



# Evolution Payroll® User Guide v 3.6

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# Evolution Payroll - Getting Started

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

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

## System Requirements

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

### Screen Resolution

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

### Internet Browser

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

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

**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

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**Note:** each item must be selected individually.

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**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:

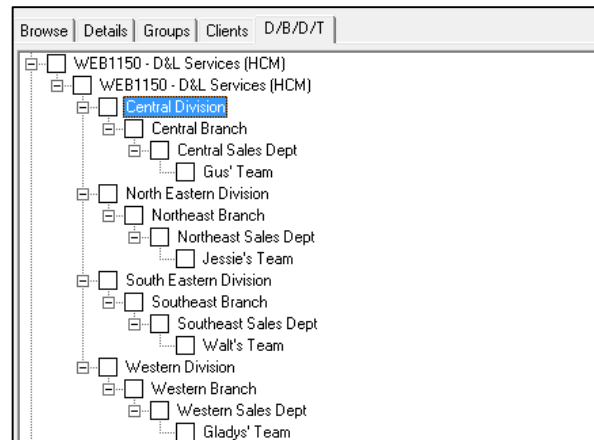
1. Employees will not be visible to a user if s/he is part of a D/B/D/T level to which the user does not have permission to view.
2. The D/B/D/T level will not be available for selection throughout the application if the user does not have permission to view it.
3. Checks will not be visible to a user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

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

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## 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.

Once security requirements have been established in Evolution,

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

The first time a user 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.

5. Click **Submit**.

6. 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.

**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.

- 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.

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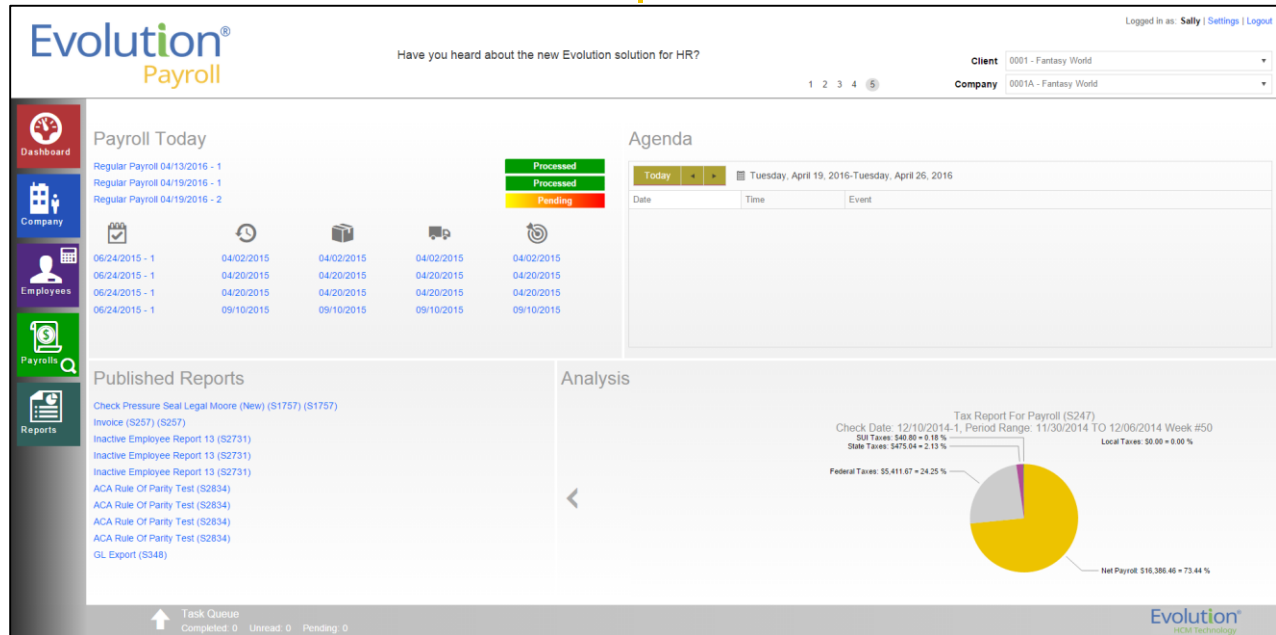
**Note:** If the service bureau has not entered anything in the Terms of Use tab, nothing needs to be accepted by the users.

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When the user accepts, the Dashboard screen opens.

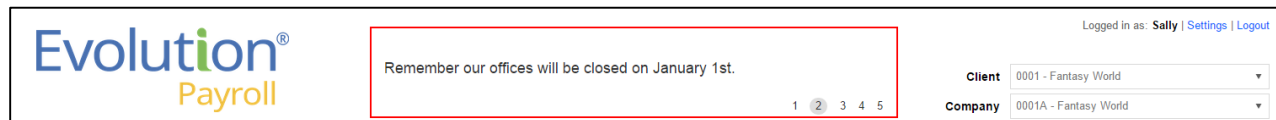
# The Dashboard

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.



## 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.



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.)

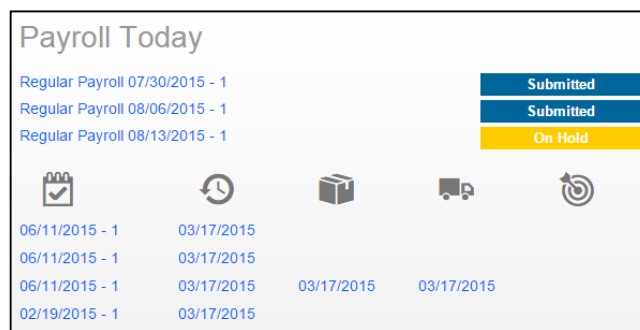
**Note:** When a different Client/Company is selected, regardless of the menu in which the user is working, the user is automatically returned to the Dashboard screen.

## 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
	Processed date of the payrolls listed below
	Packaged date of the payrolls listed below
	In Transit date of the payrolls listed below
	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		
<div> <div>Today</div> <div> <div>◀</div> <div>▶</div> </div> <div> <div>📅</div> <div>Wednesday, August 05, 2015-Wednesday, August 12, 2015</div> </div> </div>		
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.

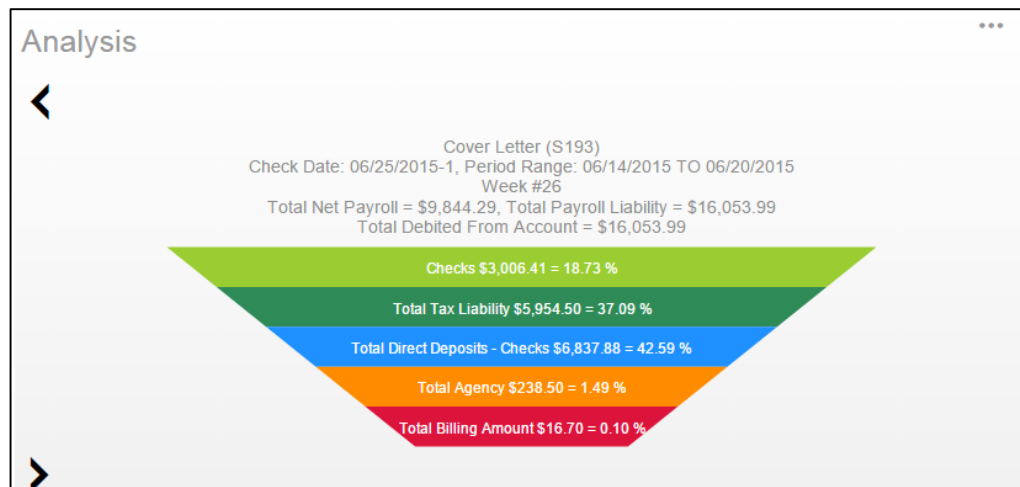
Published Reports	
Employee Change Listing (New) (S1075)	
Labor Distribution (New) (S1077)	
Labor Distribution (New) (S1077)	
Payroll Register (S109)	
Payroll Register (S109)	
Delivery Label (S184)	
Delivery Label (S184)	
Cover Letter (S193)	
Cover Letter (S193)	
Direct Deposit (S211)	

## Analysis

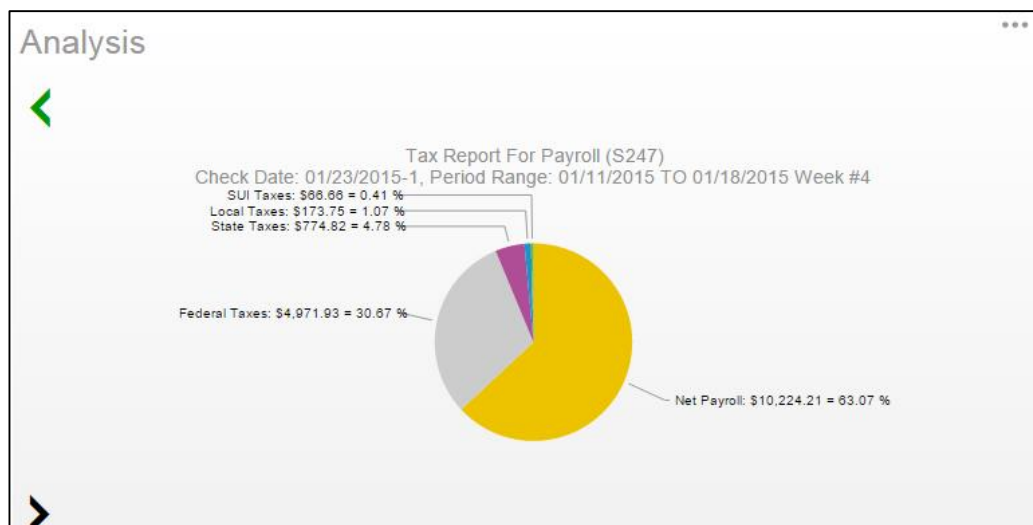
The tile on the bottom right of the Dashboard screen displays a graphical representation of the *Cover Letter Report* (S193) and *Tax Report for Payroll* (S247) reports. Users can click the left  or right  arrow to scroll to the next view.

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
<b>Report *</b> Cover Letter (S193)	<b>Print Frequency *</b> Every Scheduled Pay
<b>Report Print Name *</b> Cover Letter	<b>Priority to Print *</b> 5
#Name: Cover Letter #Ticket: #Author: Dmitry Shapovalov #Date: #Description: This report is the cover letter	Week Number Month
	<b>Number of Copies *</b> 1
	<input type="checkbox"/> Summarize <input type="checkbox"/> Duplexing
Options	
Output ASCII file name <input type="text"/> ... <input type="checkbox"/> Add to existing file	
<input type="checkbox"/> Favorite <input type="checkbox"/> Hide for Remotes <input type="checkbox"/> Print with Adjustment Payrolls Only <input checked="" type="checkbox"/> Display on Dashboard	
Override Report Mail Box <input type="text"/>	
<input type="button" value="Report Parameters"/> <input type="button" value="Run Reports"/>	

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

# Navigating Evolution Payroll

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

## Client and Company Selector

Select the client and company from the dropdown menus in the upper right corner of the screen to view company-specific information.

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

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

The screenshot displays the Evolution Payroll dashboard. At the top right, there are dropdown menus for 'Client' (0001 - Fantasy World) and 'Company' (0001A - Fantasy World). The dashboard is divided into several sections: a left sidebar with icons for Dashboard, Company, Employees, Payroll, and Reports; a central 'Payroll Today' section with a table of payroll runs; an 'Agenda' section with a calendar view; a 'Published Reports' section with a list of reports; and an 'Analysis' section with a pie chart showing tax breakdowns. The bottom of the dashboard features a 'Task Queue' and the Evolution logo.

Regular Payroll	04/13/2016 - 1	04/19/2016 - 1	04/19/2016 - 2
06/24/2015 - 1	04/02/2015	04/02/2015	04/02/2015
06/24/2015 - 1	04/20/2015	04/20/2015	04/20/2015
06/24/2015 - 1	04/20/2015	04/20/2015	04/20/2015
06/24/2015 - 1	09/10/2015	09/10/2015	09/10/2015

Category	Amount	Percentage
Federal Taxes	\$5,411.67	24.25 %
State Taxes	\$48.80	0.13 %
State Taxes	\$475.04	2.13 %
Local Taxes	\$0.00	0.00 %
Net Payroll	\$16,386.46	73.44 %

## The Employee Menu

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

**Example:** the following screen opens when the user clicks the Employees menu. This is the Table View. Click the active button to access the Form View, which lists the menu items within the Employee menu.

**Employees**

Search for Employee: Export to Excel

EE #	Last Name	First Name	SSN/EIN	State	Zip Code	Status
1	Levis	Al	884-77-3311	NY	10066	Active
2	Smith	Bill	996-55-1172	MA	10022	Active
3	Greenburg	Goldie	982-44-3369	NY	10044	Active
4	Soffer	Harry	778-22-1133	VT	05401	Active
5	Pinkmans	Jessie	885-66-9974	NY	10011	Active
6	Bichon	Selma	998-84-4112	MA	88855	Active
7	Goodman	Saul	302-66-5889	VT	05401	Active
8	Clark	Willie	996-44-1332	VT	05401	Active
9	White	Walter	600-33-1122	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	Ramagopol	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

Page 1 of 2 1 - 15 of 17 items

**Preview**

**Goldie Greenburg** 3

Last Name: Greenburg First Name: Goldie

SSN/EIN: 982-44-3369

Status: Active

Address: 951 Smith Street  
Ithaca, NY 10044

**Employees**

Search for Employee: Export to Excel

3-Greenburg, Goldie

\*SSN\* \*EIN\*  
982-44-3369

First Name: Goldie M.L. Last Name: Greenburg

Address 1: 951 Smith Street

Address 2:

City: Ithaca State: NY Zip Code: 10044

County: Phone: Extension:

Email:

Birth Date: 02/17/2004 Gender: Female Ethnicity: Black Or African Am... Tribe:

Current Hire Date: 02/17/2003 Original Hire Date:

Termination Date: Rehire Eligible: Yes

Employment Type: N/A

On Call From: On Call To:

Healthcare Coverage: No ER Paid Ins/Not Eligible

Dependent Coverage: No Benefit Eligible

Group Term Policy:

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:

**Employees**

Search for Employee: Export to Excel

EE #	Last Name	First Name	SSN/EIN	State	Zip Code	Status
1	Levis	Al	884-77-3311	NY	10066	Active
2	Smith	Bill	996-55-1172	MA	10022	Active
3	Greenburg	Goldie	982-44-3369	NY	10044	Active
4	Soffer	Harry	778-22-1133	VT	05401	Active
5	Pinkmans	Jessie	885-66-9974	NY	10011	Active
6	Bichon	Selma	998-84-4112	MA	88855	Active
7	Goodman	Saul	302-66-5889	VT	05401	Active
8	Clark	Willie	996-44-1332	VT	05401	Active
9	White	Walter	600-33-1122	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	Ramagopol	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

Page 1 of 2 1 - 15 of 17 items

**Preview**

**Goldie Greenburg** 3


Last Name: Greenburg First Name: Goldie

SSN/EIN: 982-44-3369

Status: Active

Address: 951 Smith Street  
Ithaca, NY 10044

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

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

Search for Employee...		Export to Excel				
EE #	Last Name	First Name	SSN/EIN	State	Zip Code	Status
4	Soffer	Harry	778-22-1133	VT		Active
7	Goodman	Saul	302-66-5889	VT		Active
8	Clark	Willie	996-44-1332	VT		Active
10	Bigole	Susan	963-88-1122	VT		Active
12	Kirk	Jim	213-64-5663	VT		Active
13	Ramagopol	Yani	615-46-1065	VT		Active
14	Hamerhill	Bryce	514-05-4105	VT		Active
15	Any	Body	000-00-0000	VT		Active
16	Golden	Larz	651-96-5106	VT	05401	Active
17	Scott	Bloomfield	635-21-0651	VT	05401	Active

Show items with value that:

Is equal to

VT

And

Is equal to

Filter Clear

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

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

EE #	Last Name	First Name	State	Zip Code	Status
1	Lewis	Al	NY	10066	Active
2	Smith	Bill	MA	10022	Active
3	Greenburg	Goldie	NY	10044	Active
4	Soffer	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	Al	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

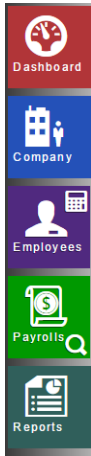
## Hot Keys

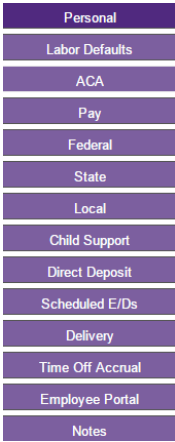
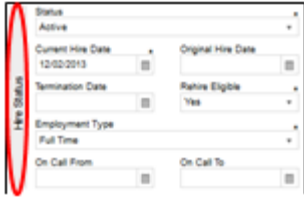
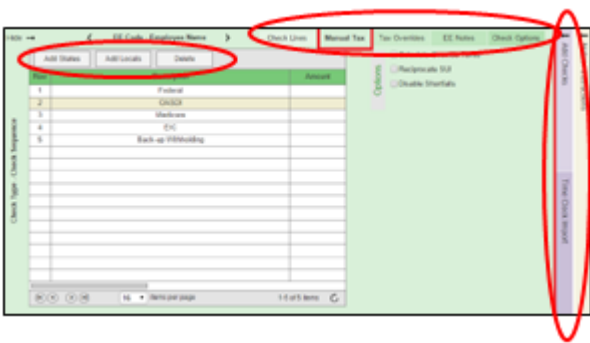
A series of **Hot Keys** have been developed to enable quicker navigation. There are several key combinations that perform the same function with different results, depending upon the menu the user is in. The table below identifies the Keyboard Hot Keys currently available.

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

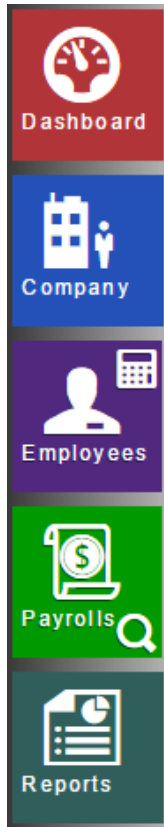
There is new terminology used throughout Evolution Payroll that warrants introduction. The table below explains the new terminology that you will see in this document as well as in the application.

Name	Example	Description
Menu Bar		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.

<b>Menu Items</b>		<p>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.</p>
<b>Sections</b>		<p>Many of the screens in the application are divided into sections. These sections have headings that separate the information pertaining to the sections.</p>
<b>Flyout tabs</b>		<p>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.</p>

# 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			
<ul style="list-style-type: none"> <li>Basics</li> <li>Organizational Levels</li> <li>ED Codes</li> <li>Status</li> </ul>	Name <b>BDazzled Design Ltd.</b>		Company Code <b>BDazz1</b>
	D.B.A. 		EIN <b>000000000</b>
	Address 1 <b>11 Spring Lane</b>		Customer Service Team <b>Customer Service</b>
	Address 2 		Customer Service Representative 
Previous   Next	City <b>Williston</b>	State <b>VT</b>	Zip Code <b>05495</b>
	Phone 	Fax 	Email <b>jjanson@Bdazz.Com</b>
Legal Address	Name <b>Linda Mills</b>		Payroll <b>123456789</b>
	Address 1 <b>7 Spring Lane</b>		Tax <b>123456789</b>
	Address 2 		Workers' Compensation <b>123456789</b>
	City <b>Williston</b>		Billing <b>123456789</b>
		State <b>VT</b>	Direct Deposit <b>123456789</b>
		Zip Code <b>05495</b>	Bank Accounts

## Company - Organization Levels screen

The **Company - Organization Levels** screen displays the Division, Branch, Department, and Team organization level-specific 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.

Details for: North Eastern Division	
Number	No East
Description	North Eastern Division
Home State	VT
Override EE Rate #	
Override Pay Rate	
Payroll Bank Account #	302875106
Tax Bank Account #	000000000
Billing Bank Account #	302875106
DD Bank Account #	



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	Rate	Rate #	OT Rate	Start D...	Default	
						Amount	
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.

Company

Basics

Organization Levels

ED Codes

States

Previous

Next

Description

Code

Alaska

AK

Massachusetts

MA

New York

NY

Pennsylvania

PA

Vermont

VT

1

1 - 5 of 5 items

Setting for: New York - NY

EIN

123456789

SDI EIN

123456789

☐ State Tax Exempt

☐ SUI Exempt

SUI Rates

Tax Name

Rate

NY-Re-employment

0.00075

NY-SUI

0.04025

1

1 - 2 of 2 items

Local Rates

Tax Name

Rate

New York City Res.

New York City Non-Res.

0.0025

MCT Mobility Tax

0.0011

1

1 - 3 of 3 items

## Appendix - Company Menu

### Company Basics screen

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

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

## Company - Organization Levels screen Company - States Screen

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

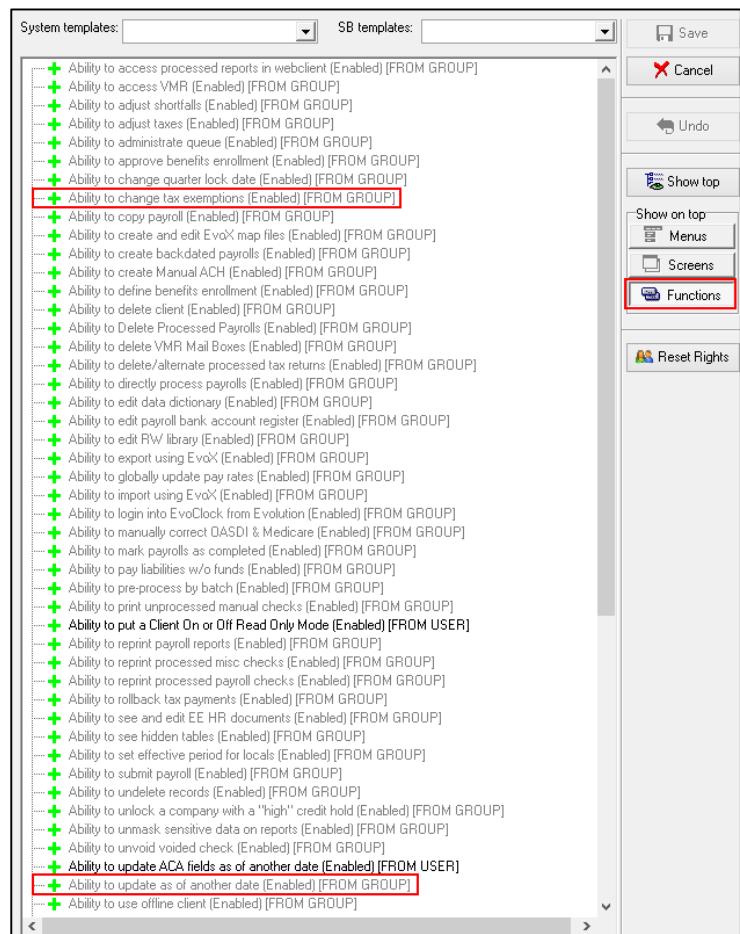
Employees can be added, edited and viewed in the Employees menu in Evolution Payroll. When navigating, it is recommended that you use the **TAB** key to move from field to field (**TAB + SHIFT** key to move to a previous field). Upon reaching the last field on a screen, click the **TAB** key to progress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



**Employees**

Search for Employee:  Export to Excel

EE #	Last Name	First Name	SSN/EIN	State	Zip Code	Status
1	Lewis	Al	*****3311	NY	10066	Active
2	Smith	Bill	*****1172	MA	10022	Active
3	Greenburg	Goldie	*****3369	NY	10044	Active
4	Soffer	Harry	*****1133	VT	05401	Active
5	Pinkmans	Jessie	*****9974	NY	10011	Active
6	Bichon	Salma	*****4112	MA	00855	Active
7	Goodman	Saul	*****5889	VT	05401	Active
8	Clark	Willie	*****1332	VT	05401	Active
9	White	Walter	*****1122	NY	10912	Active
10	Biggle	Susan	*****1122	VT	05401	Active
11	Simon	Simon	*****3647	NY	11234	Active
12	Kirk	Jim	*****5663	VT	05602	Active
13	Ramagopal	Yani	*****1065	VT	05401	Active
14	Hamerhill	Bryce	*****4105	VT	05451	Active
15	Any	Body	*****0000	VT	05602	Active

Page 1 of 2 1 - 15 of 17 Items

**Preview**

**Goldie Greenburg** 3



Last Name: Greenburg First Name: Goldie

SSN/EIN: \*\*\*\*\*3369

Status: Active

Address: 951 Smith Street  
Ithaca, NY 10044

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,  show audit history, and  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**

3-Greenburg, Goldie

**Personal**

\*SSN\* @EIN\*  
02/21/2003

First Name\*  
Goldie

Last Name\*  
Greenburg

Address 1\*  
951 Smith Street

Address 2

City\*  
Ithaca

State\*  
NY

Zip Code\*  
10044

County

Phone

Extension

Email

Birth Date  
02/17/2004

Gender\*  
Female

Ethnicity\*  
Black Or African Am...

Tribe

**Hire Status**

Current Hire Date\*  
02/17/2003

Termination Date

Employment Type\*  
N/A

On Call From

On Call To

Healthcare Coverage\*  
No ER Paid Ins/Net Eligible

Dependent Coverage\*

Benefit Eligible

Group Term Policy

OTL Hours

OTL Rate

Original Hire Date  
02/17/2003

Rehire Eligible\*  
Yes

OTL 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.

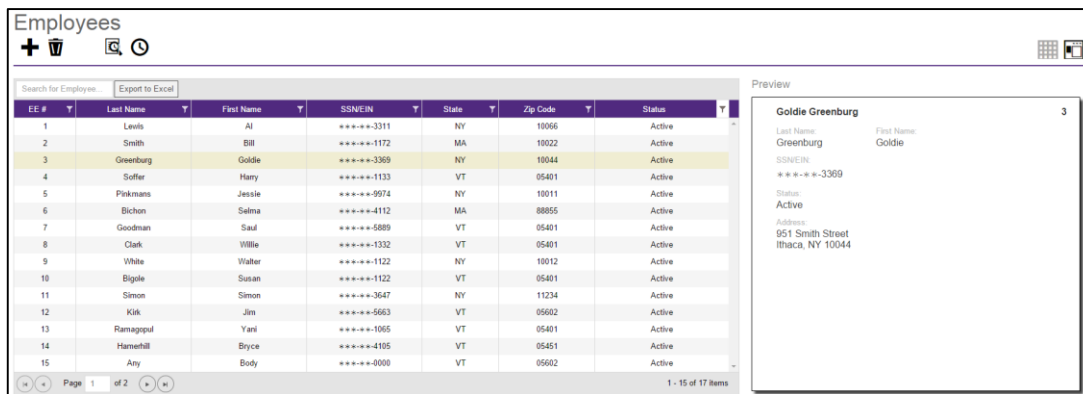
## Adding New Employees

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 screen.

**Note:** Employee SSNs are masked in the Grid View except for the last four digits.

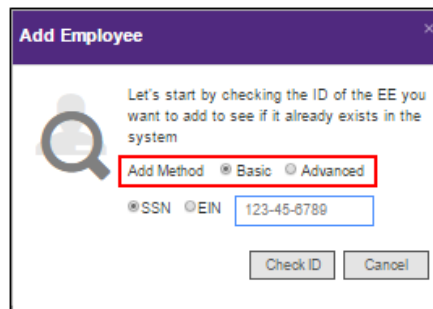


The screenshot shows the 'Employees' menu with a table of employee records. The table has columns for EE #, Last Name, First Name, SSN/EIN, State, Zip Code, and Status. A preview pane on the right shows details for Goldie Greenburg, including their SSN/EIN, status, and address.

EE #	Last Name	First Name	SSN/EIN	State	Zip Code	Status
1	Lewis	Al	*****3311	NY	10066	Active
2	Smith	Bill	*****1172	MA	10022	Active
3	Greenburg	Goldie	*****3369	NY	10044	Active
4	Soffer	Harry	*****1133	VT	05401	Active
5	Pinkmans	Jessie	*****9974	NY	10011	Active
6	Bichon	Selma	*****4112	MA	88655	Active
7	Goodman	Saul	*****5889	VT	05401	Active
8	Clark	Willie	*****1332	VT	05401	Active
9	White	Walter	*****1122	NY	10012	Active
10	Bigole	Susan	*****1122	VT	05401	Active
11	Simon	Simon	*****3647	NY	11234	Active
12	Kirk	Jim	*****5663	VT	05602	Active
13	Ramagopal	Yani	*****1065	VT	05401	Active
14	Hamerhill	Bryce	*****4105	VT	05451	Active
15	Any	Body	*****0000	VT	05602	Active

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

**Note:** The option of selecting **Basic** or **Advanced** is available only if the security function “Apply EE Quick Entry in WebClient” is disabled.



The 'Add Employee' dialog box prompts the user to check the ID of the employee. It includes a search icon, a text input field for the ID, and radio buttons for 'Add Method' (Basic and Advanced). Below this, there are radio buttons for 'SSN' and 'EIN', followed by a text input field for the number. 'Check ID' and 'Cancel' buttons are at the bottom.

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 [Employee – Basics screen](#). For detailed information about the fields on this screen, refer to the Employees - Basics Screen section in the Appendix at the end of this chapter.
2. 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.

3. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the [Employees – Personal screen](#) in the Appendix at the end of this chapter.
4. 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. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the [Employees – Labor Defaults screen](#) 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 – Pay** screen opens.

## Employees - ACA screen

The ACA screen in Evolution Payroll contains the same fields as the ACA tab in Evolution Classic, located on the [Employee – Employee – screen](#).

1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the [Employees – ACA screen](#) section in the [Employee Menu Fields module](#).
2. Press the **TAB** key or click the **Next** button when you complete entering information on this screen.

**Result:** The Employees – ACA History screen opens.

## Employees - ACA History screen

The [Employees - ACA History](#) screen lets the user view and update coverage information for employees.

Month	ACA Coverage Offer	ACA Relief Code
January	10 Part-Time EE with Coverage	20 Employee Enrolled in Coverage
February	10 Part-Time EE with Coverage	20 Employee Enrolled in Coverage
March	10 Part-Time EE with Coverage	20 Employee Enrolled in Coverage
April	10 Part-Time EE with Coverage	20 Employee Enrolled in Coverage
May	10 Part-Time EE with Coverage	20 Employee Enrolled in Coverage
June	10 Part-Time EE with Coverage	20 Employee Enrolled in Coverage
July	10 Part-Time EE with Coverage	20 Employee Enrolled in Coverage
August	10 Part-Time EE with Coverage	20 Employee Enrolled in Coverage
September	10 Part-Time EE with Coverage	20 Employee Enrolled in Coverage
October	10 Part-Time EE with Coverage	20 Employee Enrolled in Coverage
November	10 Part-Time EE with Coverage	20 Employee Enrolled in Coverage
December	10 Part-Time EE with Coverage	20 Employee Enrolled in Coverage

Select the year for which historical information is needed, and click within the month line in the requiring changing. A dropdown list opens with the applicable codes. Once a code is selected, the subsequent months are changed to match the new Code.

The screen also displays the Company default Initial Measurement Period and Stability Period, and employee Hire Date and Date of Birth. That information cannot be edited here.

1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the [Employees – ACA History screen](#) section in the Employee Menu Fields module.
2. Press the **TAB** key or click the **Next** button when you complete entering information on this screen.

**Result:** The [Employees – Pay screen](#) opens.

## Employees - Pay screen

The [Employees – Pay screen](#) contains salary information, rate amounts for hourly employees, pay frequency, etc. There are also three sub-menus that are part of the Pay menu item. The information on these screens is read-only for employees.

1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the [Employees – Pay screen section](#) in the Appendix at the end of this chapter.
2. If there are any overrides, click the **Add** button to add the required information.
3. 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.

Add	Delete			
Shift *	Shift Rate	Shift %	Default	
Extra Shift	\$25.000	1.30%	No	
Shift1	\$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.

Add	Cancel			
Piece *	Rate Amount	Rate Quantity		
Truffle	\$0.20	1.00		
1 items				

1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the [Employees - Pay Screen - Piecework 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 – 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.

Percentage *	Organizational Level	Job	Workers Comp
90	Div1/NY Branch/Department Name Field/mult		8810
10	Div1/NY Branch/Department Name Field/mult	job #1	8810
Total: 100%			

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.

**Taxation**

Marital Status \*  
Single

Exemptions \*  
0

Tax Type \*  
None

Filing Rate Credit

Override Fed Minimum Wage

**Federal Tax Status**

Federal Tax Status \*  
Include

QASDI Exempt \*  
No

Medicare Exempt \*  
No

FICA Exempt \*  
No

**W2 Settings**

Type \*  
W-2

Residential State \*  
NY

First Name

Middle Name

Last Name

Name Suffix

Deceased \*  
No

Legal Rep \*  
No

Pension \*  
No

Statutory EE \*  
No

Deferred Comp \*  
No

**1099R**

Distribution Code

Tax Amt Determined \*  
No

Total \*  
No

Pension Plan \*  
None

**ER Tax Statuses**

QASDI Exempt \*  
No

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.
2. 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.

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 [Employees – State screen section](#) 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.
5. 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.

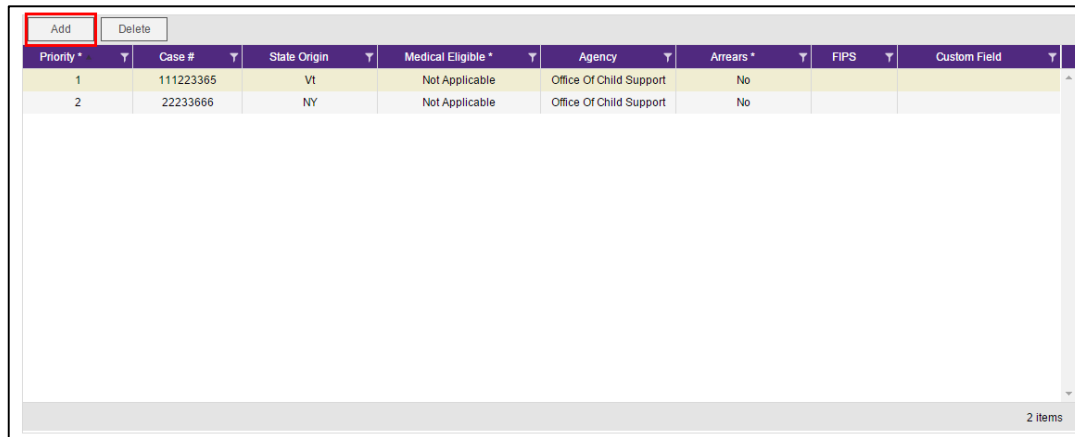
On the **Company - Taxes - Local Tax - Details** tab in Evolution Classic,

- 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.

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 [Employees – Local screen section](#) in the Appendix at the end of this chapter.
  3. Click **Save**  at the top of the Menu bar on the left-hand side of the screen when you have completed entering information on this screen.
  4. Click the **Next** button
- Result:** The **Employees – Child Support** screen opens.

## Employees – Child Support screen



Priority *	Case #	State Origin	Medical Eligible *	Agency	Arrears *	FIPS	Custom Field
1	111223365	Vt	Not Applicable	Office Of Child Support	No		
2	22233666	NY	Not Applicable	Office Of Child Support	No		

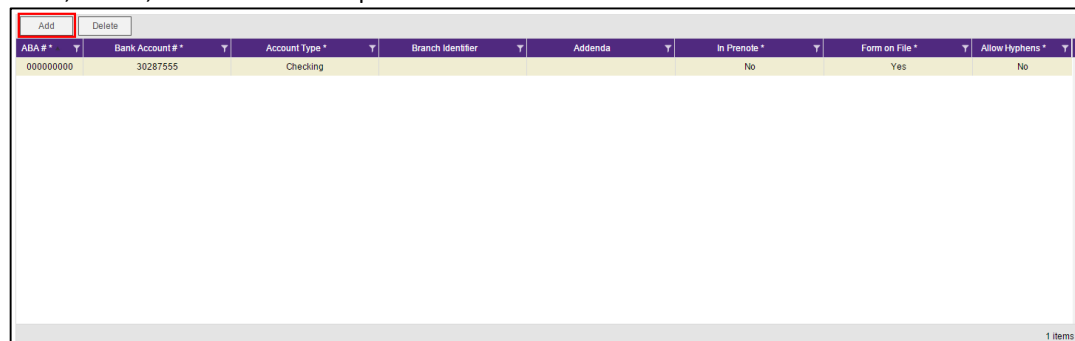
If the employee owes Child Support, the Child Support case information is displayed on this screen.

1. 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 [Employees – Child Support screen section](#) in the Appendix at the end of this chapter.
2. Click **Save** when you have completed entering information on this screen.
3. Press the **TAB** key or click the **Next** button.

**Result:** The **Employees – Direct Deposit** screen opens.

## Employees – Direct Deposit screen

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



ABA # *	Bank Account # *	Account Type *	Branch Identifier	Addenda	In Prenote *	Form on File *	Allow Hyphens *
000000000	30287555	Checking			No	Yes	No

1. Click the **Add** button to add new direct deposit information as needed, or click the **Delete** button to delete a direct deposit setup. For detailed information about the fields on this screen, refer to the [Employees – Direct Deposit screen section](#) in the Appendix at the end of this chapter.

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

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

## Employees - Scheduled E/Ds screen

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.

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 *	Description *	Calculation Method *	Amount \$	Amount %	Starting *	Ending *
D1	Direct Deposit - Partial 1	Fixed	25		02/17/2015	

Basic Schedule Limits Thresholds

Code: D1

Description: Direct Deposit - Partial 1

Priority:

Calculation Link: - Select E/D Group -

Calculate Using: Method defined for this E/D

Calculation Method: Fixed

E/D Group: - Select E/D Group -

Amount \$: 25.00

Amount %:

Always Pay/Deduct: No

Deduct Whole Check: No

Send To: Direct Deposit

Deductions to Zero: No

Take Home Pay:

Direct Deposit Account: 30287555

Reference to Display on Check:

Code *	Description *	Calculation Method *	Amount \$	Amount %	Starting *	Ending *
D3	Direct Deposit - Net	None			02/17/2015	
D4	Child Support	Fixed	50		03/01/2015	

5 Items

Code *	Description *	Calculation Method *	Amount \$	Amount %	Starting *	Ending *
D1	Direct Deposit - Partial 1	Fixed	25		02/17/2015	
D3	Direct Deposit - Net	None			02/17/2015	
D4	Child Support	Fixed	50		03/01/2015	
D6	Health Insurance	% of Gross		1	02/17/2015	
D7	Child Support - 2	Fixed	21		02/17/2015	

5 Items

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?
<b>Benefits/Deductions</b>	Health Insurance; Dental Insurance; EE 401(k) contributions, EE 401(k) catch-up contributions, Flexible Spending Accounts, Dependent Care	Yes
<b>Memo Codes (money that is set aside by the employer for the employee)</b>	401(k) match, ER paid insurance contributions	Yes
<b>Direct Deposits</b>	Employee bank accounts	Yes
<b>Agency-paid</b>	Child support, garnishments, tax levies	Yes
<b>Static Earnings</b>	Auto allowance, severance pay	Yes
<b>Loan Payments</b>	401(k) loans, company loans	Yes
<b>Salary</b>		No
<b>Hourly</b>		No
<b>Sick</b>		No
<b>Vacation</b>		No
<b>Paid Time Off</b>		No
<b>Bonuses</b>		No

To set up employee-level Scheduled E/Ds

1. Click the **Add** button to add a Scheduled E/D, or click the **Delete** button to delete a Scheduled E/D from the employee's record. For detailed information about the fields on this screen, refer to the [Employees - Scheduled E/Ds screen](#) in the Appendix at the end of this chapter.

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

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

- Agency - when Agency is selected in the Send To field, a dropdown field opens below, where the user selects the Agency.

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

- Client / Company – When Client / Company is selected

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

- Direct Deposit - 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.

D1 Direct Deposit - Partial 1 Fixed 25 02/17/2015  
Basic **Schedule** Limits Thresholds  
Starting: 02/17/2015  
Ending:   
Payrolls Affected: All  
Frequency: Every Pay  
Block Based On: Custom Defined  
Blocks: 1 2 3 4 5

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

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

- 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.

- 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 [Employees – Delivery screen section](#) in the Appendix at the end of this chapter.
  - Verify that the Primary Address information is correct.
  - Enter VMR overrides if applicable.
  - Enter a Payroll Override Address if applicable.
  - 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.

Active *	Type *	Balance *	Used *	Accrued *	Effective Date	Accrual Max	Rate	Rollover Type	Rollover Date
Yes	Time Off Accrual	30.00	20.00	50.00					

Accrual Date *	Accrued	Accrued Capped	Used	Note	Check Date	Run #	Check #
07/21/2015	50.00		0.00	Manual Adj:			
07/21/2015	0.00		20.00	Manual Adj:			

1. 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**.

**Result:** the Balance fills in.

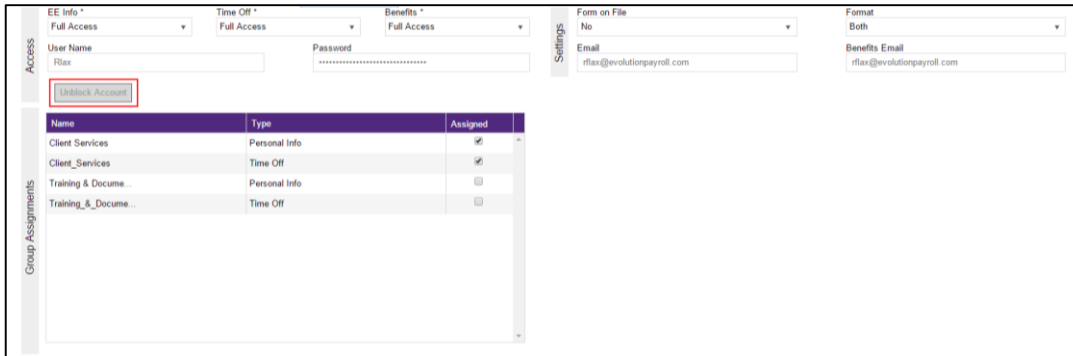
4. Enter a Used amount if applicable.
5. Complete the following fields.
6. Click **Save** when you have completed entering information on this screen.
7. Press the **TAB** key or click the **Next** button.

**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.



Name	Type	Assigned
Client Services	Personal Info	<input checked="" type="checkbox"/>
Client_Services	Time Off	<input checked="" type="checkbox"/>
Training & Docume..	Personal Info	<input type="checkbox"/>
Training & Docume..	Time Off	<input type="checkbox"/>

## Unlock 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.

Available Groups - 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 “publicly” and cannot be viewed by the employees.

### General Notes


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


Payroll Notes

General Notes

## 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.

 **Check Calculator**

✕

**BDazzled Design Ltd.**  

EE Code - Name  
 3-Ron Flax



13 Spring Lane  
 Williston, PA 12345

Federal Taxable Wages	(\$28.59)
OASDI Taxable Wages	(\$28.59)
OASDI Taxable Tips	\$0.00
Medicare Taxable Wages	(\$28.59)
<b>Gross Amount</b>	<b>\$0.00</b>

**Net Amount (\$127.41)**  
☐ Net to Gross

**EARNINGS:**  
 MEMOS:

**Check Details**  

<b>DEDUCTIONS:</b> Health Insurance \$0.00 Child Support \$100.00 Dental Insurance \$28.59 <b>Deductions SubTotal: \$128.59</b>	<b>FEDERAL TAXES:</b> OASDI Tax (\$1.77) Medicare Tax (\$0.41)  <b>LOCAL TAXES:</b> Abbottstown Boro LST \$1.00 <b>Taxes SubTotal: (\$1.18)</b>
---	---

**Check Settings**  

Earnings/Deductions	Federal	State	SUI	Local	Options																								
<div style="display: flex; justify-content: space-between; margin-bottom: 5px;"> <span>Add</span> <span>Delete</span> </div> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #4a4a8a; color: white;"> <th>E/D Code *</th> <th>Description</th> <th>Hrs/Pcs</th> <th>Pay Rate</th> <th>Amount</th> <th>Rate #</th> </tr> </thead> <tbody> <tr> <td>D02</td> <td>Health Insurance</td> <td></td> <td></td> <td style="text-align: right;">\$0.00</td> <td></td> </tr> <tr> <td>D05</td> <td>Child Support</td> <td></td> <td></td> <td style="text-align: right;">\$100.00</td> <td></td> </tr> <tr> <td>D17</td> <td>Dental Insurance</td> <td></td> <td></td> <td style="text-align: right;">\$28.59</td> <td></td> </tr> </tbody> </table> <div style="text-align: right; font-size: 0.8em; margin-top: 5px;">3 items</div>	E/D Code *	Description	Hrs/Pcs	Pay Rate	Amount	Rate #	D02	Health Insurance			\$0.00		D05	Child Support			\$100.00		D17	Dental Insurance			\$28.59						
E/D Code *	Description	Hrs/Pcs	Pay Rate	Amount	Rate #																								
D02	Health Insurance			\$0.00																									
D05	Child Support			\$100.00																									
D17	Dental Insurance			\$28.59																									

**Actions**  

Calculate

Send To Payroll

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
<b>Marital Status</b> Single <b>Tax Frequency</b> Weekly <input type="checkbox"/> Tax at Supplemental Rate <input type="checkbox"/> Federal Tax <input type="checkbox"/> Employee Overrides <input type="checkbox"/> Additional Values <b>Blocks</b> <input type="checkbox"/> EE OASDI <input type="checkbox"/> EE Medicare <input type="checkbox"/> EE EIC	<b>Exemptions</b> 0	<b>Fed Type</b> None <b>OASDI</b>  <b>Medicare</b>  <b>EIC</b>  <b>Backup Withholding</b> 				Calculate Send To Payroll

7. Click in the applicable fields to make changes, blocks, or overrides. For detailed information about the fields on this screen, refer to the [Employees – Check Calculator screen section](#) in the Appendix at the end of this chapter.
8. Click the **State** tab.

**Check Settings**

Earnings/Deductions	Federal	State	SUI	Local	Options	Actions
<b>OVR</b> New York Pennsylvania	<b>State</b> New York Pennsylvania	<b>Abr</b> NY PA	<b>Settings for: New York - NY</b> <b>Marital Status</b> Single/Head of Hous... <b>Exemptions</b>  <input type="checkbox"/> Tax at Supplemental Rate <input type="checkbox"/> Regular Tax <input type="checkbox"/> Additional Tax <input type="checkbox"/> SUI <input type="checkbox"/> SDI <b>Blocks</b>  2 items	<b>State Type</b> None <b>Overrides</b> 		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
<b>OVR</b> State (PA) PA-EE SUI Tax			<b>Settings for: State (PA) PA-EE SUI Tax</b> <b>Amount</b>  <b>Overrides</b>  1 items			Calculate Send To Payroll

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



**Check Settings**

Earnings/Deductions   Federal   State   SUI   Local   Options   **Actions**

OVR	Local Name
<input checked="" type="checkbox"/>	Adams County-Abbottstown Boro LST
<input type="checkbox"/>	New York City Non-Res. Do Not Use-New York C...
<input type="checkbox"/>	New York City Res.-New York City Res.
<input type="checkbox"/>	NY MCT-MCT Mobility Tax

4 items

Settings for: **Adams County-Abbottstown Boro LST**

☐ Block this Local Tax

Amount

Overrides

Calculate

Send To Payroll

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 Check

Enter Check #

☐ Update Scheduled E/D Balance

☐ Update Year to Date Totals

☐ Update Tax & Deduction Shortages

☐ Lock Calculations for this Check

Calculate

Send To Payroll

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 Check to Payroll**

BDazzled Design Ltd.

EE	Name	Net Amount
3	Ron, Flax 13 Spring Lane Williston, PA 12345	\$500.00

**Options set for this Check**

Manual Check # 241

Updates: Year To Date Totals

Tax Calculations are not locked in.

Change Options

**Choose a Payroll for this check**


07/02/2014  
05/18/2015  
05/24/2015  
Batch 2 - Weekly - 01/01/1900 to 01/01/1900  
New Batch  
06/01/2015  
07/14/2015  
07/15/2015  
07/15/2015  
08/03/2015  
08/05/2015  
New Payroll

Save/Return

Go To Payroll

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

## Audit History

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

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


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

- Old Value
- New Value, and
- User who made the change.

Audit of 'JoAnne Glazer'												
Record Audit Information CL_PERSON (nbr = 2) EE (nbr = 2)												
All	Personal	Labor Defaults	ACA	Pay	Federal	State	Local	Child Support	Direct Deposit	Scheduled E/Ds	Delivery	Employee Portal
Change Date	Operation	Field	Old Value	New Value	User							
04/04/2016 16:26:21 PM	Update	ACA_SJS	I	P	Unknown User [267]							
04/03/2016 16:26:18 PM	Update	ACA_SJS	P	I	Unknown User [267]							
02/24/2016 16:35:21 PM	Update	CO_JONBR		8	Unknown User [244]							
02/24/2016 16:35:20 PM	Update	CURRETERMINATION...		2/4/2016	TJ Offline [244]							
02/17/2016 15:31:56 PM	Update	CO_BRH_NBR		2	Unknown User [267]							
02/17/2016 15:31:56 PM	Update	CO_DIVN_NBR		1	Unknown User [267]							
02/17/2016 15:31:56 PM	Update	CO_DEPARTMENT_NBR		1	Unknown User [276]							
02/17/2016 15:31:56 PM	Update	CO_DIVISION_NBR		1	Unknown User [276]							
02/17/2016 15:31:56 PM	Update	CO_TEAM_NBR		3	Unknown User [276]							
02/17/2016 15:31:56 PM	Update	CO_BRANCH_NBR		2	Unknown User [276]							
02/17/2016 15:31:56 PM	Update	CO_DEPARTMENT_NBR		1	Unknown User [276]							
												426 items

**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  symbol in the column header by which the user would like to sort/filter.

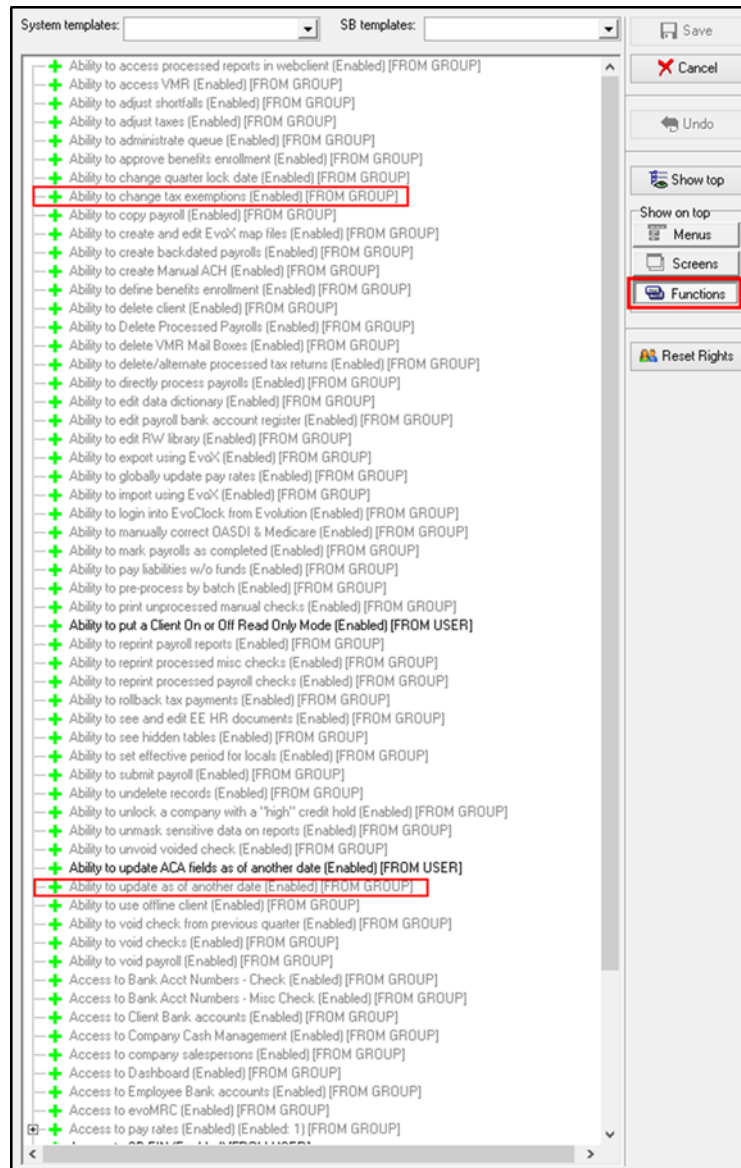
## Effective Dating Dynamic Fields

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.

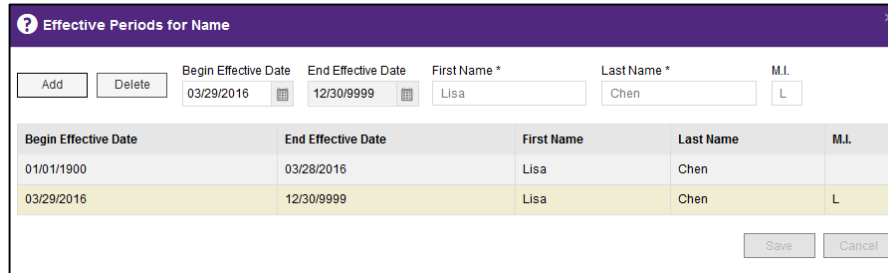
1. Go to the **Admin – Security – Users**.
2. Select the user from the list.
3. Click the **Details** tab.
4. Click the **User Rights** button.
5. Click the **Functions** button.
6. Enable the following rights:
  - Ability to update as of another date
  - Ability to change tax exemptions
7. Click **Save**.



Fields that can be effective dated have labels displayed as a hyperlink – **Example** [First Name \\*](#), which can be clicked to view the dates any changes to that field became effective.

<a href="#">First Name *</a>	<a href="#">M.I.</a>	<a href="#">Last Name *</a>
Lisa	L	Chen

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



**Effective Periods for Name**

Buttons: Add, Delete

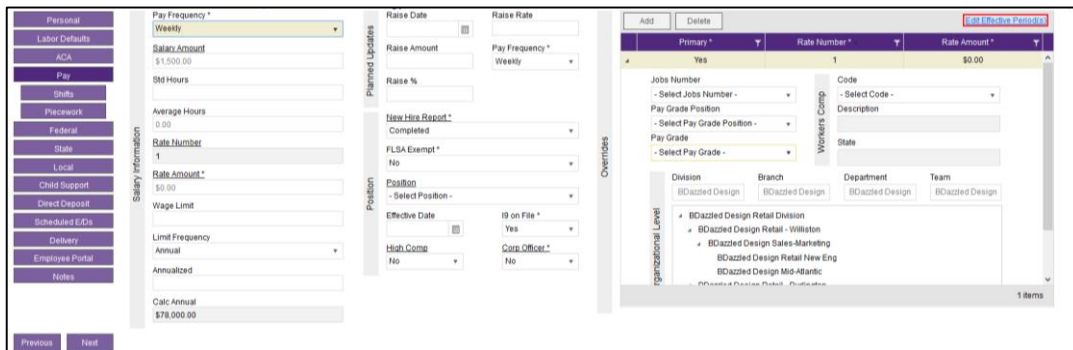
Fields: Begin Effective Date (03/29/2016), End Effective Date (12/30/9999), First Name \* (Lisa), Last Name \* (Chen), M.I. (L)

Begin Effective Date	End Effective Date	First Name	Last Name	M.I.
01/01/1900	03/28/2016	Lisa	Chen	
03/29/2016	12/30/9999	Lisa	Chen	L

Buttons: Save, Cancel

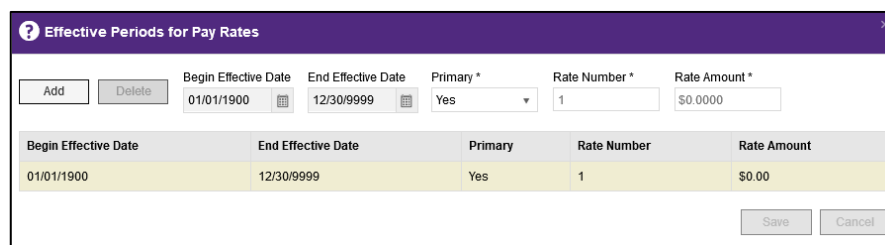
## Editing information

To edit dynamic fields,



Employee Information screen showing various fields for editing. The 'Pay' section is highlighted. The 'Effective Periods for Pay Rates' dialog box is open, showing the 'Add' button and the 'Edit Effective Period(s)' button.

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



**Effective Periods for Pay Rates**

Buttons: Add, Delete

Fields: Begin Effective Date (01/01/1900), End Effective Date (12/30/9999), Primary \* (Yes), Rate Number \* (1), Rate Amount \* (\$0.0000)

Begin Effective Date	End Effective Date	Primary	Rate Number	Rate Amount
01/01/1900	12/30/9999	Yes	1	\$0.00

Buttons: Save, Cancel

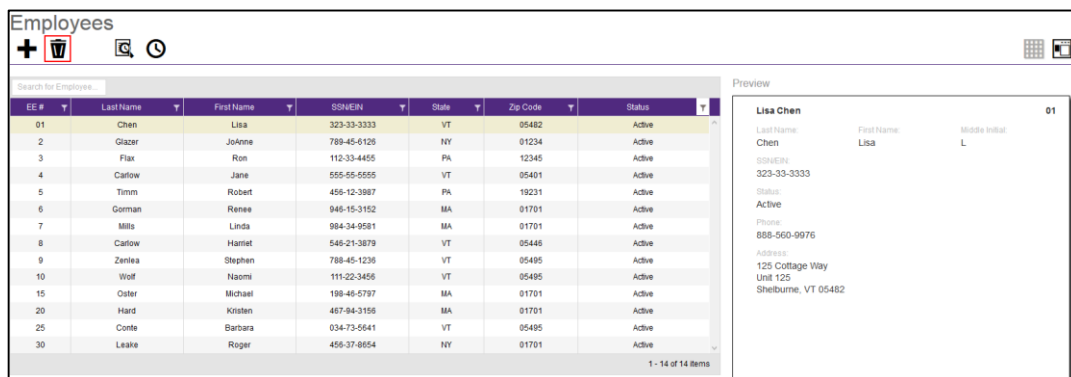
2. Click the **Add** button.
3. Change the **Begin Effective Date**.
4. Make other changes as applicable.
5. Click **Save**.

## Deleting 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




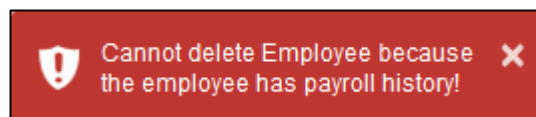
EE #	Last Name	First Name	SSN/EIN	State	Zip Code	Status
01	Chen	Lisa	323-33-3333	VT	05482	Active
2	Glazer	Jolene	789-45-6126	NY	01234	Active
3	Flax	Ron	112-33-4455	PA	12345	Active
4	Carlow	Jane	555-55-5555	VT	05401	Active
5	Timin	Robert	455-12-3987	PA	19231	Active
6	Gorman	Renee	945-15-3152	MA	01701	Active
7	Mills	Linda	984-34-9581	MA	01701	Active
8	Carlow	Harriet	545-21-3879	VT	05446	Active
9	Zenlea	Stephen	788-45-1236	VT	05495	Active
10	Wolf	Naomi	111-22-3456	VT	05495	Active
15	Oster	Michael	199-46-5797	MA	01701	Active
20	Hard	Kristen	467-94-3159	MA	01701	Active
25	Conte	Barbara	034-73-5641	VT	05495	Active
30	Leake	Roger	455-37-8554	NY	01701	Active

Preview

**Lisa Chen** 01

Last Name: Chen  
First Name: Lisa  
Middle Initial: L  
SSN/EIN: 323-33-3333  
Status: Active  
Phone: 888-560-9976  
Address: 125 Cottage Way  
Unit 125  
Shelburne, VT 05482

1. Highlight the applicable employee.
  2. Click the Delete  button.
- A confirmation screen opens asking for confirmation of the deletion.
- If the employee has any payroll history, the following error message will be displayed.



# 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.
<b>Benefits section</b>	
ACA Status	This may be automatically filled for new employees with the default ACA Status set up on the <a href="#">Company - General - Company Info - ACA tab</a> , 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
<b>Status section</b>	
<b>Status</b>	Select the employment status from the dropdown list.
<b>Current Hire Date</b>	Date employee was hired
<b>Organization Level</b>	Organization level at which the employee works if the company is set up using Divisions, Branches, Departments, and Teams.
<b>Employment Type</b>	Select the Employment Type from the dropdown list
<b>Workers' Compensation</b>	Workers' Comp Code assigned to the Job associated with the claim if applicable.
<b>Job</b>	Job associated with the Workers' Comp Code selected.
<b>Pay section</b>	
<b>Frequency</b>	How often the employee's paycheck is processed.
<b>Salary Amount</b>	Salary earned per pay period
<b>Rate 1</b>	The primary rate number
<b>Rate 2</b>	The second rate number if the employee has two positions with the company doing two different jobs.
<b>Rate 3</b>	The third rate number if the employee has three positions with the company doing three different jobs.
<b>Taxation section</b>	
<b>Fed Marital Status</b>	Marital status for federal tax purposes
<b>Fed Exemptions</b>	Number of exemptions for the employee
<b>State Marital Status</b>	Marital status for state tax purposes
<b>State Exemptions</b>	Number of state exemptions for the employee
<b>State</b>	State to which the employee pays taxes
<b>SDI</b>	State to which the employer pays Disability taxes on behalf of the employee.
<b>SUI</b>	State to which the employer pays Unemployment taxes on behalf of the employee.

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

### Employees - Personal screen

Field / Button	Description
<b>SSN</b>	Required before any other information is entered, this is the employee's Social Security Number or Employee Identification Number.
<b>EE Code</b>	(EE Number) must be alpha or numeric, up to 9 characters, and unique to the employee.
<b>Employee Type</b>	Select W-2 or 1099
<b>First Name</b>	The employee's first name
<b>MI</b>	The employee's middle initial
<b>Last Name</b>	The employee's last name
<b>Address 1</b>	The first line of the employee's address.
<b>Address 2</b>	The second line of the employee's address.
<b>City</b>	The city name of the employee's address
<b>State</b>	The state name of the employee's address
<b>Zip Code</b>	The employee's zip code
<b>County</b>	The county in which the employee lives
<b>Phone</b>	The employee's phone number
<b>Email Address</b>	Employee's email contact information
<b>Birth Date</b>	Date of birth
<b>Gender</b>	Gender
<b>Ethnicity</b>	Required
<b>Tribe</b>	Required. If American Indian is chosen, enter the Tribe name in the adjacent field.



Field / Button	Description
<b>Hire Status section</b>	
<b>Status</b>	Select the employee's Status from the dropdown list.
<b>Current Hire Date</b>	Enter if this is a rehire
<b>Original Hire Date</b>	This may be the same or different from the Current Hire Date if the employee is a rehire.
<b>Termination Date</b>	Date of termination if applicable.
<b>Rehire Eligible</b>	Is the employee eligible for rehire?
<b>Employment Type</b>	Select the Employment Type from the dropdown list
<b>On Call From</b>	Date from which the employee is on call, if applicable.
<b>On Call To</b>	Date until which the employee is on call, if applicable.
<b>Benefits section</b>	
<b>ACA Status</b>	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.
<b>Healthcare Coverage</b>	The employee's coverage status – applicable in Vermont only.
<b>Dependent Coverage</b>	If the employee is eligible, the coverage, if any, available for dependents
<b>Benefit Eligible</b>	Date on which the employee becomes eligible to receive benefits.
<b>Group Term Policy</b>	Total amount of employees' Group Term Life (GTL) policy.
<b>GTL Hours</b>	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.
<b>GTL Rate</b>	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
<b>Salary Information section</b>	
<b>Workers' Compensation</b>	Workers' Comp Code assigned to the Job associated with the claim.
<b>Job</b>	Job set up by the company.
<b>Pay Group</b>	Select the pay group.
<b>General Ledger Tag</b>	<b>Enter if the company is using General Ledger.</b>
<b>Reporting section</b>	
<b>Tipped Directly</b>	If any of the employee's wages were from being tipped directly, click the link to establish an effective date, if applicable.
<b>Ignore FICA on Cleanup Payroll</b>	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.
<b>Combine Returns on this EE</b>	If at any time, returns are to be combined for this employee, click the link to establish an effective date, if applicable.
<b>Generate Second Check</b>	Default is No. Select Yes to generate a second check for the employee for reporting purposes.
<b>Deductions to take First</b>	Select the deductions to be taken first, if applicable.
<b>Second Check Template</b>	In the case of the generation of a second check, select the second check's template, if applicable.
<b>Include in Analytics</b>	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

Field / Button	Description
<b>ACA section</b>	
<b>ACA Status</b>	<p>Select the appropriate status of the employee based on average hours worked.</p> <ul style="list-style-type: none"> <li>• <b>New Hire</b> - Used before status is determined through initial measurement period.</li> <li>• <b>Full-Time</b> - A new employee who works an average of 30 hours or more per week or 130 hours per month.</li> <li>• <b>Part-Time</b> - A new employee who is reasonably expected at the employee's start date not to be a full-time employee (and who is not a variable hour employee or a seasonal employee). Works less than 30 hours a week or 130 hours per month, on average.</li> <li>• <b>Does Not Apply</b> - Employees to whom the ACA Status does not apply.</li> </ul>

Field / Button	Description
<b>ACA section</b>	
	<ul style="list-style-type: none"> <li>• Volunteers</li> <li>• Student Workers</li> <li>• Members of Religious Orders</li> <li>• <b>Variable Hour</b> - A new employee who, at the start of employment, the employer cannot in good faith determine whether the individual is expected to average 30 hours of service per week or 130 hours per month during an initial measurement period.</li> <li>• <b>Seasonal</b> - A worker who performs labor or services on a seasonal basis, including (but not limited to) seasonal farm workers and retail workers employed exclusively during holiday seasons.</li> <li>• <b>Seasonal &lt; 120 days</b> - A worker who performs labor or services on a seasonal basis, but does not exceed 120 days of service in a calendar year.</li> <li>• <b>Full-Time Ongoing</b> - An employee who works an average of 30 hours or more per week and has completed the initial measurement and stability periods.</li> <li>• <b>Part-Time Ongoing</b> - An employee who works less than 30 hours a week or 130 hours per month, on average and has already completed their initial measurement and stability periods.</li> <li>• <b>Seasonal Ongoing</b> - A worker who performs labor or services on a seasonal basis, including (but not limited to) seasonal farm workers and retail workers employed exclusively during holiday seasons. Has already completed initial measurement and stability periods.</li> </ul>
<b>ACA Coverage Offer</b>	This field defaults to what is set on the <b>Company ACA</b> tab. If a change is made to the ACA Coverage Code in the grid below, it will display that code in the month that was selected until it is changed
<b>ACA Benefit</b>	Select the name of the benefit that will be used to determine the Lowest Cost Benefit for this employee.
<b>ACA Policy Origin</b>	Select the appropriate option for this employee for use on the 1095-B – Line 8.
<b>Benefits Eligible</b>	Yes or No. Is this employee eligible for benefits.
<b>Reporting section</b>	
<b>Form on File</b>	Yes or No. Is there a consent form on file for the employee to allow electronic publishing of the 1095 form(s)?
<b>ACA Format</b>	Select the form format that will be created for the employee. None, Both, or Paper

Field / Button	Description
<b>ACA section</b>	
<b>Form Type</b>	<p>New employees are assigned the default field that is assigned at the Company level. This can be overridden using this field.</p> <ul style="list-style-type: none"> <li>Right-click and select <b>Copy to...</b> to copy to other employees.</li> </ul>
<b>ACA Standard Hours</b>	This field is used for special Time off Accrual setups that use the normal <b>Standard Hours</b> field. Use the <b>ACA Standard Hours</b> field to override the hours that show on the ACA Reports.
<b>ACA Relief Code</b>	This field defaults to what is set on the Company ACA tab. If a change is made to the <b>ACA Relief Code</b> in the grid below, it will display that code in the month that was selected until it is changed
<b>Lowest Cost Benefit</b>	Select the Lowest Cost Benefit to be used on the 1095-C.

### Employees - ACA History Screen

Field / Button	Description
<b>View Coverage For</b>	Select the year for which information is being requested.
<b>Month</b>	Each month of the year selected
<b>ACA Coverage Offer</b>	Assigns a default Offer of Coverage Code identifying standard health care coverage offered to employees, when an employee is created in Evolution.
<b>ACA Relief Code</b>	Relief Code, to describe transition relief as defined by the Affordable Care Act that may be applicable to the employer, when an employee is created in Evolution. If a change is made to the ACA Coverage Code in the grid, it will display that code in the subsequent months
<b>Initial Measurement Period</b>	Default Initial Measurement Period assigned at the company level in Evolution.
<b>Stability Period</b>	Default Stability Period assigned at the company level in Evolution.
<b>Date of Birth</b>	Taken from the employee information when new employees are added to the company.
<b>Hire Date</b>	Taken from the employee information when new employees are added to the company.

## Employees - Pay Screen

Field / Button	Description
<b>Salary Information section</b>	
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.
<b>Planned Updates section</b>	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 <a href="#">Raise Rate</a> 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.
<b>Position section</b>	These fields in this section used to be on the Positions screen.

Field / Button	Description
<b>New Hire Report</b>	<p>Required field</p> <p><u>Pending</u> - select this option any time prior to the employee's first payroll, after which time it is automatically updated to Complete.</p> <p><u>Completed</u> - if the service bureau is using new hire reporting services, the employee has been reported as a new hire</p> <p><u>Completed by Predecessor</u> - the employee was reported as a new hire by another service bureau</p> <p>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.</p> <p><u>No</u> - system saves the employee record and doesn't ask any more questions</p> <p><u>Yes</u> - system changes the New Hire flag to Pending and opens the Rehire Wizard. The Wizard includes a series of employee screens for the user to verify the employee's set-up for pay rate, states, locals, TOA, Scheduled E/D's, and direct deposits. The Wizard only displays screens applicable to the employee.</p>
<b>FLSA Exempt</b>	Is the employee exempt from minimum wage and overtime pay under the Fair Labor Standards Act?
<b>Position</b>	Employee's work position at the company, set up on the <a href="#">Company – Benefits – HR Positions screen</a> .
<b>Effective Date</b>	Date the employee's position became effective
<b>High Comp</b>	Is the employee highly compensated?
<b>I-9 on File</b>	The employee's form I-9 is on file
<b>Corporate Officer</b>	Is the employee a corporate officer?
<b>Overrides section</b>	
<b>Add / Delete buttons</b>	Click to add a pay rate or delete a pay rate that is no longer applicable.
<b>Primary column heading</b>	Select <b>NO</b> , if this is not the employee's primary wage at the company.
<b>Rate Number column heading</b>	If a standard wage, the new line should have a Rate Number of 2 or more.
<b>Rate Amount column heading</b>	Enter the amount of the new rate.
<b>Overrides – Job section</b>	
<b>Jobs Number</b>	Number identifying the job that the employee has at the company. Overrides what was set up on the Employee – Pay Rates screen.
<b>Pay Grade Position</b>	Position the employee holds in the pay grade at the company. Overrides what was set up on the Employee – Pay Rates screen.
<b>Pay Grade</b>	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
<b>Add</b>	Click to add a new item to the piecework.
<b>Delete</b>	Click to delete a piecework item.
<b>Piece column heading</b>	Click in the blank line created by clicking the <b>Add</b> button. The piece is listed in the dropdown list.
<b>Rate Amt</b>	Rate for the piece. The rate is listed in the dropdown list
<b>Rate Qty</b>	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
<b>Labor Distribution Options</b>	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 Distribution E/D Group</b> field.
<b>Auto Labor Distribution E/D Group</b>	E/D Group used to distribute the employees' labor.
<b>Allocation section</b>	
<b>Add</b>	Click to create a new record
<b>Delete</b>	Click to delete an entry
<b>Percentage</b>	Percentage of the employee's pay attributed to that organizational level
<b>Organizational Level</b>	Name of the organizational level for which the employee works
<b>Job</b>	Title of the job worked in the level
<b>WC Code</b>	Workers' Comp code associated with that job

## Employees - Federal screen

Field / Button	Description
<b>Marital Status</b>	Marital status for federal tax purposes
<b>Exemptions</b>	Number of exemptions for the employee
<b>Tax Type</b>	Additional or override tax amount.
<b>Value</b>	Based on the tax type, the corresponding value.
<b>FUI Rate Credit</b>	The amount by which to override a FUI Rate Credit, if applicable.
<b>Override Fed Minimum Wage</b>	<p>Value used to override the Federal Minimum Wage rate used in payroll for minimum wage makeup calculations.</p> <ul style="list-style-type: none"> <li>• If a value is entered, the amount is used as the rate for minimum wage makeup calculations.</li> <li>• 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.</li> <li>• 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.</li> <li>• If no overrides are entered, standard system logic is applied in the calculation (taking the higher of the Federal or State Minimum Wage rate at the system level). Right-click on the field and select 'Copy To...' to copy the information.</li> </ul>
<b>EE Tax Statuses section</b>	The default values in this section are dependent upon whether the employee is W-2 or 1099.
<b>Federal Tax Status</b>	This is the employees' tax status. Select from the dropdown list whether the employee's tax is to be included, blocked or exempted.
<b>OASDI Exempt</b>	Whether or not the employee is exempt from paying OASDI
<b>Medicare Exempt</b>	Whether or not the employee is exempt from paying Medicare
<b>ER Tax Statuses section</b>	The default values in this section are dependent upon whether the employee is W-2 or 1099.
<b>FUI Exempt</b>	Whether or not the employer is exempt from paying FUI for this employee
<b>OASDI Exempt</b>	Whether or not the employer is exempt from paying OASDI for this employee
<b>Medicare Exempt</b>	Whether or not the employer is exempt from paying Medicare for this employee



Field / Button	Description
<b>W-2 Form section</b>	
<b>Type</b>	Type of tax form being filed if not W-2; select from the dropdown list.
<b>Residential State</b>	State for which tax forms are being filed as the employees' residence.
<b>First Name</b>	Legal name for whom all tax forms will be prepared – complete only if different from the information on the Basics tab.
<b>Middle Name</b>	
<b>Last Name</b>	
<b>Name Suffix</b>	
<b>W-2 Settings section</b>	
<b>Deceased</b>	Status is designated on the Form W-2 as deceased
<b>Statutory Employee</b>	Status is designated on the Form W-2 as statutory
<b>Legal Rep</b>	Is there a Legal Rep designated on the Form W-2?
<b>Deferred Comp</b>	Are these earnings designated as deferred compensation on the Form W-2?
<b>Pension</b>	Are these earnings from a Pension plan?
<b>1099-R section</b>	
<b>Distribution Code</b>	If a pension distribution was taken, this is the distribution code reported on the 1099-R.
<b>Tax Amount Determined</b>	Was there a tax amount determined and reported on the 1099-R?
<b>Total</b>	Was the distribution a total distribution of all assets in the pension plan?
<b>Pension Plan</b>	The type of pension plan reported on the 1099-R

## Employees - State screen

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

## Employees - Local screen

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

## Employees - Child Support screen

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

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

### Employees - Direct Deposit screen

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

### Employees - Scheduled E/Ds screen

Field / Button	Description
<b>Basic tab</b>	
<b>Code</b>	E/D Codes assigned at the system level – select from the dropdown list
<b>Description</b>	Entered automatically when the E/D Code is selected.
<b>Priority</b>	Priority to process the Scheduled E/D (Child Support E/Ds are always Priority 1)
<b>Calculation Link</b>	Select an E/D Group that the Scheduled E/D belongs to (if applicable)
<b>Calculate Using</b>	Select which calculation method will be used to calculate payroll deductions for the Scheduled E/D. There are three options: <ol style="list-style-type: none"> <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> </ol>

Field / Button	Description
	3. Use the calculation method defined at the Employee Benefit level
<b>Calculation Method</b>	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.
<b>E/D Group</b>	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 member of an E/D Group, which simplifies the calculation of earnings such as 401(k)s.	
<b>Always Pay / Deduct</b>	Offers flexibility to override E/D, similar to Blocking Week 1 - 5 <u>All payrolls</u> - earnings are paid whether or not there are earned wages for the employee; deductions are tracked to be taken from the next payroll. <u>Current Payrolls</u> - the E/D is applied to the current the payroll whether or not there are earned wages for the employee. If deduction exceeds amount in check the amount is not tracked to be made up later. If there are insufficient earnings for the deduction, the Scheduled E/D is processed based on the selection in the <b>Deductions to Zero field</b> . <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.
<b>Important:</b> to ensure that the remainder of the deduction is taken out of a subsequent pay cycle, the <b>Make Up Deducts Shortfall</b> field on the <b>Client - E/Ds - Details tab</b> must be set to Yes.	
<b>Deductions to Zero</b>	Defaults to the Deductions to Zero Default field on the <b>Client - E/Ds - Scheduled Defaults tab</b> . 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. <u>Yes</u> - the entire amount is deducted, until the check is zero. If there is shortfall it may be either a portion of or the total amount of the Scheduled E/D. <u>No</u> - a deduction is taken only when there are sufficient funds to take the whole deduction. If there are insufficient wages, the created shortfall is always the total amount of the Scheduled E/D. If there is a pre-existing shortfall, it takes the shortfall amount only when there are sufficient wages to take the whole amount. When there is a deduction and a pre-existing shortfall, and there are sufficient wages to take the shortfall but not all of the deduction, Evolution takes the shortfall, but not the deduction.

Field / Button	Description
<b>Deduct Whole Check</b>	Value selected defaults based on the setting applied on the <a href="#">Client - E/Ds - Scheduled Defaults tab</a> <u>Yes</u> - deducts the net check (use for direct deposits) <u>No</u> - deducts a portion of the check
<b>Send To*</b>	Select Agency or Client, Company, or Direct Deposit
<b>Reference to Display on Check</b>	If being sent to Agency or Client/Company on behalf of the employee...
<b>Schedule tab</b>	All payment schedule-related information is on this screen.
<b>Starting</b>	Starting date for the scheduled deduction
<b>Ending</b>	Ending date for the scheduled deduction
<b>Affects section</b>	
<b>Payrolls affected</b>	Identify which payrolls are affected by the deduction
<b>Frequency</b>	How often the deduction of the Scheduled E/D occurs.
<b>Blocks section</b>	
<b>Block Based On</b>	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.
<b>Weeks Blocked</b>	Identify which, if any, week(s) is blocked from having the deduction taken

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

## Employees - Delivery screen

Field / Button	Description
<b>Primary Address section</b>	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.
<b>VMR section</b>	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.
<b>Payroll Check Mailbox</b>	Whatever names the company has given their mailboxes are listed. To override the company setup for VMR, select the Mailbox Group here.
<b>EE Report Mailbox</b>	
<b>EE Electronic Return Mailbox</b>	
<b>2<sup>nd</sup> EE Report Mailbox</b>	
<b>Password for VMR Deliveries</b>	VMR Password
<b>Payroll Override Address section</b>	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
<b>Active</b>	Whether or not the TOA plan is currently active for the employee
<b>Type</b>	What type of TOA plan it is – PTO, Sick, Vacation, etc...
<b>Balance</b>	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.
<b>Used</b>	How much of the accrued time has been used
<b>Accrued</b>	Enter manually
<b>Effective Date</b>	Date the Accrued amount begins
<b>Accrual Max</b>	Maximum set by the company that an employee can earn in a pre-defined period
<b>Rate</b>	Rate at which the time off accrues per pay period
<b>Rollover Type</b>	If the company plan allows for a rollover, on which type of accrual is rollover allowed?
<b>Rollover Date</b>	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
<b>Access Section</b>	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.
<b>EE Info</b>	<p><u>No</u> - employees will not see any of their personal information in the Employee Portal</p> <p><u>Read-only</u> - employees can view their payroll information but will not be able to request edits in the Employee Portal</p> <p><u>Full Access</u> - employees can see and request edits to their payroll and W-4 information.</p>
<b>Time Off</b>	<p><u>No</u> - employees do not see any of their time off information in the Employee Portal</p> <p><u>Read-only</u> - employees can view their time off information but will not be able to request edits in the Employee Portal</p> <p><u>Full Access</u> - employees can see and request edits to their time off information</p>
<b>Benefits</b>	<p><u>No</u> - employees do not see any of their benefits information in the Employee Portal</p> <p><u>Read-only</u> - employees can view their benefits information but will not be able to make elections in the Employee Portal</p> <p><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.)</p>
<b>User Name</b>	The employees' user name in the Employee Portal.
<b>Password</b>	The employees' password in the Employee Portal.
<b>Unblock Account button</b>	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.
<b>Group Assignments section</b>	Pre-filled based on the setup in Evolution Classic on the <a href="#">Company - Benefits - ESS Group Assignment screen</a> .
<b>Name</b>	Name of the group/s to which the employee has been assigned.
<b>Type</b>	Type of group/s to which the employee has been assigned. (Pre-filled based on the setup in Evolution Classic.
<b>Assigned checkbox</b>	Designates whether the employee is assigned to the group.
<b>Settings section</b>	
<b>Forms on file</b>	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 <a href="#">Employees – Payrolls - Payroll View screen</a> .

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

Field / Button	Description
<b>Amount</b>	Enter an override amount if applicable for the local highlighted in the left.
<b>Make this a Manual Check</b>	Select to create a Manual check.
<b>Enter Check #</b>	This is a required field if Manual Check is selected.
<b>Update Year to Date Totals (Disable YTD)</b>	Select to keep YTD totals from appearing on the employees' check stubs.
<b>Update Tax &amp; Deduction Shortages (Disable Shortfalls)</b>	Select to keep shortages from appearing on the employees' check stubs.
<b>Lock Calculations for this Check</b>	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.

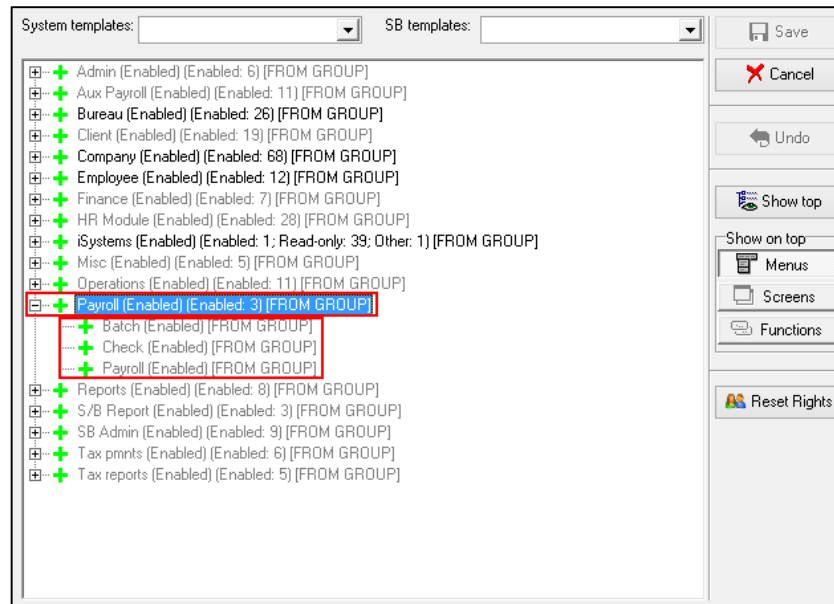
## Security Settings

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.

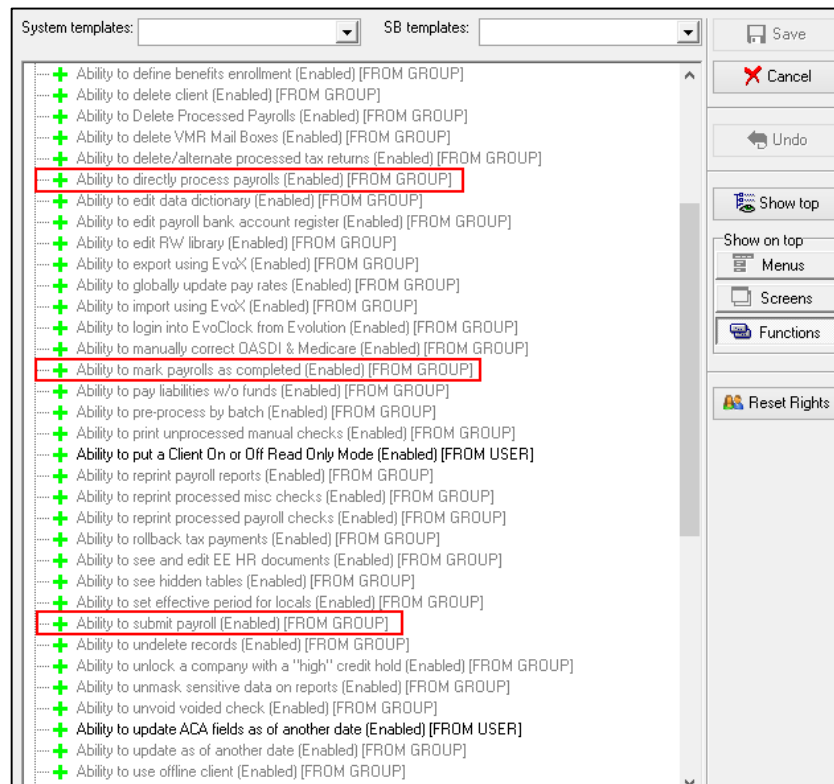
1. Go to the **Admin – Security – Users**.
2. Select the user from the list.
3. Click the **Details** tab.
4. Click the **User Rights** button.
5. Click the **Menu** button.
6. Enable the **Payroll** menu as well as
  - **Batch** - If this is disabled, in Evolution Payroll:
    - The **Payroll – Batches** 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.
  - **Check** - 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.
  - **Payroll** - 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.
  - 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”



- 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.





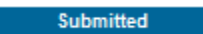
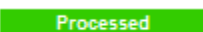

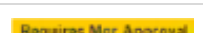
- Go to the **Admin – Security – Users**.
- Select the user from the list.
- Click the **Details** tab.
- Click the **User Rights** button.
- Click the **Functions** button.
- Enable “Payroll wizard including deposit/liability, billing, and ACH block options”


- 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  symbol in the header to change to a Table view of recent payrolls.

Check Date	Run #	Payroll Type	Created On	Due On	Current Status	Preprocessed On
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
	View – visible only on processed payrolls, click to view details of the payroll including batches, check lines, etc.
	Copy – visible on processed payrolls only, enabling them to be copied for processing.
	Payroll Results – click to view details about payrolls with a status of Processed (P) and Void (V).



Symbol	Description
	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.
	Delete – click to delete previous changes. Also, to delete a batch.
	Cancel Changes – click to cancel changes made to a screen or payroll.
	On the <b>Check Batches</b> screen – clicking takes the user to the <b>Check Batch Settings</b> screen for the batch selected.
	On the <b>Check Batch Settings</b> screen – clicking takes the user back to the <b>Check Batches</b> screen.
	On the <b>Check Batch Settings</b> screen – clicking takes the user to the <b>Check Batch Settings</b> Table View screen listing the company employees.
	On the <b>Payroll Timeline</b> screen – changes the view to a Table view from the Card view.
	On the <b>Payroll Timeline</b> 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 let the user know where they are in the Payroll process. These can also be clicked to go to specific screens in the process.

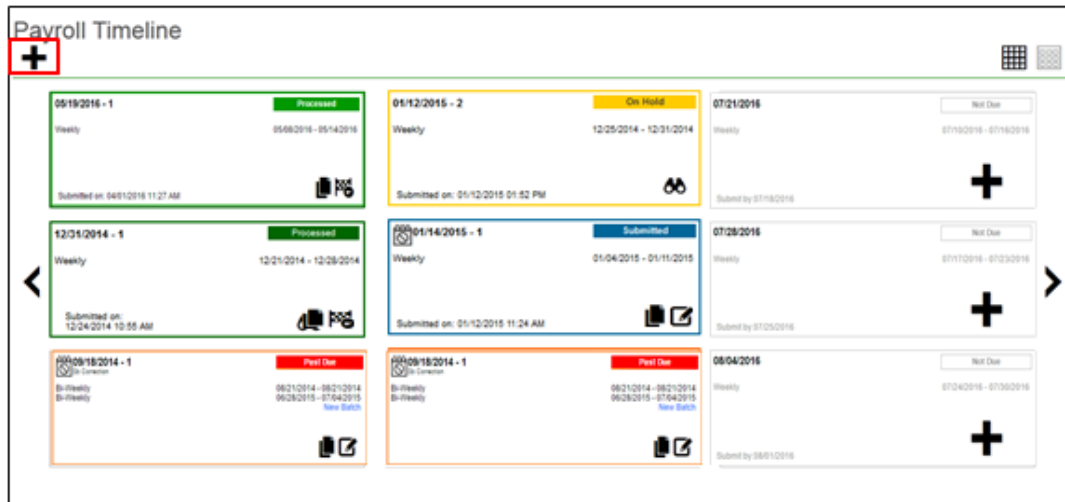
Symbol	Description
 Batches	Batches – this button is active ( <b>green</b> ) while batches are being created. To view batch information after they have been created, click this button.
 Checks	Checks - this button is active ( <b>green</b> ) while checks are being created. To view, add or edit checks 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 ( <b>green</b> ) 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 after clicking the Payroll menu.

To create a payroll in Evolution Payroll,

1. Click the **Payrolls** menu.



2. 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

1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the [Payrolls – Check Batch Settings Screen section](#) in 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.
5. Click **OK** in the window that confirms the checks have been created.

**Result:** The Batch Checks Screen opens.

## Batch Checks Screen


Type	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		40.00		\$0.00
R	2	Smith, Bill	1	40.00	\$2,100.00	\$1,500.00	40.00		\$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		\$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
<b>Totals</b>				<b>440.00</b>	<b>\$15,000.00</b>	<b>\$6,800.00</b>	<b>440.00</b>		<b>\$8,200.00</b>

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 [Payrolls - Batch Checks Screen](#) 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
  1. Click the **Add Check** button in the Navigation bar.
 

**Result:** The Add Checks screen opens.
  2. Select the Check Type being created.
  3. Select the employee(s) for whom to create a check.
  4. Click the **Create Check(s) for Selected EEs** button.
    - To add additional E/D Codes as columns, click  in the bottom right-hand corner of the screen, and select the E/D Codes from the list.

### Add Checks

Select a Check Type

Regular

Find and Select the Employees to use when creating checks. One check will be created for each Employee you select.

Check Creation Options

☐ Standard Hours: No

☐ Salary Pay: No

Use this Template

--Select--

Search for employee(s)

EE #	Last Name	First Name	Middle Initial	Status	Organizatio...
1	Lewis	Al		Active	West > WB >> WS...
2	Smith	Bill		Active	So East > SB >> S...
3	Greenburg	Goldie		Active	West > WB >> WS...
4	Soffer	Harry		Active	Central > CB >> S...
5	Pinkman	Jessie		Active	West > WB >> WS...


16 Items

Create Check(s) for Selected EEs

### Summary Detail View

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

Payroll 11/19/2015 - 1 Batch 1 : 11/29/2015 - 12/05/2015 Regular   -99999554   1 of 2						Batches	Checks	Totals	Finish
Add Check Delete Check						Summary Detail			
E/O Code	Description	Hrs/Pct	Rate Of Pay	Amount	Rate Number	Agency			
D3	Direct Deposit - Net								
D4	Child Support			\$50.00		Office Of Child Support			
D7	Child Support - 2			\$21.00		Office Of Child Support			
D6	Health Insurance			\$0.00					
Check: -99999554 - R. Batch: 1 Employee: Lewis, Al [1]									
Total Hrs: 40.00 Total Amount: \$2,484.00									
Add Check Line Delete Check Line									
D6	Health Insurance			\$25.00					
E01	Salary		\$0.00	\$2,500.00	-1				
E02	Regular	40.00	\$0.00	\$0.00	-1				
D1	Direct Deposit - Partial 1								
D3	Direct Deposit - Net								
D4	Child Support			\$50.00		Office Of Child Support			
D7	Child Support - 2			\$21.00		Office Of Child Support			
Totals		440.00		\$13,884.10					

- To add a check for employees
- Click the **Add Check** button in the Navigation bar.
- Result:** The Add Checks screen opens.
- Select the Check Type being created.
  - Select the employee(s) for whom to create a check.
  - 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.

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.

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 these screens, refer to the [Payrolls – Check Lines Screen section](#) 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 [Payrolls – Manual Tax screen](#) in the Appendix at the end of this chapter.

Payroll 11/19/2015 - 1 Batch 1 : 11/29/2015 - 12/05/2015

Check Serial # Check Type Sequence  
-99999554 Regular 1 of 2

Recalculate Check Preview ALD

Detail

Calculate Override Taxes  
Reciprocate SUI  
Disable Shortfalls

Row	Description	Amount
1	Federal	
2	OASDI	
3	Medicare	
4	EIC	
5	Backup Withholding	

5 Items

Previous Next

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** 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 [Payrolls – Fed Overrides screen section](#) in the Appendix at the end of this chapter.

Payroll 11/19/2015 - 1 Batch 1 : 11/29/2015 - 12/05/2015

Check Serial # Check Type Sequence  
-99999554 Regular 1 of 2

Recalculate Check Preview ALD

Detail

Fed Type: None  
Tax Frequency: Weekly  
Tax at Supplemental Rate: ☐

Blocks:

- ☐ Federal Tax
- ☐ Employee Overrides
- ☐ Additional Values
- ☐ EE OASDI
- ☐ EE Medicare
- ☐ EE EIC
- ☐ ER OASDI
- ☐ ER Medicare
- ☐ ER FUI

Previous Next

1. Complete the applicable fields. For detailed information about the fields on this screen, refer to page 89 in this document.
2. Click the **Payroll – State Overrides** tab.

## State Overrides screen

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

## Local Overrides screen

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](#).

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 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

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 [Payrolls – Review Screen section](#) in the Appendix at the end of this chapter.

EARNINGS		DEDUCTIONS		FEDERAL TAXES
Federal Taxable Wages	\$0.00	Salary	\$2,500.00	CMS Support
GA/DC Taxable Wages	\$0.00	Earnings SubTotal	\$2,500.00	CMS Support - 2
GA/DC Taxable Tips	\$0.00			Health Insurance
Medicare Taxable Wages	\$0.00			Deductions SubTotal
Gross Amount	\$0.00			\$96.00
Net Amount	\$0.00			

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 [Payrolls – Calculation Results section](#) in the Appendix at the end of this chapter.



**Calculation Results**

Batch 1 Weekly

Total Gross Pay: \$14460.00

E/D Code	Description	Hrs/Pcs	Amount
D1	Direct Deposit - Parti...	0.00	\$200.00

E/D Detail For: D1 - Direct Deposit - Partial 1

Type	Src	EE Code	Employee N...	Hrs/Pcs	Amount
R	S	1	Al Lewis	0.00	\$25.00
R	S	4	Harry Soffer	0.00	\$150.00
R	S	8	Willie Clark	0.00	\$25.00

3 Items

D2 Direct Deposit - Parti... 0.00 \$100.00

D3 Direct Deposit - Net 0.00 \$6,537.88

9 Items

☐ Totals by Check Type ☐ User Entries Separately

Total Taxes: \$106300.47

Description	Amount	Count
Federal Gross Wages	\$14,208.60	11

Tax Detail For: Federal Gross Wages

Src	EE Code	Employee Name	Hrs/Pcs	Amount
S	1	Al Lewis	0.00	\$2,475.00
S	10	Susan Bigole	0.00	\$350.00
S	11	Simon Simon	0.00	\$350.00
S	2	Bill Smith	0.00	\$1,495.00
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

11 Items

Federal Tax \$2,539.70 9

Federal Taxable Wages \$14,208.60 11

43 Items

☐ User Entries Separately


**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.



**Payroll Timeline**



<p>05/19/2016 - 1</p> <p>Weekly</p> <p>05/08/2016 - 05/14/2016</p> <p>Submitted on: 04/01/2016 11:27 AM</p> <p></p>	<p>05/12/2015 - 2</p> <p>Weekly</p> <p>12/29/2014 - 12/31/2014</p> <p>Submitted on: 01/12/2015 01:52 PM</p> <p></p>	<p>07/21/2016</p> <p>Weekly</p> <p>07/18/2016 - 07/18/2016</p> <p>Submitted by 07/18/2016</p> <p></p>
<p>12/31/2014 - 1</p> <p>Weekly</p> <p>12/21/2014 - 12/28/2014</p> <p>Submitted on: 12/24/2014 10:55 AM</p> <p></p>	<p>01/14/2015 - 1</p> <p>Weekly</p> <p>01/04/2015 - 01/11/2015</p> <p>Submitted on: 01/12/2015 11:24 AM</p> <p></p>	<p>07/28/2016</p> <p>Weekly</p> <p>07/17/2016 - 07/23/2016</p> <p>Submitted by 07/28/2016</p> <p></p>
<p>09/08/2014 - 1</p> <p>Bi-Weekly</p> <p>08/21/2014 - 08/21/2014</p> <p>08/28/2014 - 07/04/2015</p> <p>New Batch</p> <p></p>	<p>09/08/2014 - 1</p> <p>Bi-Weekly</p> <p>08/21/2014 - 08/21/2014</p> <p>08/28/2014 - 07/04/2015</p> <p>New Batch</p> <p></p>	<p>08/04/2016</p> <p>Weekly</p> <p>07/24/2016 - 07/30/2016</p> <p>Submitted by 08/01/2016</p> <p></p>

- Click the large **plus + sign** in the heading.

**Result:** The Payroll Settings screen opens.

- Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the [Payrolls – Payroll Settings screen section](#) in the Appendix at the end of this chapter.
- Click **Save**  in the header on the left.  
**Result:** A status of **Pending** is displayed in the header on the left.
- 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

- Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the [Payrolls – Check Batch Settings screen section](#) in the Appendix at the end of this chapter.
- Select the items to include in the payroll in the Include section.
- Complete required and applicable fields in the Time Clock Import Options section.

- 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

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 [Payrolls – Batch Checks screen section](#) in the Appendix at the end of this chapter.

Type	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	\$600.00
R	3	Greenburg, Goldie	1	40.00	\$2,800.00	\$2,800.00	40.00	\$0.00
R	4	Soffler, 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

### 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
  - Click within the column to edit of the check being modified.
  - 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.

Select a Check Type  
Regular

Find and Select the Employees to use when creating checks. One check will be created for each Employee you select.

Check Creation Options  
☐ Standard Hours: No  
☐ Salary Pay: No

Use this Template  
--Select--


EE #	Last Name	First Name	Middle Initial	Status	Organizatio...
1	Lewis	Al		Active	West > WB >> WS...
2	Smith	Bill		Active	So East > SB >> S...
3	Greenburg	Goldie		Active	West > WB >> WS...
4	Soffler	Harry		Active	Central > CB >> S...
5	Pinkman	Jessie		Active	West > WB >> WS...

Create Check(s) for Selected EEs

- Select the Check Type being created.

3. Select the employee(s) for whom to create a check.
4. Click the **Create Check(s) for Selected EEs** button.

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

- To add additional E/D Codes to the grid as columns, click  in the bottom right-hand corner of the Batch Checks Screen.

**Result:** The following screen opens listing Available Columns - E/Ds available to add to the grid, and a list of the Current Columns - the E/Ds currently listed as column headings in the grid.

**Choose Columns**

**Available Columns**

Search...

- D02 Hrs EE HSA Single (BCBS)
- D02 Amt EE HSA Single (BCBS)
- D03 Hrs EE HSA Family (BCBS)
- D03 Amt EE HSA Family (BCBS)
- D04 Hrs EE 401K (CIGNA)
- D04 Amt EE 401K (CIGNA)
- D05 Hrs EE 401K Catchup (CIGNA)
- D05 Amt EE 401K Catchup (CIGNA)
- D06 Hrs EE 401K (BCBS)
- D06 Amt EE 401K (BCBS)
- D07 Hrs EE 401K Catchup (BCBS)

**Current Columns**

Search... Select: All | None

- Type
- EE Code
- Name
- Seq
- Total Hrs
- Gross Pay
- E01 Amt Salary
- E02 Hrs Regular
- E02 Amt Regular

Locked Columns are grouped together and remain visible while scrolling through the grid  
[Restore Default Column Settings](#)

Apply Cancel

- To add E/Ds to the grid, select it/them in the Available Columns list on the left-hand side of the screen, and drag to the Current Columns list on the right.
- To remove columns from the grid, click the E/Ds in the Current Columns list and drag them to the Available Columns list on the left.
- Click **Apply**.

### Summary Detail View

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

Payroll 11/19/2015 - 1 Batch 1 : 11/29/2015 - 12/05/2015 Regular | -99999554 | 1 of 2

Summary Detail

E/D Code	Description	Hrs/Pcs	Rate Of Pay	Amount	Rate Number	Agency
D3	Direct Deposit - Net					
D4	Child Support			\$50.00		Office Of Child Support
D7	Child Support - 2			\$21.00		Office Of Child Support
D6	Health Insurance			\$0.00		
Check: -99999554 - R. Batch: 1 Employee Lewis, AJ [1] Total Hrs: 40.00 Total Amount: \$2,404.00						
D6	Health Insurance			\$25.00		
E01	Salary		\$0.00	\$2,500.00	-1	
E02	Regular	40.00	\$0.00	\$0.00	-1	
D1	Direct Deposit - Partial 1					
D3	Direct Deposit - Net					
D4	Child Support			\$50.00		Office Of Child Support
D7	Child Support - 2			\$21.00		Office Of Child Support
Totals				440.00		\$13,884.10

46 Items


- To add a check for employees
- Click the **Add Check** button in the Navigation bar.  
**Result:** The Add Checks screen opens.
  - Select the Check Type being created.
  - Select the employee(s) for whom to create a check.
  - Click the **Create Check(s) for Selected EEs** button.
- To add a Check Line click the **Add Check Line** button.

Payroll 11/19/2015 - 1 Batch 1 : 11/29/2015 - 12/05/2015 Regular | -99999554 | 1 of 2

Summary Detail

E/D Code	Description	Hrs/Pcs	Rate Of Pay	Amount	Rate Number	Agency
D6	Health Insurance			\$0.00		
D3	Direct Deposit - Net					
D4	Child Support			\$50.00		Office Of Child Support
D1	Direct Deposit - Partial 1					
Check: -99999554 - R. Batch: 1 Employee Lewis, AJ [1] Total Hrs: 40.00 Total Amount: \$2,404.00						
D7	Child Support - 2			\$21.00		Office Of Child Support
E01	Salary		\$0.00	\$2,500.00	-1	
E02	Regular	40.00	\$0.00	\$0.00	-1	
D1	Direct Deposit - Partial 1					
D3	Direct Deposit - Net					
D4	Child Support			\$50.00		Office Of Child Support
Totals				440.00		\$13,884.10

47 Items

- Select an E/D Code from the dropdown list.
  - Click **Save** in the Header.
- To add additional E/D Codes to the grid as columns, click  in the bottom right-hand corner of the Batch Checks Screen.  
**Result:** The following screen opens listing Available Columns - E/Ds available to add to the grid, and a list of the Current Columns - the E/Ds currently listed as column headings in the grid.

- To add E/Ds to the grid, select it/them in the Available Columns list on the left-hand side of the screen, and drag to the Current Columns list on the right.
- To remove columns from the grid, click the E/Ds in the Current Columns list and drag them to the Available Columns list on the left.
- Click **Apply**.

### 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.

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 [Payrolls – Batch Checks screen section](#) 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 [Payrolls – Manual Tax screen section](#) in the Appendix at the end of this chapter.

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

## Fed Overrides screen

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

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

1. Complete the applicable fields.
2. Click the **Payroll – Options** tab.



## Payroll - Options screen

Click the **Payrolls –Options** tab to block scheduled earnings and deductions on employee checks. The information on this screen can be found mostly on the **Payroll – Check – General** tab.

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 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 [Payrolls – Review screen section](#) in the Appendix at the end of this chapter.

Check Calculations	EARNINGS	DEDUCTIONS	FEDERAL TAXES
Federal Taxable Wages	\$0.00	Salary	\$2,500.00
OS/OS Taxable Wages	\$0.00	Child Support	\$21.00
OS/OS Taxable Tax	\$0.00	Child Support - 2	\$25.00
Medicare Taxable Wages	\$0.00	Health Insurance	\$25.00
Gross Amount	\$0.00	Deductions SubTotal	\$96.00
Net Amount	\$0.00		

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 [Payrolls – Calculation Results screen](#) in the Appendix at the end of this chapter.

**Calculation Results**

Batch 1 Weekly

Total Gross Pay: \$14460.00

E/D Code	Description	Hrs/Pcs	Amount
D1	Direct Deposit - Partial...	0.00	\$200.00

E/D Detail For: D1 - Direct Deposit - Partial 1

Type	Sic	EE Code	Employee Name	Hrs/Pcs	Amount
R	S	1	Al Lewis	0.00	\$25.00
R	S	4	Harry Soffer	0.00	\$150.00
R	S	8	Willie Clark	0.00	\$25.00

3 Items

D2 Direct Deposit - Parti... 0.00 \$100.00

D3 Direct Deposit - Net 0.00 \$6,537.88

9 Items

☐ Totals by Check Type ☐ User Entries Separately

Total Taxes: \$106300.47

Description	Amount	Count
Federal Gross Wages	\$14,208.60	11

Tax Detail For: Federal Gross Wages

Sic	EE Code	Employee Name	Hrs/Pcs	Amount
S	1	Al Lewis	0.00	\$2,475.00
S	10	Susan Blgole	0.00	\$350.00
S	11	Simon Simon	0.00	\$350.00
S	2	Bill Smith	0.00	\$1,495.00
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


11 Items

Federal Tax \$2,539.70 9

Federal Taxable Wages \$14,208.60 11


43 Items

☐ User Entries Separately

**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).

**Payroll Timeline**

Payroll 11/10/2015 - 1

Calculate  **Pre-Processing**

Batch 1 Weekly

Total Gross Pay: \$69,612.25

E/D Code	Description	Hrs/Pcs	Amount
D01	Checking	0.00	\$1,934.31

E/D Detail For: D01 - Checking

Type	Sic	EE Code	Employee Name	Hrs/Pcs	Amount
R	S	10	Employee Direct...	0.00	\$540.69
R	S	120	Employee Shifts	0.00	\$500.63
R	S	260	Employee GTL...	0.00	\$429.12
R	S	30	Employee 401K	0.00	\$463.87

4 Items

D02 Savings 0.00 \$300.00

33 Items

☐ Totals by Check Type ☐ User Entries Separately

Total Taxes: \$22,633.71

Description	Amount	Count
Federal Gross Wages	\$62,950.25	45

Tax Detail For: Federal Gross Wages

Sic	EE Code	Employee Name	Hrs/Pcs	Amount
S	10	Employee Direct De...	0.00	\$1,848.48
S	100	Employee Recipro...	0.00	\$570.00
S	110	Employee Jobs	0.00	\$741.60
S	120	Employee Shifts	0.00	\$1,260.20
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

45 Items

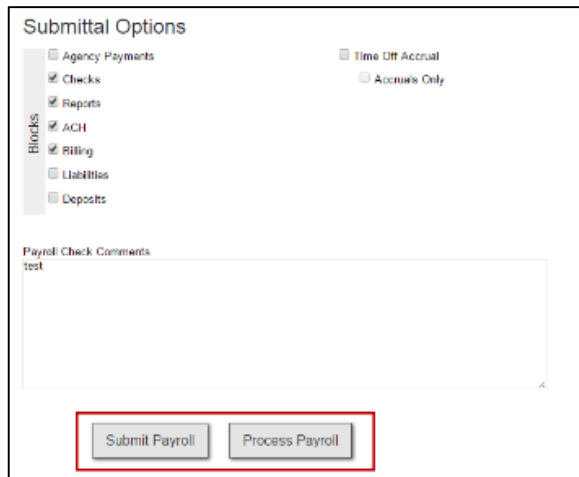
Federal Tax \$13,311.25 45

45 Items

☐ User Entries Separately

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

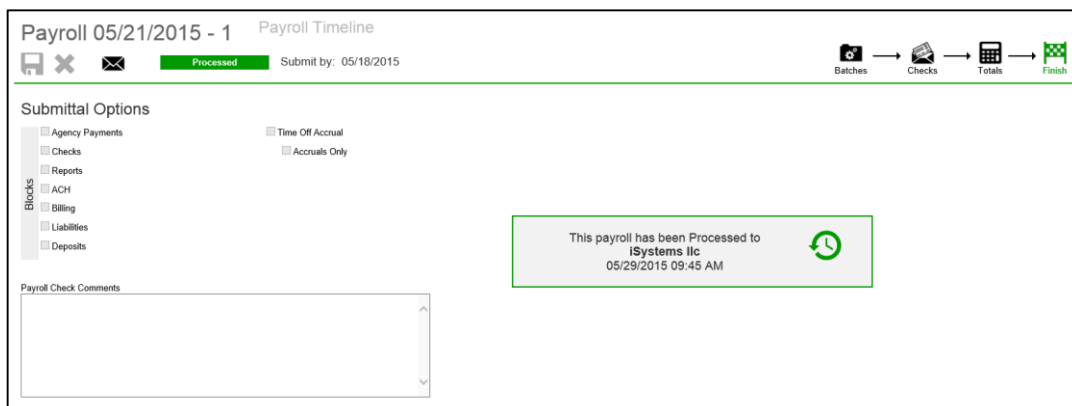
4. Finally, click **Finish**  in the header.  
**Result:** the Submittal Options screen opens.



The Submittal Options screen displays various checkboxes for payroll submission. On the left, under 'Blocks', are checkboxes for Agency Payments, Checks (checked), Reports (checked), ACH (checked), Billing (checked), Liabilities, and Deposits. On the right, there are checkboxes for Time Off Accrual and Accruals Only. Below these is a text area for 'Payroll Check Comments' containing the word 'test'. At the bottom, two buttons are visible: 'Submit Payroll' and 'Process Payroll', both of which are highlighted with a red rectangular border.


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



The Payroll Timeline screen for 'Payroll 05/21/2015 - 1' shows a 'Processed' status and a 'Submit by: 05/18/2015' deadline. A progress bar at the top right indicates the workflow: Batches → Checks → Totals → Finish. The Submittal Options section on the left is identical to the previous screen. A central message box states: 'This payroll has been Processed to iSystems llc 05/29/2015 09:45 AM' with a green circular arrow icon. The Payroll Check Comments text area is empty.

## 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.
2. 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.

The Results screen includes the following

- Date and time the payroll was processed
- Any blocks applied to the payroll while setting it up
- Comments entered for the payroll processors
- On Premise Printing - 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.
- Send to – 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.

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.

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

<input checked="" type="checkbox"/>	Serial Number	Net Wages	EE Code	Employee Name
<input checked="" type="checkbox"/>	-99999708	\$0.00	01	Goode, Alice K.
<input checked="" type="checkbox"/>	3216	\$663.93	02	Cat, Cheshire M.
<input checked="" type="checkbox"/>	3221	\$635.36	03	Rabbit, White A.
<input checked="" type="checkbox"/>	3219	\$1,460.87	04	Hatter, Mad
<input checked="" type="checkbox"/>	3220	\$840.45	05	Hearts, Queen O.
<input checked="" type="checkbox"/>	3217	\$407.96	07	Dee, Tweedle F.
<input checked="" type="checkbox"/>	3218	\$411.75	08	Dum, Tweedle A.
<input checked="" type="checkbox"/>	3222	\$798.05	13	Rose, The

8 Items

8 Selected

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.

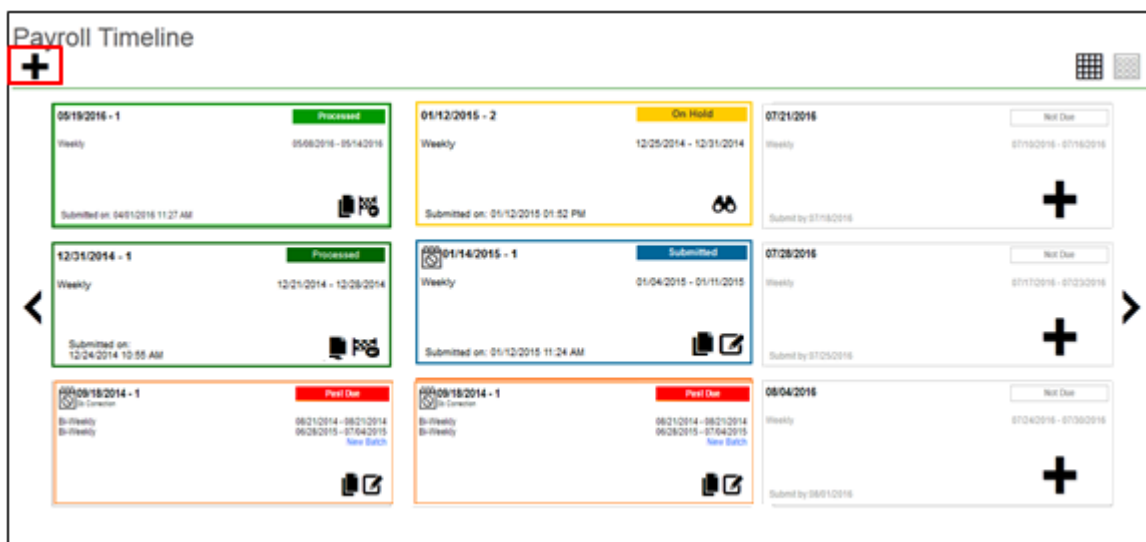
4. To select a specific miscellaneous check(s) to reprint, rather than all checks, click the **Selected: All** link.
5. Select the checkboxes for the checks to be reprinted.
6. Click the **Select** button.
7. Select the applicable options for the checks being reprinted.
  - a. Do not print banking info
  - b. Do not print background
  - c. Do not 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

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







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

- Click the **Table**  **view** symbol in the header.

Payroll Timeline

Check Date	Run #	Payroll Type	Created On	Due On	Current Status	Preprocessed On
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	On 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		Completed	03/28/2016
03/31/2016	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	
05/05/2016	1	Regular		05/02/2016	Pending	
05/12/2016	1	Regular	03/28/2016	05/09/2016	Processed	
05/19/2016		Regular		05/16/2016	Not Started	
05/26/2016		Regular		05/23/2016	Not Started	

- 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.
- Click the **Copy Payroll** symbol in the top left of the header

## Adding Additional Checks

To add additional checks to a payroll,

- 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.

**Add Checks**

Select a Check Type  
Regular

Find and Select the Employees to use when creating checks. One check will be created for each Employee you select.

Check Creation Options  
☐ Standard Hours: No  
☐ Salary Pay: No  
 Use this Template  
 --Select--

Search for employee(s)

EE #	Last Name	First Name	Middle Initial	Status	Organizatio...
1	Janson	Jennifer	L	Active	
2	Glazer	JoAnne	B	Active	
3	Flax	Ron		Active	
4	Carlow	Jane		Active	
5	Timm	Robert		Active	
6	Carroll	Robert	D	Active	

12 items

Create Check(s) for Selected EEs



4. Select the Check Type being created.
5. Select the employee(s) for whom to create a check.
6. Click the **Create Check(s) for Selected EEs** button.

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

## Adding Check Lines

1. Go to the **Payroll – Payroll Timeline** screen.
2. Click the **Edit** symbol on the payroll to be edited.

**Result:** The Batch Checks screen opens.

Payroll 05/05/2016 - 1

Batch 1 : 04/24/2016 - 04/30/2016

Regular - 99998649 | 1 of 1

Batches

Checks

Totals

Print

Export to Excel

Reset Columns

Add Check

Delete Check

Search Checks

Group By: Company Number

Summary

Type	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	\$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	\$1,900.00		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	\$1,900.00		40.00	\$1,000.00
R	10	Biggle, 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	\$15,000.00	\$6,800.00	440.00	\$8,200.00

Batch 1 Weekly

17 Items

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

Payroll 11/19/2015 - 1

Batch 1: 11/29/2015 - 12/05/2015

Regular | -99999554 | 1 of 2

Batches

Checks

Rate

Print

+

Batch 1 Weekly

Add Check

Delete Check

Summary Detail

EID Code	Description	Hrs/Pcs	Rate Or Pay	Amount	Rate Number	Agency
@ D6	Health Insurance			\$0.00		
@ D3	Direct Deposit - Net					
@ D4	Child Support			\$50.00		Office Of Child Support
@ D1	Direct Deposit - Partial 1					
<div> <div>Check: -99999554 - R, Batch: 1, Employee: Lewis, Al [1]</div> <div>Total Hrs: 40.00    Total Amount: \$2,494.80</div> <div> <div>Add Check Line</div> <div>Cancel Check Line</div> </div> </div>						
@ D7	Child Support - 2			\$21.00		Office Of Child Support
@ E01	Salary		\$0.00	\$2,500.00	-1	
E02	Regular	40.00	\$0.00	\$0.00	-1	
@ D1	Direct Deposit - Partial 1					
@ D3	Direct Deposit - Net					
@ D4	Child Support			\$50.00		Office Of Child Support
<div> <div>- See ...</div> </div>						
Totals		440.00		\$13,884.10		

47 Items

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.

The screenshot shows the 'Payroll Timeline' interface. At the top, it indicates 'Payroll 04/28/2016 - 1' and 'Batch 1: 04/17/2016 - 04/23/2016'. A 'Pending' status bar is visible. On the left, there's a sidebar with 'Batch 1' and 'Check Lines' sections. The main area displays a table with columns: E/D Code, Description, Hrs/Pcs, Pay Rate, Amount, and Rate #. The first row shows 'E02 Regular' with a pay rate of \$15.00 and an amount of \$600.00. Below the table, there are tabs for 'Basic', 'Labor Defaults', and 'Local Tax Overrides'. The 'Basic' tab is active, showing fields for Rate Number, Rate Of Pay, Hours/Pcs, Piece, State, Work Address, and Agency. A 'Refresh Scheduled E/Ds' button is highlighted with a red box in the top right area of the main screen.

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.



The screenshot shows the 'Check Batches' screen. At the top, it indicates 'Payroll 05/05/2016 - 1'. A 'Batches' button is highlighted with a red box. Below, there's a 'Check Batch 1' card. The card displays the date range '04/24/2016 - 04/30/2016', frequency 'Weekly', and details 'Hourly & Salary' and '17 Checks'. There's a gear icon and a 'Refresh' button (labeled 'E/D') highlighted with a red box. The ID '76' is shown at the bottom right of the card.

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

E/D Code	Description	Hrs/Pcs	Rate Of Pay	Amount	Rate Number	Agency
D6	Health Insurance			\$0.00		
D3	Direct Deposit - Net					
D4	Child Support			\$50.00		Office Of Child Support
D1	Direct Deposit - Partial 1					
Check: -99999554 - R. Batch: 1. Employee: Lewis, Al [1] Total Lhs: \$0.00 - Total Amount: \$2,494.00						
D7	Child Support - 2			\$21.00		Office Of Child Support
E01	Salary		\$0.00	\$2,500.00	-1	
E02	Regular	40.00	\$0.00	\$0.00	-1	
D1	Direct Deposit - Partial 1					
D3	Direct Deposit - Net					
D4	Child Support			\$50.00		Office Of Child Support
Totals				640.00		\$13,884.10

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

## Adding to an existing batch

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

Select a Check Type: Manual

Find and Select the Employees to use when creating checks. One check will be created for each Employee you select.

Check Creation Options

☐ Standard Hours: No

☐ Salary Pay: No

Use this Template: --Select--

Search for employee(s)

EE #	Last Name	First Name	Middle Initial	Status	Organizatio...
1	Lewis	Al		Active	West > WB >> WS...
2	Smith	Bill		Active	So East > SB >> S...
3	Greenburg	Goldie		Active	West > WB >> WS...
4	Soffer	Harry		Active	Central > CB >> S...
5	Pinkman	Jessie		Active	West > WB >> WS...

16 items

Select EEs

- Select **Manual** from the Check Types dropdown list.
  - 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.
- Click in the **Check#** column and give the check(s) a number.
  - Click the **Create Check(s) for Selected EEs** button.

EE #	Last Name	First Name	Update Balance	Check #
000000002	Smith	Bill	Yes	1445

**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**  symbol.
2. Click the **Plus** sign on the Batch Checks screen to create a new batch.

**Result:** the Payroll Settings screen opens.

**Check Batch - Settings**

Start Date: 6/7/2015 End Date: 6/13/2015

Frequency: Weekly

Employee Types: All

Creation Options:

- Employee Filter: -Select Template--
- Template: -Select Template--
- Checks per EE: 1
- Update Scheduled E/Ds Balance: No
- ☒ Calculate Scheduled EDs
- ☒ Standard Hours
- ☒ Salary Pay
- ☒ Payroll Defaults
- ☐ Time Off Requests

Check Types: 3rd Party

Create Checks

- 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.

**Payroll 11/20/2015 - 1**

Search for employee(s)

Drag a column header and drop it here to group by that column

EE #	Last Name	First Name	Middle Initial	Status	DDOT
1	Lewis	Al		Active	West > WB >> WS >>> GT
2	Smith	Bill		Active	So East > SB >> SES >>> WT
3	Greenburg	Goldie		Active	West > WB >> WS >>> GT
4	Soffer	Harry		Active	Central > CB >> SC >>> GGS
5	Pinkman	Jessie		Active	West > WB >> WS >>> GT
6	Bichon	Selma		Active	So East > SB >> SES >>> WT
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	Biggle	Susan		Active	Central > CB >> SC >>> GGS

Page 1 of 2

14 Items

DONE

- Select the **Check Type** 3<sup>rd</sup> Party from the dropdown list on the Payroll Settings screen.
- Complete the additional applicable fields.
- Click the **Create Checks** button.  
**Result:** the Batch Checks screen opens.
- Select the batch just created to view the employee(s) selected

**Payroll 05/05/2016 - 1** Batch 1: 04/24/2016 - 04/30/2016 Regular | -99998649 | 1 of 1

Export to Excel | Reset Columns | Add Check | Delete Check | Search Checks | Group By: Company Number | Summary

Type	EE Code	Name	Seq	Total Hrs	Gross Pay	E01 Amt Salary	E02 Hrs Regular	E02 Amt Regular	E03 Amt Regular
R	1	Lewis, Al	1	40.00	\$2,500.00	\$2,500.00	40.00	\$0.00	\$0.00
R	2	Smith, Bill	1	40.00	\$2,100.00	\$1,500.00	40.00	\$600.00	\$600.00
R	3	Greenburg, Goldie	1	40.00	\$2,800.00	\$2,800.00	40.00	\$0.00	\$0.00
R	4	Soffer, Harry	1	40.00	\$1,000.00		40.00	\$1,000.00	\$1,000.00
R	5	Pinkmans, Jessie	1	40.00	\$600.00		40.00	\$600.00	\$600.00
R	6	Bichon, Selma	1	40.00	\$640.00		40.00	\$640.00	\$640.00
R	7	Goodman, Saul	1	40.00	\$600.00		40.00	\$600.00	\$600.00
R	8	Clark, Willie	1	40.00	\$3,120.00		40.00	\$3,120.00	\$3,120.00
R	9	White, Walter	1	40.00	\$1,000.00		40.00	\$1,000.00	\$1,000.00
R	10	Biggle, Susan	1	40.00	\$350.00		40.00	\$350.00	\$350.00
R	11	Simon, Simon	1	40.00	\$350.00		40.00	\$350.00	\$350.00
Totals				440.00	\$15,000.00	\$6,800.00	440.00	\$8,200.00	\$8,200.00

17 Items

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

**Add Checks**

Select a Check Type  
3rd Party

Find and Select the Employees to use when creating checks. One check will be created for each Employee you select.

Check Creation Options  
☐ Standard Hours: No  
☐ Salary Pay: No

Use this Template  
--Select--

Search for employee(s)

EE #	Last Name	First Name	Middle Initial	Status	Organizatio...
1	Lewis	Al		Active	West > WB >> WS...
2	Smith	Bill		Active	So East > SB >> S...
3	Greenburg	Goldie		Active	West > WB >> WS...
4	Soffer	Harry		Active	Central > CB >> S...
5	Pinkman	Jessie		Active	West > WB >> WS...

16 items

Select EEs

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 to use when creating checks. One check will be created for each Employee you select.

Check Creation Options  
☐ Standard Hours: No  
☐ Salary Pay: No

Use this Template  
--Select--

EE #	Last Name	First Name	Update Balance	Check #
000000002	Smith	Bill	No	

1 items

Create Check(s) for Selected EEs

- 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".
14. Click the **Create Checks** button





**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

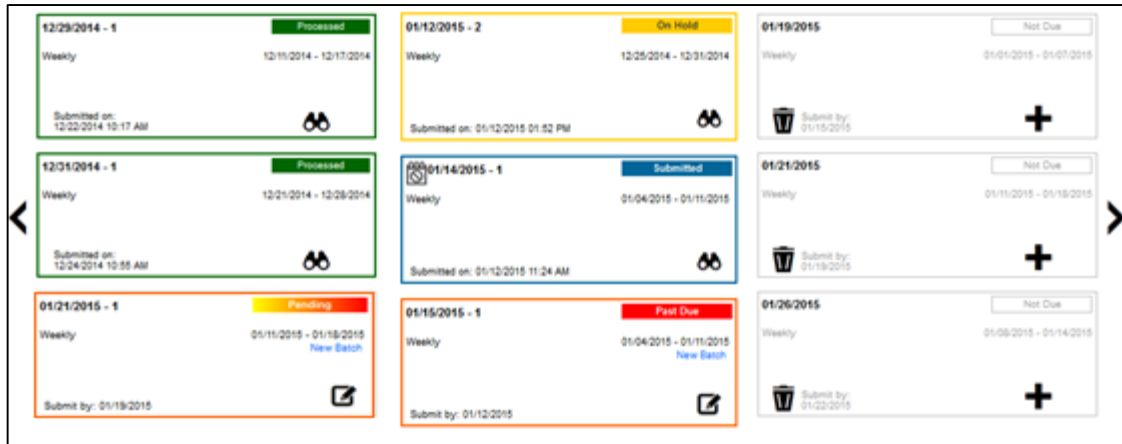
In addition to the security rights required to work on payrolls, the following must also be enabled for the user to be able to void checks:

- 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.



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

3. Complete the required and applicable fields.
4. Click **Save**  in the header on the left.
5. Click **Hide**  in the upper right-hand corner of the Payroll Settings screen.
6. 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**.

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

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

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.

Payroll 05/05/2016 - 1 Batch 1 : 04/24/2016 - 04/30/2016 Regular - 99998649 | 1 of 1

Export to Excel Reset Columns Add Check Delete Check Search Checks Group By: Company Number Summary

Type	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	\$600.00
R	3	Greenburg, Goldie	1	40.00	\$2,800.00	\$2,800.00	40.00	\$0.00
R	4	Soffler, 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	Biggle, 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

17 Items

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

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

**Add Checks**

Select a Check type  
Void

Find and Select the Check that you need to void. You can then create a negative check as a reversal of your selected Check.

Check # EE ID Within this check date range With Status of  
All All 8/4/2015 - 9/30/2015 Any Find

Check #	Run #	EE ID	Employee Name	Check #	Gross	Net	Status
08/27/2015	1	1	Lewis, Al	-99999528	\$0.00	\$0.00	Outstanding
08/27/2015	1	1	Lewis, Al	-99999522	\$0.00	\$0.00	Outstanding
08/27/2015	1	1	Lewis, Al	-99999513	\$0.00	\$0.00	Outstanding
09/17/2015	1	1	Lewis, Al	-99999498	\$0.00	\$0.00	Outstanding
09/17/2015	1	1	Lewis, Al	-99999492	\$0.00	\$0.00	Outstanding
09/24/2015	1	1	Lewis, Al	-99999481	\$2,500.00	\$0.00	Outstanding
09/24/2015	1	0	Clark, Willie	-99999478	\$0.00	\$0.00	Outstanding

107 Items

Create Void Check for Selected Check

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.

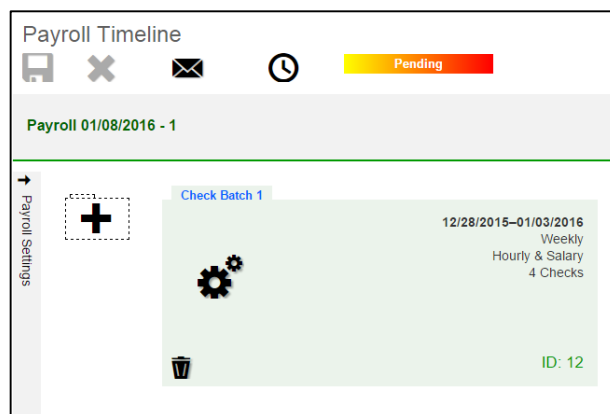
11. Process the payroll as usual.


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





4. Click **Delete**  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.

The screenshot shows the Evolution Payroll software interface. At the top, it displays 'Payroll 10/29/2015 - 1' and 'Batch 1: 10/18/2015 - 10/24/2015'. On the left, there's a sidebar with buttons like 'Batch 1 Weekly', 'Check Lines', 'Manual Tax', 'Find Overrides', 'State Overrides', 'Local Overrides', 'Options', and 'Review'. The main area shows a form for '2 - Smith, Bill - 1 of 1'. A red box highlights the 'Redistribute Allocation' button. Below this, there's a table with columns: E/D Code, Description, Hrs/Pcs, Pay Rate, Amount, and Rate #. The table shows a single row for 'E02 Regular' with 40.00 Hrs/Pcs, a Pay Rate of \$0.00, and an Amount of \$0.00. Below the table, there are fields for 'Rate Number', 'Rate Of Pay', 'Agency', 'Hours/Pcs', 'State', 'Work Address', and 'Local Tax Overrides'. At the bottom, there's a summary table with columns: E/D Code, Description, Amount, and Rate #. It shows three rows: 'E01 Salary' with \$1,500.00, 'D3 Direct Deposit - Net' with \$1,181.31, and 'D6 Health Insurance' with \$5.00. The total is \$1,500.00.

- 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.

The screenshot shows the 'Redistribute Allocations' dialog box. It has a green header with an information icon and the title 'Redistribute Allocations'. Below the header, it says 'Listed below are the allocations for your selected E/D Code: **E02 - Regular**'. It also states 'You can adjust values on the existing allocations or create additional allocations as needed.' and 'Original allocations can be modified but not removed.' There are 'Add' and 'Delete' buttons. Below these is a table with columns: Organizational Level, Workers Comp, Job Code, Hours, Amount, and Line Item Date. The table shows one row for 'Central Division/Central Branch/Central Sa...' with 40 hours and an amount of \$1,000.00. A dropdown menu is open for the 'Organizational Level' column, showing a list of teams: 'North East Northeast Branc Northeast Sales Dept Jessie's Team', 'Western C Western Branch Western Sales Dept Gladys' Team', 'Central Di Central Branch Central Sales Dept Gus' Team', and 'South East Southeast Branc Southeast Sales Dept Walt's Team'. At the bottom, there's a 'Totals' row showing 40.00 hours and \$1,000.00. There are 'Apply' and 'Cancel' buttons at the bottom right.

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

# The Payrolls Menu - Appendix

## Payrolls - Check Batch Settings screen

Field / Button	Description
<b>Creation Options section</b>	
<b>Start Date</b>	The beginning of the Payroll Batch period
<b>End Date</b>	The end of the Payroll Batch period
<b>Frequency</b>	The Payroll frequency
<b>Employee Types</b>	The employee types to include in the payroll
<b>Employee Filter – Select EEs</b>	Click to select specific employees to include in the payroll
<b>Template</b>	The Payroll Template to use for this payroll, if any.
<b>Checks per EE</b>	The number of checks per employee
<b>Check Types</b>	The type of checks for this payroll
<b>Include section</b>	
<b>Standard hours</b>	Select to use Standard Hours in the payroll
<b>Salary Pay</b>	Select to use Salary Pay in the payroll
<b>Payroll Defaults</b>	Select to use Payroll Defaults in the payroll
<b>Time Off Requests</b>	Select to use Time Off Requests in the payroll
<b>Time Clock Import Options section</b>	
<b>Time Clock Source File</b>	The source file of time clock data being used for the payroll.
<b>File Format</b>	The format of the source file
<b>Date Field Format</b>	The format of the date in the source file.
<b>Employee Synchronization</b>	Method by which employees are synced (EE Number, Last Name, and First Name).
<b>Organizational Synchronization</b>	Level of D/B/D/Ts used for the company.
<b>Job Codes</b>	Whether or not Job Codes are used in the imported file.
<b>Employee Pay rates</b>	Whether or not Employee Pay Rates are used in the imported file.
<b>Scheduled E/Ds</b>	Whether or not Scheduled E/Ds are refreshed in the imported data.
<b>Scheduled E/Ds on Additional Checks</b>	Rule on allowing Scheduled E/Ds on Additional Check.
<b>Create Check button</b>	Begins the process of creating payroll checks.

## Payrolls - Payroll Settings screen

Field / Button	Description
<b>Check Date</b>	The check date of the payroll
<b>Run Number</b>	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"
<b>Calendar options</b>	Choose whether to add a new payroll date, change a payroll date, or ignore the payroll calendar. Defaults to Ignore when selected.
<b>Payroll Type</b>	The type of payroll to be processed
<b>Blocks</b>	Select each item to be blocked on this payroll
<b>Actual Call In Date</b>	The date the payroll was called in
<b>Time Off Accrual</b>	Select to allow Time Off Accrual to show in the payroll
<b>Accruals Only</b>	Select to allow the payroll to Accrue time off, but not use show in the payroll.
<b>Payroll Check Comment</b>	The text to be displayed on checks.

## Payrolls - Batch Checks Screen

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

## Payrolls - Add Checks screen

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



## Payrolls - Check Lines - Basics tab

Field / Button	Description
<b>E/D Code column heading</b>	Earning or deduction for which an addition or subtraction is made
<b>Description column heading</b>	Description of the E/D Code added
<b>Hrs/pcs column heading</b>	Number of hours or pieces for which the earning or deduction represents
<b>Rate of Pay column heading</b>	Pay rate (if applicable) for hours added
<b>Amount column heading</b>	Dollar amount of the earning or deduction being added
<b>Rate # column heading</b>	Pay rate number if the employee has more than one job/pay rate at the company
<b>Basic tab</b>	
<b>Rate Number</b>	The primary rate number is #1. Others are subsequent numbers if the employee has two or three different positions with the company
<b>Rate of Pay</b>	Hourly pay rate for the rate number entered
<b>Agency</b>	Agency name if this is an agency check
<b>Hours/Pieces</b>	Number of hours or pieces the employee is expected to work/produce per pay period
<b>Piece</b>	Identify the piece if the employee is doing piecework
<b>State</b>	State in which the employee is employed
<b>Work Address</b>	Work address of the company
<b>SUI</b>	SUI amount the company pays per employee

## Payrolls - Check Lines - Labor Defaults tab

Field / Button	Description
<b>Labor Defaults tab</b>	
<b>Division</b>	Enter the Organization Level(s) with which the employee is associated
<b>Branch</b>	Enter the Organization Level(s) with which the employee is associated
<b>Department</b>	Enter the Organization Level(s) with which the employee is associated
<b>Team</b>	Enter the Organization Level(s) with which the employee is associated
<b>Job Code</b>	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.
<b>Shift</b>	Shift the employee works
<b>Line Item Begin Date</b>	Beginning date of the override
<b>Workers' Compensation</b>	Workers' Comp Code assigned to the Job associated with the claim.
<b>Line Item End Date</b>	End date for including the override

## Payrolls - Check Lines - Local Tax Overrides tab

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

## Payrolls - Manual Tax screen

Field / Button	Description
<b>Add States button</b>	Click to add states to override that are not already displayed. States displayed are what was set up on the <a href="#">Employee – States – Employee screen</a> .
<b>Add Locals button</b>	Click to add locals to override that are not already displayed. Locals displayed are what was set up on the <a href="#">Employee – Locals – Employee screen</a> in Evolution.
<b>Description</b>	Name of the tax
<b>Amount</b>	Dollar amount of the tax (only two decimal places allowed)
<b>Options section</b>	
<b>Calculate Override Taxes checkbox</b>	Default is selected
<b>Reciprocate SUI checkbox</b>	Default is selected
<b>Disable Shortfalls checkbox</b>	Default is unselected
<b>Note: *If all of the state / local taxes are already listed in the table, these buttons are disabled.</b>	

## Payrolls - Fed Overrides screen

Field / Button	Description
<b>Federal Type</b>	Type of federal tax to override
<b>Tax Frequency</b>	Frequency of tax payments
<b>Tax at Supplemental Rate</b>	Supplemental rate, if applicable
<b>Amount</b>	Dollar or percentage amount of the tax
<b>Blocks</b>	
<b>Additional tax</b>	Block the supplemental tax
<b>EE OASDI</b>	Block the employee OASDI
<b>EE Medicare</b>	Block the employee Medicare
<b>EE EIC</b>	Block the employee Earned Income Credit
<b>ER OASDI</b>	Block the employer OASDI
<b>ER Medicare</b>	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
<b>Time Clock Source File</b>	Identifies the source file of time clock data being used for the payroll.
<b>File Format</b>	Format of the source file
<b>Date Field Format</b>	Format of the date in the source file
<b>Employee Synchronization</b>	Method by which employees are synced (EE Number, Last Name, and First Name)
<b>Organizational Synchronization</b>	Level of D/B/D/Ts used for the company
<b>Job Codes</b>	Whether or not job codes are used in the imported file
<b>Employee Pay Rates</b>	Whether or not employee pay rates are used in the imported file.
<b>Scheduled E/Ds</b>	Whether or not Scheduled E/Ds are refreshed in the imported data.
<b>Schedule E/Ds on Additional Checks</b>	Rule on allowing Scheduled E/Ds on additional checks.
<b>Import button</b>	Begins the process of importing the time clock data.

## Payrolls - Calculation Results screen

Field / Button	Description
<b>E/D Code</b>	Scheduled earning or deduction code used in the payroll
<b>Description</b>	Describes the E/D code
<b>Hrs. /Pcs.</b>	Hours or Pieces if applicable
<b>Pay Rate</b>	Rate amount for the E/D
<b>Amount</b>	Total amount added or subtracted for the E/D
<b>Taxes Section</b>	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.
<b>Description</b>	Lists the taxable wages and taxes totals
<b>Amount</b>	Lists the total amounts of taxable wages and taxes
<b>Count</b>	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.

Report Name	Report #
Payroll Register By Co (S109)	109
Payroll Register (S109)	109
Earnings And Deductions (S181)	181
Delivery Label (S184)	184
Delivery Instructions (S187)	187
Tip Credit (S189)	189
Cover Letter (S193)	193
Direct Deposit (S211)	211
Check Reconciliation (S214)	214
Pension Works Report (S215)	215
401K Report (S215)	215
Workers Compensation (S217)	217
Taxable Wages For Payroll By Ck Date (S236)	236
Tax Report For Payroll (S247)	247
Portrait Input Worksheet (S262)	262

**Payroll Register By Co**  
Choose options for this report  
**Configure Report** →

Page 1 of 3  
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**  button to establish or edit the parameters for the report selected.

**Result:** The Report Generation screen opens.

Defined Reports Published Reports Ad-Hoc Reports

← Reports List Options for Payroll Register (RW)

Payroll Filter EE Filter Org Filter Misc Options Run Report


Select the date range to use for your report. All payrolls within your range will be selected. You can fine tune your selection by checking only the payrolls you want to include.

Starting Date 01/01/2015 Ending Date 12/14/2015 Include Apply

	Check Date	Run #	Processed Date	Status	Type
<input type="checkbox"/>	12/14/2015	44015		Pending	Regular
<input type="checkbox"/>	12/13/2015	1		Pending	Regular
<input type="checkbox"/>	12/13/2015	2		Pending	Regular
<input type="checkbox"/>	12/09/2015	1		Past Due	Regular
<input type="checkbox"/>	12/01/2015	1		Pending	Regular
<input type="checkbox"/>	11/25/2015	1		Past Due	Regular
<input type="checkbox"/>	11/11/2015	1	12/11/2015	Past Due	Regular
<input type="checkbox"/>	10/14/2015	1	12/11/2015	Past Due	Regular
<input type="checkbox"/>	09/30/2015	1		Past Due	Regular
<input type="checkbox"/>	09/16/2015	1		Past Due	Regular

Page 1 of 3 1 - 10 of 28 Items

- 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.

- Click the **Reports List**  button to return to the previous page listing the Defined Reports. Users can search for a specific report by using the **Search for Report** tool at the top of the table, or by using the filters as described in the Navigation section of this document.

Defined Reports Published Reports Ad Hoc Reports

Search For Report...

Report Name	Report #
Payroll Register By Co (S109)	109
Payroll Register (S109)	109
Earnings And Deductions (S181)	181
Delivery Label (S184)	184
Delivery Instructions (S187)	187
Tip Credit (S189)	189
Cover Letter (S193)	193
Direct Deposit (S211)	211
Check Reconciliation (S214)	214
Pension Works Report (S215)	215
401K Report (S215)	215
Workers Compensation (S217)	217
Taxable Wages For Payroll By Ck Date (S236)	236
Tax Report For Payroll (S247)	247
Portrait Input Worksheet (S262)	262

Page 1 of 3 1 - 15 of 32 Items

**Payroll Register By Co**

Choose options for this report

Configure Report →

Payroll Filter	EE Filter	Org Filter	Misc Options	Run Report
Select the date range to use for your report. All payrolls within your range will be selected. You can fine tune your selection by checking only the payrolls you want to include.				
Starting Date 01/01/2015	Ending Date 01/16/2015	Include All Payrolls	Apply	
Check Date	Run #	Processed Date	Status	Type
01/13/2015	1		Processed	Regular
				1 - 1 of 1 items

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

Defined Reports			
Published Reports		Ad-Hoc Reports	
Options for Payroll Register (RW)			
Payroll Filter	EE Filter	Org Filter	Misc Options
Run Report			
Select the organizational level that you want to use for this report. Fine tune by checking a specific level. If no selection is made, your results will include all organization levels for this company.			
Team			
Division	Branch	Department	Team
Div1	NY Branch	Department Name Field	
		Test 2nd Dept	Team2
	NH Branch		
	VT Branch		
	Branch 23	1	
	New Branch 01	Branch 1 Dept 114	
		DEPT 1	Team 1

8. Click the **Misc. Options** tab to update parameters specific to this report.  
This screen offers instructions for running the report, as well as grouping and sorting methods to choose from.



Defined Reports Published Reports Ad-Hoc Reports

← Reports List Options for Payroll Register (RW)

Payroll Filter EE Filter Org Filter **Misc Options** Run Report

Additional options available for this report:

<b>Parameters</b>	<input type="checkbox"/> Show only Summary for Multiple check dates <input type="checkbox"/> Show Home DBDT for each Employee <input checked="" type="checkbox"/> Include Memos in Totals <input checked="" type="checkbox"/> Include Pieces from Piecework in Totals <input checked="" type="checkbox"/> Break Employee Between Pages <input type="checkbox"/> Include Taxable Memos in Totals <input checked="" type="checkbox"/> Deductions as Taxes <input type="checkbox"/> Show Shift Differentials <input type="checkbox"/> Bold EE Name, Check Number, and Net Check <input checked="" type="checkbox"/> Hide SSN, State, Frequency, and Salary <input checked="" type="checkbox"/> Swap Check Date and Net Check <input checked="" type="checkbox"/> Show Employees with YTD Earnings <input type="checkbox"/> Show Cobra Credit	<b>Grouping &amp; Sorting</b> Group Level Department Group Type Summary Detail Group Sort Group Code Detail Sort Employee Last Name SUI Summarize SUI
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9. Click the **Run Report** tab to verify report settings.

Defined Reports Published Reports Ad-Hoc Reports

← Reports List Options for Payroll Register (RW)

Payroll Filter EE Filter Org Filter Misc Options **Run Report**

Depending on your filters and options, this report may take a long time to generate. If you run this report a task will be placed in the queue to generate it.  
You will find an entry in the [task queue](#) for your generated report. You can then view the report from the queue entry.


Your current report definition is set as follows:

**Date Range:** 12/14/2015-12/14/2015  
**Payrolls:** 1 Payroll(s) Selected.  
**Employees:** 8 Employee(s) Selected.  
**Organization:**

**With options set:**  
Include Memos in Totals  
Include Pieces from Piecework in Totals  
Break Employee Between Pages  
Deductions as Taxes  
Hide SSN, State, Frequency, and Salary  
etc...

**SUI:** Summarize SUI

Run this Report

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.

	Check Date	Run #	Check Period	Report #	Report Name	Type
<input checked="" type="checkbox"/>	08/31/2016	2	09/30/2018 - 10/06/2018	S257	Invoice (S257)	Report
<input type="checkbox"/>	08/31/2016	2	09/30/2018 - 10/06/2018	S2731	Inactive Employee Report 13	Report
<input type="checkbox"/>	08/31/2016	2	09/30/2018 - 10/06/2018	S2834	ACA Rule Of Parity Test	Report
<input type="checkbox"/>	08/31/2016	2	09/30/2018 - 10/06/2018	S348	GL Export	ASCIIFile
<input type="checkbox"/>	12/23/2015	1222	06/12/2016 - 07/29/2017	S1757	Check Pressure Seal Legal Moore (New) (S1757)	PRCheck
<input type="checkbox"/>	12/23/2015	1222	06/12/2016 - 07/29/2017	S257	Invoice (S257)	Report
<input type="checkbox"/>	12/23/2015	1222	06/12/2016 - 07/29/2017	S2731	Inactive Employee Report 13	Report
<input type="checkbox"/>	12/23/2015	1222	06/12/2016 - 07/29/2017	S2731	Inactive Employee Report 13	Report
<input type="checkbox"/>	12/23/2015	1222	06/12/2016 - 07/29/2017	S2731	Inactive Employee Report 13	Report
<input type="checkbox"/>	12/23/2015	1222	06/12/2016 - 07/29/2017	S2834	ACA Rule Of Parity Test	Report
<input type="checkbox"/>	12/23/2015	1222	06/12/2016 - 07/29/2017	S2834	ACA Rule Of Parity Test	Report
<input type="checkbox"/>	12/23/2015	1222	06/12/2016 - 07/29/2017	S2834	ACA Rule Of Parity Test	Report
<input type="checkbox"/>	12/23/2015	1222	06/12/2016 - 07/29/2017	S2834	ACA Rule Of Parity Test	Report
<input type="checkbox"/>	12/23/2015	1222	06/12/2016 - 07/29/2017	S348	GL Export	ASCIIFile
<input type="checkbox"/>	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.

The screenshot shows the 'Ad Hoc Reports' interface. At the top, there are tabs for 'Defined Reports' and 'Published Reports'. Below the title, there are icons for adding (+), saving (floppy disk), and deleting (X) reports. A search bar labeled 'Search for Report...' is present. A table lists three reports:

Report Name	Report #
Ad Hoc - Employee (S1134)	1134
Ad Hoc - Payroll (S1132)	1132
Employee Address Report (S1134)	1134

Below the table, it says '1 - 3 of 3 items'. To the right, under the heading 'Ad Hoc - Employee', there is a section 'Choose options for this report' with two buttons: 'Edit Report' and 'Run Report', both with right-pointing arrows.

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).

The screenshot shows the 'New Report' configuration screen. At the top, there are tabs for 'Defined Reports' and 'Published Reports'. Below the title, there are icons for adding (+), saving (floppy disk), and deleting (X) reports. A 'Reports List' button with a left-pointing arrow is visible. On the left side, there is a vertical label 'New Report'. The main form has two fields: 'Report Name \*' with the text 'New Report Name' and 'Select Adhoc Report Template' with a dropdown menu showing 'Ad Hoc - Company (S1153)'. A red box highlights the 'Configure Report' button with a right-pointing arrow.

6. Click the Configure Report button.

The screenshot shows the 'Ad Hoc Reports' interface with tabs for 'Defined Reports' and 'Published Reports'. The 'Ad Hoc Reports' tab is active, displaying a list of reports. The 'Options for BDazzled Company Test Report (S1153)' are shown, including a table of columns and a section for column properties.

Column ID	Column Title	Hidden	Size
COL1	Team Code	No	
COL2	Department	No	80

Column Properties:

- Column Type: Team
- Column Title: Team Code
- Column Size: [input field]
- ☐ Hidden Column
- Column Values (Select ONLY 1 Column value per column):
  - ☒ FIELD DISPLAY NAME
  - ☐ Address1
  - ☐ Address2
  - ☐ Billing Cl Bank Acct Nbr
  - ☐ City

Buttons at the bottom: Add Fields, Delete Fields, Move Up, Move Down, 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

1. Click the **Reports** menu to open.

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

The screenshot shows the 'Ad Hoc Reports' interface with tabs for 'Defined Reports' and 'Published Reports'. The 'Ad Hoc Reports' tab is active, displaying a list of reports. The 'Ad Hoc - Employee' report is selected, and the 'Edit Report' button is highlighted.

Report Name	Report #
Ad Hoc - Employee (S1134)	1134
Ad Hoc - Payroll (S1132)	1132
Employee Address Report (S1134)	1134

Buttons: Edit Report, Run Report.

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.

The screenshot shows the 'Ad Hoc Reports' interface. At the top, there are tabs for 'Defined Reports' and 'Published Reports'. Below the title, there are icons for adding, saving, and deleting reports. A search bar is present with the text 'Search for Report...'. A table lists three reports:

Report Name	Report #
Ad Hoc - Employee (S1134)	1134
Ad Hoc - Payroll (S1132)	1132
Employee Address Report (S1134)	1134

Below the table, it says '1 - 3 of 3 items'. To the right, under the heading 'Ad Hoc - Employee', there is a section 'Choose options for this report' with two buttons: 'Edit Report' and 'Run Report', each with a right-pointing arrow.

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.

The screenshot shows the 'Configure Report' screen for the 'Ad Hoc - Employee' report. It has four tabs: 'Columns', 'Employee Filter', 'Misc', and 'Run Report'. The 'Columns' tab is active. On the left, there is a 'List of Columns' section with a table:

Column ID	Column Title	Hidden	Size
COL1	Custom Employee Code	No	5
COL2	Last Name	No	10
COL3	First Name	No	1

Below the table are buttons for 'Add Fields', 'Delete Fields', 'Move Up', and 'Move Down'. On the right, there is a 'Column Property' section with fields for 'Column Type' (set to 'Employee'), 'Column Title' (set to 'Custom Employee Code'), 'Column Size' (set to '5'), and a checkbox for 'Hidden Column'. There is also a 'Print Text Instead of Abbreviation' checkbox and a 'Column Filter' field. Below these are 'Column Values' (1 column value per non-calculated column) with a list of options: 'Address1', 'Address2', 'Auto Labor Cl Ed Group', and 'Auto Pay Shift'. At the bottom right, there are 'Apply Changes' and 'Cancel Changes' buttons.

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

+ [icon] x

← Reports List Options for Ad Hoc - Employee

Columns Employee Filter Misc Run Report

Depending on your filters and options, this report may take a long time to generate. If you run this report a task will be placed in the queue to generate it. You will find an entry in the [task queue](#) for your generated report. You can then view the 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 : ,

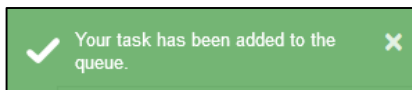
Qualifier : "

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.

**Note:** To create the report in Excel, save the file as an ASCII format and then convert it to Excel.

## 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
401(K) Report (S215)
ACA Eligibility Analysis Report (S2713)
ACA FTE Report (S2711)
ACA Rule Of Parity Test Report (S2834)
ACA Status Audit Report (S3085)
Birthday Report (S457)
Certified Payroll Report (S518)
Check Reconciliation Report (S214)
Check Stub Detail Report (S2590)
Compensation Detail Report (S601)
Cover Letter Report (S193)
Cover Letter With Tax Report (S1082)
Direct Deposit Report (S211)
Employee Audit Report (S1075)
Employee Change Listing Report (S539)
Employee Change Listing Report (New) (S1075)
Employee HR Date Report (S457)
Employee Profiles Report (S263)
GL Export Report (S348)
General Ledger Report (S183)
HR Alert (S759)
HR EEO-1 Report (S455)
HR EEO-1 Section D Employment Data Report (S1537)
HR EEO-4 Headcount Report (S566)
HR EEO Ethnic ID Report (S467)

Report
HR EEO Standard Report (S450)
HR Emergency Listing by Emergency Contact Report (S452)
HR Employee Review Report (S850)
HR Mailing Labels (S449)
HR OSHA 300 Report (S462)
HR OSHA 300A Report (S567)
HR OSHA 301 Report (S451)
HR OSHA Injury Report By Cost (465)
HR OSHA Injury Report by Home Dept. (S453)
HR OSHA Report By Body Part Code (S466)
HR OSHA Report by Injury Code (S464)
HR OSHA Report By Status (S568)
HR Personnel Report (S463)
HR Veterans Report (S714)
HR Workers Compensation Code Report (S454)
Inactive Employees Report (S2731)
Individual Earnings Report (S431)
Input Worksheet (S351)
Job Costing Report (S229)
Labor Distribution Report (New) (S1077)
New Hire Pending Report (S292)
New Job Costing Report (S554)
Payroll Register Report (S109)
Period Summary Report (S404)



Report
Personnel Register (S344)
Portrait Input Worksheet (S262)
Tax Notices Report (S341)
Tax Report for Payroll (S247)
Taxable Wages for Payroll Report (S236)

Report
Time Off Register Report with Hours (S920)
Workers' Compensation Report (S217)

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

## Reports - Published Reports

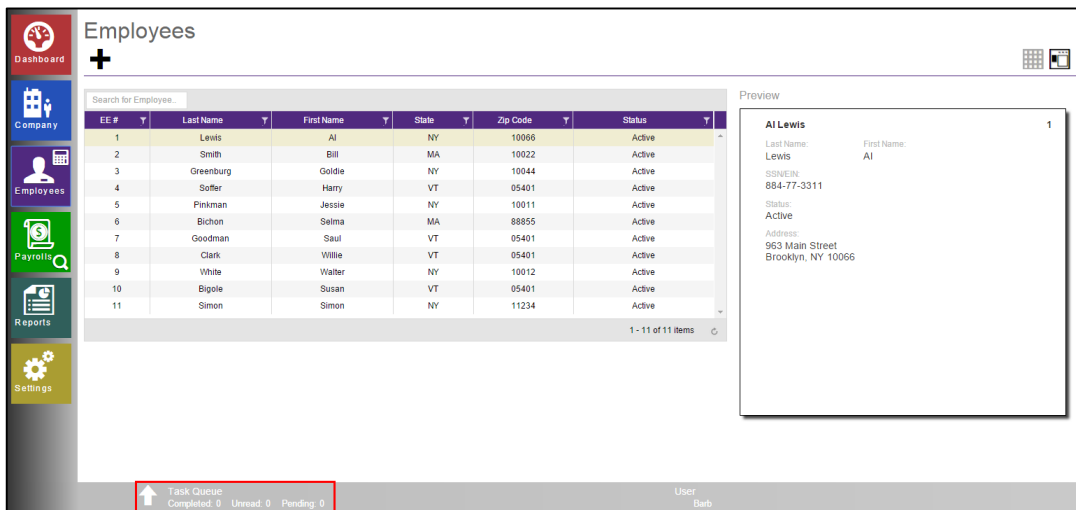
Column Name	Description	Example
<b>Check Date</b>	The date of the payroll from which the report was generated. For Tax Returns, this is the last date entered on the tax return screen when tax returns are processed.	1/20/2015 – Check Date 12/31/2014 – Tax Return Date
<b>Run #</b>	The payroll run from which the report was created. Tax Returns will show a run number of 0	1, 2, 3, etc... 0
<b>Check Period</b>	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
<b>Report #</b>	The Evolution report number for this report.	S193, S257, S356, etc....
<b>Report Name</b>	The name of the report or tax return.	Cover Letter, SUI Tax Wages by Quarter, etc...
<b>Type</b>	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.



The screenshot shows the Evolution Payroll application interface. On the left is a navigation sidebar with icons for Dashboard, Company, Employees, Payroll, Reports, and Settings. The main area is titled "Employees" and contains a table with columns: EE #, Last Name, First Name, State, Zip Code, and Status. The table lists 11 employees. To the right of the table is a "Preview" window showing details for "Al Lewis", including Last Name, First Name, SSN/EIN, Status, and Address. At the bottom of the application, a "Task Queue" notification bar is visible, showing "Completed: 0", "Unread: 0", and "Pending: 0". A red box highlights the "Task Queue" icon and text in the bottom left corner of the application window.

EE #	Last Name	First Name	State	Zip Code	Status
1	Lewis	Al	NY	10066	Active
2	Smith	Bill	MA	10022	Active
3	Greenburg	Goldie	NY	10044	Active
4	Softer	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

Preview

**Al Lewis**

Last Name: Lewis First Name: Al

SSN/EIN: 884-77-3311

Status: Active

Address: 963 Main Street  
Brooklyn, NY 10066

Task Queue  
Completed: 0 Unread: 0 Pending: 0

**My Task Queue** Logged in as: Sally | [Settings](#) | [Hide](#)

Search for Task...

Run Report ID: 223  
Direct Deposit #211  
● **Finished Successfully** · Today 4:58 PM

Run Report ID: 222  
Cover Letter #193  
● **Finished Successfully** · Today 4:52 PM

Run Report ID: 221  
Payroll Register #109  
● **Finished Successfully** · Today 4:41 PM

Preprocess Payrolls ID: 220  
WEB1150 Pr:4/28/2016 - 1  
● **Finished Successfully** · Today 4:27 PM

Preprocess Payrolls ID: 219  
WEB1150 Pr:4/28/2016 - 1  
● **Finished Successfully** · Today 4:25 PM

Preprocess Payrolls ID: 218  
0001A Pr:6/8/2016 - 1  
● **Finished with Exceptions** · Today 4:18 PM

Process Payrolls ID: 217  
0001A Pr:5/25/2016 - 1  
● **Finished with Exceptions** · Today 4:13 PM

Results Log

CO# WEB1150 . Cover Letter #193

Download

page 1 of 1

**#WEB1150 D&L Services (HCM)**

CO# WEB1150 . Cover Letter #193	
Check Date :	05/19/2016-1
Period Range :	05/08/2016 TO 05/14/2016
Week Number :	Week #20

I am the cover letter notes. There is quite a lot of room here.  
Have a nice day!

**Payroll Totals:**

	# Checks	
Total Regular Checks	3	0.00
Total Direct Deposits	12	0.00
Total Manual Checks	0	0.00
Total 3rd Party Checks	0	0.00
Total Void Checks	0	0.00
Total COBRA Checks	0	0.00
<b>Total Net Payroll</b>	<b>11 Items</b>	<b>0.00</b>
Total Billing Impound		39.23
Total Agency Checks	2	238.50
Total Agency Checks DD	0	0.00
Total Agency Checks Void	0	0.00
Total Tax Deposit Checks		Tax deposit to be made by iSystems
<b>Sum of Checks</b>		<b>277.73</b>
<b>Total of Checks Printed</b>	<b>13 Items</b>	
Total Tax Liability		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 (\$193)*. 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.

**My Task Queue** Hide

ID	Task	Status	Last Update	Summary	Current State
6924395	Process Payrolls	❗ Finished with Exceptions	01/14/2015 4:09PM	BDazz1 Pr:1/19/2015-1	Finished
6924391	Preprocess Payrolls	✅ Finished Successfully	01/14/2015 4:08PM	BDazz1 Pr:1/19/2015-1	Finished
6924382	Run Report	✅ Finished Successfully	01/14/2015 4:04PM	BDazz1, Payroll Register	Finished
6924376	Run Report	✅ Finished Successfully	01/14/2015 4:02PM	BDazz1, Workers' Compensation	Finished
6919790	Preprocess Payrolls	✅ Finished Successfully	01/12/2015 1:43PM	BDazz1 Pr:1/12/2015 - 2	Finished

Page 1 of 2 1 - 5 of 10 items

---

**Task: Process Payrolls** Save Print Finished with Exceptions 01/14/2015 4:09PM

BDazz1 Pr:1/19/2015-1

Results Exceptions Log

```

Delivery method is not setup correctly
date/time      : 2015-01-14, 10:09:37, 77ms
computer name  : INLPWA03
user name     : SYSTEM <admin>
operating system : Windows NT New build 9200
system language : English
system up time : 53 days 17 hours
program up time : 1 day 17 hours
processors     : 16x Intel(R) Xeon(R) CPU X5690 @ 3.47GHz
physical memory : 4504/8191 MB (free/total)
free disk space : (C:) 15.27 GB
display mode   : 1024x768, 32 bit
process id     : 573c
allocated memory : 269.00 MB
executable     : EvRequestBroker.exe
exec. date/time : 2015-01-08 09:40
version        : 10.7.0.11
madExcept version : 3.0b
callstack oro  : $f47bf0f2, $06942006, $4ca2899e
exception number : 2790
exception class : EInconsistentData
exception message : Delivery method is not setup correctly.
  
```

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

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

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

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

## 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.