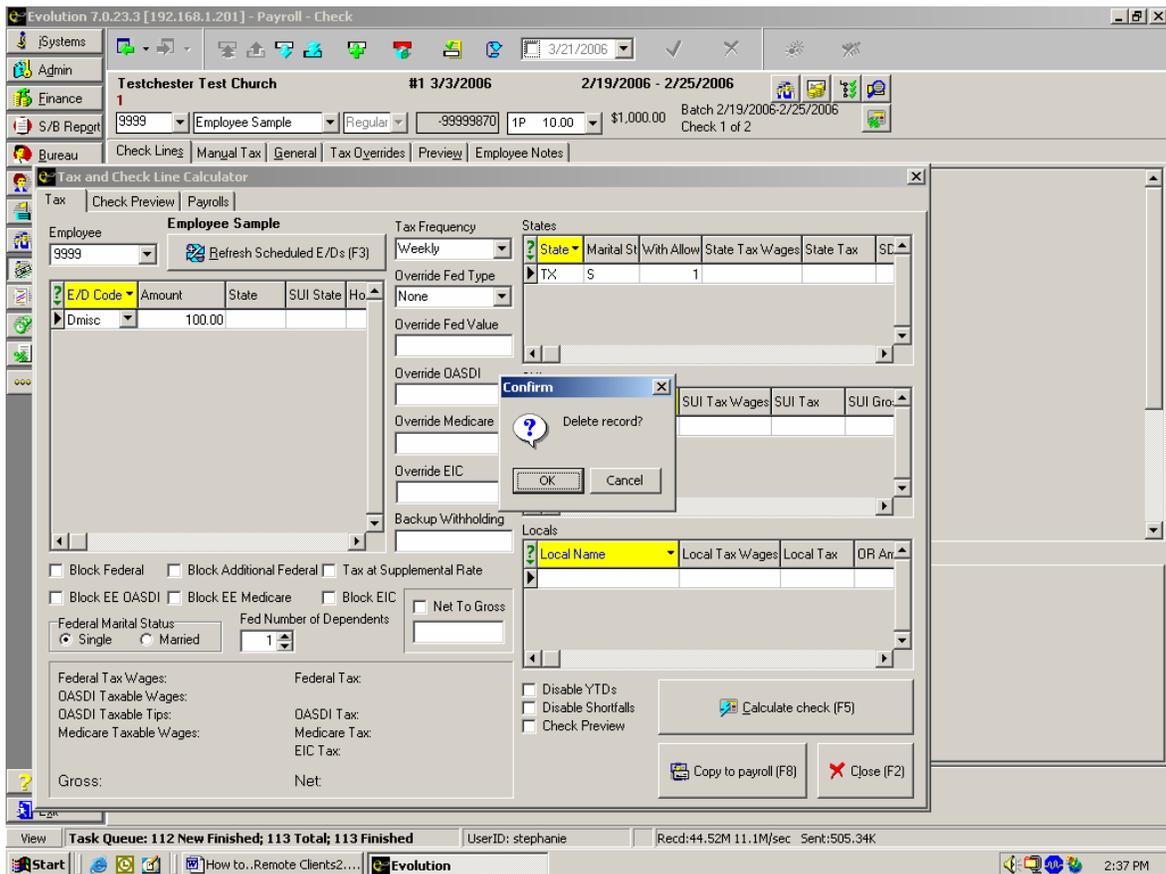
6. Under E/D code, click on the box until you see a drop-down arrow appear. By clicking on the drop-down arrow, you can select the category of pay (regular, overtime, salary, vacation, etc.). Once you have the correct earnings code selected type in the gross amount of pay under amount or hit Enter on your keyboard until you get to the hours column.

7. If you choose to enter the number of hours then you do not have to enter a rate of pay. Once you calculate the check, the payroll system will use the employee's primary rate to figure the gross amount. If you want to use a different rate of pay, you can enter the rate of pay in the rate of pay column. If you are trying to calculate Overtime and you are using the Overtime Earnings Code, do not enter the time-and-a-half rate of pay. Enter the regular amount of pay and the payroll system will calculate it at time-and-a-half.
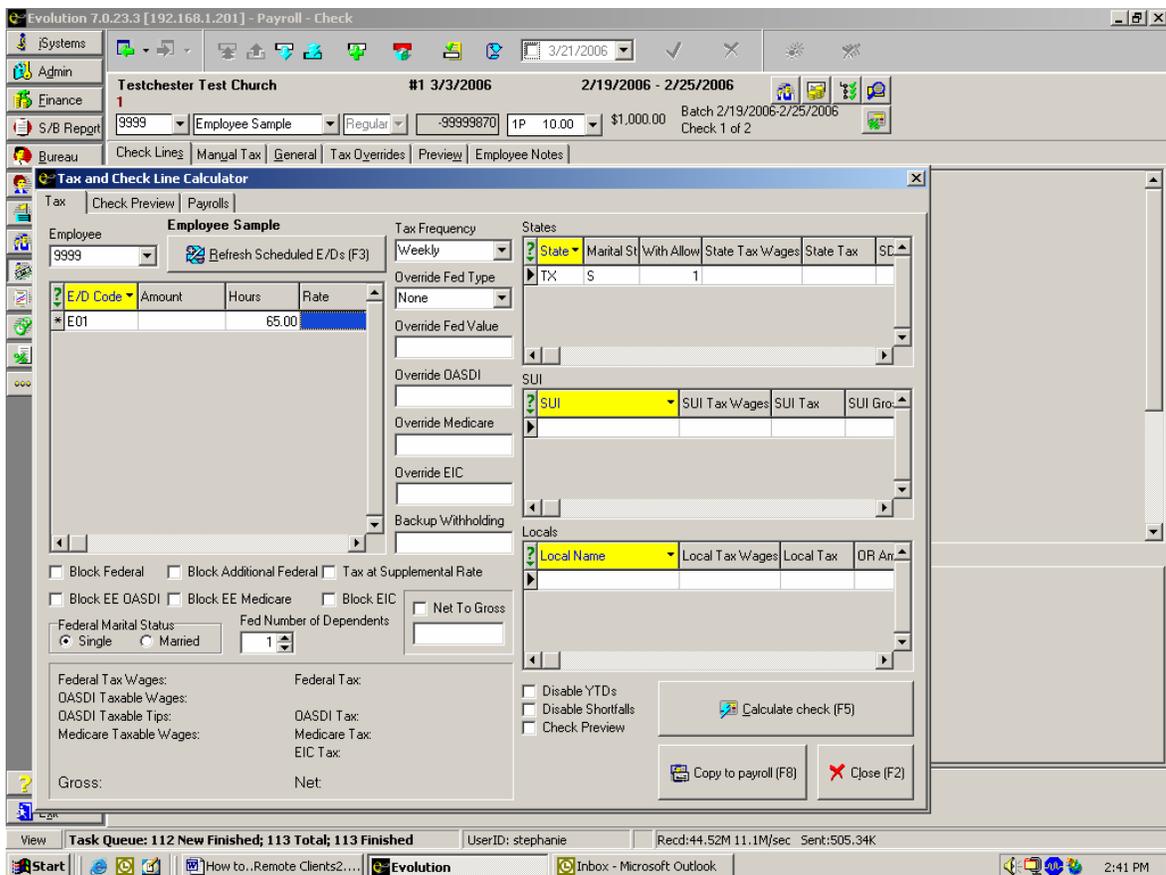
8. After entering the earnings and/or deduction codes that you need for the manual check, click on the CALCULATE CHECK button or hit F5 on your keyboard.

9. Within seconds you will see a breakdown of the taxes and the net pay. The net pay is the amount you will need to write the manual check for.
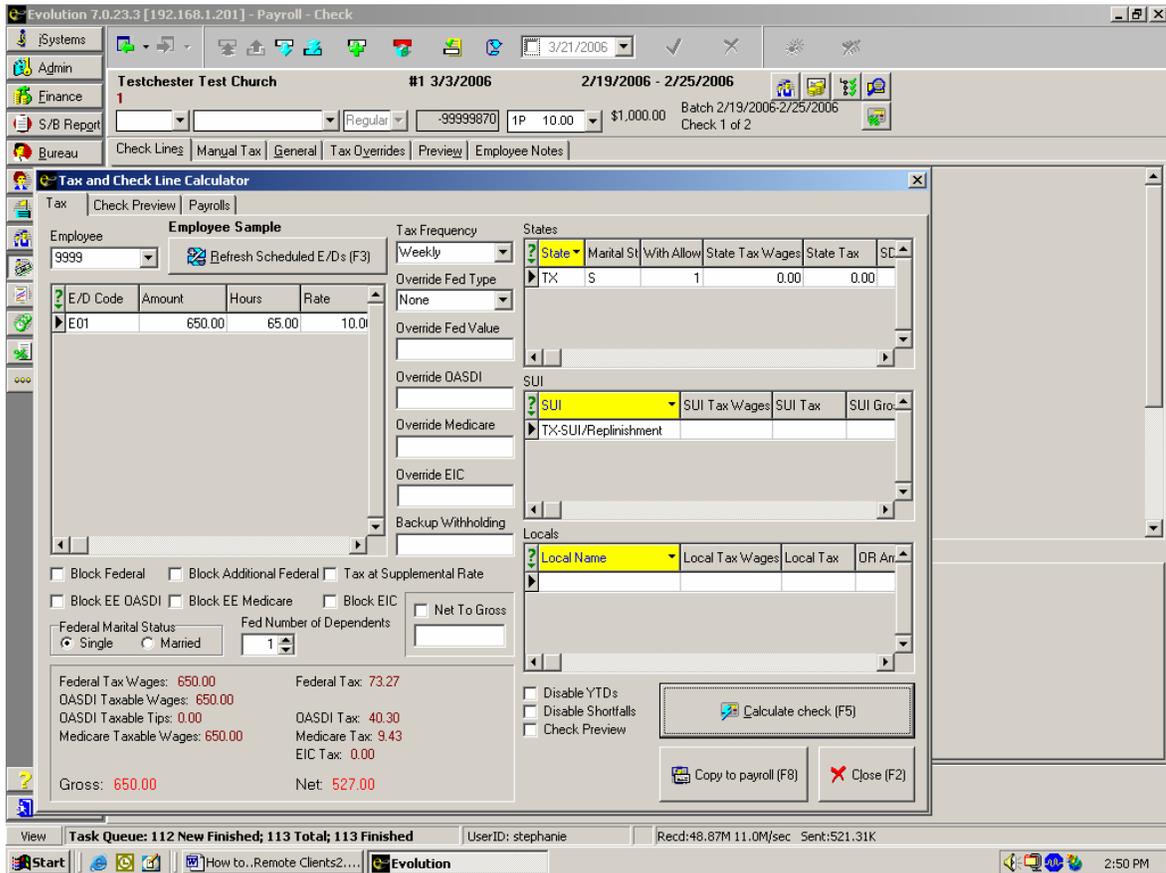
To print a copy of the manual check you just calculated, click on the Check Preview tab (located at the top of the Check and Tax Line Calculator box) and then hit F7. You can also use your mouse to right click anywhere on the screen and then select Print Results (F7). When the Print Box pops up, select the printer you want to print to and then click on OK.

Calculating a manual check in the payroll does not save the check. It is very important you enter the manual check into the payroll so the payroll records will be correct. Keep a copy of the manual check you calculated and refer to the Entering a Manual Check in Payroll directions.

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Calculating a Net to Gross Manual Check

If you have issued a manual check to one of your employees and estimated the net pay, you will need to gross up the check.

1. Click on the EMPLOYEE command button and select employee.

2. Once on the Browse tab, find the employee you need to gross up a check for and double click on the employee's name.

3. Then hit F9 on your keyboard or click on the Tax and Check Line Calculator button (beside the magnifying glass located near the top right-hand side of the EE Entry screen).

4. Click the box to the left of the words 'Net to Gross' (located near the bottom of the Tax and Check Line Calculator box). Make sure a check mark has been placed to the left of the words 'Net to Gross.'

5. In the box below the words 'Net to Gross,' enter the net amount of the check you wrote to your employee.

6. Then either click on the CALCULATE CHECK button or hit F5 on your keyboard.
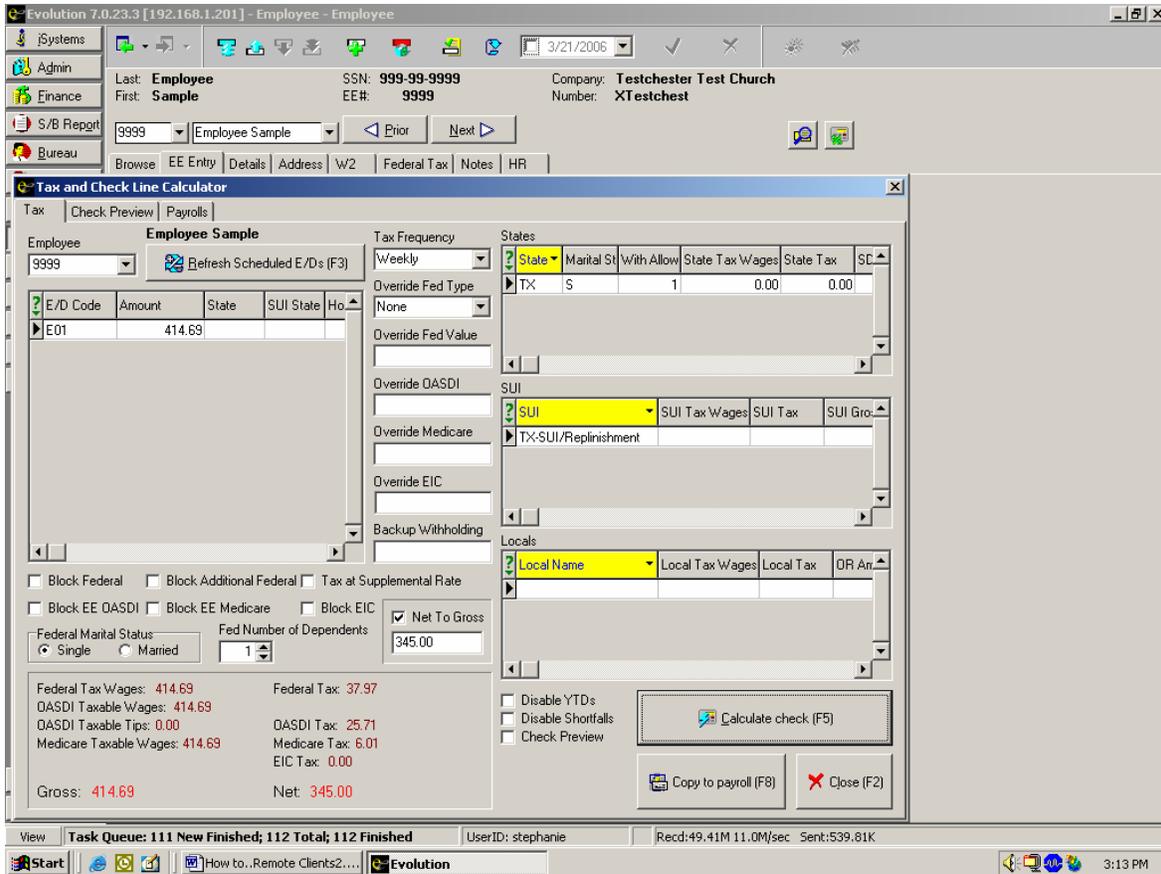
7. Within seconds, you will see the gross amount and a breakdown of the taxes.

8. If you want to print a copy of the manual check then click on the Check Preview tab and hit F7. You can also use your mouse to right click anywhere on the Check Preview screen and click on Print Results (F7). When the Print Box pops up, select the printer you want to print to and then click on OK.

***Calculating a Net to Gross Manual Check does not save the check. It is very important you enter the manual check into the payroll so the payroll records will be correct. Keep a copy of the manual check you calculated and refer to the Entering a Manual Check in Payroll directions.***

Entering a Manual Check in Payroll

It is important all manual checks are entered in Evolution. If your last payroll of the year has been processed and you still have manual checks to enter, give us a call. A special year-end payroll will have to be processed so W2's are correct.

Follow the directions below to make sure the manual check hasn't already been entered.

1. Click on the EMPLOYEE command button and select employee. On the Browse tab, highlight the employee on the right-hand side of the screen.

2. Next, either hit F12 on your Keyboard or click on the Check Finder (Magnifying Glass) button located in the upper right-hand corner of your screen.

3. When the Check Finder box pops up, click on the FILTER button. A list of all checks issued to the employee for the current year will pull up. To sort by check number, click the check number box until you see an arrow pointing down. Look through all the checks to make sure the manual check you need to enter hasn't already been entered into Evolution.

If the manual check has not been entered into Evolution and you have already referred to the Calculating a Manual Check or Calculating a Net to Gross Manual Check instructions then follow the directions below to enter the manual check in payroll.

1. Click on the PAYROLL command button and select payroll.

2. Create a payroll and a payroll batch (refer to the Starting a Payroll instructions) if you haven't already done so. If the payroll has already been created then click on the BATCH button at the bottom of your screen.

3. Once on the Checks tab, double click on any employee in your batch. You will be directed to the Check Lines tab.

4. On the Check Lines tab, hit the plus sign (at the top of your screen). When the payroll expert box pops up, you need to change the check type from Regular (default) to Manual by clicking on the drop-down arrow. After changing the check type to Manual, click the NEXT button.
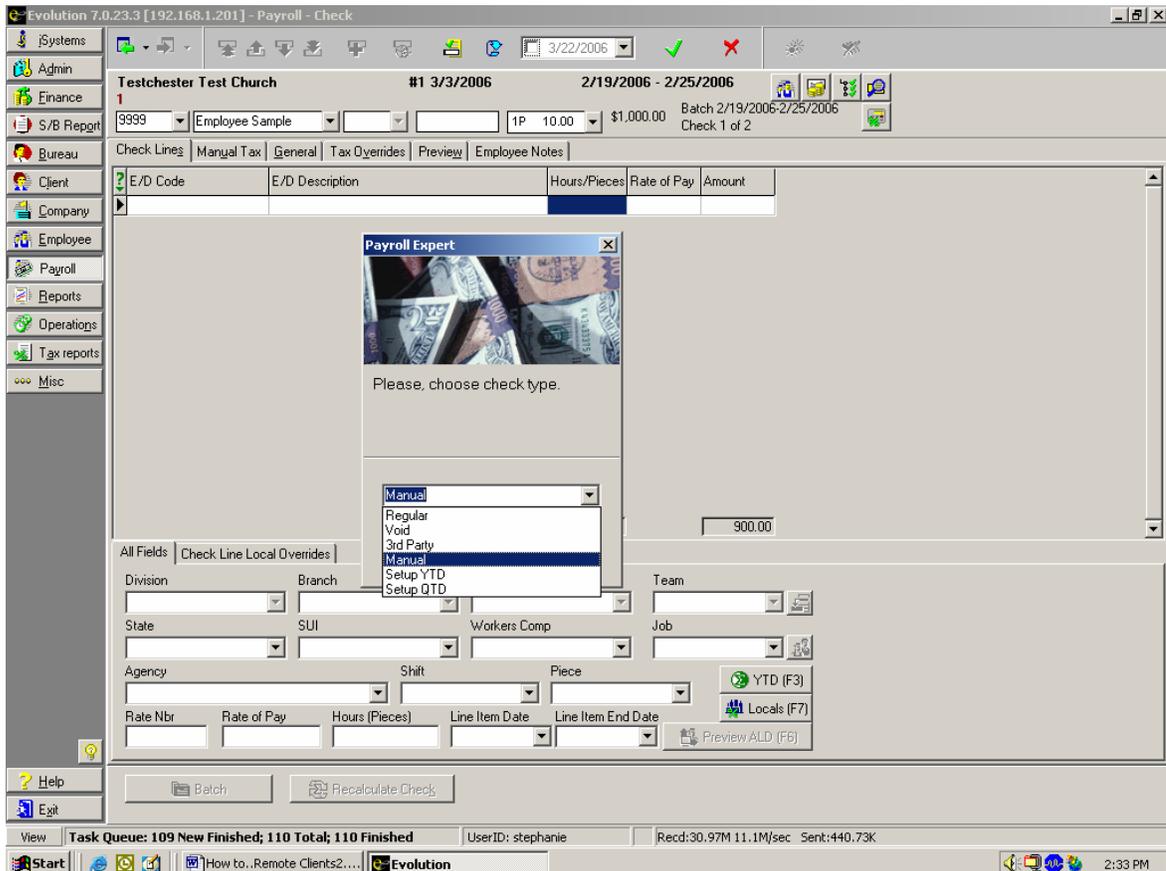
5. Then the payroll expert box will ask you to select an employee for the new check. You can select the employee by EE name, EE code or social security number. After selecting the employee, click the NEXT button.
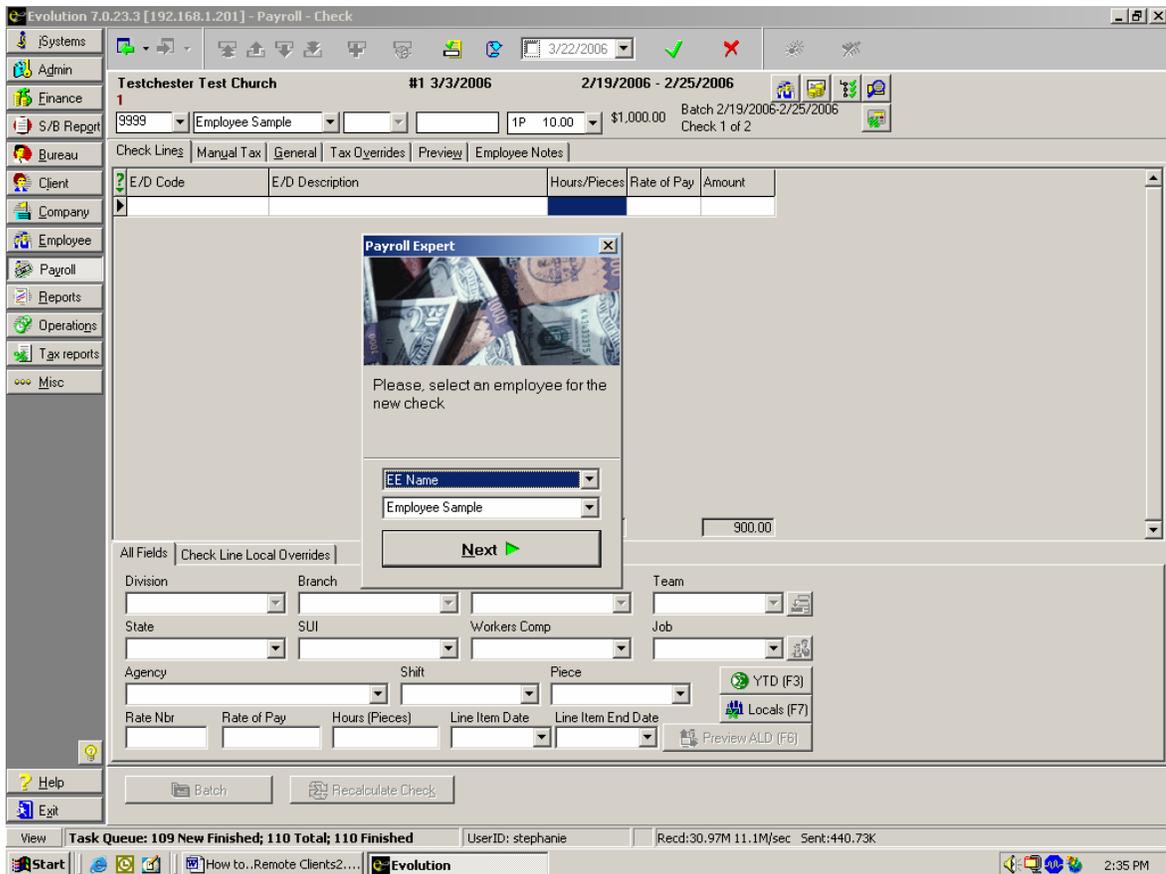
6. Now enter the manual check number and click on the NEXT button. You will then be taken back to the Check Lines tab of the employee you need to enter the manual check for.

7. Once on the Check Lines tab, you can enter any Earnings or Deduction code and then type in the hours, rate of pay and the amount for hourly employees or just the amount for salary employees. You must enter the amount of pay because it will not be calculated for you.

   a. If your employee has an earnings or deduction Scheduled E/D, it will not bring it in when entering a manual check in the payroll. You will have to manually enter the Scheduled E/D earnings or deduction you want it to add or deduct from the manual check.
   b. If you are entering a manual check for an hourly employee and the employee has overtime hours, it is important you add the Overtime E/D code, type in the hours, type in the straight-time pay rate and then type in the time-and-a-half gross overtime amount.

8. If the employee has an Additional Federal Tax amount set up, you can block it. To block federal taxes completely or any additional federal tax amounts click on the Tax Overrides tab and put YES under the words 'Block Federal' or 'Block Additional Federal.'
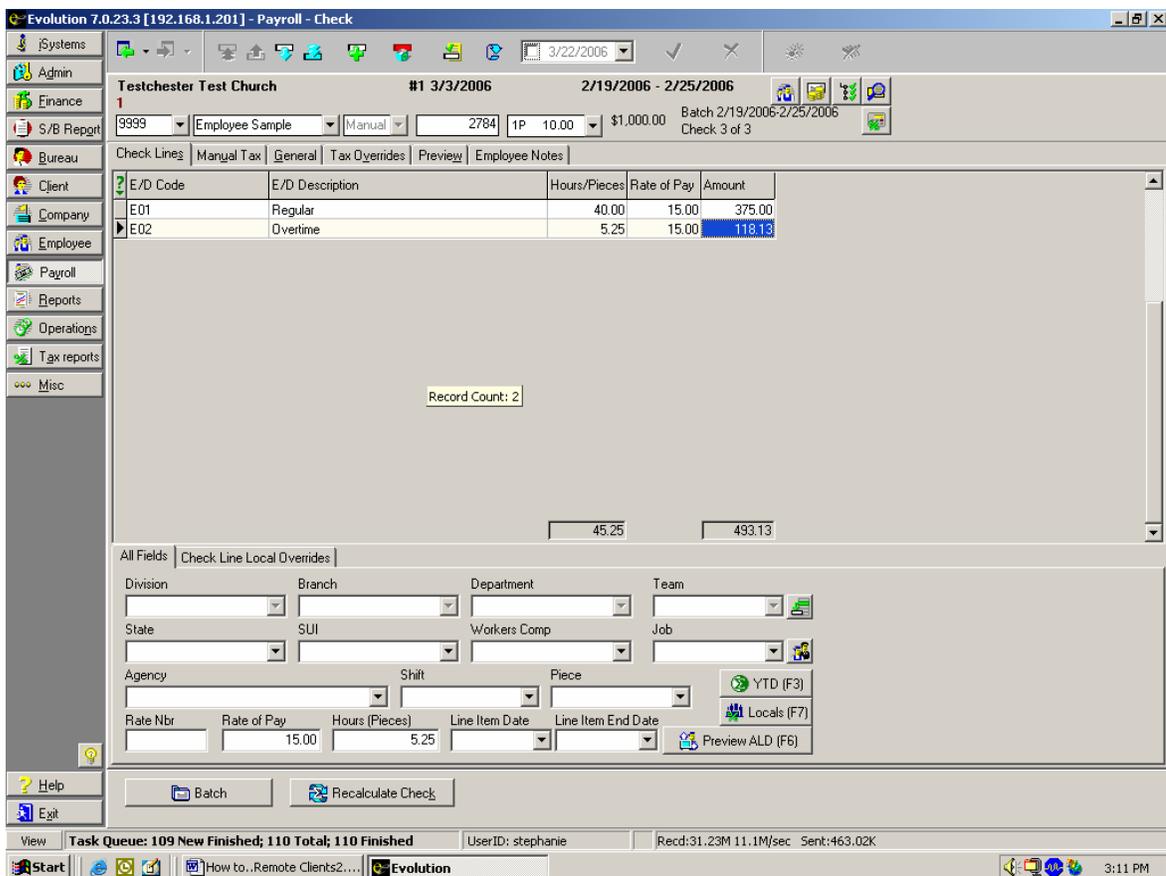
9. Save and commit your changes by clicking the green check mark and yellow sun.
There are more instructions on the next page for Entering a Manual Check in Payroll so please keep reading.

It is important to recalculate the manual check to make sure the net amount is the same as what you previously calculated and wrote.

1. After saving the manual check, stay on the Check Lines tab and click on the RECALCULATE CHECK button located near the bottom of your screen.

2. Within seconds you will be redirected to the Preview tab. Here, you will see the gross pay, amount of deductions and the net pay. **Make sure the net pay of the recalculated manual check is the same as the amount of the check you wrote.** If the net pay is correct, click on the PLUG TAXES button. This will ensure the net pay stays the same during the processing of your payroll.
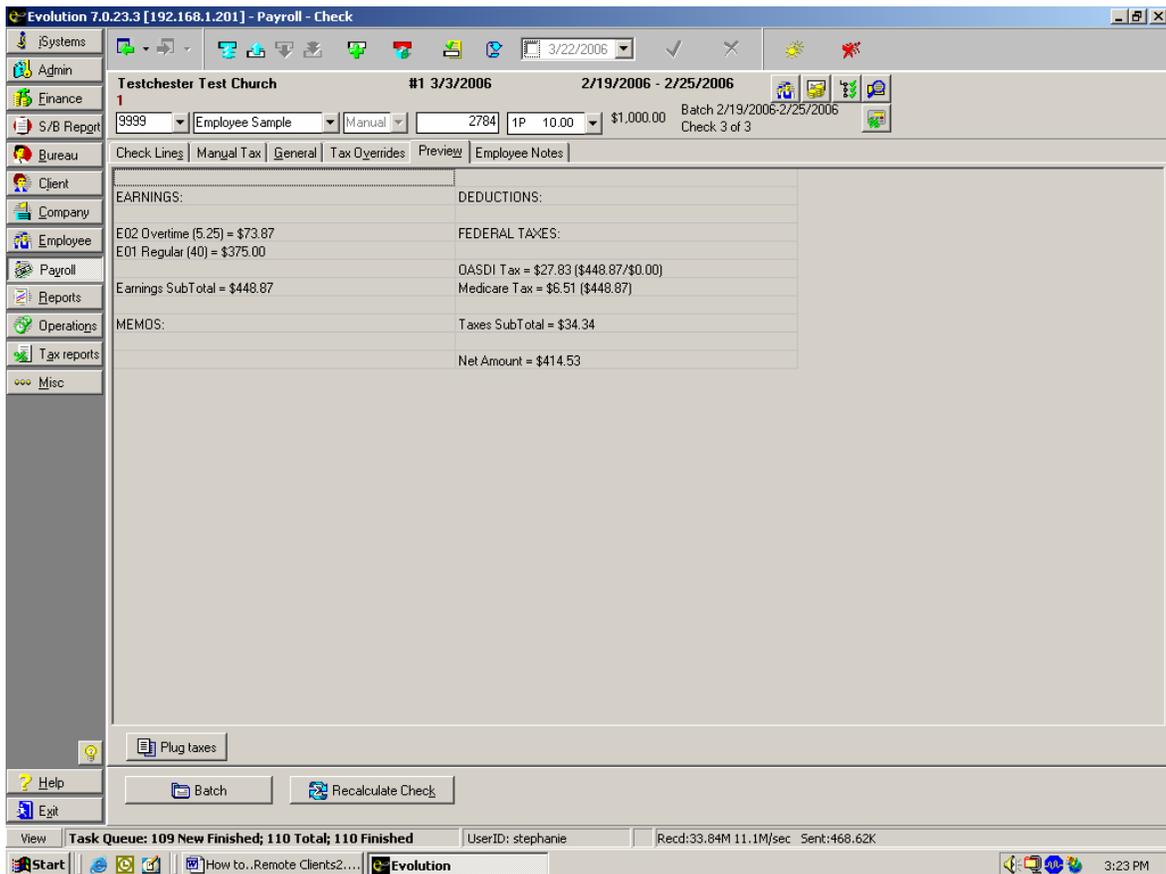
3. After clicking on the PLUG TAXES button, you will be redirected to the Manual Tax tab. Click on the yellow sun to commit the plugged taxes.

4. If the recalculated net pay amount is incorrect, follow steps 5-7 on the next page to manually enter the taxes.

5. If the recalculated net pay amount does not match the amount you wrote the manual check for then you will need to find what doesn't match. You can manually adjust the federal tax if the federal tax is the one that is different. To do this, click on the Manual Tax tab and enter the correct Federal amount. Under the words 'Calculate Override Taxes,' select Yes. Save and commit your changes by clicking on the green check mark and yellow sun. If the OASDI or Medicare tax amounts are different then call Payroll Partners at (817) 226-8111. Your payroll processor will have to manually adjust the OASDI and Medicare taxes.
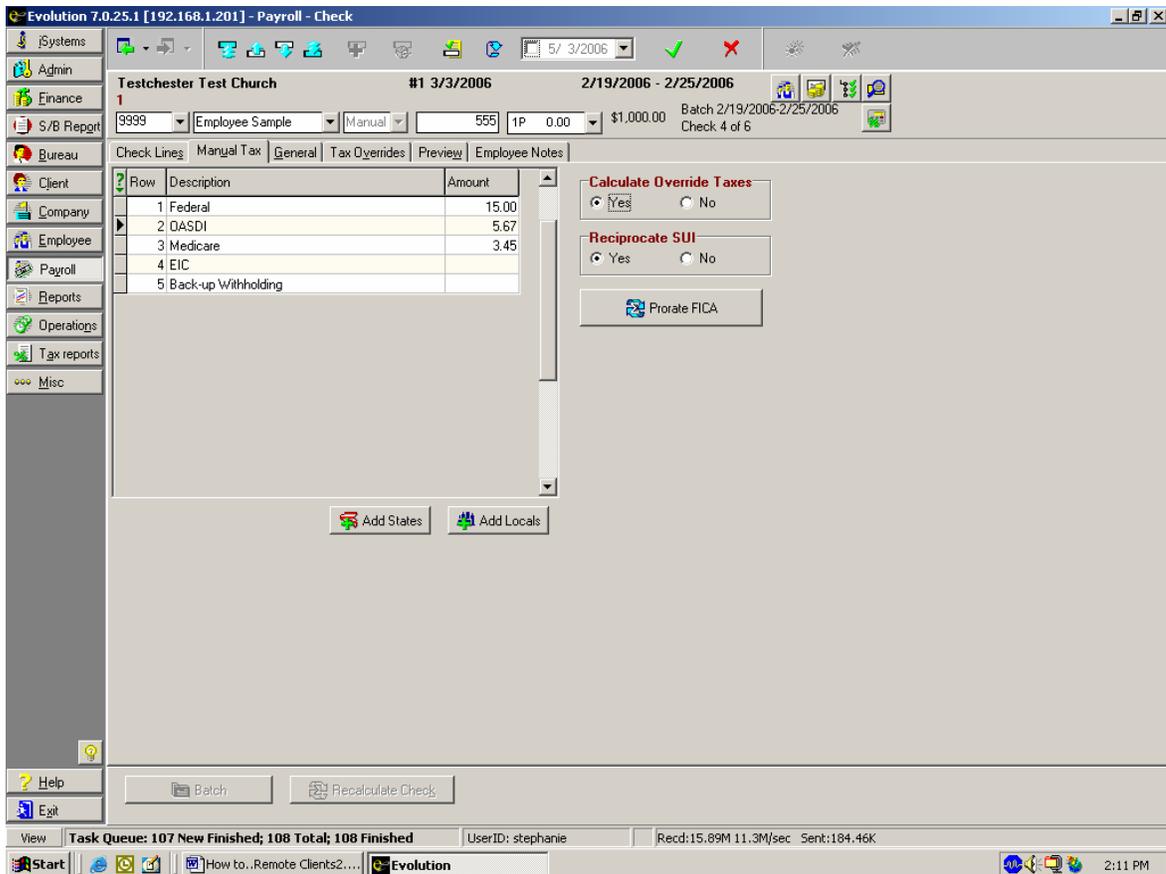
6. Commit your changes by clicking on the yellow sun.

7. If you manually changed the federal withholding and it was the only tax that was different then go to the Preview tab and click on the RECALCULATE CHECK button. Within seconds, the new net pay should appear. It should now be the correct amount since the federal tax was manually entered. Commit your changes by clicking on the yellow sun.

8. If you called Payroll Partners to manually adjust the OASDI and Medicare tax then you will need to Refresh (blue circular arrow at the top of your screen located near the date box) your screen and run a new pre-process so you can double check the net pay of the manual check.

Payroll Partners Frequently Asked Questions

- **I forgot my Evolution password, what do I do?**

  Call Payroll Partners at (817) 226-8111. There is no way for us to look up your password and tell you what it is, but we can reset the password so you can log in. Unless you tell us what to change the password to, we will use **payroll** (we always use lower case unless specifically asked to use upper case) as the new password. You can change your password after logging in if you choose to.

- **I typed in my Evolution password several times in a row and couldn't get in. I must have typed the incorrect password, and I am now getting an error message telling me I am locked out. What do I do?**

  Call Payroll Partners at (817) 226-8111. We will unlock Evolution for you. This does not require us to reset your password. Therefore, if you can't remember your password, ask us to reset it. If you don't tell us what to change the password to, we will use **payroll** (we always use lower case unless specifically asked to use upper case) as the new password. You can always change your password after logging in.

- **What do I do when I get an Access Violation?**

  Refresh (blue circular arrow at the top of your screen located to the left of the date box) your screen. If that doesn't work, the only thing you can do is log out of Evolution and log back in. If you were in the process of making a change more than likely it did not save the change. You will need to double check to make sure the change(s) got saved. *Remember it is always a good idea to click the yellow sun to commit after every few changes.*

- **Why does my pre-process not show any taxes or deductions?**

  After clicking on the pre-process button on the payroll screen, you must wait until the Total and Finished of your Task Queue (located at the bottom of your screen) are equal. For instance, before running your report, the Task Queue could read 1 Total; 1 Finished. After you click on the PRE-PROCESS button (located on the payroll screen), the Task Queue would read 2 Total; 1 Finished. Once they are equal, you are ready to click on the REPORTS command button and run your payroll register.

- **What do I do if I have special instructions for *Payroll Partners*?**

  If you have any special instructions for us please submit your payroll using the SB Review Button. By submitting your payroll using the SB Review Button, you will have the option of sending us an e-mail. You can also send an e-mail to info@payrollpartners.com. We usually process a payroll within minutes of your submitting it to us so if you need us to double check anything, it is important you submit your payroll using the SB Review Button.
  Remember your payroll will be what you see on the pre-process.

- **Where can I enter payroll reminder notes to myself?**

  There are two places you can enter payroll notes to remind you of an upcoming payroll change. The best way to guarantee you will see the note is to click on the EMPLOYEE command button and select employee. Highlight the employee you want to put the note on and click on the Notes tab. Under the Payroll Notes section, you can write anything you want. This is a great place to write a note about an upcoming pay rate increase, a special one-time deduction or a special wage adjustment on a check. Be sure to commit the notes by clicking on the yellow sun. The only people that will be able to see what you write will be you, anyone else with your business that has an Evolution password and us. If the employee is Active and you are creating a payroll and a payroll batch for the same pay frequency as the employee, the employee will pull into the payroll highlighted. The yellow highlighted employee in Evolution alerts you to the fact there is a note you need to read. To read the note in the payroll, all you have to do is double click on the employee. The payroll note will pop up immediately and you can make any necessary changes.
  The other place to enter a payroll note is on the Payroll---Notes screen. To enter a note here, click on the PAYROLL command button and select Payroll. Then click on the Notes tab. You can write anything you want to remind you to do something on an upcoming payroll or to double check something. Notes placed on the Payroll---Notes section will only be seen before you enter into the payroll.
  Please be aware we do not see any of the notes unless we enter your payroll or you call and tell us to look at the notes. If we need to see something please use the SB REVIEW button to submit your payroll. This will allow us to read double check any payroll notes you may have.

- **Where can I enter a note that will be printed on my employee's check stub?**

  If you want to write a note that will print on all your employees' check stubs, click on the PAYROLL command button and select payroll. Create your payroll and payroll batch and then go back to the Payroll---Payroll main screen. Highlight the current check date and in the box that says 'Payroll Check Comments,' you can

write any message you want. Be sure to commit the message by clicking on the yellow sun when you are finished. **Remember the message you write under 'Payroll Check Comments' will be printed on all of your employees' check stubs for the current payroll.**

If you want to write an employee-specific note that will only print on one employee's check stub, click on the PAYROLL command button and select payroll. If you haven't already done so, create your payroll and payroll batch. Once on the Check tab inside the payroll, highlight and double click on the employee you want to write a note to. You will be directed to the Check Lines tab. Click on the General tab and in the box that says 'Current Check Comments,' you can write any message you want. Be sure to commit the message by clicking on the yellow sun. **Remember the message you write under 'Current Check Comments' is an employee-specific note that will only print on one employee's check stub for that payroll only.**

- **How do I add or delete a column from my Payroll---Checks screen?**

  You will need to start a payroll and a payroll batch first. Click on the PAYROLL command button and select payroll. If you haven't started a payroll or payroll batch, refer to the Starting a Payroll directions on pages 8-9. If your payroll and payroll batch have already been created, highlight the check date and then click on the BATCH button located at the bottom of your screen. You should be directed to the Checks tab. If not, click over to the Checks tab. Once on the Checks tab, use your mouse to right click anywhere on the screen. Scroll down to E/D and then over to either the Add or Delete. Both the Add and Delete should have an arrow beside the words pointing right. When you have highlighted either the Add or Delete, a list of all Earnings and Deductions Codes for your company will come up. Highlight the Earnings or Deduction code you want to add and then scroll over to Hrs or Amt.

  If you added an Earnings or Deduction column then on the Checks tab, you will be able to scroll over to the desired E/D. If you deleted an Earnings or Deduction column then on the Checks tab, you won't see the column any more.

- **I used a different computer to enter all my payroll data, and I noticed all or most of my Earnings and Deduction columns in the payroll are missing. I didn't delete the columns so why did this happen?**

  The Earnings and Deduction columns (on the Checks tab) in the payroll batch are workstation specific. Therefore, if you change computers or work on a different computer and you want to see certain Earnings or Deduction columns, you will have to add the columns in. To do this, refer to the answer in the above frequently asked question to add the columns.

- **An employee borrowed money from the company, and we have agreed to let the employee make payments on the loan/advance. How can I keep track of the payments and how much money an employee has paid back on the loan/advance?**

  When you set up the Loan or Advance Scheduled E/D, you can enter and save the target amount. By entering the full loan or advance amount as the target amount, you can let the computer tell you when the loan or advance has been completely paid back.

  To do this, click the EMPLOYEE command button and select Scheduled E/Ds. Click on the Browse tab and then find and highlight the employee. Double-click on the highlighted employee. Once on the Browse Scheduled E/Ds tab, check to make sure the Loan or Advance has not already been set up. If it's not set up, click the plus sign at the top of your screen and enter the E/D on the Details 1 tab. If the E/D has previously been set up highlight it and click on the Details 1 tab. Under amount (first column) enter the amount of the per pay period deduction. Be sure there is no end date. Then click on the Details 2 tab. Click the drop-down arrow below the words 'Target Action' and scroll down to 'Do Not Reset Balance but Leave Line.' Under the Target Amount field type in the total amount of the loan/advance. Leave the Balance Taken field empty if the employee hasn't repaid any of the loan yet. If the employee has already paid some of the loan back to the business enter the amount paid back under the Balance Taken field. Commit your changes by clicking on the yellow sun.

  Every time a payroll is processed and the loan/advance comes out of an employee's check, the Balance Taken field on the Scheduled E/D will change. When the Target Amount has been reached, the computer will stop deducting the loan/advance from your employee's checks.

  If you set up a multiple payment loan/advance Scheduled E/D you must remember to never enter an additional one-time loan/advance in the payroll. Doing this would cause the Balance Taken amount on the original loan/advance to be incorrect. If you need to add an additional one-time loan/advance, you can adjust the Target Amount on the original loan/advance and then change the deduction amount in the payroll.

- **What do I do when an employee claims EXEMPT on his or her W4 form?**

  In order for federal withholding tax to be exempt, your employee must fill out his or her W4 form correctly. If he or she writes in a number of exemptions on line 5 or writes an additional amount on line 6 and claims exempt on line 7 then the form is filled out incorrectly. The employee will need to fill out a new W4 form for your records. **To claim exempt, your employee must leave line 5 and line 6 on the W4 blank and write exempt on line 7.**

  If the W4 form is filled out correctly please fax a copy to Payroll Partners at (817) 467-9994. Be sure the name of your company is on the cover letter or on the top of the W4. After faxing the updated W4, please call your payroll processor at (817)

226-8111. Your remote Evolution software does not allow you to block an employee's federal withholding permanently, but we will gladly block it for you so give us a call.

If your employee changes his or her withholding status and he or she was previously claiming exempt then fax a new W4 to (817) 467-9994 and give Payroll Partners a call at (817) 226-8111. We will need to unblock the Federal Tax so the employee can start withholding federal taxes.

- **One of my employees recently got married and has asked me to change her last name on payroll records. What do I need to do?**

  It is important you get her to fill out a new W4 form for your records with the correct and updated name change and federal withholding status. You should not change her last name in Evolution until you get a new copy of her social security card with the corrected last name. Legal names and social security numbers need to match so you should not change the last name until you get a copy of the new social security card.

- **My employee marked 'Married, but withhold at higher Single Rate,' on his or her W4 form. On the Employee---Employee screen in Evolution, there is only a place for Single or Married. What do I do?**

  If your employee marks 'Married, but withhold at higher Single Rate,' on his or her W4 then the employee is considered to be Single. Therefore, under the Federal/State Marital Status fields on the Employee---Employee screen, you would mark Single.

- **When I was setting up a new employee, I noticed an EIC field on the third column of the Employee---Employee----EE Entry tab. What is this and what should I put in this field?**

  EIC stands for Earned Income Credit. This field should automatically default to NONE on the EE Entry tab. **Unless the employee is eligible for EIC, it is very important you leave the default set at NONE.** To be eligible, the employee must complete a Form W-5 EIC Advance Payment Certificate and meet certain income tests. Do not click the drop-down arrow under the EIC field and change the default. If you have any questions give Payroll Partners a call at (817) 226-8111.

- **Why isn't Swipeclock importing the correct totals into my payroll?**

  After importing your time from Swipeclock into Evolution, you need to check the exception report. To do this click on the Import tab in your payroll and then click on the VIEW REPORT FILE button. This will tell you if there was an EE code missing, a missing category, etc.

  If there are no exceptions and the totals imported into Evolution don't match the Swipeclock totals then you may have imported your previous payroll records. To correct this you need to make sure the file you are saving to when you download from Swipeclock has the exact same file name and location as the file you are importing into Evolution. When you save your downloaded times from Swipeclock, make a note of the folder and file name it is saving to.

  Once on the Import tab in Evolution, you need to pick the file name before importing. To do this click on the ellipsis button (three-dot button to the right of the Source File Name) and at the top where it says Look In, click the drop-down arrow and open the folder where you saved the downloaded times from Swipeclock. Once you have found the file, click on Open.

  You should still be on the Import tab in Evolution and now you are ready to click on the IMPORT TO PAYROLL button. After importing, click on the Earnings and Deductions or Checks tab to see your totals. Make sure they match the totals from your summary report in Swipeclock. Once the totals match, make sure you commit your changes by clicking on the yellow sun.

- **How can I filter my EE screen to show all my employees including terminated employees?**

  Click on the EMPLOYEE command button and select employee. Then click the red question mark (middle right-hand side of screen) beside the EE Code bar. A Filter Records to View box will pop up. You can then filter by EE code, last name, first name, social security number or status.

  For instance, if you want to see active employees only, type in ACTIVE beside the box that says status. Then hit the OK button at the bottom.

  If you want to see your terminated and active employees then click on the red question mark, and when the Filter Records to View box pulls up, click on the CLEAR-ALL button and then click on the OK button.

- **Where can I look to see if an employee received a check a couple of pay periods ago?**

  You can always run a payroll register and filter it for a certain employee, but the easiest way to see if an employee received a check a few payrolls back and the amount of that check is to click on the EMPLOYEE command button and select employee. Highlight the employee you are looking for and then click on the

CHECK FINDER button. The CHECK FINDER button is a magnifying glass located in the upper right-hand corner of your screen.

Since you have already highlighted the employee, the EE code will already be filtered so click the FILTER button. You will then be able to see the check date, check number, gross pay and net pay. If you want to look at a certain check, highlight the check and click on the SHOW button. You will then be able to see a breakdown of taxes and deductions.

If you want to print this page you will need to hit the PRINT SCREEN button on your keyboard, open up a blank document such as Microsoft Word, click somewhere on the screen, right click your mouse and use the mouse to scroll down to paste. This should be a screen print of what you just saw in Evolution. Now you are ready to print your document.

- **Where can I go to look up an employee's Year to Date (YTD)?**

There are three different ways to look up an employee's YTD amount. The easiest way is to look at the YTD column on the employee's last pay check stub or your last payroll register.

If you don't have the reports handy then you can go to Evolution and click on the EMPLOYEE command button and select Employee. Once on the Browse tab, highlight the employee and click on the Details tab. Click on the YTD (F3) button located near the right-hand side of your screen or hit F3 on your keyboard. Within seconds, a Year to Date box will pop up. Here you can see the gross YTD amount, the amount of any deductions and the amount of the taxes. If you want to view a previous year, click on the up or down arrow to the right of the year box and change the year. Once you have changed the year, click on the APPLY button.

The third way to view an employee's YTD record is to run a payroll register. Click on the REPORTS command button and select Run Reports. Select the payroll register (be sure there is a check mark to the left of the report) and then click on the Report Parameters tab. Under the words 'Select Payrolls for,' click in the box beside Year. If you want to see just a summary of the year then click on the Misc. tab and select Show only Summary for Multiple check dates. Then click on the Employee Filter tab and select the employee you want to run a report for. To make it easier to find your employee, you can sort by social security number, first name or last name. To sort by any of these methods, click on the gray heading bar until you see an arrow pointing down. Highlight the employee and click the box to the left of the name to place a check mark there. Lastly, you can either print or view the report on your screen. In the upper right-hand corner of your screen, uncheck the box that says 'Run through the Queue' and then click the drop-down arrow above the words to select Print or Preview. Once you have selected Print or Preview, click on the RUN REPORT(S) button.

- **If any of my employees have Direct Deposit, at what time do I need to have my payroll to *Payroll Partners*?**

  It is extremely important we have the payroll and any paperwork for any changes you want us to double check before 12 noon Central time, three business days before your check date. This is to ensure Direct Deposits get posted on your check date.

- **What do I do if my check date falls on a bank holiday or weekend?**

  You need to change the check date. To do this click on the PAYROLL command button and select payroll. Highlight the check date you want to change, and then under the words 'Check Date' (lower right-hand side of your screen), click on the drop-down arrow and select your new check date. This must be done before you submit your payroll. If you notice you didn't change the check date before submitting the payroll to us please call us at (817) 226-8111 immediately. We will then change the check date for you.

  Remember if any of your employees have Direct Deposit the payroll must be submitted to us by 12 noon, three business days before your check date.

- **What do I do if a bank holiday falls a day or two before my check date and some or all of my employees have direct deposit?**

  We must have all completed direct deposit payrolls by 12 noon Central time, three business days before your check date to ensure Direct Deposits get posted on your check date. Although Payroll Partners and many other businesses may be open on a bank holiday, this does not mean you can consider the bank holiday as a regular business day. **Bank Holidays do not count as a business days.** For example, if you usually submit your payroll before noon on Tuesday for a Friday check date and Wednesday is a bank holiday then we must have your completed payroll by 12 noon Central Time on Monday to ensure direct deposits get posted.

- **An employee just told me he closed his bank account and today is pay day. What do I do?**

  Depending on the situation regarding the employee's closing or transferring of his or her bank account, the money may still be deposited into the old account. The employee should call his or her bank and explain what happened to see if the money will be deposited. Approximately two business days after pay day we will be notified if the direct deposit didn't go through. The money will come back to us, and we will either forward it to you or deposit it into the employee's new account.

- **I entered a one-time deduction in the payroll, but the deduction amount isn't coming out of my employee's check?**

  If the deduction did not come out of your employee's check after running a pre-process or recalculating a check in the payroll, it might be because the employee did not make enough money to cover the amount of the deduction. If this occurs please give Payroll Partners a call at (817) 226-8111.
  We will need to take a look at the deduction to see how we can best accommodate you. We will either set up the deduction to take out the absolute most it can so the net pay will be $0.00 or we will help you split the deduction into payments.

- **How do I add an employee into a batch?**

  If you have already started a payroll and created a batch and need to add in either a new employee or a terminated employee that has been rehired you will have to pull them into the batch.

  Refer to the Adding an Employee into a Batch instructions on pages 10-11 of the Evolution Help for Remote Users Manual.

- **How do I stop an employee's Direct Deposit on the current payroll only?**

  Refer to the Stopping a Direct Deposit on the current payroll only instructions on page 18 of the Evolution Help for Remote Users Manual.

- **How do I stop an employee's Direct Deposit permanently?**

  Refer to the Stopping a Direct Deposit permanently instructions on pages 19-20 of the Evolution Help for Remote Users Manual.

- **How do I stop Scheduled E/D(s) for an employee on the current payroll only?**

  Refer to the Stopping all Scheduled E/Ds or the Stopping a Scheduled E/D instructions on pages 21-23 of the Evolution Help for Remote Users Manual.

- **How do I void a check?**

  Checks must be voided in the same quarter in which they were issued. **DO NOT VOID A CHECK FOR A PRIOR QUARTER.** If you need to void a check from a prior quarter, call Payroll Partners at (817) 226-8111.

  It is important you remember to void checks in Evolution so payroll records will be correct and up-to-date. Voiding a check in Evolution must be done after a payroll batch has been started.

  Refer to the Voiding a Check instructions on pages 31-32 of the Evolution Help for Remote Users Manual.

- **How do I calculate a manual check?**

  Refer to the Calculating a Manual Check instructions on pages 33-39 of the Evolution Help for Remote Users Manual.

  Remember calculating a manual check in the EE screen does not save the check. It is very important you enter the manual check into the payroll so payroll records will be correct.

- **How can I view an employee's payroll records?**

  This report will allow you to see a breakdown by payroll of gross wages, hours worked and deduction amounts.

  1. Click on the REPORTS command button and select Run Reports.

  2. Place a check mark to the left-hand side of the Payroll Register. To do this click in the box directly to the left of the payroll register.

  3. Click on the Report Parameters tab. You can select all payrolls for a certain quarter or for the year by clicking in the box on the left-hand side of Quarter 1, Quarter 2, etc. This will place a check mark under the Check Date of all payrolls for the selected time period. If there are a few check dates you do not want included in the report, you can deselect the dates by clicking on the check mark to the left-hand side of the check date. You can also filter the dates of your report by changing the From and To dates. If you do this you will have to place a check mark next to all the check dates in this range. It will not select them for you.

  4. If you want to see a Year to Date summary total of the pay periods you selected, click on the Misc. tab. Click (put a check mark) on the box beside

Show Only Summary for Multiple Check Dates. If you do not want to see a Year to Date summary total then skip to Step 5.

5. If you don't want to see a summary, then click on the EMPLOYEE FILTER tab and select the employee(s) you want (Be sure there is a check mark in the box out to the left.). If you select one than more employee at a time, it will put the employees one right after the other. If you want the employees on separate pages you will have to pick one employee, run the report and then follow the above steps for the next employee. In other words, you will be running the report multiple times for more than one employee.

6. Before clicking on the RUN REPORT button, choose whether you want to preview or print the report. You can do this by clicking on the drop-down arrow on the left-hand side of the RUN REPORT button.

- **How do I set up a Direct Deposit and/or a Savings Direct Deposit for an employee?**

Refer to the Setting up a Single Direct Deposit and/or the Setting up Multiple Direct Deposits instructions on pages 12-17 of the Evolution Help for Remote Users Manual.

- **How do I set up child support?**

If you have received a child support order from the Attorney General for one of your employees please fax the letter and child support information to Payroll Partners at (817) 467-9994. Be sure the name of your company is on the cover letter or on the top of the child support order. We will get the child support or multiple child supports set up for you. Before you submit your next payroll, double check the pre-process to make sure the employee's child support pulled into the payroll.

- **How do I set up a Scheduled E/D such as medical to only come out of the second check of the month?**

1. Click on the EMPLOYEE command button and select Scheduled E/Ds.

2. On the Browse tab, double click the employee. If the Scheduled E/D is already set up then double click on it and skip to step 4. If it is not set up then hit the plus sign at the top of your screen

3. Under E/D code, click on the drop-down arrow and select the type of E/D you are trying to set up.

4. After making sure everything is filled in, click on the drop-down arrow beside FREQUENCY and select Last Scheduled of the Month. Then on the right-hand side of your screen where it says Block Week 1, put yes to weeks 1, 2 and 3. Also under the words 'Always Pay/Deduct,' put No.

5. As always commit your changes and refresh Scheduled E/Ds if the payroll has already been started. To refresh Scheduled E/Ds after saving, click on the PAYROLL command button and a box will pop up asking you if you want to refresh Scheduled E/Ds. You need to say YES so the changes will be carried over into the payroll.

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