

Evolution<sup>®</sup> HCM  
by ASURE SOFTWARE



# Evolution Payroll



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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

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.

### 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+

## Third Party Browser Extensions

**Important:** The use of third party browser extensions is prohibited when using Evolution Payroll. See the table below to learn how to disable extensions for your browser.

Browser	Instructions for disabling extensions
Google Chrome	<ul style="list-style-type: none"> <li>Click the menu button  in the toolbar.</li> <li>Select Settings.</li> <li>Click Extensions in the far left.</li> <li>On the screen that opens, deselect any checkboxes that are marked  Enabled</li> <li>Restart the browser.</li> </ul>
Mozilla / Firefox	<ul style="list-style-type: none"> <li>Click the menu  button in the toolbar.</li> <li>Select Add-ons.</li> <li>Click Extensions in the far left.</li> <li>Select the Add-on/Extension you wish to remove.</li> <li>Click the  button.</li> <li>Restart the browser.</li> </ul>
Internet Explorer	<ul style="list-style-type: none"> <li>Click the Settings  button in the toolbar.</li> <li>Select <b>Manage Add-ons</b></li> <li>Select <b>Toolbars and Extensions</b> in the far left.</li> <li>The Manage Add-ons screen opens.</li> <li>Select an add-on in the grid, and click the <b>Disable</b> button if available.</li> <li>Restart the browser.</li> </ul>
Safari	<ul style="list-style-type: none"> <li>Go to the Safari menu.</li> <li>Select <b>Extensions</b></li> <li>Select an extension from the list</li> <li>Deselect the <b>Enable</b> checkbox.</li> <li>Restart the browser</li> </ul>

## Security Settings

Access to Evolution Payroll is granted in Evolution Classic. Users may be granted access to as many or as few menus and functions in Evolution Classic 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.

- a. Go to the Admin - Security – Users (or Groups) screen, and select the user.
- b. 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.
- c. Click the black **plus sign** next to Employee to open related topics
- d. 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:

- a. 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.
- b. 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.
- c. 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 Classic. 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 unsuccessful login attempts will lock the account (forcing the user to answer the security questions)
- 3 unsuccessful 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 unsuccessful login attempts will lock the account (forcing the user to answer security questions)
- 3 incorrect 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 unsuccessful login attempts will block the account

In addition to establishing the level of enhanced security, other security considerations must be set on this screen.

Field / Button	Description
<b>Password Duration</b>	How often passwords are required to be changed
<b>Minimum Password Length</b>	Minimum number of characters the password must contain
<b>Enforce Mixed Password</b>	New passwords must contain at least one alpha, one numeric, and one special character
<b>Send Screenshot with Error</b>	The system automatically sends a screen print when an error message is received.

The screenshot shows the 'Security' settings in the Evolution HCM application. The 'Security' section is highlighted with a red box. It contains the following fields and options:

- Password Duration:** 00.00 Days
- Enhanced Security:** Medium
- Minimum Password Length:** 1
- Enforce Mixed Password:** ☐
- Send Screenshot With Error:** ☒

Other visible settings include:

- Default Check Format:** Pressure Seal Letter Greatland (New)
- Misc Check Format:** Pressure Seal Letter Greatland (New)
- Auto Save:** 3 Mins
- AR Export Directory:** [Empty field]
- MICR Vertical Adjustment:** 0
- Payroll Notification E-Mail:** [Empty field]
- EFTPS Bank Format:** ☒ Anexsys, ☐ Bank of America, ☒ Batch Provider
- Use PreNote:** ☒ Yes, ☐ No
- In Prenote Days:** 5
- Prohibit Offline:** ☐
- Bank Check:** ☒ Wells Fargo, ☐ Citibank, ☐ Wells Fargo/Keybank, ☐ Wells Cashiers, ☐ BBT, ☐ Union Bank of California, ☐ User defined
- Workers Comp Impound Type:** ACH
- Block DD Impound Type changes:** ☐ Yes, ☒ No
- Total ACH File Amount:** 5,000,000.00
- Total ACH File Limitations:** N/A
- Tax Exception Impound Type:** Wire Transfer
- Tax Payment Client:** [Empty field]
- Block Negative Checks From Trust:** ☐
- TQA Descriptions on Check:** ☐
- Days Prior To Check Date for Backdate:** [Empty field]

Once security requirements have been established in Evolution Classic,

1. Open a Web browser and enter the URL provided by Asure Software.
2. The first time a user logs in, enter the Username and Password assigned to them by the service bureau.
3. Click **Sign In**.

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

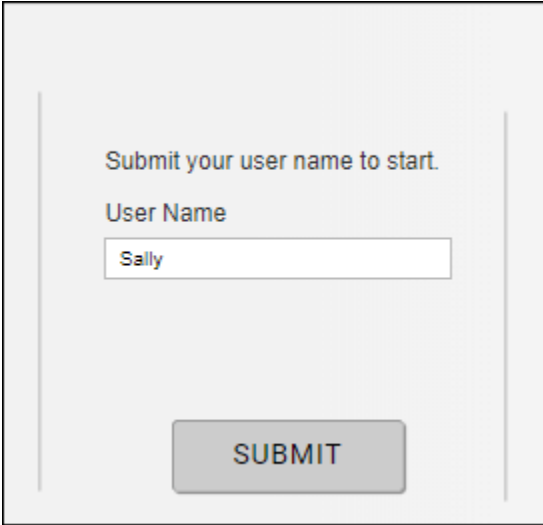
4. Click **OK**.
5. Select Questions 1, 2, and 3 from the dropdown lists and provide answers to the questions.
6. Click **Submit**.
7. If the Enhanced Security field in Evolution Classic has either a **medium** or **high** value, the user will be prompted to create and answer two additional security questions, which will be asked each time the user logs in.
8. **Result:** The Dashboard opens.

## Forgotten Password

If the user forgets their password,

1. Click **I forgot my password** on the login screen.

**Result:** A new screen opens requiring the user to enter their username and click **Submit**.



The user is asked to answer three security questions previously established.

The screenshot shows a login interface with two main sections: 'Secure User Login' and 'Forgot Password'. The 'Secure User Login' section prompts the user to 'Submit your user name to start.' and provides a text input field for 'User Name' containing the text 'Sally'. The 'Forgot Password' section prompts the user to 'Provide Security Validation' and 'Answer these questions to verify your identity'. It contains three text input fields for security questions: 'What was your last name?' (se), 'What is your school name?' (se), and 'What is your home town?' (se). A 'SUBMIT' button is located at the bottom right of the 'Forgot Password' section.

2. Click **Submit**.

**Note:** If the security questions are answered incorrectly three times, the user will get a message that the account is blocked, and instruct them to contact their service bureau

If an account becomes blocked and is then unblocked by Admin, user must redefine questions/answers upon next login.



## Account Settings

Once a user has logged in, s/he can change their password and/or their security questions at any time by clicking the arrow next to their name in the upper right corner of the screen.

The screenshot shows the 'Account Settings' interface. It features two dropdown menus at the top, both labeled 'BDazz1 - BDazzled Design Ltd.'. Below these, there is a large empty rectangular area. In the bottom right corner of this area, there is a dropdown menu showing the name 'Barb' with a downward arrow, which is highlighted with a red rectangular box.

Click Settings to open the Password and Security screen, on which changes can be made.

Settings


**PERSONAL SETTINGS**

**AGENDA**

### Password & Security

To make changes to your security questions or password, you must enter your current password.

Current Password \*

Required 

Change Password

Minimum length must not be less than 1 characters

New Password \*

Required

Confirm Password \*

Required

Change General Security Questions

We'll use these to verify your identity if you forget your password and can't log in.

Question 1 \*

What was your childhood nickname? ▼

Answer 1 \*

Required

Question 2 \*

What is your father's middle name? ▼

Answer 2 \*

Required

Question 3 \*

What is your grandmother's first name? ▼

Answer 3 \*

Required

After any changes, the Save button at the top of the screen becomes active. Click to save changes.

## Terms of Use

Service bureaus can define the Terms of Use for their internal and external users. These Terms of Use are presented when users first log in, after the Terms of User are entered (or changed) on the [SB Admin - Service Bureau - Terms of Use tab](#).

When users log in and see the Terms of Use, they must accept the terms to use Evolution Payroll. Once accepted, the Terms of Use are not presented again unless a change is made by the service bureau to the terms. To accept the Terms of Use, click the **Accept** button.

- New users are presented with the Terms of Use after the user has selected three security questions and answers.
- Existing users will see the Terms of Use upon initial login or if the Terms of Use have changed.

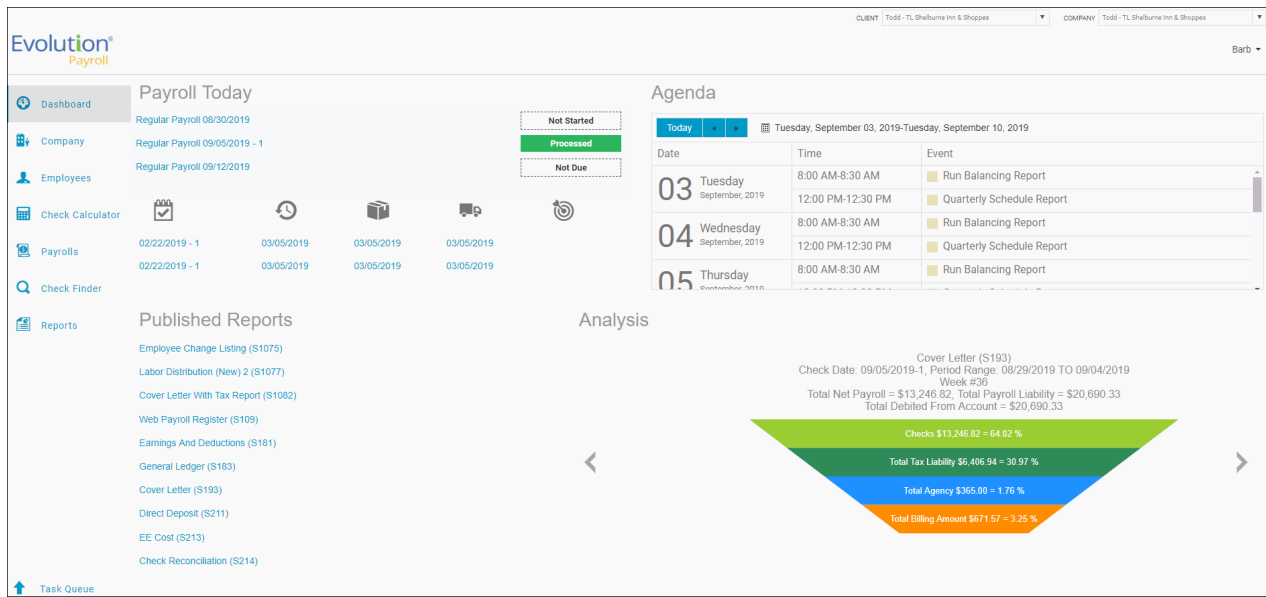
**Note:** If the service bureau has not entered anything in the Terms of Use tab, nothing needs to be accepted by the users.

When the user accepts, the Dashboard screen opens.



# The Dashboard

Information on the Evolution Payroll Dashboard is laid out in sections, or tiles, from which users can navigate to the information selected. Dashboard functionality is covered in more detail later in this guide.



## Header

In the Header at the top of the screen, far left, is the company's logo.

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.

**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.

### Payroll Today

[Regular Payroll 08/30/2019](#)

Not Started

[Regular Payroll 09/05/2019 - 1](#)

Processed

[Regular Payroll 09/12/2019](#)

Not Due

<a href="#">02/22/2019 - 1</a>	<a href="#">03/05/2019</a>	<a href="#">03/05/2019</a>	<a href="#">03/05/2019</a>	
<a href="#">02/22/2019 - 1</a>	<a href="#">03/05/2019</a>	<a href="#">03/05/2019</a>	<a href="#">03/05/2019</a>	

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 on the Dashboard, 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 in Evolution Classic, 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>Tuesday, September 03, 2019-Tuesday, September 10, 2019</div> </div> </div>		
Date	Time	Event
03 Tuesday September, 2019	8:00 AM-8:30 AM	Run Balancing Report
	12:00 PM-12:30 PM	Quarterly Schedule Report
04 Wednesday September, 2019	8:00 AM-8:30 AM	Run Balancing Report
	12:00 PM-12:30 PM	Quarterly Schedule Report
05 Thursday September, 2019	8:00 AM-8:30 AM	Run Balancing Report

## 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.

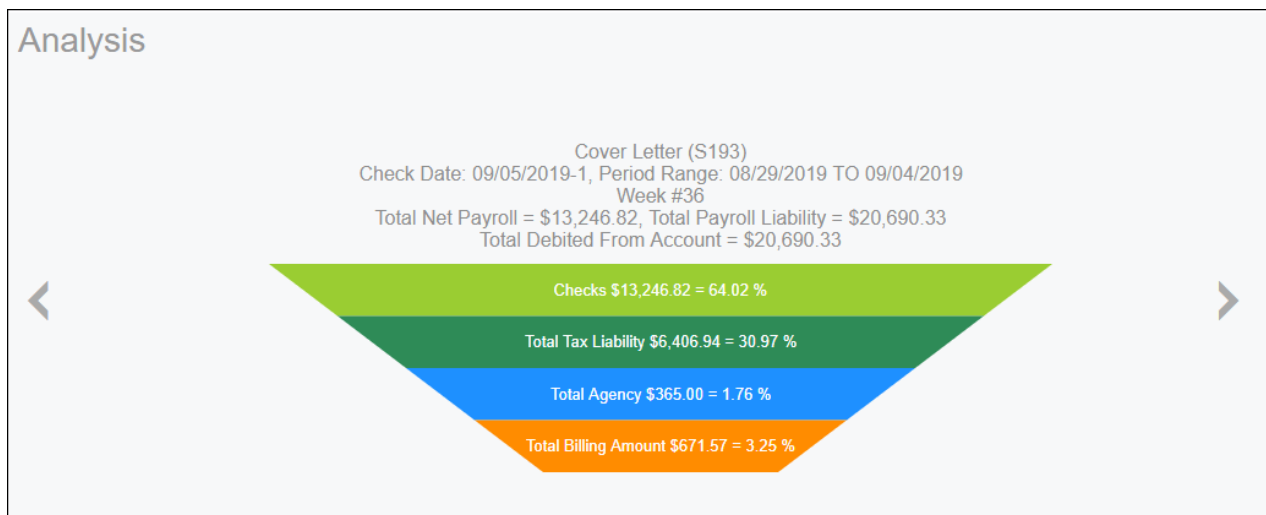
Published Reports
<a href="#">Employee Change Listing (S1075)</a>
<a href="#">Labor Distribution (New) 2 (S1077)</a>
<a href="#">Cover Letter With Tax Report (S1082)</a>
<a href="#">Web Payroll Register (S109)</a>
<a href="#">Earnings And Deductions (S181)</a>
<a href="#">General Ledger (S183)</a>
<a href="#">Cover Letter (S193)</a>
<a href="#">Direct Deposit (S211)</a>
<a href="#">EE Cost (S213)</a>
<a href="#">Check Reconciliation (S214)</a>

## Analysis

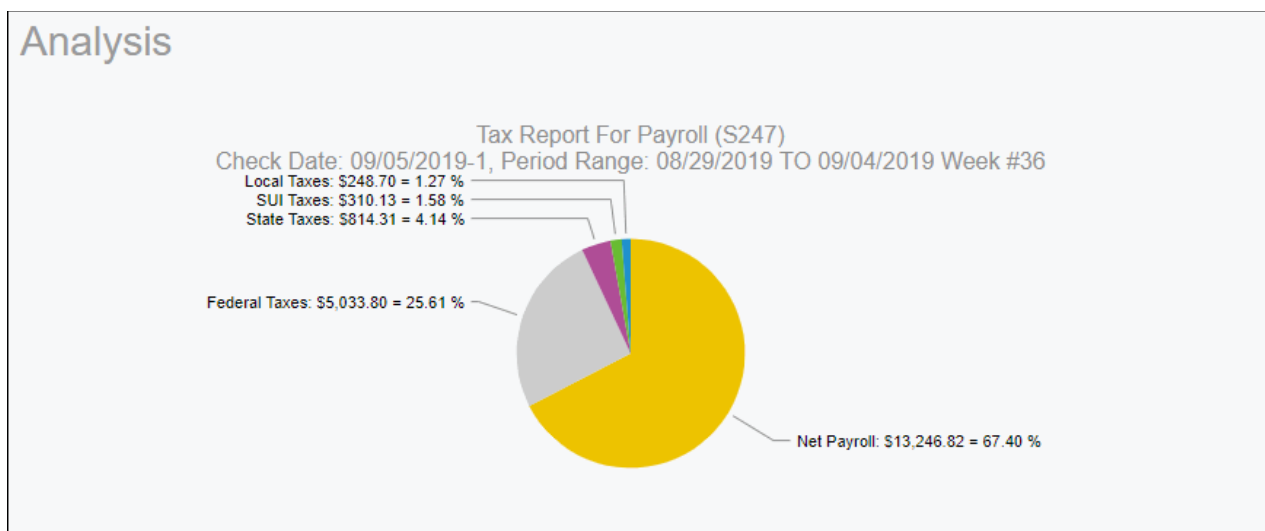
The tile on the bottom right of the Dashboard screen displays a graphical representation of the *Cover Letter Report (S193)* and *Tax Report for Payroll (S247)* reports. Users can click the left  or right  arrow to scroll to the next view.

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 Classic, 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**.

The screenshot displays the 'Setup Reports' interface in Evolution HCM. It is divided into three main sections: 'Report', 'Payroll Processing Print Settings', and 'Options'.

- Report Section:**
  - Report \***: A dropdown menu showing 'Cover Letter [S193]'.
  - Report Print Name \***: A text field containing 'Cover Letter'.
  - Metadata:** A list showing details like '#Name: Cover Letter', '#Ticket:', '#Author: Dimitry Shapovalov', '#Date:', and '#Description: This report is the cover letter'.
- Payroll Processing Print Settings Section:**
  - Print Frequency \***: A dropdown menu set to 'Every Scheduled Pay' (highlighted with a red box).
  - Priority to Print \***: A numeric spinner set to '5'.
  - Week Number**: A dropdown menu.
  - Month**: A dropdown menu.
  - Number of Copies \***: A numeric spinner set to '1'.
  - Summarize** and **Duplexing**: Unchecked checkboxes.
- Options Section:**
  - Output ASCII file name**: A text field with a browse button ('...').
  - Add to existing file**: An unchecked checkbox.
  - Favorite**, **Hide for Remotes**, and **Print with Adjustment Payrolls Only**: Unchecked checkboxes.
  - Display on Dashboard**: A checked checkbox (highlighted with a red box).
  - Override Report Mail Box**: A dropdown menu.
  - Buttons:** 'Report Parameters' and '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.

## 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 in the Menu bar, or
2. Click the Tile titles

The screenshot displays the Evolution Payroll dashboard. At the top right, there are dropdown menus for 'CLIENT' (Blast1 - Blastco Design Ltd) and 'COMPANY' (Blast1 - Blastco Design Ltd). The main dashboard area is divided into several sections:

- Dashboard:** Includes a 'Payroll Today' tile (highlighted with a red box) and a 'Regular Payroll 08/30/2019' tile.
- Company:** Includes a 'Regular Payroll 09/05/2019 - 1' tile.
- Employees:** Includes a 'Regular Payroll 09/12/2019' tile.
- Check Calculator:** Includes a '02/22/2019 - 1' tile.
- Payrolls:** Includes a '02/22/2019 - 1' tile.
- Check Finder:** Includes a '02/22/2019 - 1' tile.
- Reports:** Includes a 'Published Reports' section with links to various reports like 'Employee Change Listing (S1075)', 'Labor Distribution (New) 2 (S1077)', 'Cover Letter With Tax Report (S1082)', 'Web Payroll Register (S109)', 'Earnings And Deductions (S181)', 'General Ledger (S183)', 'Cover Letter (S193)', 'Direct Deposit (S211)', 'EE Cost (S213)', and 'Check Reconciliation (S214)'.

On the right side, there is an 'Agenda' section showing a calendar for Tuesday, September 03, 2019, to Tuesday, September 10, 2019. It lists events such as 'Run Balancing Report' and 'Quarterly Schedule Report'.

Below the agenda is an 'Analysis' section showing a summary of payroll data for the period 09/05/2019-1, Period Range: 08/29/2019 TO 09/04/2019, Week #39. The summary includes:

- Cover Letter (S193)
- Check Date: 09/05/2019-1, Period Range: 08/29/2019 TO 09/04/2019, Week #39
- Total Net Payroll = \$13,246.82, Total Payroll Liability = \$20,690.33
- Total Debited From Account = \$20,690.33
- Checks \$13,246.82 = 64.02 %
- Total Tax Liability \$5,406.94 = 30.97 %
- Total Agency \$365.00 = 1.76 %
- Total Billing Amount \$671.57 = 3.25 %

## 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
2	Glazer	JoAnne	*****6126	NY	01234	Active
3	Flax	Ron	*****4455	NY	12345	Active
4	Carlow	Jane	*****5555	CA	98765	Active
5	Town	Robert	*****9987	PA	19231	Active
6	Miller	Bernie	*****3152	MA	01701	Active
7	Milla	Linda	*****9561	MA	01701	Active
8	Carlow	Harriet	*****9879	VT	05446	Active
9	Zerlea	Stephen	*****1236	VT	05495	Active
10	Wolf	Naomi	*****3459	VT	05495	Active
11	Salacie	Richard	*****6678	KY	42398	Active
12	Hard	Eric	*****5543	NY	01701	Active
20	Cesucoli	Kristen	*****3156	MA	01701	Active
21	Appelman	Lori	*****3134	MD	20817	Active
25	Corte	Barbara	*****5641	VT	05495	Active
30	Leake	Roger	*****8554	NY	01701	Active

1 - 15 of 18 items

Preview

JoAnne Glazer

2

Last Name: Glazer

First Name: JoAnne

SSN/EIN: \*\*\*\*\*6126

Status: Active

Phone: 802-877-9136

Email: jglazer@bdazzled.com

Address: 9 Spring Rd  
Williston, NY 01234

Employees

+

🗑️

🔍

🕒

📄

📄

2 - Glazer, JoAnne

2 - Glazer, JoAnne

PERSONAL

LABOR DEFAULTS

ACA

PAY

FEDERAL

STATE

LOCAL

CHILD SUPPORT

DIRECT DEPOSIT

SCHEDULED E/DS

DELIVERY

TIME OFF ACCRUAL

EMPLOYEE PORTAL

NOTES

Demographics

SSN \* EIN \*

789-45-6126

W-2

EE Code \*

2

Time Clock #

First Name \*

JoAnne

Last Name \*

Glazer

Address 1 \*

9 Spring Rd

Address 2

City \*

Williston

State \*

NY

Zip Code \*

01234

County

Buffalo

Phone

(802) 877-9136

Extension

Email

jglazer@bdazzled.com

Birth Date

07/28/1957

Gender \*

Female

Ethnicity \*

White

Tribe

Hire Status

Status \*

Active

Current Hire Date \*

07/01/2006

Original Hire Date

Termination Date

Refire Eligible \*

Yes

Employee Type \*

Full Time

On Call From

On Call To

Benefits

Healthcare Coverage \*

No ER Paid ins/Not Eligible

Dependent Coverage \*

Employee Dependents

Benefit Eligible

09/01/2006

Group Term Policy

OTL Hours


OTL Rate

## 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.

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	
2	Glazer	JoAnne	***-**-6126	NY		Active	
3	Flax	Ron	***-**-4455	NY		Active	
4	Carlow	Jane	***-**-5555	CA		Active	
5	Timm	Robert	***-**-3987	PA		Active	
6	Miller	Renee	***-**-3152	MA		Active	
7	Mills	Linda	***-**-9581	MA		Active	
8	Carlow	Harriet	***-**-3879	VT		Active	
9	Zenlea	Stephen	***-**-1236	VT		Active	
10	Wolf	Naomi	***-**-3456	VT		Active	
11	Salacie	Richard	***-**-6678	KY	42398	Active	
12	Hard	Eric	***-**-6543	NY	01701	Active	
20	Casuoci	Kristen	***-**-3156	MA	01701	Active	
21	Appleman	Lori	***-**-5134	MD	20817	Active	
25	Conte	Barbara	***-**-5641	VT	05495	Active	
30	Leake	Roger	***-**-8654	NY	01701	Active	

Show items with value that:

Is equal to

And

Is equal to

FILTER CLEAR

Page 1 of 2

1 - 15 of 18 items

**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.

**Column Re-ordering** – click and drag the column heading to re-order the data – for example, click and drag the First Name column to view before the Last Name column.



## 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.

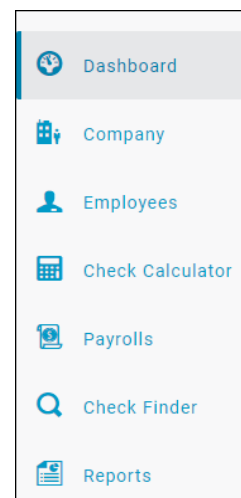
Keyboard Key/s	Description
Press the ALT key + N	Add new employee / Add new payroll
Press the CTRL key + S	Save employee / Save payroll
Press the CTRL key + E	Export grid to Excel (this only works in Grid view)
Press ALT + Insert	Insert / add a record (row) into a table (instead of clicking the Add button.)
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 are a few terms used in Evolution Payroll that warrant introduction. A few of the new terms you will see in this document as well as in the application are described below.

### Menu Bar

List of Menus (links) on the left-hand side of the screens. Click the links to be brought to the main screen of the menu selected.



## Menu Items

Within some of the menus (Company and Employee) there are sub-menus on the left side of the screen with menu items that pertain to the topics of those menu screens. Our example is from the Employees menu.

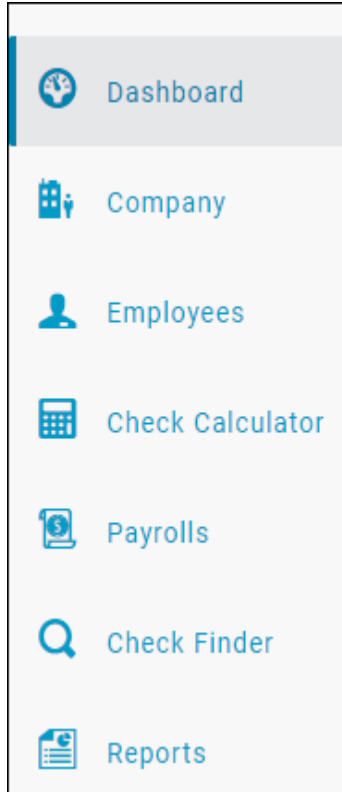
PERSONAL
LABOR DEFAULTS
ACA
PAY
FEDERAL
STATE
LOCAL
CHILD SUPPORT
DIRECT DEPOSIT
SCHEDULED E/DS
DELIVERY
TIME OFF ACCRUAL
EMPLOYEE PORTAL
NOTES

## Fly-out tabs

There are tabs you will see in the application that open from the sides, called Fly-out tabs. These will be discussed in detail within the Evolution Payroll modules.

## 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.



The Evolution Payroll Dashboard Information 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 Classic. The data in the Company menu is currently read-only however it can be edited in Evolution Classic.

Employee information can be added, viewed, and edited in the Employees menu.

Opens the Check Calculator screen on which non-payroll employee checks can be calculated from Gross-to-Net or Net-to-Gross.

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 Check Finder menu link opens a Check Finder screen on which parameters are entered to search for a specific check by check number or employee code / name within a particular date range, and status.

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

<b>BASICS</b>	Name BDazzled Design Ltd.		Company Code BDazz1	
<b>ORGANIZATIONAL LEVELS</b>	D.B.A. 		EIN 000000000	
<b>ED CODES</b>	Address 1 11 Spring Lane		Customer Service Team Customer Service	
<b>STATES</b>	Address 2 		Customer Service Representative Conte	
PREVIOUS	City Williston	State VT	Zip Code 05495	Email barbara.conte@asuresoftware.com
NEXT	Phone 	Fax 	Bank Accounts	
	Legal Address		Payroll 123456789	
	Name Linda Mills		Tax 123456789	
	Address 1 7 Spring Lane		Workers' Compensation 123456789	
	Address 2 		Billing 123456789	
	City Williston	State VT	Zip Code 05495	Direct Deposit 123456789

### 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.

Company

BASICS

ORGANIZATIONAL LEVELS

ED CODES

STATES

PREVIOUS

NEXT

BDazzled Design Retail Division

BDazzled Design Retail - Williston

BDazzled Design Sales-Marketing

BDazzled Design Retail New Eng

BDazzled Design Mid-Atlantic

BDazzled Design Retail - Burlington

BDazzled Design Retail Client Services

BDazzled Design Retail Orders

Details for: BDazzled Design Retail Division

Number	100
Description	BDazzled Design Retail Division
Home State	VT
Override EE Rate #	
Override Pay Rate	
Payroll Bank Account #	123456789
Tax Bank Account #	635435163
Billing Bank Account #	354987433
DD Bank Account #	123456789

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.

Company

BASICS

ORGANIZATIONAL LEVELS

ED CODES

STATES

PREVIOUS

NEXT

Code	Description	Rate	Rate #	OT Rate Multipli...	Start Date	Default	Amount	Percentage
08	Wyoming Workers Comp							
D01	401(k) EE Contribution							
D02	Health Insurance							
D03	1099-R							
D04	Garnishment							
D05	Child Support							28.00
D055	Child Support 4							
D06	Child Support 2							28.00
D07	Child Support 3							28.00
D08	Direct Deposit							
D09	Direct Deposit Net							
D10	HSA Family							
D101	Percent of State Taxable Wages							
D11	HSA Single							
D12	HSA Catch up							
D13	ER HSA Single							
D14	ER HSA Family							
D15	ER Employee Taxable HSA Family							
D16	ER Employee Taxable HSA Single							
D17	Dental Insurance							
D18	Vision Plan							
D19	Standard Deduction							
D22	Levy							
D31	Percent of State Taxable Wages							
D33	Flexible Spending Account							

## Company - States screen

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

Company

BASICS

ORGANIZATIONAL LEVELS

ED CODES

STATES

PREVIOUS

NEXT

Description ▲	Code ▼
Alaska	AK
California	CA
Kentucky	KY
Maryland	MD
Massachusetts	MA
New Mexico	NM
New York	NY
Pennsylvania	PA
Puerto Rico	PR
Vermont	VT
Washington	WA

11 items

Setting for: Massachusetts - MA

EIN  
123456789

SDI EIN  
123456789

☐ State Tax Exempt

☐ SUI Exempt

SUI Rates

Tax Name	Rate
MA-SUI	0.0283
MA-Workforce Development	0.0006
MA-Healthcare	0.0048

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.

Field / Button	Description
<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.
Field / Button	Description
<b>Workers' Compensation</b>	The Workers' Compensation bank account number.
<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.



Field / Button	Description
<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
<b>Description</b>	The state name.
<b>Code</b>	The state code.
<b>EIN</b>	The Employer Identification Number.
<b>SDI EIN</b>	Employer Identification number used when paying State Disability Insurance in the state
<b>State Tax Exempt</b>	Whether the company is exempt from paying state tax in this state.
<b>SUI Exempt</b>	Whether the company is exempt from paying SUI for this state.
<b>SUI Rates section</b>	State Unemployment Insurance rates that the company pays based on the states in which it is set up to do business.
<b>Tax Name</b>	The SUI tax name.
<b>Rate</b>	The rate of the SUI tax.
<b>Local Rates section</b>	Local rates that the company pays based on the states in which it is set up to do business.
<b>Tax Name</b>	Name of the local tax
<b>Rate</b>	The local tax rate.

# The Employees Menu

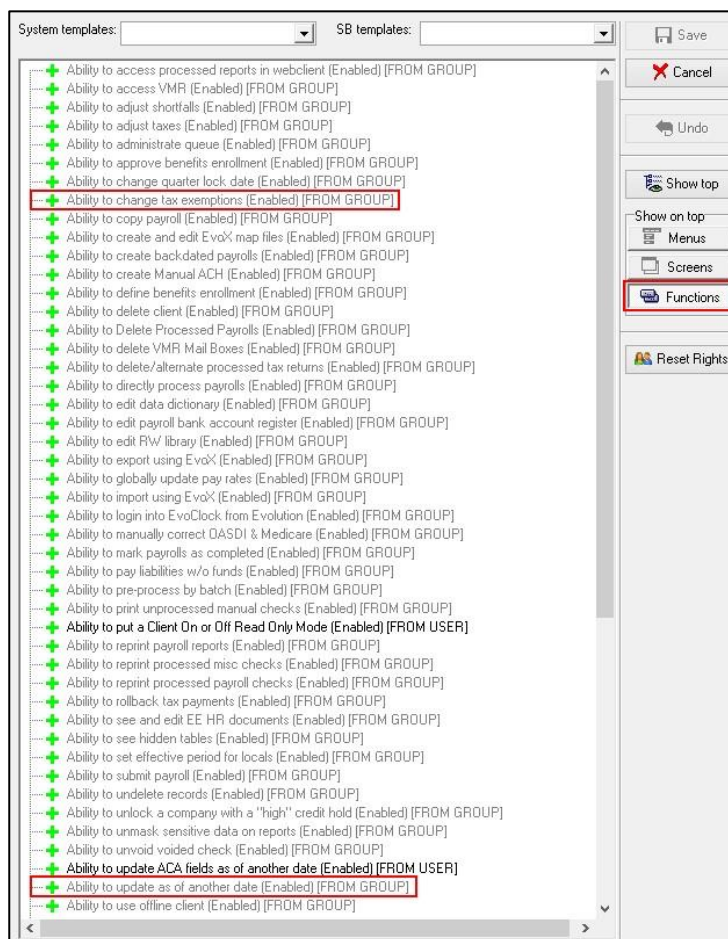
Employees can be added, edited and viewed in the Employees menu in Evolution Payroll. When navigating, it is recommended that you use the **TAB** key to move from field to field (**TAB + SHIFT** key to move to a previous field). Upon reaching the last field on a screen, click the **TAB** key to progress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



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.

Employees

Search for Employee...

EE #	Last Name	First Name	SSN/EIN	State	Zip Code	Status
2	Glazer	JoAnne	*****6126	NY	01234	Active
3	Flax	Ron	*****4455	NY	12345	Active
4	Carlow	Jane	*****5555	CA	98765	Active
5	Timm	Robert	*****3987	PA	19231	Active
6	Miller	Renee	*****3152	MA	01701	Active
7	Mills	Linda	*****9581	MA	01701	Active
8	Carlow	Harriet	*****3879	VT	05446	Active
9	Zerlea	Stephen	*****1236	VT	05495	Active
10	Wolf	Naomi	*****3456	VT	05495	Active
11	Salacie	Richard	*****6678	KY	42398	Active
12	Hard	Eric	*****6543	NY	01701	Active
20	Casucci	Kristen	*****3156	MA	01701	Active
21	Appleman	Lori	*****5134	MD	20817	Active
25	Conte	Barbara	*****5641	VT	05495	Active
30	Leake	Roger	*****8654	NY	01701	Active

1 - 15 of 18 items

Preview

**JoAnne Glazer** 2

Last Name: Glazer First Name: JoAnne




SSN/EIN: \*\*\*\*\*6126

Status: Active

Phone: 802-877-9136

Email: [jglazer@Bdazzled.com](mailto:jglazer@Bdazzled.com)

Address: 9 Spring Rd  
Williston, NY 01234

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.

**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.

Employees

+ [Icons]

Search for Employee... EXPORT TO EXCEL

EE #	Last Name	First Name	SSN/EIN	State	Zip Code	Status
2	Glazer	JoAnne	-----0126	NY	01234	Active
3	Flax	Ron	-----4455	NY	12345	Active
4	Carlson	Jane	-----5555	CA	98765	Active
5	Timm	Robert	-----9987	PA	19231	Active
6	Miller	Renee	-----3152	MA	01701	Active
7	Mills	Linda	-----9581	MA	01701	Active
8	Carlson	Harriet	-----9879	VT	05446	Active
9	Zenlea	Stephen	-----7236	VT	05495	Active
10	Wolf	Naomi	-----3456	VT	05495	Active
11	Salacie	Richard	-----6678	KY	42398	Active
12	Hard	Eric	-----6543	NY	01701	Active
20	Cesucoli	Kristen	-----3156	MA	01701	Active
21	Appelman	Lori	-----5134	MD	20817	Active
25	Conte	Barbara	-----5641	VT	05495	Active
30	Leslie	Roger	-----8554	NY	01701	Active

1 - 15 of 18 items

Preview

**JoAnne Glazer** 2

Last Name: Glazer First Name: JoAnne

SSN/EIN: --- -- 0126

Status: Active

Phone: 802-877-9136

Email: [jglazer@Bdazzled.com](mailto:jglazer@Bdazzled.com)

Address: 9 Spring Rd  
Williston, NY 01234

- Click the large **plus + sign** in the heading to create a new record  
**Result:** The Add Employee box opens.

**Add Employee**

Let's start by checking the ID of the EE you want to add to see if it already exists in the system

☒ SSN ☐ EIN

CHECK ID CANCEL

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

## Employees View screen

The Employees – View screen is displayed only when creating a new employee. Once the basic information is added and saved, additional Employees Menu items are available on the left-hand side of the screen if needed.

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

### New Employee

#### Employee Info

☒ SSN \*
 ☐ EIN \*

EE Code \*

Clock Nbr \*

First Name \*

Middle Initial

Last Name \*

Address 1 \*

Address 2

City \*

State \*

Zip \*

Ethnicity \*

Date Of Birth \*

Primary Phone

Gender \*

#### Taxation Details

Federal Marital Status \*

Federal Dependents \*

State \*

SDI

SUI \*

State Marital Status \*

State Dep

#### Position

Current Hire Date \*

Current Status Code \*

Review Date

EE Type \*

FT / PT \*

Hourly / Salary \*

Employee Group \*

#### Pay

Salary Amount

Rate 1 Amount \*

Div / Site / Dept / Job Code \*

Pay Frequency \*

Rate 2 Amount

Div / Site / Dept / Job Code

Default WC

Rate 3 Amount

Div / Site / Dept / Job Code

EE Paid Tips?

Tipped Directly?

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

1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the Employees View screen in the Appendix at the end of this chapter.
2. Click the **Save** button when you complete entering information on this screen.  
**Result:** The Employees View screen opens with additional Employees Menu items available on the left-hand side of the screen.

## Employees - Personal screen

Once the New Employee information is saved, the Employees Personal screen displays the information added in a different format. If there is information to be added, place the cursor within the field and add. For detailed information about the fields on this screen, refer to the Employees – Personal screen in the Appendix at the end of this chapter.

1. Click the **Next** button when you complete entering information on this screen.

**Result:** The Employees – Labor Defaults screen opens.

## Employees - Labor Defaults screen

2 - Glazer, JoAnne

**PERSONAL**  
LABOR DEFAULTS  
ACA  
PAY  
FEDERAL  
STATE  
LOCAL  
CHILD SUPPORT  
DIRECT DEPOSIT  
SCHEDULED E/D/S  
DELIVERY  
TIME OFF ACCRUAL  
EMPLOYEE PORTAL  
NOTES

PREVIOUS NEXT

**Salary Information**

Worker's Compensation: 8811

Job: 1021

Union: - Select Union -

Employee Group: - Select Employee Group -

General Ledger Tag:

**Organizational Level**

Division: BDazzled Design Retail Divisi  
Branch: BDazzled Design Retail - Burl  
Department: BDazzled Design Retail Client  
Team: BDazzled Design Retail Shipp

BDazzled Design Retail Division  
BDazzled Design Retail - Williston  
BDazzled Design Retail - Burlington  
BDazzled Design Retail Client Services  
BDazzled Design Retail Shipping/Dist

**Reporting**

Tipped Directly: No

Ignore FICA on Cleaned Payroll: No

Combine Returns On This EE: Yes

Generate Second Check: No

Deductions To Take First: Use E/D Priorities

Second Check Template: - Select Second Check Template -

Include In Analytics: Yes

1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the Employees – Labor Defaults screen in the Appendix at the end of this chapter.
2. Click the **Next** button when you complete entering information on this screen.
3. **Result:** The Employees – ACA History 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**. If there is information to be added, place the cursor within the field and add.

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 Appendix at the end of this chapter.
2. 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.

2 - Glazer, JoAnne

ACA Coverage

View Coverage For: 2019 EXPORT TO EXCEL

Month	ACA Coverage Offer	ACA Relief Code
January	1D MEC for EE and Spouse Only	
February	1D MEC for EE and Spouse Only	
March	1D MEC for EE and Spouse Only	
April	1D MEC for EE and Spouse Only	
May	1D MEC for EE and Spouse Only	
June	1D MEC for EE and Spouse Only	
July	1D MEC for EE and Spouse Only	
August	1D MEC for EE and Spouse Only	
September	1D MEC for EE and Spouse Only	
October	1D MEC for EE and Spouse Only	
November	1D MEC for EE and Spouse Only	
December	1D MEC for EE and Spouse Only	

ACA Periods

Initial Measurement Period: 01/2016 - 06/2016  
Stability Period: 01/2014 - 12/2014

Employee Dates

Date of Birth: 07/28/1957  
Hire Date: 07/01/2006  
Original Hire Date: --  
Termination Date: --

PREVIOUS NEXT

Select the year for which historical information is needed, and click within the month line in the **ACA Coverage Offer** and/or **ACA Relief Code** column to select a value from the dropdown list that 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 in the Employee Menu Fields module.
2. 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.

<

2 - Glazer, JoAnne

>

2 - Glazer, JoAnne

PERSONAL

LABOR DEFAULTS

ACA

PAY

SHIFTS

PIECEWORK

FEDERAL

STATE

LOCAL

CHILD SUPPORT

DIRECT DEPOSIT

SCHEDULED E/DS

DELIVERY

TIME OFF ACCRUAL

EMPLOYEE PORTAL

NOTES

PREVIOUS

NEXT

### Salary Information

Pay Frequency \*  
Monthly

Salary Amount  
\$5,000.00

Std Hours

Average Hours  
0.00

Rate Number

Rate Amount \*  
\$0.00

Wage Limit

Limit Frequency  
Annual

Annualized

Calc Annual  
\$60,000.00

### Planned Updates

Raise Date

Raise Rate

Raise Amount

Pay Frequency \*  
Weekly

Raise %

### Position

New Hire Report \*  
Completed

FLSA Exempt \*  
No

Position  
- Select Position -

Effective Date  
12/30/2013

I9 on File \*  
Yes

High Comp  
No

Comp Officer \*  
No

Clock In Method  
Hourly

Incorrect Setup for Non-Exempt Hours; please contact your administrator. \*

### Overrides

ADD

DELETE

EXPORT TO EXCEL

Edit Effective Period(s)

Primary *	Rate Number *	Rate Amount *
Yes	1	\$0.00

1 items

1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the Employees – Pay screen 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. 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 Classic, 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 security access set up in Evolution Classic to be able to create and apply shifts.

Employees

4 - Carlow, Jane

4 - Carlow, Jane

PERSONAL  
LABOR DEFAULTS  
ACA  
PAY  
SHIFTS  
PIECEWORK  
FEDERAL  
STATE  
LOCAL  
CHILD SUPPORT  
DIRECT DEPOSIT  
SCHEDULED E/D'S  
DELIVERY  
TIME OFF ACCRUAL  
EMPLOYEE PORTAL  
NOTES

ADD CANCEL

Shift *	Shift Rate	Shift %	Default
Second Shift	\$10.000		No

PREVIOUS NEXT

1 Items

- Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the Employees – Pay screen – Shifts in the Appendix at the end of this chapter.
- 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 Classic at the Client level.

1 - Smith, Lucy

1 - Smith, Lucy

PERSONAL  
LABOR DEFAULTS  
ACA  
PAY  
SHIFTS  
PIECEWORK  
FEDERAL  
STATE  
LOCAL  
CHILD SUPPORT  
DIRECT DEPOSIT  
SCHEDULED E/D'S  
DELIVERY  
EMPLOYEE PORTAL  
NOTES

ADD DELETE

Piece *	Rate Amount	Rate Quantity
Toffee	\$0.30	1.00
Maple Nut Goodies	\$3.00	9.00
Marshmallow Treats	\$20.00	5.00
Chocolate Covered Strawberries	\$3.00	6.00

PREVIOUS NEXT

4 Items

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

1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the Employees - Pay Screen - Piecework in the Appendix at the end of this chapter.
2. Click the **Next** button when you complete entering information on this screen.
3. **Result:** The Employees –Federal screen opens.

## Employees - Federal screen

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

The screenshot shows the 'Employees - Federal' screen for employee '2 - Glazer, JoAnne'. The interface is divided into several sections:

- Navigation Sidebar:** Includes tabs for PERSONAL, LABOR DEFAULTS, ACA, PAY, FEDERAL (selected), STATE, LOCAL, CHILD SUPPORT, DIRECT DEPOSIT, SCHEDULED E/D'S, DELIVERY, TIME OFF ACCRUAL, EMPLOYEE PORTAL, and NOTES. At the bottom are 'PREVIOUS' and 'NEXT' buttons.
- Taxation Section:**
  - Marital Status \*: Married
  - Exemptions \*: 0
  - W4 Total Dependents Tax Credit: [Empty]
  - W4 Other Income: [Empty]
  - W4 Deductions: [Empty]
  - Tax Type \*: None
  - Value: [Empty]
  - FUI Rate Credit: [Empty]
  - Override Fed Minimum Wage: [Empty]
- W2 Form Section:**
  - Type \*: W-2
  - Residential State \*: NY
  - First Name: [Empty]
  - Middle Name: [Empty]
  - Last Name: [Empty]
  - Name Suffix: [Empty]
- 1099R Section:**
  - Distribution Code: [Empty]
  - Tax Amt Determined \*: No
  - Total \*: No
  - Pension Plan \*: None
- W2 Settings Section:**
  - Deceased \*: No
  - Statutory EE \*: No
  - Legal Rep \*: No
  - Deferred Comp \*: No
  - Pension \*: No
- EE Tax Statuses Section:**
  - Federal Tax Status \*: Include
  - OASDI Exempt \*: No
  - Medicare Exempt \*: No
- ER Tax Statuses Section:**
  - FUI Exempt \*: No
  - OASDI 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 in the Appendix at the end of this chapter.
2. 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.

1. 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.
2. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the Employees – State screen in the Appendix at the end of this chapter.
3. Click the **Add** button to add another state as needed, or click the **Delete** button to delete a state from the employee's record.
4. 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...	Then...
The <b>Auto-create on New Hire</b> 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.
The <b>Auto-create on New Hire</b> field is set to No...	...no local taxes will be attached to new employees of that company. Users must manually add the local taxes when creating new employees in Evolution Payroll.
The <b>Auto-create on New Hire</b> field is set to Ask...	...a screen opens in Evolution Payroll, prompting the user to apply that local tax.

2 - Glazer, JoAnne

ADD DELETE EXPORT TO EXCEL

Active	Local *	State *	County *	Local Type *	Tax Rate *	Misc Amount	Tax Code
Yes	MCT Mobility Tax	New York	NY MCT	ER	0.0011		


Tax Status: Include Deduct Behavior: Always

Overrides: Pretax Deductions: Yes Tax Type: None % Of Taxable Wages: Work Address Override: No

Active	Local *	State *	County *	Local Type *	Tax Rate *	Misc Amount	Tax Code
Yes	New York City Non-Res.	New York	New York City Non-Res.	EE	0.0025		
Yes	New York City Res.	New York	New York City Res.	EE	0.00		

PREVIOUS NEXT

3 items

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. For detailed information about the fields on this screen, refer to the Employees – Local screen in the Appendix at the end of this chapter.
2. 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.
3. Click the **Next** button.

**Result:** The Employees – Child Support screen opens.

## Employees - Child Support screen

The screenshot displays the 'Employees - Child Support' screen. On the left is a sidebar with navigation tabs: PERSONAL, LABOR DEFAULTS, ACA, PAY, FEDERAL, STATE, LOCAL, CHILD SUPPORT (highlighted), DIRECT DEPOSIT, SCHEDULED E/DS, DELIVERY, TIME OFF ACCRUAL, EMPLOYEE PORTAL, and NOTES. Below these are 'PREVIOUS' and 'NEXT' buttons. The top header shows a dropdown menu with '3 - Flax, Ron' and a right arrow. The main area contains a table with columns: Priority \*, Case #, State Origin, Medical Eligible \*, Agency, Arrears \*, FIPS, and Custom Field. A single row of data is visible: Priority 1, Case # 651-6989, State Origin VT, Medical Eligible Not Applicable, Agency Child And Welfare Services, Arrears No, FIPS, and Custom Field. At the bottom right, it says '1 items'.

Priority *	Case #	State Origin	Medical Eligible *	Agency	Arrears *	FIPS	Custom Field
1	651-6989	VT	Not Applicable	Child And Welfare Services	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 in the Appendix at the end of this chapter.
2. Click **Save** when you have completed entering information on this screen.
3. 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	3487324	Money Market			No	Yes	No
000000000	4723582	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 in the Appendix at the end of this chapter.
2. Click **Save** when you have completed entering information on this screen.
3. Click the **Next** button.

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

## Employees - Scheduled E/Ds screen

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.

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.

Scheduled Defaults

☒ Yes ☐ No

Auto Enlist on New Hire

☒ Yes ☐ No

Calculation Method

Fixed

Amount %

500

Frequency

Every Pay

Month #

None

Which Payrolls

All

Default Agency

Blue Cross Blue Shield of Vermont

Effective Start Date

4/15/2014

Priority

1

Block 1st Week of Month

☐ Yes ☒ No

Block 2nd Week of Month

☐ Yes ☒ No

Block 3rd Week of Month

☐ Yes ☒ No

Block 4th Week of Month

☐ Yes ☒ No

Block 5th Week of Month

☐ Yes ☒ No

Deductions to zero

☐ Yes ☒ No

Deduct Whole Check

☐ Yes ☒ No

Always Pay/Deduct

Current Payroll

Maximum Average Amount E/D Group

Maximum Average Hours E/D Group

Max Avg Hourly Wage Rate

Threshold E/D Group

401k Wages

Threshold Amount

☒ Use Pension Limit

Funding code

Excess Code

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:** 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](#).

Code *	Description *	Calculation Method *	Amount \$	Amount %	Starting *	Ending *
D02	Health Insurance	% of Gross		6	01/01/2014	
D04	Garnishment	Garnishment CA			02/16/2017	
D05	Child Support	Fixed	100		01/01/2014	
D055	Child Support 4	Fixed			02/12/2019	
D17	Dental Insurance	Fixed	47		09/18/2014	

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

Basic | Schedule | Limits | Thresholds

Code: D02, Description: Health Insurance, Priority: , Calculation Link: - Select E/D Group -

Calculate Using: Method defined for this E/D

Calculation Method: % of Gross, Amount \$: , Amount %: 6.00, E/D Group: - Select E/D Group -

Always Pay/Deduct: All Payrolls, Deductions to Zero: No, Deduct Whole Check: No, Send To: Client/Company, Reference to Display on Check:

Code *	Description *	Calculation Method *	Amount \$	Amount %	Starting *	Ending *
D04	Garnishment	Garnishment CA			02/16/2017	
D05	Child Support	Fixed	100		01/01/2014	
D055	Child Support 4	Fixed			02/12/2019	

The table below identifies some of the most common E/D codes that are and 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) catchup 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>	N	No
<b>Hourly</b>		No
<b>Sick</b>		No
<b>Vacation</b>		No
<b>Paid Time Off</b>		No
<b>Bonuses</b>		No

## Setting up employee-level Scheduled E/Ds

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.

6 - Miller, Renee D.

ADD CANCEL EXPORT TO EXCEL

Code *	Description *	Calculation Method *	Amount \$	Amount %	Starting *	Ending
D10	HSA Family	Fixed			09/04/2019	

Basic Schedule Limits Thresholds

Code: D10 Description: HSA Family Always Pay/Deduct: No Deductions to Zero: No

Priority: Calculation Link: HSA Link Pre-Tax Deduct Whole Check: No

Calculate Using: Method from Employee Benefit Send To: Client/Company

Employee Benefit Reference to Display on Check:

D01	401(k) EE Contribution	Fixed		6	09/18/2014	
D02	Health Insurance	Fixed	65		09/18/2014	
D17	Dental Insurance	Fixed	55		09/18/2014	
D18	Vision Plan	Fixed	54		09/18/2014	

6 items

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

- **Agency** - when Agency is selected in the **Send To** field, a dropdown field opens below, from which the user selects the Agency.
- **Client / Company** – When Client / Company is selected
- **Direct Deposit** - when Direct Deposit is selected in the **Send To** field, a dropdown field opens below, from which 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.

ADD CANCEL EXPORT TO EXCEL

Code *	Description *	Calculation Method *	Amount \$	Amount %	Starting *	Ending
D10	HSA Family	Fixed			09/04/2019	

Basic Schedule Limits Thresholds

Effective: Starting: 09/04/2019 Ending:

Affects: Payrolls Affected: All Frequency: Every Pay

Blocks: Block Based On: Custom Defined Weeks blocked: 1 2 3 4 5

D01	401(k) EE Contribution	Fixed		6	09/18/2014	
D02	Health Insurance	Fixed	65		09/18/2014	
D17	Dental Insurance	Fixed	55		09/18/2014	
D18	Vision Plan	Fixed	54		09/18/2014	
DH	Mass Retirement	% of E/D Group Amt		2	01/23/2017	

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

The screenshot shows the 'Limits' tab for the 'HSA Family' entity. The top navigation bar includes 'ADD', 'CANCEL', and 'EXPORT TO EXCEL'. Below the header, there are tabs for 'Basic', 'Schedule', 'Limits' (selected), and 'Thresholds'. The main area is divided into three sections: 'Minimums', 'Maximums', and 'Maximum Averages'. Each section contains input fields for 'E/D Group', 'Pay Period %', 'Pay Period \$', and 'EE Annual \$'. The 'Maximums' section also includes a 'Client Annual \$' field. The 'Maximum Averages' section includes 'Amount E/D Group', 'Hours E/D Group', and 'Hourly Rate' fields. The 'E/D Group' dropdowns are currently set to '- Select E/D Group -'.

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

The screenshot shows the 'Thresholds' tab for the 'HSA Family' entity. The top navigation bar includes 'ADD', 'CANCEL', and 'EXPORT TO EXCEL'. Below the header, there are tabs for 'Basic', 'Schedule', 'Limits', and 'Thresholds' (selected). The main area is divided into two sections: 'Targets' and 'Thresholds'. The 'Targets' section contains input fields for 'Action', 'Remaining', 'Balance Taken', and 'Amount \$'. The 'Thresholds' section contains an 'E/D Group' dropdown, an 'Amount \$' field, and a checkbox for 'Use Pension Limit'. The 'E/D Group' dropdown is currently set to '- Select E/D Group -'. At the bottom, there is a table with 6 items.

Code *	Description *	Calculation Method *	Amount \$	Amount %	Starting *	Ending
D01	401(k) EE Contribution	Fixed		6	09/18/2014	
D02	Health Insurance	Fixed	65		09/18/2014	
D17	Dental Insurance	Fixed	55		09/18/2014	

- Click **Save** when you have completed entering information on this screen.
  - 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.

The screenshot shows the 'Delivery' screen for employee '2 - Glazer, JoAnne'. On the left is a navigation menu with options: PERSONAL, LABOR DEFAULTS, ACA, PAY, FEDERAL, STATE, LOCAL, CHILD SUPPORT, DIRECT DEPOSIT, SCHEDULED E/DS, DELIVERY (highlighted), TIME OFF ACCRUAL, EMPLOYEE PORTAL, and NOTES. Below the menu are 'PREVIOUS' and 'NEXT' buttons. The main area is divided into sections: 'Primary Address' with fields for Address 1 (9 Spring Rd), Address 2, City (Williston), State (NY), Zip Code (01234), County (Buffalo), Country, Email (jglazer@bdazzled.com), and three phone numbers; 'Payroll Override Address' with similar fields; 'VMR' (Voucher Mail Return) settings including 'Payroll Check Mail Box' (Checks), 'EE Electronic Return Mail Box' (- Select Mail Box -), 'EE Report Mail Box' (Reports), '2nd EE Report Mail Box' (Electronic To FTP), and a 'Password for VMR Deliveries' field; and a 'Print Voucher' button with a 'Yes' dropdown.

1. 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 in the Appendix at the end of this chapter.
  2. Verify that the Primary Address information is correct.
  3. Enter VMR overrides if applicable.
  4. Enter a Payroll Override Address if applicable.
  5. Click **Save** when you have completed entering information on this screen.
  6. 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 or not to make TOA available to employees.

Active *	Type *	Balance *	Used *	Accrued *	Effective Date	Accrual Max	Rate	Rollover Type	Rollover Date
Yes	PTO	39.00	0.00	39.00					
Yes	MA Sick Pay Monthly	59.9829	0.00	59.9829					

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 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 box opens requesting a reason for the adjustment.

You are about to adjust ACCRUED value

Please provide reason for the adjustment and press Ok or press Cancel if you do not wish to make the adjustment. Adjustment reason (28 char max):

Passed 6 month anniversary

OK CANCEL

4. Enter a reason > click **OK**.



5. Enter a Used amount if applicable.  
**Result:** the Balance fills in.
6. Complete the following fields.
7. Click **Save** when you have completed entering information on this screen.
8. 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 in the Appendix at the end of this chapter.

2 - Glazer, JoAnne

**Access**

EE Info \* Time Off \* Benefits \*

Full Access Full Access Read Only

User Name Password

Jglazer

**Settings**

Form on File

Yes

Email

jglazer@evolutionpayroll.com

Format

Both

Benefits Email

Jglazer@bdazz.com

**Group Assignments**

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

UNBLOCK ACCOUNT

PREVIOUS NEXT

### Unblock Account Button

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

### Group Assignments section

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

- 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 fly-out tab on the [Employees – Payrolls - Payroll View](#) screen.

## Auditing Employee User 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	Time Off Accrual	Employee Portal	Notes
Change Date ▼	Operation ▼	Field ▼		Old Value ▼		New Value ▼		User ▼						
09/04/2019 16:51:23 PM	Create	ANNUAL_ACCRUAL_MAXIMUM						Barb Conte [244]						
09/04/2019 16:51:23 PM	Create	CO_TIME_OFF_ACCRUAL_NBR				Vacation [3]		Barb Conte [244]						
09/04/2019 16:51:23 PM	Create	EFFECTIVE_ACCRUAL_DATE						Barb Conte [244]						
09/04/2019 16:51:23 PM	Create	OVERRIDE_RATE						Barb Conte [244]						
09/04/2019 16:51:23 PM	Create	RLLOVR_CO_TIME_OFF_ACCRUAL_NBR						Barb Conte [244]						
09/04/2019 16:51:23 PM	Create	ROLLOVER_DATE						Barb Conte [244]						
09/04/2019 16:51:23 PM	Create	STATUS				Yes [Y]		Barb Conte [244]						
04/11/2019 10:36:44 AM	Update	CO_WORKERS_COMP_NBR				3		Conte Barb						
03/05/2019 16:22:34 PM	Update	PR_EE_REPORT_SEC_MB_GROUP_NBR				Electronic To FTP [1]		Barb Conte [244]						
03/05/2019 16:22:34 PM	Update	PR_EE_REPORT_MB_GROUP_NBR				Reports [3]		Barb Conte [244]						
03/05/2019 16:22:34 PM	Update	PR_CHECK_MB_GROUP_NBR				Checks [8]		Barb Conte [244]						
02/25/2019 11:24:11 AM	Update	CURRENT_TERMINATION_DATE		2/25/2019				Barb Conte [244]						
02/25/2019 11:22:01 AM	Update	TIME_OFF_ENABLED		Full Access [F]		Read Only [Y]		Barb Conte [244]						
02/25/2019 11:22:01 AM	Update	BENEFITS_ENABLED		Full Access [F]		Read Only [Y]		Barb Conte [244]						
02/25/2019 11:22:01 AM	Update	CURRENT_TERMINATION_DATE				2/25/2019		Barb Conte [244]						

**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.

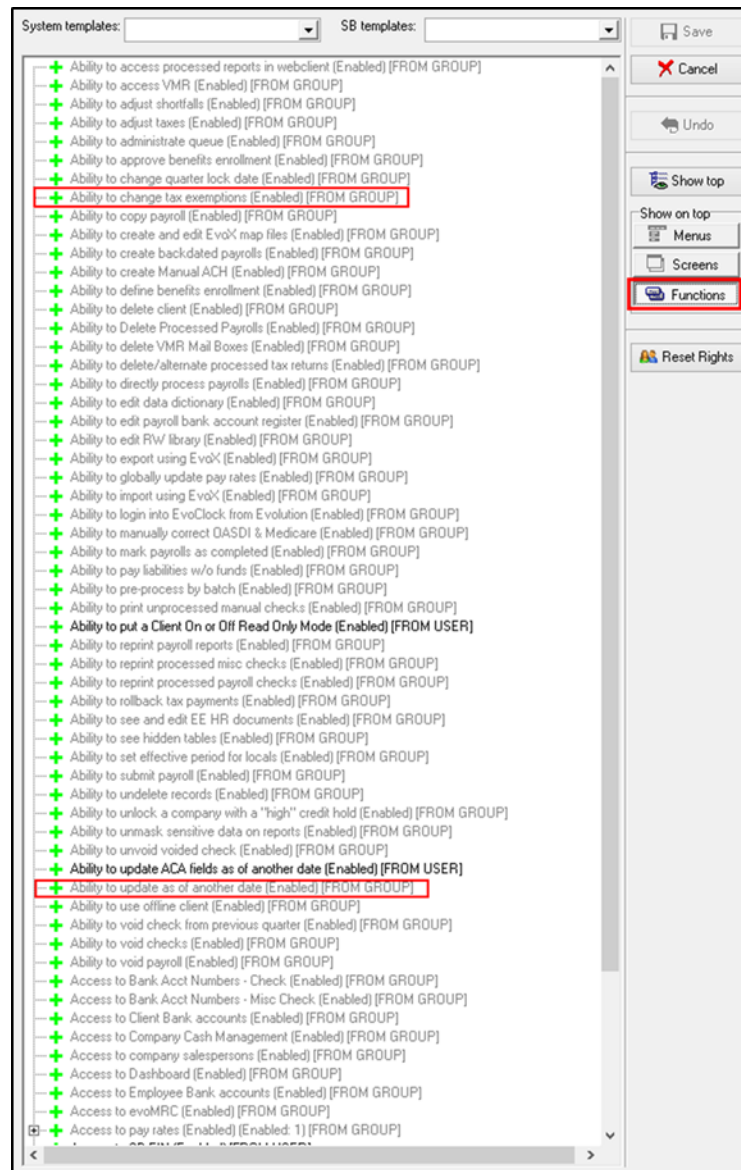
## Effective Dating Dynamic Fields

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:** Click [First Name \\*](#) 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>
JoAnne		Glazer

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

Effective Periods for Name

ADD

DELETE

Begin Effective Date

07/06/2017

End Effective Date

01/09/2019

First Name \*

JoAnne

Last Name \*

Stewart

M.I.

Begin Effective Date	End Effective Date	First Name	Last Name	M.I.
01/01/1900	05/24/2017	JoAnne	Glazer	B
05/25/2017	07/05/2017	JoAnne	Johnston	
07/06/2017	01/09/2019	JoAnne	Stewart	
01/10/2019	12/30/9999	JoAnne	Glazer	

SAVE

CANCEL

## Editing information

Some screens in Evolution Payroll that support dynamic fields have a link in the upper right-hand corner, "Edit Effective Period(s)."

7 - Mills, Linda

### Salary Information

Pay Frequency \*  
Weekly

Salary Amount  
\$19.00

Std Hours  
0.00

Average Hours  
0.00

Rate Number  
\$19.00

Wage Limit  
\$19.00

Limit Frequency  
Annual

Annualized  
\$0.00

Calc Annual  
\$0.00

### Planned Updates

Raise Date  
01/03/2014

Raise Amount  
\$19.00

Raise %  
0.00

Pay Frequency \*  
Weekly

### Position

New Hire Report \*

Completed by Predecessor

FLSA Exempt \*

No

Position  
- Select Position -

Effective Date  
01/03/2014

I9 on File \*

Yes

High Comp  
No

Corp Officer \*

No

Clock In Method  
- Select Clock In Method -

Incorrect Setup for Non-Exempt Hours: please contact your administrator. \*

### Overrides

ADD DELETE EXPORT TO EXCEL Edit Effective Period(s)

Primary *	Rate Number *	Rate Amount *
Yes	1	\$19.00

1 items

- Click the **Edit Effective Period(s)** link on the screen if applicable (available on screens that support dynamic fields.)

**Result:** The Effective Periods screen opens.

Effective Periods for Pay Rates

ADD DELETE

Begin Effective Date  
09/05/2019

End Effective Date  
12/30/9999

Primary \*  
No

Rate Number \*  
21.00

Rate Amount \*  
21.00

Begin Effective Date	End Effective Date	Primary	Rate Number	Rate Amount
01/01/1900	12/30/9999	Yes	1	\$19.00
09/05/2019	12/30/9999	No		\$21.00

SAVE CANCEL

2. Click the **Add** button.
3. The **Begin Effective Date** field changes automatically to today's date. Change that if it should be a different 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. If they have payroll history, the Delete button will not be available to click.

To delete an employee

1. Highlight the applicable employee.
2. Click the **Delete**  button.

Employees

Search for Employee...

EXPORT TO EXCEL

EE #	Last Name	First Name	SSN/EIN	State	Zip Code	Status
2	Glazer	JoAnne	***-6126	NY	01234	Active
3	Flax	Ron	***-4455	NY	12345	Active
4	Carlow	Jane	***-5555	CA	98765	Active
5	Timm	Robert	***-9987	PA	19231	Active
6	Miller	Renee	***-3152	MA	01701	Active
7	Mills	Linda	***-9581	MA	01701	Active
8	Carlow	Harriet	***-3879	VT	05446	Active
9	Zenlea	Stephen	***-1236	VT	05495	Active
10	Wolf	Naomi	***-3456	VT	05495	Active
11	Salacie	Richard	***-6678	KY	42398	Active
12	Hard	Eric	***-6543	NY	01701	Active
20	Casucci	Kristen	***-3156	MA	01701	Active
21	Appleman	Lori	***-5134	MD	20817	Active
25	Conte	Barbara	***-5641	VT	05495	Active
30	Leake	Roger	***-8654	NY	01701	Active

Page 1 of 2

1 - 15 of 18 items

Preview

Linda Mills 7

Last Name: Mills

First Name: Linda

SSN/EIN: \*\*\*-9581

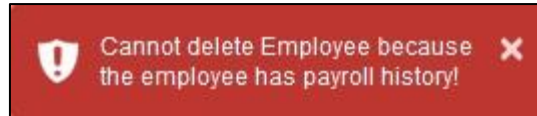
Status: Active

Phone: 508-877-2342

Email: [lmills@Bedazzled.com](mailto:lmills@Bedazzled.com)

Address: 7 Spring Lane  
Framingham, MA 01701

**Result:** 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 - New Employee 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.
Clock Number	Enter the employee's time clock number
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
Ethnicity	Required
Date of Birth	Employee's birth date
Primary Phone	The employee's primary phone number
Gender	Gender
Pay Section	
Salary Amount	Salary earned per pay period
Pay Frequency	How often the employee's paycheck is processed.

Field / Button	Description
<b>Default WC</b>	Workers' Comp Code assigned to the Job associated with a future potential claim if applicable.
<b>EE Paid Tips?</b>	Relevant for restaurants and other service-related companies
<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>Div / Site / Dept / Job</b>	Organization level at which the employee will be working if the company is set up using Divisions, Branches, Departments, and Teams.
<b>Tipped Directly?</b>	Relevant to restaurant employees.
<b>Taxation Details section</b>	
<b>Fed Marital Status</b>	Marital status for federal tax purposes
<b>State</b>	State employee pays state tax to
<b>State Marital Status</b>	Marital status for state tax purposes
<b>Fed Dependents</b>	Number of dependents the employee claims for federal tax filing
<b>SDI</b>	State to which the company pays disability insurance to, on behalf of the employee
<b>SUI</b>	State to which the company pays unemployment insurance to, on behalf of the employee
<b>State Dependents</b>	Number of state dependents the employee claims for state tax filing

Field / Button	Description
<b>Position section</b>	
<b>Current Hire Date</b>	Date employee was hired (For this round of employment if the employee had worked there before.)
<b>Review Date</b>	Select the date for the employee's review if known.
<b>EE Type</b>	Select the employee's position type from the dropdown list.
<b>Hourly / Salary</b>	Select whether the employee is paid hourly or salary
<b>Current Status Code</b>	Select the employment status from the dropdown list.
<b>FT/PT</b>	Select whether the employee is full-time or part-time, a temp, 1099, etc.
<b>Pay Group</b>	Select whether the employee is part of EE Group A – L or EE Group M – Z.

## Employees - Personal screen

Field / Button	Description
<b>SSN</b>	Employee's Social Security Number or Employer Identification Number.
<b>EE Code</b>	(EE Number) alpha or numeric, up to 9 characters, and unique to the employee.
<b>Time Clock #</b>	The time clock number assigned to the employee
<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

Field / Button	Description
<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 selected, enter the Tribe name in the adjacent field.
<b>Hire Status section</b>	
<b>Status</b>	Select the employee's Status from the dropdown list.
<b>Current Hire Date</b>	Date employee was hired (For this round of employment if the employee had worked there before.)
<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

Field / Button	Description
<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>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>Union</b>	Select the union to which the employee belongs if applicable.
<b>Pay Group</b>	Select the pay group if not already populated

Field / Button	Description
<b>General Ledger Tag</b>	Enter if the company is using General Ledger.
<b>Reporting section</b>	
<b>Tipped Directly</b>	Yes or No if not populated from the initial setup. If changing the value, click the link to establish the Effective Date.
<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.
<b>Organizational Level</b>	The D/B/D/T level to which the employee is assigned if applicable.

## Employees - ACA Screen

Field / Button	Description
<b>ACA section</b>	

Field / Button	Description
ACA Status	<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> <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</li> <li>• 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</li> </ul>

Field / Button	Description
	exclusively during holiday seasons. Has already completed initial measurement and stability periods.
<b>ACA Coverage Offer</b>	This field defaults to what is set up on the Company ACA 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? If changing, click the link to establish an Effective Date, if applicable.
<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 reporting of the 1095 form(s)?
<b>ACA Format</b>	Select the form format that will be created for the employee. None, Both, or Paper
<b>Form Type</b>	New employees are assigned the default field that is assigned at the Company level. This can be overridden using this field. <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.



Field / Button	Description
<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>	
<b>Pay Frequency</b>	How often the employee's paycheck is processed.
<b>Salary Amount</b>	Salary earned per pay period (salaried employees only)
<b>Standard Hours</b>	Number of hours the employee is expected to work (this may be left blank for salaried employees working a 40-hour week.)
<b>Average Hours</b>	Average hours the employee works – this field is system-calculated and is not editable.
<b>Rate Number</b>	The rate number if not the primary rate – this is read only.
<b>Rate Amount</b>	The rate for the rate number above.
<b>Wage Limit</b>	Wage limit used for Workers' Comp billing and impounds
<b>Limit Frequency</b>	If there is a wage limit, to what period is the limit applied?
<b>Annualized</b>	If there is a wage limit for a period other than annual, what is the annualized total amount of the limit?
<b>Calc Annual</b>	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.
<b>Raise Date</b>	The date a future raise takes effect.
<b>Raise Amount</b>	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.
<b>Raise %</b>	The potential percentage of the future raise. Use this for salaried or hourly employees.
<b>Raise Rate</b>	The hourly rate of the potential raise.

Field / Button	Description
<b>Pay Frequency</b>	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.
<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. <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.

Field / Button	Description
Rate Number column heading	If a standard wage, the new line should have a Rate Number of 2 or more.
Rate Amount column heading	Enter the amount of the new rate.

## Piecework Sub-menu

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

## Auto Labor Distribution Sub-menu

Field / Button	Description
Labor Distribution Options	Defaults to <b>Distribute Both</b> - method used to distribute employee's labor for unions. They may be distributed for earnings, taxes, deductions, all, or none, and must be used in conjunction with the <b>Auto Labor Distribution E/D Group</b> field.
Auto Labor Distribution E/D Group	E/D Group used to distribute the employees' labor.
Allocation section	
Add	Click to create a new record

<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. Six new marital statuses have been added in compliance with the redesigned Form W-4. Select the applicable marital status based on the information and instructions on the <a href="#">IRS Website</a> .
<b>Exemptions</b>	Number of exemptions / federal dependents claimed.  <b>Note:</b> Because there is no longer a box for Federal Dependents on the new Form W-4, the <b>Exemptions</b> field on this screen is only used for information from the "old" W-4s. For new entries, based on the new tax regulations, enter a zero because it is a required field. The system does not consider a value other than 0 in the new calculations based on the new marital statuses.
<b>W-4 Other Income</b>	Information to be added here only if completing Steps 2-4 on the redesigned Form W-4. For more information, refer to the instructions on pages 2 and 3 of the .PDF on the <a href="#">IRS Website</a> .
<b>W-4 Deductions</b>	<ul style="list-style-type: none"> <li><u>Other Income</u> – If tax should be withheld from other income expected this year that will not have withholding.</li> <li><u>Deductions</u> – if deductions will be claimed other than the standard deduction, to reduce withholding.</li> </ul>
<b>Tax Type</b>	Additional or override tax amount. Select from Additional Amount, Additional Percent, Regular Amount, or Regular Percent.

Field / Button	Description
<b>Value</b>	Based on the tax type, enter 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

Field / Button	Description
<b>Medicare Exempt</b>	Whether or not the employer is exempt from paying Medicare for this employee
<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?

Field / Button	Description
<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.



Field / Button	Description
<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.

Field / Button	Description
<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 <b>Healthcare Coverage</b> field value on the Employees – Basics screen.
<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>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>	<p>Select which calculation method will be used to calculate payroll deductions for the Scheduled E/D. There are three options:</p> <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> <li>3. Use the calculation method defined at the Employee Benefit level</li> </ol>
<b>Calculation Method</b>	<p>Method used to calculate deductions from payrolls. Select the method from the dropdown list.</p> <p><u>Amount \$</u> - If the Calculation Method selected is a fixed dollar amount enter that amount.</p> <p><u>Amount %</u> - If the Calculation Method selected is based on a percentage enter the percentage amount.</p>
<b>E/D Group</b>	Select an E/D Group if the Scheduled E/D is included in an E/D Group.
<p><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.</p>	

Field / Button	Description
<b>Always Pay / Deduct</b>	<p>Offers flexibility to override E/D, similar to Blocking Week 1 - 5</p> <ul style="list-style-type: none"> <li><u>All payrolls</u> - earnings are paid whether or not there are earned wages for the employee; deductions are tracked to be taken from the next payroll.</li> <li><u>Current Payrolls</u> - the E/D is applied to the current the payroll whether or not there are earned wages for the employee. If deduction exceeds amount in check the amount is not tracked to be made up later.</li> <li>If there are insufficient earnings for the deduction, the Scheduled E/D is processed based on the selection in the <b>Deductions to Zero field</b>.</li> <li><u>No</u> - if the employee has no wages in a payroll cycle, the system does not pay/deduct the E/D, nor is it tracked it to be made up later.</li> </ul>
<p><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 <a href="#">Client - E/Ds - Details tab</a> must be set to Yes.</p>	
<b>Deduct Whole Check</b>	<p>Value selected defaults based on the setting applied on the <a href="#">Client - E/Ds - Scheduled Defaults tab</a></p> <p><u>Yes</u> - deducts the net check (use for direct deposits)</p> <p><u>No</u> - deducts a portion of the check</p>
<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>Deductions to Zero</b>	<p>Defaults to the Deductions to Zero Default field on the <a href="#">Client - E/Ds - Scheduled Defaults tab</a>. 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 /</p> <p>Deduction not Taken makeup on or off. It only tells the system whether or not to take partial amounts for deductions.</p> <ul style="list-style-type: none"> <li><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.</li> <li><u>No</u> - a deduction is taken only when there are sufficient funds to take the whole deduction. If there are insufficient wages, the created shortfall is always the total amount of</li> </ul>

Field / Button	Description
	<p>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.</p> <ul style="list-style-type: none"> <li>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.</li> </ul>

## Employees - Scheduled E/Ds - Schedule tab

Field / Button	Description
<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

## Employees - Scheduled E/Ds Limits tab

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 <a href="#">Employee – Scheduled E/Ds – Advanced tab</a> )
<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>Balance Taken</b>	
<b>Amount \$</b>	

## Employees - Scheduled E/Ds - Thresholds tab

Field / Button	Description
Action	These fields refer to the goal amounts at which deductions stop – the same information entered on the <a href="#">Employee – Scheduled E/Ds Advanced tab</a> in Evolution.
Remaining	
Balance Taken	
Amount \$	
E/D Group	

## Employees - Delivery screen

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



## Employees - Time off Accrual screen

Field / Button	Description
<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>

Field / Button	Description
<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 <b>Company - Benefits - ESS Group Assignment screen</b> .
<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?
<b>Email</b>	Email address for account notifications
<b>Format</b>	Format of the returns; electronic, paper, or both

Field / Button	Description
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 fly-out 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	

Field / Button	Description
<b>Tax Frequency</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>Federal Tax</b>	Select to block Federal tax from being deducted from this check.
<b>Employee Overrides</b>	Select to block any employee overrides from being included in this check.
<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>	

Field / Button	Description
<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>	
<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.

Field / Button	Description
<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.

## Check Calculator Menu

The **Check Calculator Menu** 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

Net Amount: \$100.00

13 Spring Lane  
Wilkins, PA 19231

☒ Net to Gross

**Check Settings**

Earnings/Deductions | Federal | State | SUI | Local | Options

ADD | DELETE

E/D Code * ▲	Description ▲	Hrs/Pcs ▼	Pay Rate ▼	Amount ▼	Rate # ▼
D02	Health Insurance				
D04	Garnishment				
D05	Child Support			\$100.00	
D17	Dental Insurance			\$47.00	
D055	Child Support 4				

5 items

**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 Calculator

BDazzled Design Ltd.

EE Code - Name

3-Ron Flax

Net Amount

\$100.00

13 Spring Lane

Wilkins, PA 19231

☒ Net to Gross

Check Settings

Earnings/Deductions

Federal

State

SUI

Local

Options

Marital Status

Single

Exemptions

0

Tax Frequency

Weekly

☐ Tax at Supplemental Rate

Blocks

☐ Federal Tax

☐ Employee Overrides

☐ Additional Values

☐ EE QASDI

☐ EE Medicare

☐ EE EIC

Overrides

Fed Type

None

QASDI

Medicare

EIC

Backup Withholding

Actions

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 in the Appendix at the end of this chapter.
8. Click the **State** tab.



- Click in the applicable fields to make changes, blocks, or to add an override.
- Click the **SUI** tab.

1/8/2020

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

**Check Calculator**

BDazzled Design Ltd.

EE Code - Name: 3-Ron Flax  
13 Spring Lane  
Wilkins, PA 19231

Net Amount: \$100.00  
☒ Net to Gross

Check Settings

Earnings/Deductions Federal State SUI Local Options

Local Name: Adams County-Abbottstown Boro LST

Settings for: Adams County-Abbottstown Boro LST

☒ Block this Local Tax

Overrides

Amount

4 items

Actions

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 Calculator**

BDazzled Design Ltd.

EE Code - Name: 3-Ron Flax  
13 Spring Lane  
Wilkins, PA 19231

Net Amount: ☐ Net to Gross

Check Settings

Earnings/Deductions Federal State SUI Local Options

☒ 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

Actions

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

**Send this Check to Payroll**

EE	Name	Net Amount
3	BDazzled Design Ltd. Ron, Flax 13 Spring Lane Williston, NY 12345	(\$144.41)

**Options set for this Check**

Manual Check # 1423

Updates: Year To Date Totals

Tax Calculations locked in.

CHANGE  
OPTIONS

**Choose a Payroll for this check**

01/23/2014 - 2

01/11/2017 - 1

01/13/2017 - 1

08/10/2017 - 3

09/12/2019 - 1

Batch 1 - Weekly - 09/05/2019 to 09/11/2019

Batch 2 - Weekly - 09/05/2019 to 09/11/2019

New Batch

New Payroll

SAVE/RETURN

GO TO PAYROLL

19. Click **Go to Payroll** or **Save Return**.

# 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.

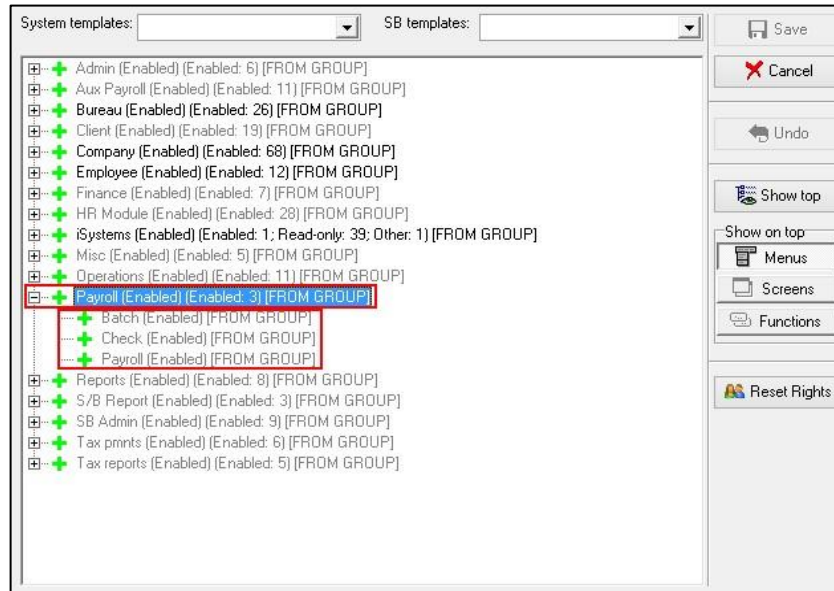
## Security Settings

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.

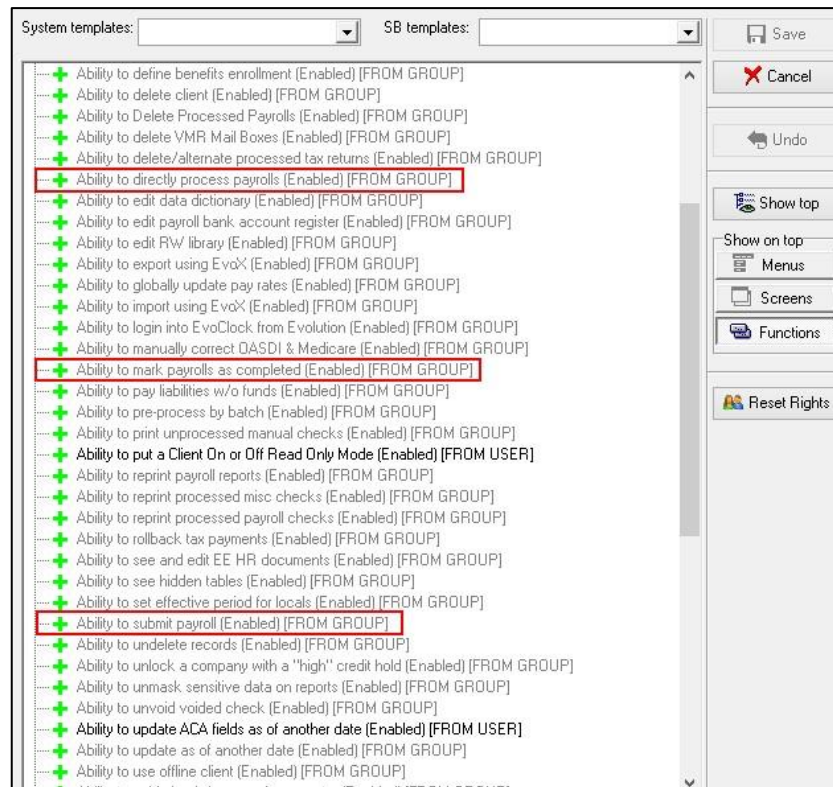
1. Go to the Admin – Security – Users.
2. Select the user from the list.
3. Click the **Details** tab.
4. Click the **User Rights** button.
5. Click the **Menu** button.
6. Enable the **Payroll** menu as well as
  - Batch - If this is disabled, in Evolution Payroll:
    - The **Payroll – Batches** screen 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).
    - Users can view the Payroll Card and Grid Views.
    - Users can create a new payroll (+ sign at top left of screen)

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

- 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** in Evolution Payroll icon is enabled



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



10. Click **Save**.

## Security settings for blocking options

There are several items in Evolution Payroll that can be blocked from payrolls; four of which require additional security permissions to be enabled for a user to block these from the payroll. They are ACH, Billing, Liabilities, and Deposits - both on the Payroll Settings screen, and on the Payroll Finish screen.

Payroll Settings

← Hide

Check Date\*

08/30/2019

Run #\*

1

Payroll Type

Regular

Actual Call In Date

Blocks

☐ Agency Payments
 ☒ Checks
 ☒ Reports
 ☐ ACH
 ☐ Billing
 ☐ Liabilities
 ☐ Deposits

Time Off Accrual

☐ Time Off Accrual
 ☐ Accruals Only

Payroll Check Comment

Payroll 08/30/2019 - 1

Submittal Options

Blocks

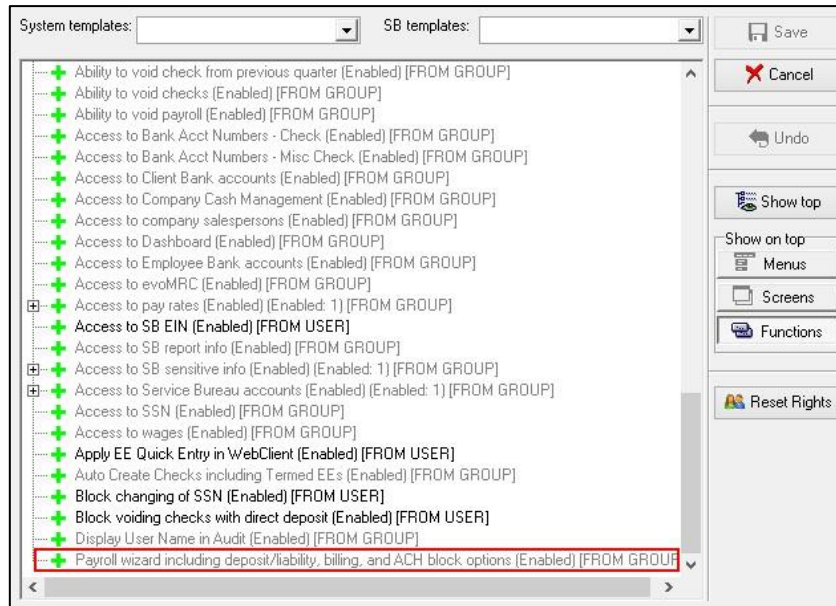
☐ Agency Payments
 ☒ Checks
 ☒ Reports
 ☐ ACH
 ☐ Billing
 ☐ Liabilities
 ☐ Deposits

Time Off Accrual

☐ Time Off Accrual
 ☐ Accruals Only

Payroll Check Comments

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



7. Click **Save**.




## The Payrolls Menu


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


The table below describes eight statuses you may see on the Timeline screen.


Status	Description
<b>Not Due</b>	Scheduled payrolls that are not due to be processed yet.
<b>Past Due</b>	Scheduled payrolls that did not get processed as scheduled.
<b>Pending</b>	Payroll was started but not submitted
<b>On Hold</b>	Payroll was submitted to the service bureau for review.
<b>Submitted</b>	Payroll was submitted to the service bureau for processing.
<b>Processed</b>	Payroll has been processed.
<b>Backdated</b>	Payroll has been backdated
<b>Requires Mgr Approval</b>	Payroll requires manager approval prior to processing.


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



Payroll Timeline




























EXPORT TO EXCEL

Check Date ▲	Run # ▼	Payroll Type ▼	Created On ▼	Due On ▼	Current Status ▼	Preprocessed On ▼
08/22/2019	1	Regular	09/05/2019	08/20/2019	Submitted	09/03/2019
08/29/2019	1	Regular	09/05/2019	08/27/2019	Submitted	
08/30/2019	1	Regular	09/05/2019	08/28/2019	Submitted	
09/05/2019	1	Regular	09/03/2019	09/03/2019	Processed	
09/12/2019	1	Regular	09/05/2019	09/10/2019	Submitted	
09/19/2019		Regular		09/17/2019	Not Started	
09/26/2019		Regular		09/24/2019	Not Started	
10/01/2019		Regular		09/27/2019	Not Started	
10/03/2019		Regular		10/01/2019	Not Started	
10/10/2019		Regular		10/08/2019	Not Started	
10/17/2019		Regular		10/15/2019	Not Started	
10/24/2019		Regular		10/22/2019	Not Started	
10/31/2019		Regular		10/29/2019	Not Started	

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).
	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 <a href="#">Check Batches screen</a> – clicking takes the user to the <a href="#">Check Batch Settings screen</a> for the batch selected.
	On the <a href="#">Check Batch Settings screen</a> – clicking takes the user back to the <a href="#">Check Batches screen</a> .
	On the <a href="#">Check Batch Settings screen</a> – clicking takes the user to the <a href="#">Check Batch Settings Table View screen</a> listing the company employees.
	On the <a href="#">Payroll Timeline screen</a> – changes the view to a Table view from the Card view.
	On the <a href="#">Payroll Timeline screen</a> – 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 (green) while batches are being created. To view batch information after they have been created, click this button.
 Checks	Checks - this button is active (green) while checks are being created. To view, add or edit checks after they have been created, click this button.
 Totals	Payroll calculations - click a payroll to view or edit. Click to calculate totals when checks have been added or deleted from batches.
 Finish	Process Payroll - this button is active (green) while payrolls are being finished and submitted for review or processing.





## Creating a Scheduled Payroll










The **Payrolls – Timeline** screen is the first screen to open after clicking the Payroll menu.

To create a payroll in Evolution Payroll,

1. Click the **Payrolls** menu.

Payroll Timeline

<div>08/22/2019 - 1</div> <div>Submitted</div> <div>Weekly</div> <div>08/01/2019 - 08/07/2019</div> <div>Submitted on: 09/05/2019 01:23 PM</div> 	<div>09/05/2019 - 1</div> <div>Processed</div> <div>Weekly</div> <div>08/29/2019 - 09/04/2019</div> <div>Submitted on: 09/03/2019 09:55 AM</div> 	<div>09/26/2019</div> <div>Not Due</div> <div>Weekly</div> <div>09/19/2019 - 09/25/2019</div> <div>Submit by:09/24/2019</div> 
<div>08/29/2019 - 1</div> <div>Submitted</div> <div>Weekly</div> <div>08/22/2019 - 08/28/2019</div> <div>Submitted on: 09/05/2019 01:16 PM</div> 	<div>09/12/2019 - 1</div> <div>Submitted</div> <div>Weekly</div> <div>09/05/2019 - 09/11/2019</div> <div>Submitted on: 09/05/2019 11:19 AM</div> 	<div>10/01/2019</div> <div>Not Due</div> <div>Monthly</div> <div>09/01/2019 - 09/30/2019</div> <div>Submit by:09/27/2019</div> 
<div>08/30/2019 - 1</div> <div>Submitted</div> <div>Monthly</div> <div>08/01/2019 - 08/30/2019</div> <div>Submitted on: 09/05/2019 01:20 PM</div> 	<div>09/19/2019</div> <div>Not Due</div> <div>Weekly</div> <div>09/12/2019 - 09/18/2019</div> <div>Submit by:09/17/2019</div> 	<div>10/03/2019</div> <div>Not Due</div> <div>Weekly</div> <div>09/26/2019 - 10/02/2019</div> <div>Submit by:10/01/2019</div> 

- Click the large plus **+** sign in the Header to create a new payroll.  
**Result:** The Create Payroll screen opens asking if you are creating a Payroll from the Calendar or a New Payroll (Unscheduled).
- Click **Payroll from the Calendar**

Create Payroll

Create: ☒ Payroll from the Calendar  
☐ New Payroll

Select a Date from the Payroll Calendar:

09/26/2019 ▼

[Edit Settings, Blocks and Comments](#)

OK CANCEL

- Select the date from the Payroll Calendar.
- Click **OK**.

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

## Check Batch Settings Screen

**Payroll Timeline**

Payroll 09/19/2019 - 1

**Check Batch -7 - Settings**

**Creation Options**

Start Date\* 9/12/2019 End Date\* 9/18/2019

Frequency Weekly

Employee Types All

Employee Filter -Select Template- [Select EEs](#)

Template -Select Template-

Checks per EE 1

Check Types Regular

☐ Create 945 Checks

☒ Calculate Scheduled EDs

**Include**

☒ Standard Hours

☒ Salary Pay

☒ Payroll Defaults

**Time Clock Import Options**

Time Clock Source File Choose file \*\*\* X

File Format Comma Delimited

Date Field Format 2 Digit Year (mm/dd/yy)

Employee Synchronization Custom #

Organizational Synchronization Full DBDT

Job Codes

Apply Org Level

**CREATE CHECKS**

**Payroll 09/19/2019 - 1**

**Check Batch -7 - Settings**

Search for employee(s)

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

<input type="checkbox"/>	EE #	Last Name	First Name	Middle Initial	Status	DBDT
<input type="checkbox"/>	01	Smith	Lisa		Terminated	100 > 1000 >> 10022 >>> 1025
<input type="checkbox"/>	1	Janson	Jennifer	L	Termination Due To Death	100 > 1001 >> 101 >>> 1002
<input type="checkbox"/>	3	Flax	Ron		Active	100 > 1000 >> 10022 >>> 1025
<input type="checkbox"/>	4	Carlow	Jane		Active	100 > 1001 >> 101 >>> 1002
<input type="checkbox"/>	5	Timm	Robert		Active	100 > 1000 >> 10022 >>> 1026
<input type="checkbox"/>	6	Miller	Renee	D	Active	100 > 1000 >> 10022 >>> 1026
<input type="checkbox"/>	7	Mills	Linda		Active	100 > 1000 >> 10022 >>> 1025
<input type="checkbox"/>	8	Carlow	Harriet	E	Active	100 > 1001 >> 101 >>> 1002
<input type="checkbox"/>	10	Wolf	Naomi		Active	100 > 1001 >> 101 >>> 1002
<input type="checkbox"/>	11	Salacie	Richard		Active	100 > 1000 >> 10022 >>> 1026

Page 1 of 3 23 items

1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the Payrolls – Check Batch Settings Screen in the Appendix at the end of this chapter.
2. To select specific employees to include in the payroll, click **Select EEs** next to the **Employee Filter** field.
3. Click the checkbox (far left) at the top of the employees list to Select All, or select individual employees.

4. Click **Done**, which brings you back to the Check Batch Settings screen.
5. Click the **Create Checks** button.  
**Result:** A confirmation opens letting the user know that the checks were successfully created.
6. Click **OK**.  
**Result:** The Batch Checks Screen opens.

## Batch Checks Screen

Payroll Timeline

Payroll 09/19/2019 - 1    Batch 1 : 09/12/2019 - 09/18/2019    Regular | -99995490 | 1 of 1

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

Type	EE Code	Name	Seq	Total Hrs	Gross Pay	E01 Hrs Salary	E01 Amt Salary	E02 Hrs Regular	E02 Amt Regular	E20 Hrs Salary	E20 Amt Salary
R	1	Janson, Jennifer L.	1	0.00	\$2,000.00		\$2,000.00				
R	01	Smith, Lisa	1	0.00	\$1,500.00		\$1,500.00				
R	3	Flax, Ron	1	0.00	\$2,000.00		\$2,000.00				
R	4	Carlson, Jane	1	0.00	\$1,000.00		\$1,000.00				
R	5	Timm, Robert	1	0.00	\$2,500.00		\$2,500.00				
R	6	Miller, Renee D.	1	0.00	\$1,200.00		\$1,200.00				
R	7	Mills, Linda	1	0.00	\$0.00						
R	8	Carlson, Harriet E.	1	35.00	\$455.00			35.00	\$455.00		
R	10	Wolf, Naomi	1	15.00	\$337.50			15.00	\$337.50		
R	11	Salacie, Richard	1	0.00	\$1,000.00						
R	12	Hard, Eric	1	0.00	\$3,000.00		\$3,000.00				
R	15	Oster, Michael M.	1	0.00	\$0.00						
R	20	Casucci, Kristen I.	1	0.00	\$0.00						
R	21	Amann, Kristin M.	1	0.00	\$0.00						
Totals				90.00	\$22,992.50		\$22,200.00	90.00	\$792.50		

Batch 1 Weekly

Payroll Notes    Time Clock Import    Employee Notes

23 Items

This screen offers three different viewing options, based upon the level of detail required by the user. The view is selected from the dropdown list in the far right of the Navigation Bar. For detailed information about the fields on this screen, refer to the Payrolls - Batch Checks Screen 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
  - a. Click within the column to edit of the check being modified.
  - b. Once finished click **Save** in the Header.
- To add a check for employees

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
 

Use this Template

-Select-

☐ Salary Pay: No

Search for employee(s)

<input type="checkbox"/>	EE #	Last Name	First Name	Middle Initial	Status	Organization Level
<input type="checkbox"/>	01	Smith	Lisa		Terminated	100 > 1000 >> 10022 >>> 1...
<input type="checkbox"/>	1	Janson	Jennifer	L	Termination Due To Death	100 > 1001 >> 101 >>> 1002
<input type="checkbox"/>	3	Flax	Ron		Active	100 > 1000 >> 10022 >>> 1...
<input type="checkbox"/>	4	Carlow	Jane		Active	100 > 1001 >> 101 >>> 1002
<input type="checkbox"/>	5	Timm	Robert		Active	100 > 1000 >> 10022 >>> 1...

Page 1 of 5

23 items

CREATE CHECK(S) FOR SELECTED EES

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


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

b. Select the Check Type being created.

c. Select the employee(s) for whom to create a check.

d. 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...

- 08 Hrs Wyoming Workers Comp
- 08 Amt Wyoming Workers Comp
- D01 Hrs 401(k) EE Contribution
- D01 Amt 401(k) EE Contribution
- D02 Hrs Health Insurance
- D02 Amt Health Insurance
- D03 Hrs 1099-R
- D03 Amt 1099-R
- D04 Hrs Garnishment
- D04 Amt Garnishment
- D05 Hrs Child Support

Current Columns

Search... Select: All | None

- Type
- EE Code
- Name
- Seq**
- Total Hrs
- Gross Pay
- E01 Hrs Salary
- E01 Amt Salary
- E02 Hrs Regular
- E02 Amt Regular
- E20 Hrs Salary

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.



ADD CHECK DELETE CHECK		Summary Detail								
E/D Code	Description	Hrs/Pcs	Rate Of Pay	Amount	Rate Number	Agency				
▶ Check -99995484 - R, Batch: 1, Employee: Appleman, Lori K. [21] Total Hrs: 0.00 , Total Amount: \$0.00										
▶ Check -99995479 - R, Batch: 1, Employee: Berezin, Donna K. [40] Total Hrs: 0.00 , Total Amount: \$0.00										
▶ Check -99995494 - R, Batch: 1, Employee: Carlow, Harriet E. [8] Total Hrs: 35.00 , Total Amount: \$455.00										
▶ Check -99995485 - R, Batch: 1, Employee: Carlow, Jane [4] Total Hrs: 0.00 , Total Amount: \$822.00										
▶ Check -99995478 - R, Batch: 1, Employee: Carvin, Neal [33] Total Hrs: 0.00 , Total Amount: \$4,500.00										
▶ Check -99995488 - R, Batch: 1, Employee: Casucci, Kristen I. [20] Total Hrs: 0.00 , Total Amount: \$0.00										
▶ Check -99995481 - R, Batch: 1, Employee: Conte, Barbara L. [25] Total Hrs: 40.00 , Total Amount: \$2,977.50										
Totals		\$23,975.92								
67 items										

- To add a check for employees, 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	Organization Level
<input type="checkbox"/>	01	Smith	Lisa		Terminated	100 > 1000 >> 10022 >>> 1...
<input type="checkbox"/>	1	Janson	Jennifer	L	Termination Due To Death	100 > 1001 >> 101 >>> 1002
<input type="checkbox"/>	3	Flax	Ron		Active	100 > 1000 >> 10022 >>> 1...
<input type="checkbox"/>	4	Carlow	Jane		Active	100 > 1001 >> 101 >>> 1002
<input type="checkbox"/>	5	Timm	Robert		Active	100 > 1000 >> 10022 >>> 1...

Page 1 of 5

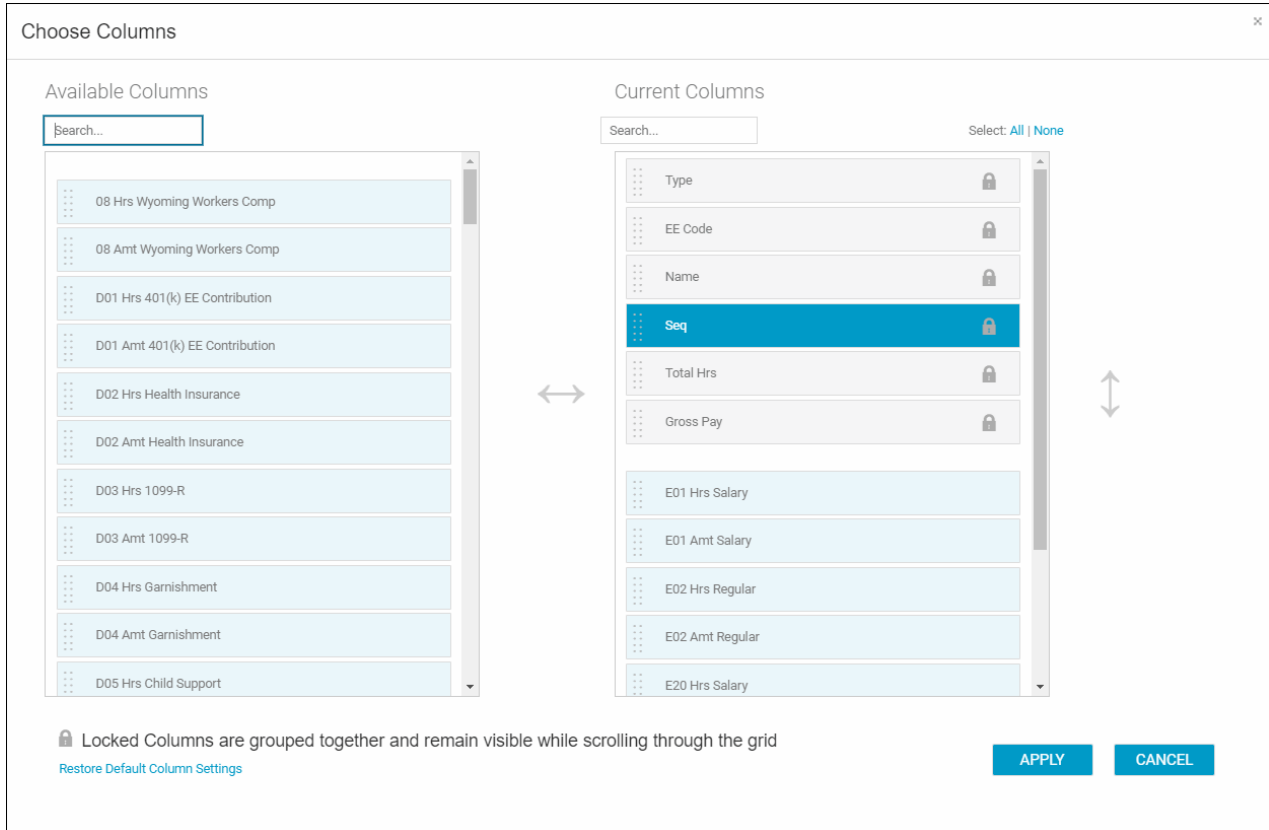
23 items

CREATE CHECK(S) FOR SELECTED EES

- Select the Check Type being created.
- Select the employee(s) for whom to create a check.

4. Click the **Create Check(s) for Selected EEs** button.
  - To add a Check Line click the **Add Check Line** button.
  - To add additional 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...

- 08 Hrs Wyoming Workers Comp
- 08 Amt Wyoming Workers Comp
- D01 Hrs 401(k) EE Contribution
- D01 Amt 401(k) EE Contribution
- D02 Hrs Health Insurance
- D02 Amt Health Insurance
- D03 Hrs 1099-R
- D03 Amt 1099-R
- D04 Hrs Garnishment
- D04 Amt Garnishment
- D05 Hrs Child Support

Current Columns

Search...

Select: All | None

- Type
- EE Code
- Name
- Seq
- Total Hrs
- Gross Pay
- E01 Hrs Salary
- E01 Amt Salary
- E02 Hrs Regular
- E02 Amt Regular
- E20 Hrs Salary

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.
5. 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.

Batch 1 Weekly

CREATE NEW CHECK

1 - Janson, Jennifer L. - 1 of 1

Check Serial #Check TypeSequence: -99995490 Regular 1 of 1

RECALCULATE CHECK PREVIEW ALD REFRESH SCHEDULED E/DS

E/D Code	Description	Hrs/Pcs	Pay Rate	Amount	Rate #
E02	Regular			\$0.00	1 (P) : \$0.00
E01	Salary			\$0.00	1 (P) : \$0.00
D01	401(k) EE Contribution			\$0.00	
D02	Health Insurance			\$170.00	
D17	Dental Insurance			\$55.00	
D18	Vision Plan			\$54.00	

6 items

Payroll Notes Time Clock Import Employee Notes

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 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 screen](#) in Evolution Classic. For detailed information about this screen, refer to the Payrolls – Manual Tax screen in the Appendix at the end of this chapter.

Batch 1 Weekly

CREATE NEW CHECK

1 - Janson, Jennifer L. - 1 of 1

Check Serial #Check TypeSequence: -99995490 Regular 1 of 1

RECALCULATE CHECK PREVIEW ALD REFRESH SCHEDULED E/DS

ADD STATES ADD LOCALS

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

Options

- ☒ Calculate Override Taxes
- ☒ Reciprocate SUI
- ☐ Disable Shortfalls

5 items

Payroll Notes Time Clock Import Employee Notes

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

## Fed Overrides screen

Click the **Fed Overrides** tab to block or override Federal taxes. Information on this screen is the same information as is found on the **Payrolls – Check – Tax Overrides** tab in Evolution Classic. 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 in the Appendix at the end of this chapter.

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

## State Overrides screen

Batch 1 Weekly

CREATE NEW CHECK

CHECK LINES

MANUAL TAX

FED OVERRIDES

STATE OVERRIDES

LOCAL OVERRIDES

OPTIONS

REVIEW

PREVIOUS

NEXT

3 - Flax, Ron - 1 of 1

Check Serial #Check TypeSequence

-99995495 Regular 1 of 1

RECALCULATE CHECK

PREVIEW ALD

REFRESH SCHEDULED E/DS

OVR	State	Abr
	New York	NY
	Pennsylvania	PA

Settings for:

New York - NY

State Type

None

Tax at Supplemental Rate

Blocks

☐ Regular Tax

☐ Additional Tax

☐ SUI

☐ SDI

2 items

Payroll Notes

Time Clock Import

Employee Notes

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

## Local Overrides screen

Batch 1 Weekly

CREATE NEW CHECK

CHECK LINES

MANUAL TAX

FED OVERRIDES

STATE OVERRIDES

LOCAL OVERRIDES

OPTIONS

REVIEW

PREVIOUS

NEXT

12 - Hard, Eric - 1 of 1

Check Serial #Check TypeSequence

-99995493 Regular 1 of 1

RECALCULATE CHECK

PREVIEW ALD

REFRESH SCHEDULED E/DS

OVR	Local Name	Type
	MCT Mobility Tax - NY...	ER
	New York City Non-Re...	EE
	New York City Res. - N...	EE

Settings for:

MCT Mobility Tax - NY MCT

☐ Block this Local Tax

Amount

3 items

Payroll Notes

Time Clock Import

Employee Notes

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 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 in the Appendix at the end of this chapter.

Check Calculations		FEDERAL TAXES:	
Federal Taxable Wages	\$0.00	EARNINGS:	
OASDI Taxable Wages	\$0.00	E01 Salary	\$3,000.00
OASDI Taxable Tips	\$0.00	Earnings SubTotal:	\$3,000.00
Medicare Taxable Wages	\$0.00	MEMOS:	
Gross Amount	\$0.00		
Net Amount	\$0.00		

Payroll 08/29/2019 - 1      Batch 1 : 08/22/2019 - 08/28/2019

Calculation Results

Total Gross Pay: \$18,992.50

Total Taxes: \$0.00

Batch 1 Weekly

Totals

EXPORT TO EXCEL

E/D Code	Description	Hrs/Pcs	Amount
D01	401(k) EE Contribution	0.00	\$90.00
D02	Health Insurance	0.00	\$251.12
D04	Garnishment	0.00	\$0.00
D05	Child Support	0.00	\$228.00
D055	Child Support 4	0.00	\$0.00
D09	Direct Deposit Net	0.00	\$0.00
D17	Dental Insurance	0.00	\$102.00
D18	Vision Plan	0.00	\$54.00
D33	Flexible Spending Account	0.00	\$0.00
DH	Mass Retirement	0.00	\$12.46
E01	Salary	0.00	\$16,200.00
E02	Regular	90.00	\$792.50
E22	Clergy Earnings	0.00	\$2,000.00
M03	ER Safe Harbor Match	0.00	\$0.00
M05	401(k) ER Contribution M...	0.00	\$0.00

15 items

Totals by Check Type    User Entries Separately

Taxes

EXPORT TO EXCEL

Description	Amount	Count
-------------	--------	-------


No items to display


User Entries Separately

Payroll Notes

- Once verified, click the **Lock Tax Calculations** button to save those figures.
- 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 in the Appendix at the end of this chapter.

**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

Date Range	Status	Frequency	Submission Details
08/22/2019 - 1	Submitted	Weekly	Submitted on: 09/05/2019 01:23 PM
09/05/2019 - 1	Processed	Weekly	Submitted on: 09/03/2019 09:55 AM
09/26/2019	Not Due	Weekly	Submit by: 09/24/2019
08/29/2019 - 1	Submitted	Weekly	Submitted on: 09/05/2019 01:16 PM
09/12/2019 - 1	Submitted	Weekly	Submitted on: 09/05/2019 11:19 AM
10/01/2019	Not Due	Monthly	Submit by: 09/27/2019
08/30/2019 - 1	Submitted	Monthly	Submitted on: 09/05/2019 01:20 PM
09/19/2019	Not Due	Weekly	Submit by: 09/17/2019
10/03/2019	Not Due	Weekly	Submit by: 10/01/2019

2. Click the large **plus sign** in the heading.

**Result:** The Create Payroll screen opens asking if you are creating a Payroll from the Calendar or a New Payroll (Unscheduled).



3. Click **New Payroll**

4. Select the **Check Date** and select whether to
- Ignore - do nothing to the calendar
  - Insert New - insert the new check date into the Calendar, or
  - Replace Existing - replace a check date already in the calendar.
5. Click **OK**.
- Result:** The Check Batch Settings screen opens.

## Check Batch Settings screen

1. Select the items to include in the payroll in the Include section.
2. Complete required and applicable fields in the Time Clock Import Options section.
3. Click the **Create Checks** button.
4. 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 in the Appendix at the end of this chapter.

Payroll Timeline

Payroll 09/19/2019 - 1    Batch 1 : 09/12/2019 - 09/18/2019    Regular | -99995490 | 1 of 1

EXPORT TO EXCEL    ADD CHECK    DELETE CHECK    Search Checks...    Group By: Company Number    Summary

Type	EE Code	Name	Seq	Total Hrs	Gross Pay	E01 Hrs Salary	E01 Amt Salary	E02 Hrs Regular	E02 Amt Regular	E20 Hrs Salary	E20 Amt Salary
R	1	Janson, Jennifer L.	1	0.00	\$2,000.00		\$2,000.00				
R	01	Smith, Lisa	1	0.00	\$1,500.00		\$1,500.00				
R	3	Flax, Ron	1	0.00	\$2,000.00		\$2,000.00				
R	4	Carlow, Jane	1	0.00	\$1,000.00		\$1,000.00				
R	5	Timm, Robert	1	0.00	\$2,500.00		\$2,500.00				
R	6	Miller, Renee D.	1	0.00	\$1,200.00		\$1,200.00				
R	7	Mills, Linda	1	0.00	\$0.00						
R	8	Carlow, Harriet E.	1	35.00	\$455.00			35.00	\$455.00		
R	10	Wolf, Naomi	1	15.00	\$337.50			15.00	\$337.50		
R	11	Salacie, Richard	1	0.00	\$1,000.00						
R	12	Hard, Eric	1	0.00	\$3,000.00		\$3,000.00				
R	15	Oster, Michael M.	1	0.00	\$0.00						
R	20	Casucci, Kristen I.	1	0.00	\$0.00						
R	21	Anderson, Linda K.	1	0.00	\$0.00						
Totals				90.00	\$22,992.50		\$22,200.00	90.00	\$792.50		

Batch 1 Weekly

Payroll Notes

Time Clock Import

Employee Notes

23 Items

## 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.

### 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      Use this Template

☐ Salary Pay: No      -Select-

Search for employee(s)


<input type="checkbox"/>	EE #	Last Name	First Name	Middle Initial	Status	Organization Level
<input type="checkbox"/>	01	Smith	Lisa		Terminated	100 > 1000 >> 10022 >>> 1...
<input type="checkbox"/>	1	Janson	Jennifer	L	Termination Due To Death	100 > 1001 >> 101 >>> 1002
<input type="checkbox"/>	3	Flax	Ron		Active	100 > 1000 >> 10022 >>> 1...
<input type="checkbox"/>	4	Carlow	Jane		Active	100 > 1001 >> 101 >>> 1002
<input type="checkbox"/>	5	Timm	Robert		Active	100 > 1000 >> 10022 >>> 1...

Page 1 of 5      23 items

**CREATE CHECK(S) FOR SELECTED EES**

1. Select the Check Type being created.
2. Select the employee(s) for whom to create a check.
3. 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...

08 Hrs Wyoming Workers Comp

08 Amt Wyoming Workers Comp

D01 Hrs 401(k) EE Contribution

D01 Amt 401(k) EE Contribution

D02 Hrs Health Insurance

D02 Amt Health Insurance

D03 Hrs 1099-R

D03 Amt 1099-R

D04 Hrs Garnishment

D04 Amt Garnishment

D05 Hrs Child Support

Current Columns

Search...

Select: All | None

Type

EE Code

Name

Seq

Total Hrs

Gross Pay

E01 Hrs Salary

E01 Amt Salary

E02 Hrs Regular

E02 Amt Regular

E20 Hrs Salary

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.

+

Batch 1

Weekly

ADD CHECK

DELETE CHECK

Summary Detail

E/D Code	Description	Hrs/Pcs	Rate Of Pay	Amount	Rate Number	Agency
▶ Check - 99995484 - R, Batch: 1, Employee: Appleman, Lori K. [21]						
Total Hrs: 0.00 , Total Amount: \$0.00						
▶ Check - 99995479 - R, Batch: 1, Employee: Berezin, Donna K. [40]						
Total Hrs: 0.00 , Total Amount: \$0.00						
▶ Check - 99995494 - R, Batch: 1, Employee: Carlow, Harriet E. [8]						
Total Hrs: 35.00 , Total Amount: \$455.00						
▶ Check - 99995485 - R, Batch: 1, Employee: Carlow, Jane [4]						
Total Hrs: 0.00 , Total Amount: \$822.00						
▶ Check - 99995478 - R, Batch: 1, Employee: Carvin, Neal [33]						
Total Hrs: 0.00 , Total Amount: \$4,500.00						
▶ Check - 99995488 - R, Batch: 1, Employee: Casucci, Kristen I. [20]						
Total Hrs: 0.00 , Total Amount: \$0.00						
▶ Check - 99995481 - R, Batch: 1, Employee: Conte, Barbara L. [25]						
Total Hrs: 40.00 , Total Amount: \$2,977.50						
Totals		\$23,975.92				

67 Items

Time Clock Import

Payroll Notes

Employee Notes

- To add a check for employees, 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	Organization Level
<input type="checkbox"/>	01	Smith	Lisa		Terminated	100 > 1000 >> 10022 >>> 1...
<input type="checkbox"/>	1	Janson	Jennifer	L	Termination Due To Death	100 > 1001 >> 101 >>> 1002
<input type="checkbox"/>	3	Flax	Ron		Active	100 > 1000 >> 10022 >>> 1...
<input type="checkbox"/>	4	Carlow	Jane		Active	100 > 1001 >> 101 >>> 1002
<input type="checkbox"/>	5	Timm	Robert		Active	100 > 1000 >> 10022 >>> 1...

Page 1 of 5

23 items


CREATE CHECK(S) FOR SELECTED EES

- Select the **Check Type** being created.
- Select the employee(s) for whom to create a check.

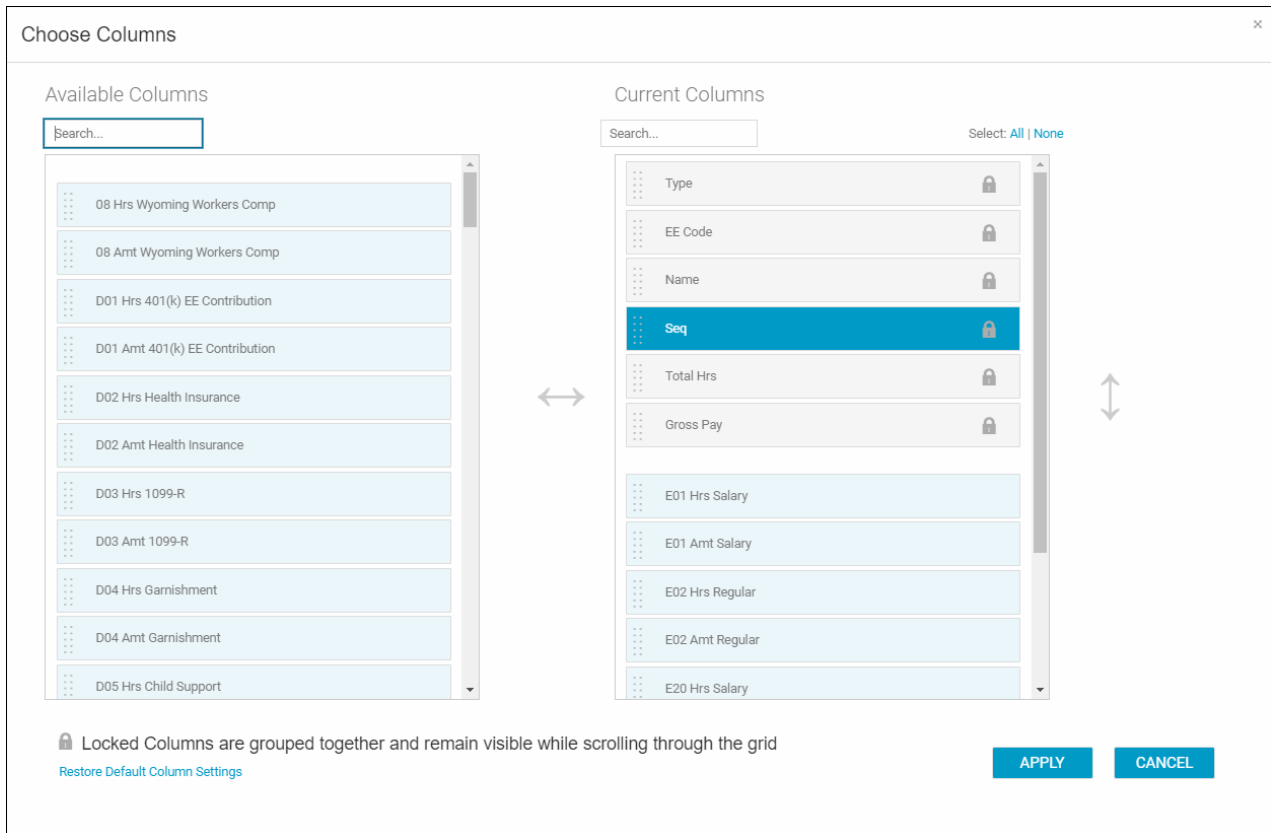
126

Asure Software

1/8/2020

4. Click the **Create Check(s) for Selected EEs** button.
  - To add a Check Line select a check and click the **Add Check Line** button.
  - 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...

- 08 Hrs Wyoming Workers Comp
- 08 Amt Wyoming Workers Comp
- D01 Hrs 401(k) EE Contribution
- D01 Amt 401(k) EE Contribution
- D02 Hrs Health Insurance
- D02 Amt Health Insurance
- D03 Hrs 1099-R
- D03 Amt 1099-R
- D04 Hrs Garnishment
- D04 Amt Garnishment
- D05 Hrs Child Support

Current Columns

Search...

Select: All | None

- Type
- EE Code
- Name
- Seq
- Total Hrs
- Gross Pay
- E01 Hrs Salary
- E01 Amt Salary
- E02 Hrs Regular
- E02 Amt Regular
- E20 Hrs Salary

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.
5. 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 - Janson, Jennifer L. - 1 of 1

Check Serial #Check TypeSequence  
-99995490 Regular 1 of 1

RECALCULATE CHECK PREVIEW ALD REFRESH SCHEDULED E/DS

E/D Code	Description	Hrs/Pcs	Pay Rate	Amount	Rate #
E02	Regular			\$0.00	1 (P) : \$0.00
E01	Salary			\$2,000.00	1 (P) : \$0.00
D01	401(k) EE Contribution			\$0.00	
D02	Health Insurance			\$170.00	
D17	Dental Insurance			\$55.00	
D18	Vision Plan			\$54.00	

6 items

1. Complete the required and applicable fields on this screen as well as on the Labor Defaults and Local Tax Overrides tabs. For detailed information about the fields on this screen, refer to the pages beginning at the Payrolls – Batch Checks screen 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 Classic. For detailed information about this screen, refer to the Payrolls – Manual Tax screen in the Appendix at the end of this chapter.

1 - Janson, Jennifer L. - 1 of 1

Check Serial #Check TypeSequence  
-99995490 Regular 1 of 1

RECALCULATE CHECK PREVIEW ALD REFRESH SCHEDULED E/DS

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

5 items

Options

- ☒ Calculate Override Taxes
- ☒ Reciprocate SUI
- ☐ Disable Shortfalls



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 Classic. 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 in the Appendix at the end of this chapter.

The screenshot shows the 'Fed Overrides' screen for employee '1 - Janson, Jennifer L. - 1 of 1'. The left sidebar contains a navigation menu with 'FED OVERRIDES' highlighted. The main content area includes a 'CREATE NEW CHECK' button, a 'Batch 1 Weekly' indicator, and a list of tabs: 'CHECK LINES', 'MANUAL TAX', 'FED OVERRIDES', 'STATE OVERRIDES', 'LOCAL OVERRIDES', 'OPTIONS', and 'REVIEW'. The 'FED OVERRIDES' tab is active. The screen displays the following fields and options:

- Check Serial #**: -99995490
- Check Type**: Regular
- Sequence**: 1 of 1
- Buttons**: RECALCULATE CHECK, PREVIEW ALD, REFRESH SCHEDULED E/DS
- 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

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

## State Overrides screen

The screenshot shows the 'State Overrides' screen for employee '3 - Flax, Ron - 1 of 1'. The left sidebar contains a navigation menu with 'STATE OVERRIDES' highlighted. The main content area includes a 'CREATE NEW CHECK' button, a 'Batch 1 Weekly' indicator, and a list of tabs: 'CHECK LINES', 'MANUAL TAX', 'FED OVERRIDES', 'STATE OVERRIDES', 'LOCAL OVERRIDES', 'OPTIONS', and 'REVIEW'. The 'STATE OVERRIDES' tab is active. The screen displays the following fields and options:

- Check Serial #**: -99995495
- Check Type**: Regular
- Sequence**: 1 of 1
- Buttons**: RECALCULATE CHECK, PREVIEW ALD, REFRESH SCHEDULED E/DS
- Table**:
 

OVR	State	Abr
	New York	NY
	Pennsylvania	PA
- Settings for: New York - NY**
- State Type**: None
- Tax at Supplemental Rate**: ☐
- Blocks**:
  - ☐ Regular Tax
  - ☐ Additional Tax
  - ☐ SUI
  - ☐ SDI

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

Batch 1 Weekly

CREATE NEW CHECK

12 - Hard, Eric - 1 of 1

Check Serial #Check TypeSequence  
-99995493 Regular 1 of 1

RECALCULATE CHECK PREVIEW ALD REFRESH SCHEDULED E/DS

OVR	Local Name	Type
	MCT Mobility Tax - NY...	ER
	New York City Non-Re...	EE
	New York City Res - N...	EE

Settings for:  
MCT Mobility Tax - NY MCT

☐ Block this Local Tax

Amount

3 items

Payroll Notes  
Time Clock Import  
Employee Notes

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 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 in the Appendix at the end of this chapter.

Federal Taxable Wages	EARNINGS:	DEDUCTIONS:	FEDERAL TAXES:
OASDI Taxable Wages \$0.00	E01 Salary \$3,000.00		
OASDI Taxable Tips \$0.00	Earnings SubTotal: \$3,000.00		
Medicare Taxable Wages \$0.00	MEMOS:		
Gross Amount \$0.00			
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 the Totals  symbol 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.

Payroll 08/29/2019 - 1      Batch 1 : 08/22/2019 - 08/28/2019

Batches → Checks → Totals → Finish

### Calculation Results

Total Gross Pay: \$18,992.50      Total Taxes: \$0.00

**Totals**

EXPORT TO EXCEL

E/D Code ▲	Description	Hrs/Pcs	Amount
▶ D01	401(k) EE Contribution	0.00	\$90.00
▶ D02	Health Insurance	0.00	\$251.12
▶ D04	Garnishment	0.00	\$0.00
▶ D05	Child Support	0.00	\$228.00
▶ D055	Child Support 4	0.00	\$0.00
▶ D09	Direct Deposit Net	0.00	\$0.00
▶ D17	Dental Insurance	0.00	\$102.00
▶ D18	Vision Plan	0.00	\$54.00
▶ D33	Flexible Spending Account	0.00	\$0.00
▶ DH	Mass Retirement	0.00	\$12.46
▶ E01	Salary	0.00	\$16,200.00
▶ E02	Regular	90.00	\$792.50
▶ E22	Clergy Earnings	0.00	\$2,000.00
▶ M03	ER Safe Harbor Match	0.00	\$0.00
▶ M05	401(k) ER Contribution M...	0.00	\$0.00

15 Items

☐ Totals by Check Type    ☐ User Entries Separately

**Taxes**

EXPORT TO EXCEL

Description ▲	Amount	Count
No items to display		

☐ User Entries Separately

Payroll Notes

**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

Pre-processing is always recommended prior to submitting a payroll.

After the checks have been created, when the Calculate button is clicked, 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 09/19/2019 - 1      Batch 1 : 09/12/2019 - 09/18/2019

Calculation Results

**CALCULATE**

Total Gross Pay: \$24,992.50

Total Taxes: \$0.00

Totals

E/D Code	Description	Hrs/Pcs	Amount
D01	401(k) EE Contribution	0.00	\$90.00
D02	Health Insurance	0.00	\$421.12
D04	Garnishment	0.00	\$0.00
D05	Child Support	0.00	\$228.00
D055	Child Support 4	0.00	\$0.00
D09	Direct Deposit Net	0.00	\$0.00
D17	Dental Insurance	0.00	\$157.00
D18	Vision Plan	0.00	\$108.00
D33	Flexible Spending Account	0.00	\$0.00
DH	Mass Retirement	0.00	\$12.46
E01	Salary	0.00	\$22,200.00
E02	Regular	90.00	\$792.50
E22	Clergy Earnings	0.00	\$2,000.00
M03	ER Safe Harbor Match	0.00	\$0.00
M05	401(k) ER Contribution M.L.	0.00	\$0.00

Taxes

Description	Amount	Count
-------------	--------	-------

Batch 1 Weekly

Payroll Notes

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

- Click **Finish**  in the header.

**Result:** The Submittal Options screen opens.

**Important:** The blocking of ACH, Billing, and Deposits are controlled by the Security function “Payroll Wizard Including Deposit/Liability, Billing, and ACH Block Options”. To prevent users from blocking those items, be certain this function is DISABLED in the Security Settings!

**Submittal Options**

Blocks

☐ Agency Payments☐ Checks☐ Reports☐ ACH☐ Billing☐ Liabilities☐ Deposits☐ Time Off Accrual☐ Accruals Only

Payroll Check Comments

SUBMIT PAYROLL

PROCESS PAYROLL

4. Select applicable Submittal Options.
5. 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.

---

Payroll 09/12/2019 - 1

Submittal Options

Blocks

☐ Agency Payments

☒ Checks

☒ Reports

☐ ACH

☐ Billing

☐ Liabilities

☐ Deposits

☐ Time Off Accrual

☐ Accruals Only


Payroll Check Comments

This payroll has been submitted to  
**Asure Software**  
09/05/2019 11:19 AM

Payroll Notes

Batches → Checks → Totals → Finish

## 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.

# The Results Screen

Users can view payroll results and reprint reports, invoices, payroll checks, or miscellaneous checks from the Results screen, which 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.

## 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:
  - “Ability to reprint payroll reports”
  - “Ability to reprint processed payroll checks”
  - “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.

---

## Viewing Payroll Results

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

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

**Result:** The Results screen opens



Payroll 09/05/2019 - 1

Details

Processed on  
09/03/2019 at 09:55 AM

Applied Blocks

Check Comments

Send to Task Queue

Items

- ☒ Reports
- ☒ Invoices
- ☒ Payroll Checks
- [Selected: All](#)
- ☐ Misc Checks

Options

- ☐ Don't print banking info
- ☐ Don't print background
- ☐ Don't use VMR Settings

Show Time Off Balances

As of Current Date

Payroll Check Stock

Legal Top Stub 2/Up (New...)

SEND

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.
- Options - any other instructions that were included when running the payroll or report.

## Reprinting Reports and Invoices

Select the checkbox(es) in the Items section of the Results screen, of what need to be reprinted.

The screenshot displays a web interface with two main sections: 'Items' and 'Options'. In the 'Items' section, there are four items: 'Reports' (checked), 'Invoices' (checked), 'Payroll Checks' (checked), and 'Misc Checks' (unchecked). Below 'Payroll Checks' is a link that says 'Selected: All'. In the 'Options' section, there are three checkboxes: 'Don't print banking info' (unchecked), 'Don't print background' (unchecked), and 'Don't use VMR Settings' (unchecked). Below these is a dropdown menu labeled 'Show Time Off Balances' with the selected option being 'As of Current Date'. Further down is another dropdown menu labeled 'Payroll Check Stock' with the selected option being 'Legal Top Stub 2/Up (New...'. At the bottom right of the 'Options' section is a button labeled 'SEND'.

3. Select the applicable options for the reports and/or invoices being reprinted.
  - Do not print banking info
  - Do not print background
  - Do not 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**.)

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 list 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.

**Payroll Checks**

<input type="checkbox"/>	Serial Nu...	Net W...	EE C...	Employee Name
<input type="checkbox"/>	2472	\$768.58	3	Flax, Ron
<input checked="" type="checkbox"/>	2476	\$419.10	8	Carlow, Harriet E.
<input type="checkbox"/>	2479	\$2,069.44	12	Hard, Eric
<input checked="" type="checkbox"/>	2477	\$207.32	10	Wolf, Naomi
<input checked="" type="checkbox"/>	2473	\$567.62	4	Carlow, Jane
<input type="checkbox"/>	2474	\$1,734.07	5	Timm, Robert

10 items

3 Selected

- Select the checkboxes for the checks to be reprinted.
- Click the **Select** button.
- Select the applicable options for the reports and/or invoices being reprinted.
  - Do not print banking info
  - Do not print background
  - Do not use VMR settings
- Time-off balances can be shown as of the **Current Day** or as of a **Historical Date**, using the dropdown field.
- 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.  
**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.
2. Select the payroll check stock for printing the checks from the Payroll Check Stock dropdown field on the right side of the screen.
3. To select a specific miscellaneous check(s) to reprint, rather than all checks, click the “Selected: None” link.
4. Select the checkboxes for the checks to be reprinted.
5. Click the **Select** button.
6. Select the applicable options for the checks being reprinted.
  - Do not print banking info
  - Do not print background
  - Do not use VMR settings
7. Time-off balances can be shown as of the **Current Day** or as of a **Historical Date**, using the dropdown field.
8. 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.

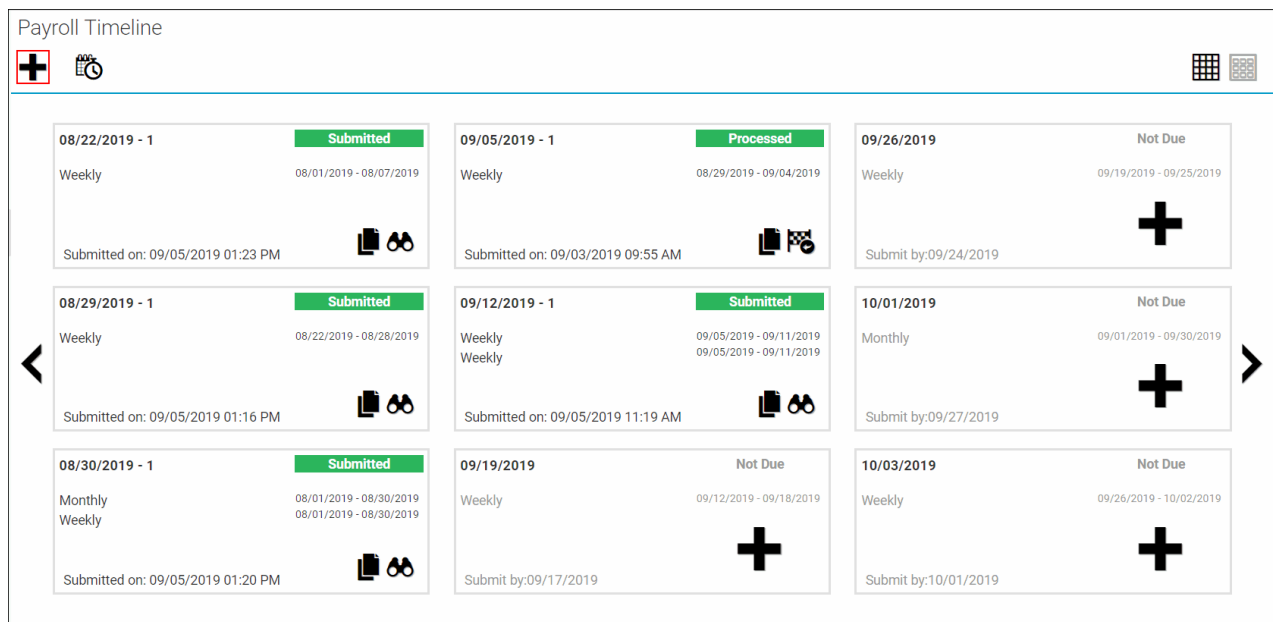
# Copying a Payroll


Payrolls can be copied directly from the Payroll Timeline screen in Evolution Payroll (in either the Payroll Table view or the Payroll Card view).

**Note:** 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
2. Click the **Table**  **view** symbol in the header.

Payroll Timeline

EXPORT TO EXCEL


Check Date *	Run #	Payroll Type	Created On	Due On	Current Status	Preprocessed On
08/22/2019	1	Regular	09/05/2019	08/20/2019	Submitted	09/03/2019
08/29/2019	1	Regular	09/05/2019	08/27/2019	Submitted	
08/30/2019	1	Regular	09/05/2019	08/28/2019	Submitted	
09/05/2019	1	Regular	09/03/2019	09/03/2019	Processed	
09/12/2019	1	Regular	09/05/2019	09/10/2019	Submitted	
09/19/2019		Regular		09/17/2019	Not Started	
09/26/2019		Regular		09/24/2019	Not Started	
10/01/2019		Regular		09/27/2019	Not Started	
10/03/2019		Regular		10/01/2019	Not Started	
10/10/2019		Regular		10/08/2019	Not Started	
10/17/2019		Regular		10/15/2019	Not Started	
10/24/2019		Regular		10/22/2019	Not Started	
10/31/2019		Regular		10/29/2019	Not Started	

- Select a payroll [row] on the screen that you want to copy.
  - 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

**Note:** The Copy Payroll symbol is not displayed if a payroll with a status of Void or Not Started is selected.

## 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
 

Use this Template

-Select-

☐ Salary Pay: No

Search for employee(s)

<input type="checkbox"/>	EE #	Last Name	First Name	Middle Initial	Status	Organization Level
<input type="checkbox"/>	01	Smith	Lisa		Terminated	100 > 1000 >> 10022 >>> 1...
<input type="checkbox"/>	1	Janson	Jennifer	L	Termination Due To Death	100 > 1001 >> 101 >>> 1002
<input type="checkbox"/>	3	Flax	Ron		Active	100 > 1000 >> 10022 >>> 1...
<input type="checkbox"/>	4	Carlow	Jane		Active	100 > 1001 >> 101 >>> 1002
<input type="checkbox"/>	5	Timm	Robert		Active	100 > 1000 >> 10022 >>> 1...

Page 1 of 5

23 items

CREATE CHECK(S) FOR SELECTED EES

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

## Adding Check Lines

- Go to the **Payroll – Payroll Timeline** screen.
  - Click the **Edit** symbol on the payroll to be edited.
- Result:** The Batch Checks screen opens.

Payroll Timeline

Payroll 09/19/2019 - 1 Batch 1 : 09/12/2019 - 09/18/2019 Regular | -99995490 | 1 of 1

EXPORT TO EXCEL ADD CHECK DELETE CHECK Search Checks... Group By: Company Number Summary

Type	EE Code	Name	Seq	Total Hrs	Gross Pay	E01 Hrs Salary	E01 Amt Salary	E02 Hrs Regular	E02 Amt Regular	E20 Hrs Salary	E20 Amt Salary
R	1	Janson, Jennifer L.	1	0.00	\$2,000.00		\$2,000.00				
R	01	Smith, Lisa	1	0.00	\$1,500.00		\$1,500.00				
R	3	Flax, Ron	1	0.00	\$2,000.00		\$2,000.00				
R	4	Carlson, Jane	1	0.00	\$1,000.00		\$1,000.00				
R	5	Timm, Robert	1	0.00	\$2,500.00		\$2,500.00				
R	6	Miller, Renee D.	1	0.00	\$1,200.00		\$1,200.00				
R	7	Mills, Linda	1	0.00	\$0.00						
R	8	Carlson, Harriet E.	1	35.00	\$455.00						
R	10	Wolf, Naomi	1	15.00	\$337.50						
R	11	Salacie, Richard	1	0.00	\$1,000.00						
R	12	Hard, Eric	1	0.00	\$3,000.00		\$1,000.00				
R	15	Oster, Michael M.	1	0.00	\$0.00		\$3,000.00				
R	20	Casucci, Kristen L.	1	0.00	\$0.00						
R	21	Appleman, Lori K.	1	0.00	\$0.00						
Totals				90.00	\$22,992.50		\$22,200.00	90.00	\$792.50		

Batch 1 Weekly

Payroll Notes Time Clock Import Employee Notes

23 Items

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

Payroll 08/29/2019 - 2 Batch 1 : 08/22/2019 - 08/28/2019 Regular | -99995464 | 1 of 1

ADD CHECK DELETE CHECK Summary Detail

E/D Code	Description	Hrs/Pcs	Rate Of Pay	Amount	Rate Number	Agency
Check: -99995464 - R, Batch: 1, Employee: Appleman, Lori K. [21]						
Total Hrs: 0.00, Total Amount: \$0.00						
ADD CHECK LINE	DELETE CHECK LINE					
E02	Regular		\$25.00		1 (P) : \$25.00	
Check: -99995460 - R, Batch: 1, Employee: Berezin, Donna K. [40]						
Total Hrs: 0.00, Total Amount: \$0.00						
Check: -99995471 - R, Batch: 1, Employee: Carlson, Harriet E. [8]						
Total Hrs: 35.00, Total Amount: \$455.00						
Check: -99995465 - R, Batch: 1, Employee: Carlson, Jane [4]						
Total Hrs: 0.00, Total Amount: \$822.00						
Check: -99995459 - R, Batch: 1, Employee: Carvin, Neal [33]						
Total Hrs: 0.00, Total Amount: \$4,500.00						
Check: -99995468 - R, Batch: 1, Employee: Casucci, Kristen L. [20]						
Total Hrs: 0.00, Total Amount: \$0.00						

Batch 1 Weekly

Payroll Notes Time Clock Import Employee Notes

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



# Refreshing Scheduled E/Ds for Checks and Batches

The Refresh Scheduled E/Ds button can be used to refresh E/Ds on select Payroll screens for a check or batch, before the payroll is submitted for processing. **Example**, after making changes to a check line for an individual pending check, refresh Scheduled E/Ds to revert all of the Scheduled E/Ds in the check line to the values originally set up on the Employee – Scheduled E/Ds screen

This feature is available for checks in the Payroll – Detail view screen and for batches, on the Batch Card on the Batches screen

To begin,

1. Go to the Payrolls – Payroll Timeline screen.
2. Locate the Pending payroll requiring adjustment and click the **Edit** symbol.

09/19/2019 - 1

Pending

Weekly

09/12/2019 - 09/18/2019  
New Batch

Submit by:09/17/2019

**Result:** The Checks screen opens.

3. Select the **Detail** view from the dropdown list.

Payroll 09/19/2019 - 1

Batch 1 : 09/12/2019 - 09/18/2019

+

Batch 1 Weekly

CREATE NEW CHECK

CHECK LINES

MANUAL TAX

FED OVERRIDES

STATE OVERRIDES

LOCAL OVERRIDES

OPTIONS

REVIEW

PREVIOUS

NEXT

1 - Janson, Jennifer L. - 1 of 1

Check Serial #Check TypeSequence  
-99995490 Regular 1 of 1

RECALCULATE CHECK

PREVIEW ALD

REFRESH SCHEDULED E/Ds

E/D Code	Description	Hrs/Pcs	Pay Rate	Amount	Rate #
E02	Regular			\$0.00	1 (P) : \$0.00
E01	Salary			\$0.00	1 (P) : \$0.00
D01	401(K) EE Contribution			\$0.00	
D02	Health Insurance			\$170.00	
D17	Dental Insurance			\$55.00	
D18	Vision Plan			\$54.00	

6 items

Time Clock Import

Payroll Notes

Employee Notes

4. Click the **Refresh Scheduled E/Ds** button.

Once 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 Hot Keys also do not work while the system is locked for the refreshing task.





- 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. From the **Payrolls – Payroll Timeline screen**, locate the Pending payroll requiring adjustment and click the **Edit** symbol.

Payroll 09/19/2019 - 1    Batch 1 : 09/12/2019 - 09/18/2019    Regular | -99995490 | 1 of 1

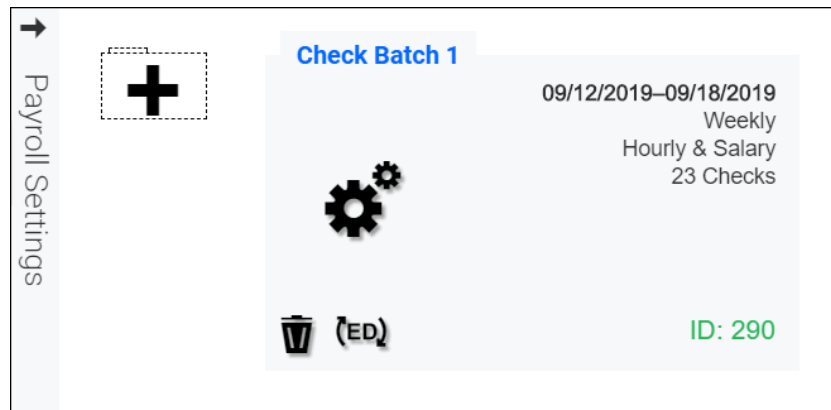
EXPORT TO EXCEL    ADD CHECK    DELETE CHECK    Search Checks...    Group By: Company Number    Summary

Type	EE Code	Name	Seq	Total Hrs	Gross Pay	E01 Hrs Salary	E01 Amt Salary	E02 Hrs Regular	E02 Amt Regular	E20 Hrs Salary	E20 Amt Salary	E25
R	1	Janson, Jennifer L.	1	0.00	\$2,000.00		\$2,000.00					
R	01	Smith, Lisa	1	0.00	\$1,500.00		\$1,500.00					
R	3	Flax, Ron	1	0.00	\$2,000.00		\$2,000.00					
R	4	Carlow, Jane	1	0.00	\$1,000.00		\$1,000.00					
R	5	Timm, Robert	1	0.00	\$2,500.00		\$2,500.00					
R	6	Miller, Renee D.	1	0.00	\$1,200.00		\$1,200.00					
R	7	Mills, Linda	1	0.00	\$0.00							
R	8	Carlow, Harriet E.	1	35.00	\$455.00			35.00	\$455.00			
R	10	Wolf, Naomi	1	15.00	\$337.50			15.00	\$337.50			
R	11	Salacie, Richard	1	0.00	\$1,000.00							
R	12	Hard, Eric	1	0.00	\$3,000.00		\$3,000.00					
R	15	Oster, Michael M.	1	0.00	\$0.00							
R	20	Casucci, Kristen L.	1	0.00	\$0.00							
R	21	Annalman, Linda M.	1	0.00	\$0.00							
				Totals	90.00	\$22,992.50		\$22,200.00	90.00	\$792.50		

23 Items

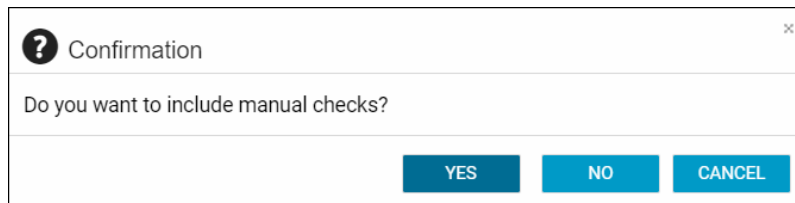
Payroll Notes  
 Time Clock Import  
 Employee Notes

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



- On the Batch for which to refresh the scheduled E/Ds, click the **Refresh E/Ds for this Batch** (ED) symbol.

**Result:** A confirmation screen opens asking whether to include Manual Checks.



- Select the applicable response.

## Blocking Scheduled E/Ds from a Payroll

One or more Scheduled E/Ds can be blocked from any unprocessed payrolls.

- Go to the [Payroll – Payroll Timeline](#) screen.
- Click the **Table view** symbol in the header.
- Select a payroll and click the Block Scheduled E/Ds (ED) symbol in the top left of the header

**Result:** The Block Scheduled E/Ds screen is displayed.

Payroll 08/29/2019 - 3

**Currently Blocked E/Ds**

D01 : 401(k) EE Contribution  
D02 : Health Insurance  
D04 : Garnishment

**E/D Selection**

Search for E/Ds

E/D Code	E/D Description	Block
08	Wyoming Workers Comp	<input type="checkbox"/>
D01	401(k) EE Contribution	<input checked="" type="checkbox"/>
D02	Health Insurance	<input checked="" type="checkbox"/>
D03	1099-R	<input type="checkbox"/>
D04	Garnishment	<input checked="" type="checkbox"/>
D05	Child Support	<input type="checkbox"/>
D055	Child Support 4	<input type="checkbox"/>
D06	Child Support 2	<input type="checkbox"/>
D07	Child Support 3	<input type="checkbox"/>
D08	Direct Deposit	<input type="checkbox"/>
D09	Direct Deposit Net	<input type="checkbox"/>
D10	HSA Family	<input type="checkbox"/>
D101	Percent of State Taxable Wages	<input type="checkbox"/>
D11	HSA Single	<input type="checkbox"/>
D12	HSA Catch up	<input type="checkbox"/>
D13	ER HSA Single	<input type="checkbox"/>
D14	ER HSA Family	<input type="checkbox"/>
D15	ER Federal Taxable 1099-E	<input type="checkbox"/>

56 Items

**Batch Selection**

Number	ID	Period	Frequency	No. of Checks	
1	292	08/22/2019 - 08/28/2019	Weekly	16 Checks	<input checked="" type="checkbox"/>

1 Items


APPLY CANCEL

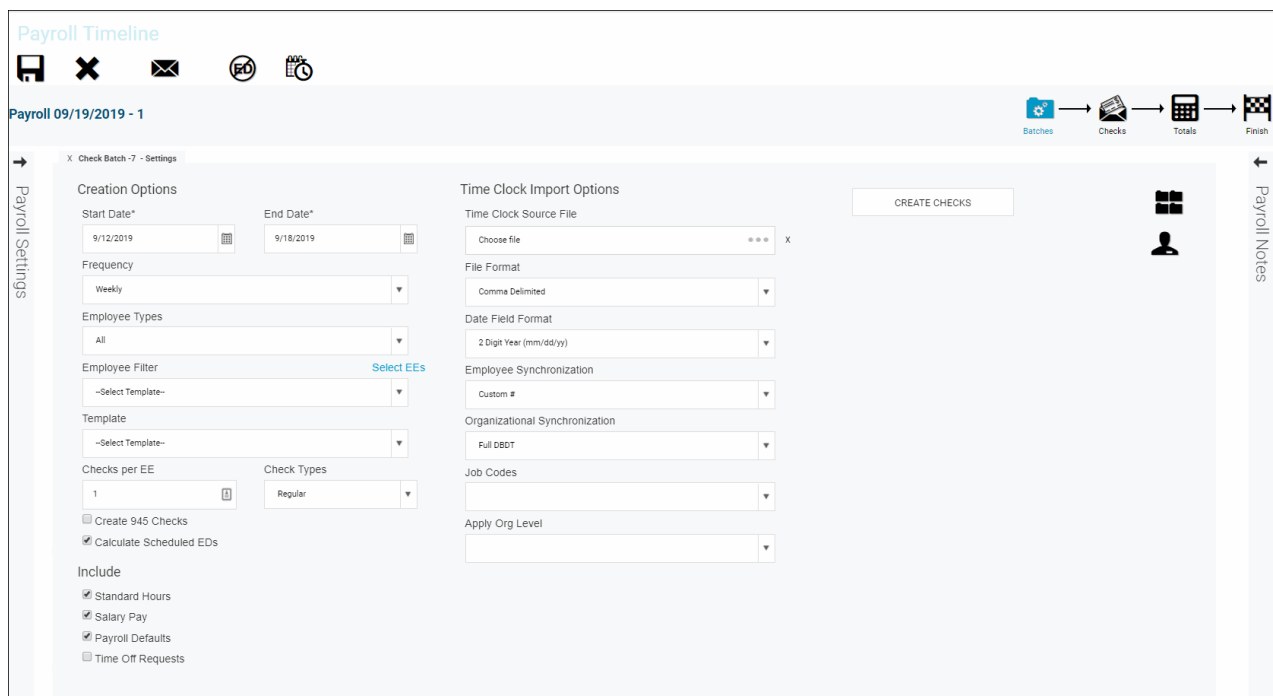
4. Select the Scheduled E/Ds to block from the payroll.
5. Select the batches from which the Scheduled E/Ds should be blocked.
6. Click **Apply**  
**Result:** The system displays a confirmation message “Are you sure you want to block the Scheduled E/Ds from the selected Batches? The selected batches 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.

# Creating Manual Checks

Users can create manual checks to be added to a payroll when creating a batch, or to an existing batch.

## Creating a new batch

1. On the Payroll Timeline screen select a payroll with a status of Pending and click 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.



3. 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.

4. Click the **Create Checks** button and proceed as normal when running a payroll.

## Adding to an existing batch

1. On the Payroll Timeline screen select a payroll with a status of Pending by clicking the **Edit** symbol.
2. Click a batch that has already been created.
3. Click the **Add Check** button in the Navigation bar

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

Add Checks

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)

<input type="checkbox"/>	EE #	Last Name	First Name	Middle Initial	Status	Organization Level
<input type="checkbox"/>	01	Smith	Lisa		Terminated	100 > 1000 >> 10022 >>> 1...
<input type="checkbox"/>	1	Janson	Jennifer	L	Termination Due To Death	100 > 1001 >> 101 >>> 1002
<input type="checkbox"/>	3	Flax	Ron		Active	100 > 1000 >> 10022 >>> 1...
<input type="checkbox"/>	4	Carlow	Jane		Active	100 > 1001 >> 101 >>> 1002
<input type="checkbox"/>	5	Timm	Robert		Active	100 > 1000 >> 10022 >>> 1...

Page 1 of 5

23 items

SELECT EES

4. Select **Manual** from the Check Types dropdown list.
5. Select the employees in the checkboxes who are to receive a manual check.
6. Click **Select EEs**

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

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

150

Asure Software

1/8/2020

### Add Checks

**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--

EE #	Last Name	First Name	Update Balance	Check #
000000005	Timm	Robert	No	4621

1 items

**CREATE CHECK(S) FOR SELECTED EES**

- Click the Create Check(s) for Selected EEs button.

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

EXPORT TO EXCEL		ADD CHECK		DELETE CHECK		Search Checks...		Group By: Company Number					Summary ▼	
Type	EE Code	Name	Seq	Total Hrs	Gross Pay	E01 Hrs Salary	E01 Amt Salary	E02 Hrs Regular	E02 Amt Regular	E20 Hrs Salary	E20 Amt Salary	E25		
R	1	Janson, Jennifer L.	1	0.00	\$2,000.00		\$2,000.00							
R	01	Smith, Lisa	1	0.00	\$1,500.00		\$1,500.00							
R	3	Flax, Ron	1	0.00	\$2,000.00		\$2,000.00							
R	4	Carlow, Jane	1	0.00	\$1,000.00		\$1,000.00							
M	5	Timm, Robert	2	0.00	\$0.00									

- Click the **Create Checks** button
- 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).

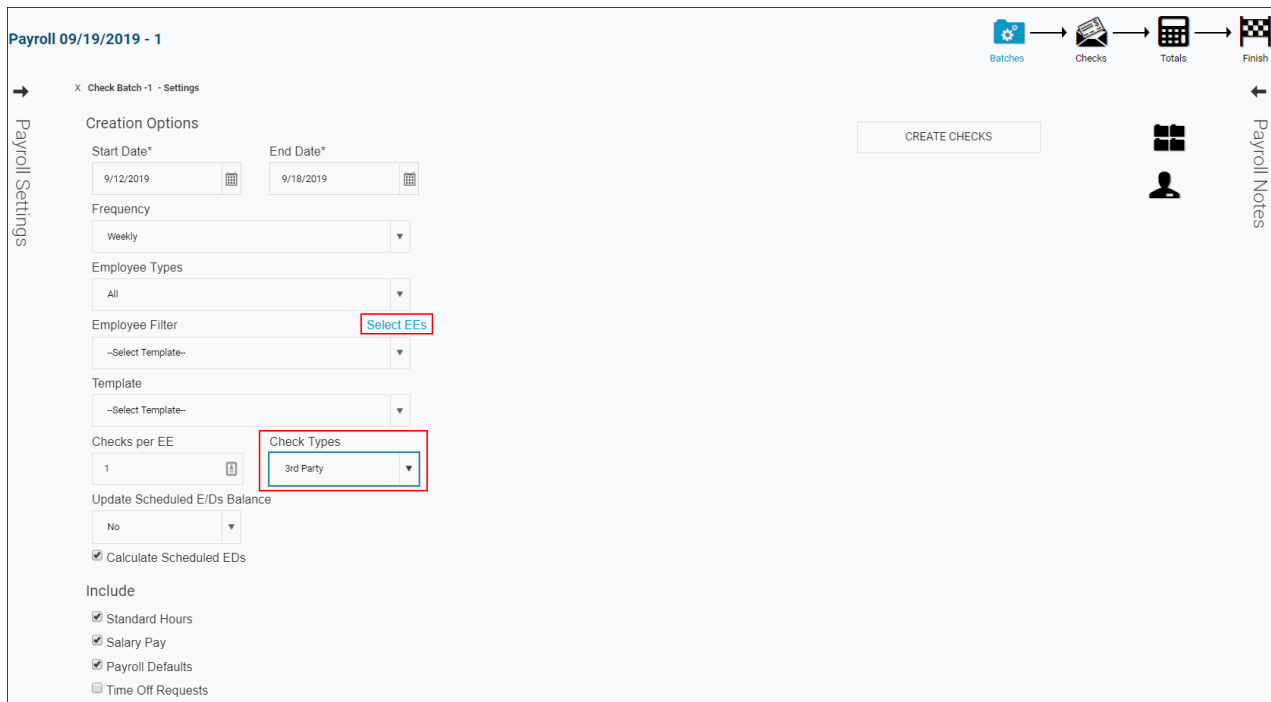
- Scheduled E/D amounts like Child Support should accept entered amounts.
- No EP, EO or EQ hours or amounts in manual checks.

## 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.



Payroll 09/19/2019 - 1

Check Batch -1 - Settings

Creation Options

Start Date\* 9/12/2019 End Date\* 9/18/2019

Frequency Weekly

Employee Types All

Employee Filter **Select EEs**

Template -Select Template-

Checks per EE 1

Check Types **3rd Party**

Update Scheduled E/Ds Balance No

☒ Calculate Scheduled EDs

Include

☒ Standard Hours

☒ Salary Pay

☒ Payroll Defaults

☐ Time Off Requests

CREATE CHECKS

Payroll Notes

3. Click **Select EEs** to identify 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.

Payroll 09/19/2019 - 1

Check Batch -2 - Settings

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	DBDT
01	Smith	Lisa		Terminated	100 * 1000 >> 10022 >>> 1025
1	Janson	Jennifer	L	Termination Due To Death	100 * 1001 >> 101 >>> 1002
3	Flax	Ron		Active	100 * 1000 >> 10022 >>> 1025
4	Carlow	Jane		Active	100 * 1001 >> 101 >>> 1002
5	Timm	Robert		Active	100 * 1000 >> 10022 >>> 1026
6	Miller	Renee	D	Active	100 * 1000 >> 10022 >>> 1026
7	Mills	Linda		Active	100 * 1000 >> 10022 >>> 1025
8	Carlow	Harriet	E	Active	100 * 1001 >> 101 >>> 1002
10	Wolf	Naomi		Active	100 * 1001 >> 101 >>> 1002
11	Salacie	Richard		Active	100 * 1000 >> 10022 >>> 1026

Page 1 of 3

23 Items

DONE

4. Click the **Done** button.

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

Payroll Timeline

Payroll 09/19/2019 - 1 Batch 1 : 09/12/2019 - 09/18/2019 Regular | -99995490 | 1 of 1

EXPORT TO EXCEL ADD CHECK DELETE CHECK Search Checks... Group By: Company Number Summary

Type	EE Code	Name	Seq	Total Hrs	Gross Pay	E01 Hrs Salary	E01 Amt Salary	E02 Hrs Regular	E02 Amt Regular	E20 Hrs Salary	E20 Amt Salary
R	1	Janson, Jennifer L.	1	0.00	\$2,000.00		\$2,000.00				
R	01	Smith, Lisa	1	0.00	\$1,500.00		\$1,500.00				
R	3	Flax, Ron	1	0.00	\$2,000.00		\$2,000.00				
R	4	Carlow, Jane	1	0.00	\$1,000.00		\$1,000.00				
R	5	Timm, Robert	1	0.00	\$2,500.00		\$2,500.00				
R	6	Miller, Renee D.	1	0.00	\$1,200.00		\$1,200.00				
R	7	Mills, Linda	1	0.00	\$0.00						
R	8	Carlow, Harriet E.	1	35.00	\$455.00			35.00	\$455.00		
R	10	Wolf, Naomi	1	15.00	\$337.50			15.00	\$337.50		
R	11	Salacie, Richard	1	0.00	\$1,000.00						
R	12	Hard, Eric	1	0.00	\$3,000.00		\$3,000.00				
R	15	Oster, Michael M.	1	0.00	\$0.00						
R	20	Casucci, Kristen L.	1	0.00	\$0.00						
R	21	Annalman, L. Neil W.	1	0.00	\$0.00						
Totals				90.00	\$22,992.50		\$22,200.00	90.00	\$792.50		

Batch 1 Weekly

23 Items

5. Click the **Add Check** button.

**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	Organization Level
<input type="checkbox"/>	01	Smith	Lisa		Terminated	100 > 1000 >> 10022 >>> 1...
<input type="checkbox"/>	1	Janson	Jennifer	L	Termination Due To Death	100 > 1001 >> 101 >>> 1002
<input type="checkbox"/>	3	Flax	Ron		Active	100 > 1000 >> 10022 >>> 1...
<input type="checkbox"/>	4	Carlow	Jane		Active	100 > 1001 >> 101 >>> 1002
<input checked="" type="checkbox"/>	5	Timm	Robert		Active	100 > 1000 >> 10022 >>> 1...

Page 1 of 5 23 items

**SELECT EES**

6. Select the **Check Type** 3<sup>rd</sup> Party from the dropdown list on the Payroll Settings screen.
7. Complete the additional applicable fields.
8. Click **Select EEs**  
**Result:** A Confirmation screen opens listing the check(s) to be created.
9. Click in the **Check#** column and give the check(s) a number.
10. Click **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".

Payroll 09/19/2019 - 1    Batch 1 : 09/12/2019 - 09/18/2019    Regular | -99995482 | 1 of 1

EXPORT TO EXCEL    ADD CHECK    DELETE CHECK    Search Checks...    Group By: Company Number    Summary

Type	EE Code	Name	Seq	Total Hrs	Gross Pay	E01 Hrs Salary	E01 Amt Salary	E02 Hrs Regular	E02 Amt Regular	E20 Hrs Salary	E20 Amt Salary	E25
R	1	Janson, Jennifer L.	1	0.00	\$2,000.00		\$2,000.00					
R	01	Smith, Lisa	1	0.00	\$1,500.00		\$1,500.00					
R	3	Flax, Ron	1	0.00	\$2,000.00		\$2,000.00					
R	4	Carlow, Jane	1	0.00	\$1,000.00		\$1,000.00					
3	5	Timm, Robert	2	0.00	\$0.00							

Batch 1 Weekly

Time Clock Import

Payroll Notes

## Adding Third Party Checks to an existing batch

1. On the Payroll Timeline screen select a payroll with a status of Pending by clicking the **Edit** symbol.
2. Click a batch already created.
3. 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)

<input type="checkbox"/>	EE #	Last Name	First Name	Middle Initial	Status	Organization Level
<input type="checkbox"/>	01	Smith	Lisa		Terminated	100 > 1000 >> 10022 >>> 1...
<input type="checkbox"/>	1	Janson	Jennifer	L	Termination Due To Death	100 > 1001 >> 101 >>> 1002
<input type="checkbox"/>	3	Flax	Ron		Active	100 > 1000 >> 10022 >>> 1...
<input type="checkbox"/>	4	Carlow	Jane		Active	100 > 1001 >> 101 >>> 1002
<input checked="" type="checkbox"/>	5	Timm	Robert		Active	100 > 1000 >> 10022 >>> 1...

Page 1 of 5

23 items

SELECT EES

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

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

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

5/30/2018

Asure Software

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**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 #
000000005	Timm	Robert	No	4621

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 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. Go to the Payrolls - Payroll Timeline screen.

The screenshot shows the 'Payroll Timeline' interface. At the top left, there's a header with a plus icon and a clock icon. The main area is a grid of payroll entries. Each entry shows a date range, frequency, status, and submission details. For example, the first entry is '08/22/2019 - 1' with a 'Submitted' status, frequency 'Weekly', and submission time '09/05/2019 01:23 PM'. Other entries show 'Processed' or 'Not Due' statuses. Large plus signs are visible in the 'Not Due' entries, indicating where a new payroll can be created. Navigation arrows are present on the left and right sides of the grid.

2. Click the large **plus sign** in the heading to create a new payroll.  
**Result:** A Create Payroll screen opens asking if you are creating a Payroll from the Calendar (scheduled) or a New Payroll (unscheduled.)

Create Payroll

Create: ☐ Payroll from the Calendar  
☒ New Payroll

Check Date\*

Calendar Options\*  
Select...  
Select...  
Ignore  
Insert New  
Replace Existing

[Edit Settings, Blocks and Comments](#)

OK CANCEL

3. If it's a New Payroll, enter the **Check Date** and **Calendar Options**:
  - Ignore - this payroll will be treated as an unscheduled payroll and nothing will be added to the calendar
  - Insert New - the payroll created will be treated as a scheduled check date and the check date will be added to the Calendar.
  - Replace Existing - this payroll date replaces the next scheduled check date in the calendar, and the calendar will be updated with this new date.
4. Click **OK**.

**Result:** The Check Batch Settings screen opens.

For detailed information about the individual fields on this screen, refer to the Payrolls – Check Batch Settings Screen section in the Payroll Menu Fields module.

5. Complete the required and applicable fields.
6. To select Employees, click **Select EEs** in the Creation Options section.

EE #	Last Name	First Name	Middle Initial	Status	DBDT
01	Smith	Lisa		Terminated	100 > 1000 >> 10022 >>> 1025
1	Janson	Jennifer	L	Termination Due To Death	100 > 1001 >> 101 >>> 1002
3	Flax	Ron		Active	100 > 1000 >> 10022 >>> 1025
4	Carlow	Jane		Active	100 > 1001 >> 101 >>> 1002
5	Timm	Robert		Active	100 > 1000 >> 10022 >>> 1026
6	Miller	Renee	D	Active	100 > 1000 >> 10022 >>> 1026
7	Mills	Linda		Active	100 > 1000 >> 10022 >>> 1025
8	Carlow	Harriet	E	Active	100 > 1001 >> 101 >>> 1002
10	Wolf	Naomi		Active	100 > 1001 >> 101 >>> 1002
11	Salacie	Richard		Active	100 > 1000 >> 10022 >>> 1026

7. Click the checkbox (far left) at the top of the employees list to Select All, or select individual employees.

8. Click **Done**, which brings you back to the Check Batch Settings screen.
9. Click the **Create Checks button**.  
**Result:** A confirmation opens letting the user know that the checks were successfully created.
10. Click **OK**.  
**Result:** The Batch Checks Screen opens.

Payroll Timeline

Pending

Payroll 09/19/2019 - 1    Batch 1 : 09/12/2019 - 09/18/2019    Regular | -99995490 | 1 of 1

→ → →

EXPORT TO EXCEL    ADD CHECK    DELETE CHECK    Search Checks...    Group By: Company Number    Summary

Type	EE Code	Name	Seq	Total Hrs	Gross Pay	E01 Hrs Salary	E01 Amt Salary	E02 Hrs Regular	E02 Amt Regular	E20 Hrs Salary	E20 Amt Salary
R	1	Janson, Jennifer L.	1	0.00	\$2,000.00		\$2,000.00				
R	01	Smith, Lisa	1	0.00	\$1,500.00		\$1,500.00				
R	3	Flax, Ron	1	0.00	\$2,000.00		\$2,000.00				
R	4	Carlow, Jane	1	0.00	\$1,000.00		\$1,000.00				
R	5	Timm, Robert	1	0.00	\$2,500.00		\$2,500.00				
R	6	Miller, Renee D.	1	0.00	\$1,200.00		\$1,200.00				
R	7	Mills, Linda	1	0.00	\$0.00						
R	8	Carlow, Harriet E.	1	35.00	\$455.00			35.00	\$455.00		
R	10	Wolf, Naomi	1	15.00	\$337.50			15.00	\$337.50		
R	11	Salacie, Richard	1	0.00	\$1,000.00						
R	12	Hard, Eric	1	0.00	\$3,000.00		\$3,000.00				
R	15	Oster, Michael M.	1	0.00	\$0.00						
R	20	Casucci, Kristen I.	1	0.00	\$0.00						
R	21	Annalman, Loretta M.	1	0.00	\$0.00						
Totals				90.00	\$22,992.50		\$22,200.00	90.00	\$792.50		

Batch 1 Weekly

Payroll Notes  
Time Clock Import  
Employee Notes

23 Items

11. 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

FIND

12345

16

7/1/2019 - 9/30/2019

Any

Check Da...	Run #	EE ID	Employee Name	Check #	Gross	Net	Status
No items to display							

CREATE VOID CHECK FOR SELECTED CHECK

12. Select Void for the **Check Type**.
13. Enter search criteria to find the check to void (Check #, EE ID, check range...)
14. 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 recommended that checks from previous quarters not be voided.

15. Highlight the check line to be voided.
16. 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.

Payroll 09/19/2019 - 1    Batch 1 : 09/12/2019 - 09/18/2019    Regular | -99995495 | 1 of 1

EXPORT TO EXCEL    ADD CHECK    DELETE CHECK    Search Checks...    Group By: Company Number    Summary

Type	EE Code	Name	Seq	Total Hrs	Gross Pay	E01 Hrs Salary	E01 Amt Salary	E02 Hrs Regular	E02 Amt Regular	E20 Hrs Salary	E20 Amt Salary	E25
R	1	Janson, Jennifer L.	1	0.00	\$2,000.00		\$2,000.00					
R	01	Smith, Lisa	1	0.00	\$1,500.00		\$1,500.00					
R	3	Flax, Ron	1	0.00	\$2,000.00		\$2,000.00					
R	4	Carlow, Jane	1	0.00	\$1,000.00		\$1,000.00					
M	5	Timm, Robert	2	0.00	\$0.00							
R	5	Timm, Robert	3	0.00	\$0.00							
R	5	Timm, Robert	1	0.00	\$2,500.00		\$2,500.00					
R	6	Miller, Renee D.	1	0.00	\$1,200.00		\$1,200.00					
R	7	Mills, Linda	1	0.00	\$0.00							
V	8	Carlow, Harriet E.	2	-35.00	-\$455.00							
R	8	Carlow, Harriet E.	1	35.00	\$455.00			-35.00	-\$455.00			
R	10	Wolf, Naomi	1	15.00	\$337.50			35.00	\$455.00			
R	11	Salacie, Richard	1	0.00	\$1,000.00			15.00	\$337.50			
R	12	Hard, Eric	1	0.00	\$3,000.00		\$1,000.00					
Totals				55.00	\$22,537.50		\$22,200.00	55.00	\$337.50			

26 Items

Batch 1 Weekly

Payroll Notes  
Time Clock Import  
Employee Notes

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

17. Process the payroll as if it were any other payroll.

## Voiding a check by editing a waiting payroll

1. On the Payroll Timeline screen click the **Edit** button for a payroll with a Pending status.
2. Click on / open a batch that has been created.

Payroll 09/19/2019 - 1      Batch 1 : 09/12/2019 - 09/18/2019      Regular | -99995490 | 1 of 1

EXPORT TO EXCEL    ADD CHECK    DELETE CHECK    Search Checks...    Group By: Company Number    Summary

Type	EE Code	Name	Seq	Total Hrs	Gross Pay	E01 Hrs Salary	E01 Amt Salary	E02 Hrs Regular	E02 Amt Regular	E20 Hrs Salary	E20 Amt Salary	E25
R	1	Janson, Jennifer L.	1	0.00	\$2,000.00		\$2,000.00					
R	01	Smith, Lisa	1	0.00	\$1,500.00		\$1,500.00					
R	3	Flax, Ron	1	0.00	\$2,000.00		\$2,000.00					
R	4	Carlson, Jane	1	0.00	\$1,000.00		\$1,000.00					
R	5	Timm, Robert	1	0.00	\$2,500.00		\$2,500.00					
R	6	Miller, Renee D.	1	0.00	\$1,200.00		\$1,200.00					
R	7	Mills, Linda	1	0.00	\$0.00							
R	8	Carlson, Harriet E.	1	35.00	\$455.00			35.00	\$455.00			
R	10	Wolf, Naomi	1	15.00	\$337.50			15.00	\$337.50			
R	11	Salacie, Richard	1	0.00	\$1,000.00		\$1,000.00					
R	12	Hard, Eric	1	0.00	\$3,000.00		\$3,000.00					
R	15	Oster, Michael M.	1	0.00	\$0.00							
R	20	Casucci, Kristen L.	1	0.00	\$0.00							
R	21	Amelmann, Linda M.	1	0.00	\$0.00							
Totals				90.00	\$22,992.50		\$22,200.00	90.00	\$792.50			

Batch 1 Weekly

Payroll Notes    Time Clock Import    Employee Notes

23 items

- Click **Batches** in the upper right-hand corner of the header, opening the Check Batch Settings screen.
  - 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

12345    16    7/1/2019 - 9/30/2019    Any

FIND

Check Da...	Run #	EE ID	Employee Name	Check #	Gross	Net	Status
No items to display							

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**.

Payroll 09/19/2019 - 1    Batch 1 : 09/12/2019 - 09/18/2019    Regular | -99995495 | 1 of 1

→ → →

EXPORT TO EXCEL    ADD CHECK    DELETE CHECK    Search Checks...    Group By: Company Number    Summary

Type	EE Code	Name	Seq	Total Hrs	Gross Pay	E01 Hrs Salary	E01 Amt Salary	E02 Hrs Regular	E02 Amt Regular	E20 Hrs Salary	E20 Amt Salary	E25
R	1	Janson, Jennifer L.	1	0.00	\$2,000.00		\$2,000.00					
R	01	Smith, Lisa	1	0.00	\$1,500.00		\$1,500.00					
R	3	Flax, Ron	1	0.00	\$2,000.00		\$2,000.00					
R	4	Carlow, Jane	1	0.00	\$1,000.00		\$1,000.00					
M	5	Timm, Robert	2	0.00	\$0.00							
R	5	Timm, Robert	3	0.00	\$0.00							
R	5	Timm, Robert	1	0.00	\$2,500.00		\$2,500.00					
R	6	Miller, Renee D.	1	0.00	\$1,200.00		\$1,200.00					
R	7	Mills, Linda	1	0.00	\$0.00							
V	8	Carlow, Harriet E.	2	-35.00	-\$455.00							
R	8	Carlow, Harriet E.	1	35.00	\$455.00			-35.00	-\$455.00			
R	10	Wolf, Naomi	1	15.00	\$337.50			35.00	\$455.00			
R	11	Salacie, Richard	1	0.00	\$1,000.00			15.00	\$337.50			
R	12	Hard, Eric	1	0.00	\$3,000.00		\$1,000.00					
Totals				55.00	\$22,537.50		\$22,200.00	55.00	\$337.50			

26 items

Batch 1 Weekly  
 Payroll Notes  
 Time Clock Import  
 Employee Notes


There are now two check lines for the voided check - the original (Check Type R) and the one with a Check Type of V.

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

10. Process the payroll as usual.

# Deleting Batches

There may be a need, from time to time, when a batch must be deleted.  
To delete a batch,

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.

Payroll Timeline

Payroll 09/19/2019 - 1    Batch 1 : 09/12/2019 - 09/18/2019    Regular | -99995490 | 1 of 1


EXPORT TO EXCEL    ADD CHECK    DELETE CHECK    Search Checks...    Group By: Company Number    Summary

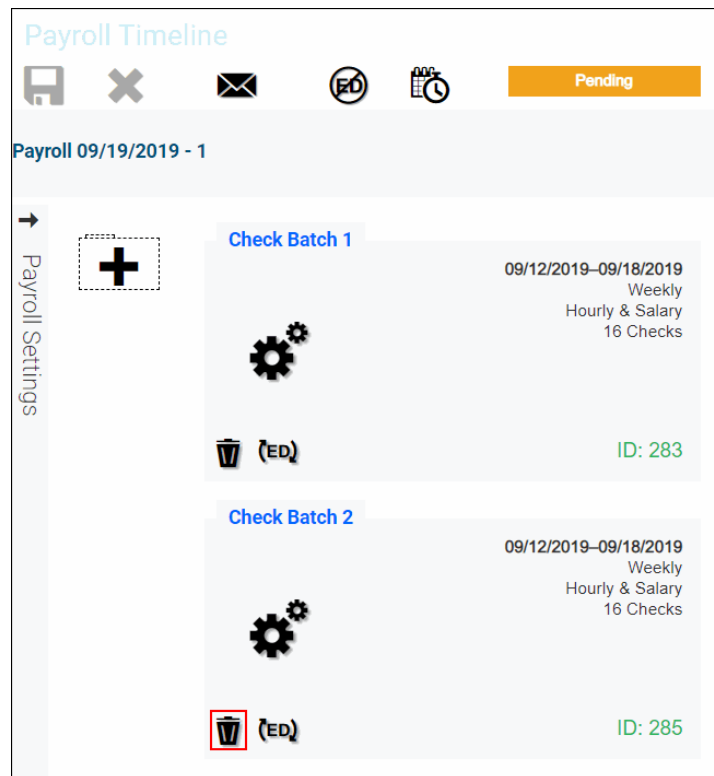
Type	EE Code	Name	Seq	Total Hrs	Gross Pay	E01 Hrs Salary	E01 Amt Salary	E02 Hrs Regular	E02 Amt Regular	E20 Hrs Salary	E20 Amt Salary
R	1	Janson, Jennifer L.	1	0.00	\$2,000.00		\$2,000.00				
R	01	Smith, Lisa	1	0.00	\$1,500.00		\$1,500.00				
R	3	Flax, Ron	1	0.00	\$2,000.00		\$2,000.00				
R	4	Carlow, Jane	1	0.00	\$1,000.00		\$1,000.00				
R	5	Timm, Robert	1	0.00	\$2,500.00		\$2,500.00				
R	6	Miller, Renee D.	1	0.00	\$1,200.00		\$1,200.00				
R	7	Mills, Linda	1	0.00	\$0.00						
R	8	Carlow, Harriet E.	1	35.00	\$455.00			35.00	\$455.00		
R	10	Wolf, Naomi	1	15.00	\$337.50			15.00	\$337.50		
R	11	Salacie, Richard	1	0.00	\$1,000.00		\$1,000.00				
R	12	Hard, Eric	1	0.00	\$3,000.00		\$3,000.00				
R	15	Oster, Michael M.	1	0.00	\$0.00		\$3,000.00				
R	20	Casucci, Kristen L.	1	0.00	\$0.00						
R	21	Anniaman, Kristi M.	1	0.00	\$0.00						
Totals				90.00	\$22,992.50		\$22,200.00	90.00	\$792.50		

Batch 1 Weekly

Payroll Notes    Time Clock Import    Employee Notes

23 Items

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




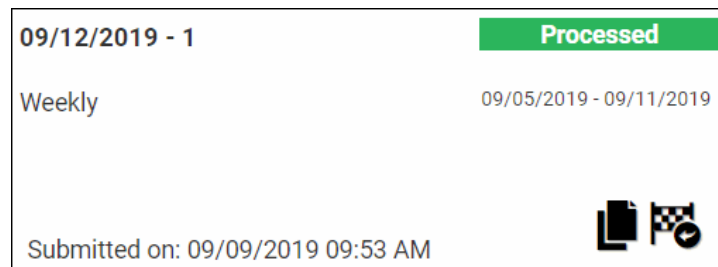
4. Click the **Delete** button in the left-hand corner of the Check Batch.  
**Result:** a message will open asking if you are sure you want to delete this batch > click **Yes**.  
The batch is deleted, and the batch sequence number is updated accordingly.

# Redistributing Labor Allocation

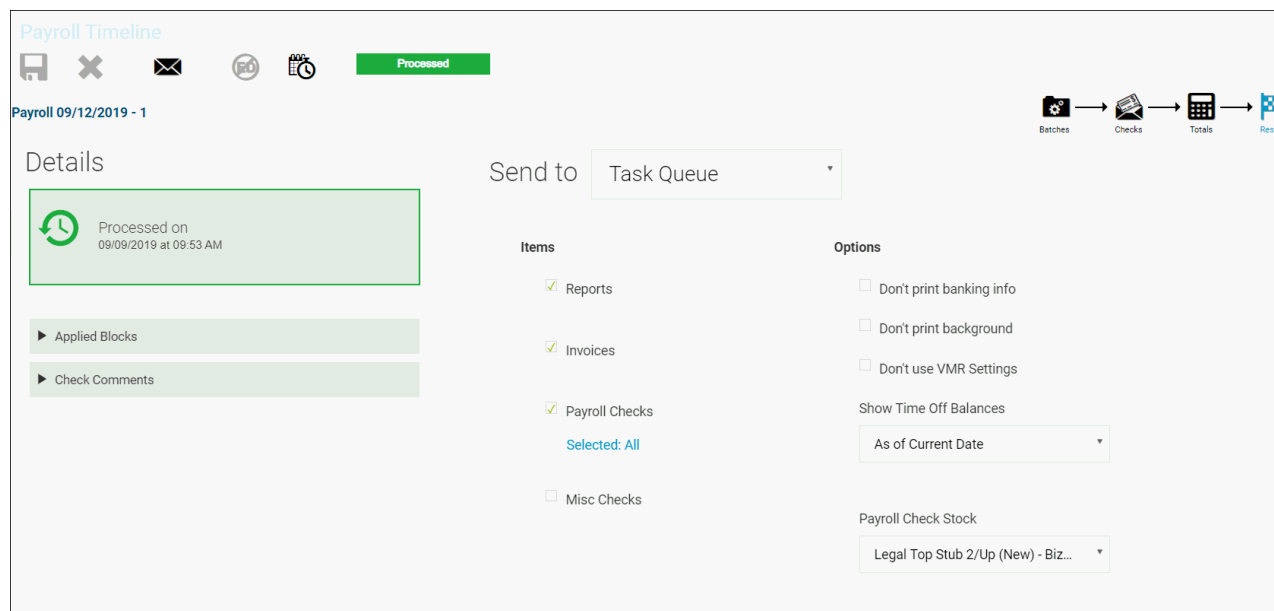
After a payroll has been processed the labor allocation sometimes needs readjustment for reporting purposes. Evolution Payroll supports the redistribute labor allocation process similarly to the Redistribute D/B/D/T process in Evolution Classic.

To redistribute labor allocation in Evolution Payroll,

1. Go to the Payrolls – Payroll Timeline screen.
2. Locate the Processed payroll requiring readjustment and click the Payroll Results  symbol.



**Result:** The following payroll details screen opens.



3. Click the **Checks** symbol in the upper right corner of the header.
4. Select the batch if there is more than one.
5. Select the **Detail view** from the dropdown list.
6. Highlight one of the E/D Codes > Click the Redistribute Allocation button.

**Result:** The Redistribute Allocations screen is displayed. Users can modify the existing labor allocations (click within the field to modify) or add a new allocation.

Payroll 09/12/2019 - 1      Batch 1 : 09/05/2019 - 09/11/2019

Detail

3 - Flax, Ron - 1 of 1      Check Serial # 2472      Check Type Regular      Sequence 1 of 1      REDISTRIBUTE ALLOCATION      PREVIEW ALD

EXPORT TO EXCEL

E/D Code	Description	Hrs/Pcs	Pay Rate	Amount	Rate #
E01	Salary			\$0.00	\$2,000.00
D02	Health Insurance				\$120.00
D04	Garnishment				\$345.20
D05	Child Support				\$100.00
D17	Dental Insurance				\$47.00

5 Items

Batch 1 Weekly

CHECK LINES  
MANUAL TAX  
FED OVERRIDES  
STATE OVERRIDES  
LOCAL OVERRIDES  
OPTIONS  
REVIEW

PREVIOUS NEXT

Payroll Notes  
Time Clock Import  
Employee Notes

- 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

Redistribute Allocations

Listed below are the allocations for your selected E/D Code: **D02 - Health Insurance**  
You can adjust values on the existing allocations or create additional allocations as needed.  
Original allocations can be modified but not removed.

ADD

Organizational Level	Workers Comp	Job Code	Hours	Amount	Line Item Date
BDazzled Design Retail Division/BDazzled Design Re...	8811	1021		\$120.00	

Division Branch Department Team

- Select Team -

BDazzled Der:BDazzled Design Ret: BDazzled Design Sales-Mark BDazzled Design Ret: BDazzled Design Ret: BDazzled Design Sales-Mark BDazzled Design Mid BDazzled Der:BDazzled Design Ret: BDazzled Design Retail Clie: BDazzled Design Ret:

Totals \$120.00

2 Items

Apply Cancel



# Time Clock Imports

The functionality of time clock imports in Evolution Payroll is the same as the time clock import functionality in Evolution Classic.

1. Begin by following the initial steps to create either a scheduled or unscheduled payroll.
2. Time clock import parameters are on the Check Batch Settings screen.

3. Once the required and applicable fields are completed on the left-hand side of the screen, complete the fields on the right regarding the time clock import file.

Field / Button	Description
<b>Time Clock Source File</b>	Select the file from which the data is being imported
<b>File Format</b>	Select the format of the import file
<b>Date Field Format</b>	Select the format of the date fields in the import file...mm/dd/yyyy, etc.
<b>Employee Synchronization</b>	Select how the employees are grouped in the import file – by name, employee number, etc....
<b>Organizational Synchronization</b>	Select the organizational level if using D/B/D/Ts
<b>Job Codes</b>	Select whether job codes will be imported with the data

Field / Button	Description
Apply Org Level	Select if keeping the organization level used in the import file

- Click the **Create Checks** button.

**Result:** A log file is created displaying that the import was successful and/or unsuccessful

# 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.

Field / Button	Description
<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 checks.
<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 screen

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

Field / Button	Description
<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 screen

Field / Button	Description
<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

Field / Button	Description
Line Item Begin Date	Beginning date of the override
Workers' Compensation	Workers' Comp Code assigned to the job associated with the claim
Line Item End Date	End date for including the override

## Payrolls - Check Lines - Local Tax Overrides screen

Field / Button	Description
Local Name	Name of the local tax
Exclude	Whether or not to exclude local tax from the check

## Payrolls - Manual Tax screen

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

## 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
<b>State</b>	State for which there is an override
<b>Abr</b>	State abbreviation
<b>State Type</b>	Is the override for regular tax or additional
<b>Amount</b>	Dollar or percentage amount of the tax override
<b>Blocks</b>	
<b>Regular Tax</b>	Is there a regular tax to block



Field / Button	Description
<b>Additional tax</b>	Is there an additional tax to block
<b>SUI</b>	Is SUI being blocked
<b>SDI</b>	Is SDI being blocked

## Payrolls - Options screen

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

## Payrolls - Review screen

Field / Button	Description
<b>Lock Tax Calculations button</b>	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

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

## Check Finder Menu

The Check Finder menu link opens a Check Finder screen on which parameters are entered to search for a specific check by check number or employee code / name within a particular date range, and status.

# 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 Classic and sent to Evolution Payroll using VMR.

## Defined Reports

Defined reports are 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 Classic 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.

Reports

DEFINED REPORTS

PUBLISHED REPORTS

AD HOC REPORTS

Search For Report...

EXPORT TO EXCEL

Report Name	Report #
Payroll Register (S109)	109
Earnings And Deductions (S181)	181
General Ledger (S183)	183
Tip Minimum Wage (S192)	192
Cover Letter (S193)	193
Direct Deposit (S211)	211
EE Cost (S213)	213
401K Report (S215)	215
Time-Off Report (S216)	216
Time-Off History (S223)	223
Job Costing (S229)	229
Taxable Wages For Payroll By Ck Date (S236)	236
Excess Tips FICA Credit Report (S244)	244
Tax Report For Payroll (S247)	247
New Hire Pending (S292)	292

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1 - 15 of 49 items

Payroll Register

Choose options for this report

CONFIGURE REPORT →

1. Select the report from the list.
2. Click the **Configure Report** button.

**Result:** The parameters screen opens for the report being configured.

Reports

DEFINED REPORTS ← REPORTS LIST Options for Payroll Register

PUBLISHED REPORTS

AD HOC REPORTS

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 01/01/2019 Ending Date 10/09/2019 Include All Payrolls APPLY

<input type="checkbox"/>	Check Date ▼	Run # ▼	Processed Date ▼	Status ▼	Type ▼
<input type="checkbox"/>	09/19/2019	1		Pending	Regular
<input checked="" type="checkbox"/>	09/12/2019	1	09/09/2019 09:53:53 AM	Processed	Regular
<input type="checkbox"/>	09/05/2019	1		Not Started	Regular
<input type="checkbox"/>	04/01/2019	1	03/19/2019 10:38:10 AM	Processed	Regular
<input type="checkbox"/>	03/28/2019	1	03/18/2019 03:52:16 PM	Processed	Regular
<input type="checkbox"/>	03/21/2019	1	03/18/2019 03:40:31 PM	Processed	Regular
<input type="checkbox"/>	03/18/2019	1	03/18/2019 03:37:26 PM	Processed	Tax Deposit
<input type="checkbox"/>	03/11/2019	1	03/06/2019 03:24:23 PM	Processed	Misc Check Adjustment
<input type="checkbox"/>	02/21/2019	1	02/25/2019 10:57:03 AM	Processed	Regular
<input type="checkbox"/>	02/14/2019	1	02/12/2019 02:33:01 PM	Processed	Regular

Page 1 of 2 1 - 10 of 11 items

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

DEFINED REPORTS

PUBLISHED REPORTS

AD HOC REPORTS

Search For Report...

EXPORT TO EXCEL

Report Name	Report #
Payroll Register (S109)	109
Earnings And Deductions (S181)	181
General Ledger (S183)	183
Tip Minimum Wage (S192)	192
Cover Letter (S193)	193
Direct Deposit (S211)	211
EE Cost (S213)	213
401K Report (S215)	215
Time-Off Report (S216)	216
Time-Off History (S223)	223
Job Costing (S229)	229
Taxable Wages For Payroll By Ck Date (S236)	236
Excess Tips FICA Credit Report (S244)	244
Tax Report For Payroll (S247)	247
New Hire Pending (S292)	292

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1 - 15 of 49 items

### Payroll Register

Choose options for this report

CONFIGURE REPORT

## Generating a Report

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.

Reports

DEFINED REPORTS   ← REPORTS LIST   Options for Payroll Register

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: 01/01/2019   Ending Date: 10/09/2019   Include: All Payrolls   APPLY

<input type="checkbox"/>	Check Date ▼	Run # ▼	Processed Date ▼	Status ▼	Type ▼
<input type="checkbox"/>	09/19/2019	1		Pending	Regular
<input checked="" type="checkbox"/>	09/12/2019	1	09/09/2019 09:53:53 AM	Processed	Regular
<input type="checkbox"/>	09/05/2019	1		Not Started	Regular
<input type="checkbox"/>	04/01/2019	1	03/19/2019 10:38:10 AM	Processed	Regular
<input type="checkbox"/>	03/28/2019	1	03/18/2019 03:52:16 PM	Processed	Regular
<input type="checkbox"/>	03/21/2019	1	03/18/2019 03:40:31 PM	Processed	Regular
<input type="checkbox"/>	03/18/2019	1	03/18/2019 03:37:26 PM	Processed	Tax Deposit
<input type="checkbox"/>	03/11/2019	1	03/06/2019 03:24:23 PM	Processed	Misc Check Adjustment
<input type="checkbox"/>	02/21/2019	1	02/25/2019 10:57:03 AM	Processed	Regular
<input type="checkbox"/>	02/14/2019	1	02/12/2019 02:33:01 PM	Processed	Regular

Page 1 of 2   1 - 10 of 11 items

- Click **Apply** to return a list of payrolls based on the filters selected.
- 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.

- Click the **EE Filter** tab to select or deselect employees from the report.

Reports

DEFINED REPORTS   ← REPORTS LIST   Options for Payroll Register

PAYROLL FILTER   EE FILTER   Org Filter   Misc Options   Run Report

You can apply a filter to reduce the number of employees in the list. Fine tune the list by checking.

Search for employee(s)

<input type="checkbox"/>	EE # ▼	SSN / EIN ▼	Last Name ▼	First Name ▼	MI ▼	Status ▼
<input type="checkbox"/>	01	323-33-3333	Smith	Lisa		Terminated
<input type="checkbox"/>	1	123-45-6987	Janson	Jennifer	L	Termination Due To Death
<input type="checkbox"/>	2	789-45-6126	Glazer	JoAnne		Active
<input type="checkbox"/>	3	112-33-4455	Flax	Ron		Active
<input type="checkbox"/>	4	555-55-5555	Carlow	Jane		Active
<input type="checkbox"/>	5	456-12-3987	Timm	Robert		Active
<input type="checkbox"/>	6	946-15-3152	Miller	Renee	D	Active
<input type="checkbox"/>	7	984-34-9581	Mills	Linda		Active
<input type="checkbox"/>	8	546-21-3879	Carlow	Harriet	E	Active
<input type="checkbox"/>	9	788-45-1236	Zenlea	Stephen		Active

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- Click the **Org Filter** tab to filter by organization (D/B/D/T) level

Reports

Options for Payroll Register

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

<input checked="" type="checkbox"/>	Division	Division #	Branch	Branch #	Department	Department #	Team	Team #
<input checked="" type="checkbox"/>	BDazzled Design Retail Division	100	BDazzled Design Retail - Williston	1000	BDazzled Design Sales-Marketing	10022	BDazzled Design Retail New Eng	1025
<input checked="" type="checkbox"/>	BDazzled Design Retail Division	100	BDazzled Design Retail - Williston	1000	BDazzled Design Sales-Marketing	10022	BDazzled Design Mid-Atlantic	1026
<input checked="" type="checkbox"/>	BDazzled Design Retail Division	100	BDazzled Design Retail - Burlington	1001	BDazzled Design Retail Client Services	101	BDazzled Design Retail Shipping/Dist	1002

- 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.

Reports

Options for Payroll Register

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

Additional options available for this report:

Parameters

- ☐ Show only Summary for Multiple check dates
- ☐ Show Home DBDT for each Employee
- ☒ Include Memos in Totals
- ☒ Include Pieces from Piecework in Totals
- ☒ Break Employee Between Pages
- ☒ Include Taxable Memos in Totals
- ☒ Deductions as Taxes
- ☐ Show Shift Differentials
- ☐ Bold EE Name, Check Number and Net Check
- ☐ Hide SSN, State Frequency and Salary

Grouping & Sorting

Group Level  
Division

Group Type  
Summary Detail

Group Sort  
Group Code

Detail Sort  
Employee SSN

SUI  
Do according to Company Setup

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

DEFINED REPORTS

PUBLISHED REPORTS

AD HOC REPORTS

REPORTS LIST

Options for Payroll Register

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:** 09/12/2019-09/12/2019

**Payrolls:** 1 Payroll(s) Selected.

**Employees:** 25 Employee(s) Selected.

**Organization:**

BDazzled Design Retail Division>BDazzled Design Retail - Williston>BDazzled Design Sales-Marketing>BDazzled Design Retail New Eng

BDazzled Design Retail Division>BDazzled Design Retail - Williston>BDazzled Design Sales-Marketing>BDazzled Design Mid-Atlantic

BDazzled Design Retail Division>BDazzled Design Retail - Burlington>BDazzled Design Retail Client Services>BDazzled Design Retail Shipping/Dist

With **options** set:

Include Memos in Totals

Include Pieces from Piecework in Totals

Break Employee Between Pages

Include Taxable Memos in Totals

Deductions as Taxes

etc...

Group Level: Division


Group Sort: Group Code

Detail Sort: Employee SSN

Group Type: Summary Detail

SUI: Do according to Company Setup

RUN THIS REPORT

10. Click **Run This Report**.
11. Click the **Task Queue**  **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 via the Virtual Mail Room (VMR) to Evolution Payroll. To display a preview of a Published Report,

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

Reports							
DEFINED REPORTS	Search for Report...			EXPORT TO EXCEL		PREVIEW REPORT →	
PUBLISHED REPORTS	<input type="checkbox"/>	Check Date ▼	Run # ▼	Check Period	Report # ▲ ▼	Report Name ▼	Type ▼
AD HOC REPORTS	<input checked="" type="checkbox"/>	02/22/2019	1	02/11/2019 - 02/17/2019	S1075	Employee Change Listing	Report
	<input checked="" type="checkbox"/>	02/22/2019	1	02/11/2019 - 02/17/2019	S1077	Labor Distribution (New) 2	Report
	<input type="checkbox"/>	02/22/2019	1	02/11/2019 - 02/17/2019	S1082	Cover Letter With Tax Report	Report
	<input type="checkbox"/>	02/22/2019	1	02/11/2019 - 02/17/2019	S109	Web Payroll Register	Report
	<input type="checkbox"/>	02/22/2019	1	02/11/2019 - 02/17/2019	S181	Earnings And Deductions	Report
	<input type="checkbox"/>	02/22/2019	1	02/11/2019 - 02/17/2019	S183	General Ledger	Report
	<input type="checkbox"/>	02/22/2019	1	02/11/2019 - 02/17/2019	S193	Cover Letter	Report
	<input type="checkbox"/>	02/22/2019	1	02/11/2019 - 02/17/2019	S211	Direct Deposit	Report
	<input type="checkbox"/>	02/22/2019	1	02/11/2019 - 02/17/2019	S213	EE Cost	Report
	<input type="checkbox"/>	02/22/2019	1	02/11/2019 - 02/17/2019	S214	Check Reconciliation-2	Report
	<input type="checkbox"/>	02/22/2019	1	02/11/2019 - 02/17/2019	S214	Check Reconciliation	Report
	<input type="checkbox"/>	02/22/2019	1	02/11/2019 - 02/17/2019	S215	401K Report	Report
	<input type="checkbox"/>	02/22/2019	1	02/11/2019 - 02/17/2019	S217	Workers Compensation	Report
	<input type="checkbox"/>	02/22/2019	1	02/11/2019 - 02/17/2019	S223	Time-Off History	Report
	<input type="checkbox"/>	02/22/2019	1	02/11/2019 - 02/17/2019	S229	Job Costing	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.
4. If more than one report is selected, use the arrows at the bottom of the Preview window to navigate between reports.
5. 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.
6. Print as normal from the **File** menu in the Windows Menu bar.
7. Click the **Reports List** button to return to the screen listing the Published Reports.

## Ad Hoc Reports

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 users' 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, and 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.

Verify there is a green plus sign to the left of Ad Hoc Reports. If there is a red minus sign, right-click 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 Menu bar.

Reports

+

Report Name *	Report #
Ad Hoc - Company (S1153)	1153
Ad Hoc - Employee (S1134)	1134
Ad Hoc - Payroll (S1132)	1132
Demo Payroll Report (S1132)	1132
test (S1132)	1132

1 - 5 of 5 items

Ad Hoc - Company

Choose options for this report

EDIT REPORT →

RUN REPORT →

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).

Reports

+

DEFINED REPORTS

PUBLISHED REPORTS

AD HOC REPORTS

← REPORTS LIST

### Ad Hoc Report

New Report

Report Name \*

Ad Hoc Report

Select Adhoc Report Template

Ad Hoc - Company (S1153)

CONFIGURE REPORT →

6. Click the **Configure Report** button.

Options for Ad Hoc Report (S1153)

Columns   Sorting

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

2 items

ADD FIELDS   DELETE FIELDS   MOVE UP   MOVE DOWN

Column Type: Team

Column Title: Team Code

Column Size:

☐ Hidden Column

Column Values (Select ONLY 1 Column value per column)

☐ FIELD DISPLAY NAME

☐ Address1

☐ Address2

☐ Billing CI Bank Acct Nbr

47 items

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.

Options for Ad Hoc Report (S1153)

Columns   Sorting

Column ID	Column Title	Hidden	Size
COL1	Team Code	No	
COL2	Department	No	80
COL3	New Column 3	No	

3 items

ADD FIELDS   DELETE FIELDS   MOVE UP   MOVE DOWN

Column Type: Calculated

Column Title: Location

Column Size: 50

☐ Hidden Column

Expression:

APPLY CHANGES   CANCEL CHANGES

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.

Reports

+

DEFINED REPORTS

PUBLISHED REPORTS

AD HOC REPORTS

Search for Report...

Report Name ^	Report #
Ad Hoc - Company (S1153)	1153
Ad Hoc - Employee (S1134)	1134
Ad Hoc - Payroll (S1132)	1132
Demo Payroll Report (S1132)	1132
test (S1132)	1132

1 - 5 of 5 items

Ad Hoc - Employee

Choose options for this report

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

## Reports



DEFINED REPORTS

PUBLISHED REPORTS

AD HOC REPORTS

Search for Report...

Report Name ^	Report #
Ad Hoc - Company (S1153)	1153
Ad Hoc - Employee (S1134)	1134
Ad Hoc - Payroll (S1132)	1132
Demo Payroll Report (S1132)	1132
test (S1132)	1132

1 - 5 of 5 items

## Ad Hoc - Employee

Choose options for this report

EDIT REPORT →

**RUN REPORT →**

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

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

DEFINED REPORTS

PUBLISHED REPORTS

AD HOC REPORTS

← REPORTS LIST Options for Ad Hoc - Employee

Columns EE Filter Misc Options **Run Report**

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

3 items

ADD FIELDS DELETE FIELDS MOVE UP MOVE DOWN

Column Type: Employee

Column Title: Custom Employee Code

Column Size: 1

☐ Hidden Column

☒ Print Text Instead of Abbreviation

Column Filter:

Examples: =John, LIKE 'D%', <=5, BETWEEN 5 and 10

Column Values (1 column value per non-calculated column)

☐ FIELD DISPLAY NAME

☐ Address1

☐ Address2

☐ Auto Labor Cl Ed Group

148 items

APPLY CHANGES CANCEL CHANGES

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



Reports

DEFINED REPORTS

PUBLISHED REPORTS

AD HOC REPORTS

REPORTS LIST

Options for Ad Hoc - Employee

Columns

EE 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:

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.



8. 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	Report
401(K) Report (S215)	HR Mailing Labels (S449)
ACA Eligibility Analysis Report (S2713)	HR OSHA 300 Report (S462)
ACA FTE Report (S2711)	HR OSHA 300A Report (S567)
ACA Rule Of Parity Test Report (S2834)	HR OSHA 301 Report (S451)
Birthday Report (S457)	HR OSHA Injury Report By Cost (465)
Certified Payroll Report (S518)	HR OSHA Injury Report by Home Dept. (S453)
Check Reconciliation Report (S214)	HR OSHA Report By Body Part Code (S466)
Check Stub Detail Report (S2590)	HR OSHA Report by Injury Code (S464)
Compensation Detail Report (S601)	HR OSHA Report By Status (S568)
Contact Report (S452)	HR Personnel Report (S463)
Cover Letter Report (S193)	HR Veterans Report (S714)
Cover Letter With Tax Report (S1082)	HR Workers Compensation Code Report (S454)
Direct Deposit Report (S211)	Inactive Employees Report (S2731)
Employee Audit Report (S1075)	Individual Earnings Report (S431)
Employee Change Listing Report (S539)	Input Worksheet (S351)
Employee Change Listing Report (New) (S1075)	Job Costing Report (S229)
Employee HR Date Report (S457)	Labor Distribution Report (New) (S1077)
Employee Profiles Report (S263)	New Hire Pending Report (S292)
GL Export Report (S348)	New Job Costing Report (S554)

Report	Report
General Ledger Report (S183)	Payroll Register Report (S109)
HR Alert (S759)	Period Summary Report (S404)
HR EEO-1 Report (S455)	Personnel Register (S344)
HR EEO-1 Section D Employment Data Report (S1537)	Portrait Input Worksheet (S262)
HR EEO-4 Headcount Report (S566)	Tax Notices Report (S341)
HR EEO Ethnic ID Report (S467)	Tax Report for Payroll (S247)
HR EEO Standard Report (S450)	Taxable Wages for Payroll Report (S236)
HR Emergency Listing by Emergency	Time Off Register Report with Hours (S920)
HR Employee Review Report (S850)	Workers' Compensation Report (S217)

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

## 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 displays the Evolution Payroll Dashboard. The top navigation bar includes the Evolution Payroll logo and user information. The left sidebar contains navigation links: Dashboard, Company, Employees, Check Calculator, Payrolls, Check Finder, and Reports. The main content area is divided into several sections:

- Payroll Today:** Shows regular payroll runs for 09/05/2019, 09/12/2019, and 09/19/2019, each with a count of 1. To the right are status buttons: Submitted (green), Processed (green), and Pending (orange).
- Agenda:** A table listing tasks for Monday, September 09, 2019, and Tuesday, September 10, 2019. Tasks include Run Balancing Report, Run Quarterly Liabilities vs. Deposits Report, Quarterly Schedule Report, and Quarterly Tax Report.
- Analysis:** Contains two charts. The first is a pie chart titled 'Tax Report For Payroll (S247)' showing the breakdown of taxes: Local Taxes (\$248.70 = 1.27%), SUI Taxes (\$310.13 = 1.56%), State Taxes (\$514.31 = 4.14%), Federal Taxes (\$5,033.80 = 25.61%), and Net Payroll (\$13,246.82 = 67.40%). The second is a funnel chart titled 'Cover Letter (S193)' showing the breakdown of payroll costs: Checks (\$13,246.82 = 64.02%), Total Tax Liability (\$5,496.94 = 30.97%), Total Agency (\$365.00 = 1.76%), and Total Billing Amount (\$6,711.57 = 3.25%).

In the bottom left corner of the dashboard, a red box highlights the 'Task Queue' link, which is represented by a blue upward-pointing arrow icon.

**Result:** The Task Queue opens listing the recent tasks run on the workstation.

### My Task Queue

Search for Task...

Run Report

Todd . Ad Hoc - Employee #1134

▲ Finished with Warnings · Today 3:10 PM

Run Report

BDazz1 . nwe test #1134

▲ Finished with Warnings · Today 3:05 PM

Process Payrolls

BDazz1 Pr:9/12/2019-1

● Finished Successfully · Today 9:54 AM

Preprocess Payrolls

BDazz1 Pr:9/12/2019-1

● Finished Successfully · Today 9:53 AM

Preprocess Payrolls

BDazz1 Pr:9/12/2019-1

● Finished with Exceptions · Today 9:49 AM

Preprocess Payrolls

BDazz1 Pr:9/19/2019-1

● Finished with Exceptions · 9/5/19 4:37 PM

Preprocess Payrolls

BDazz1 Pr:9/19/2019-1

● Finished with Exceptions · 9/5/19 4:33 PM

Preprocess Payrolls

BDazz1 Pr:9/19/2019-1

● Finished with Exceptions · 9/5/19 4:32 PM

Run Report

BDazz1 . Cover Letter

● Finished Successfully · 9/3/19 9:57 AM

Results

Log

CO# BDazz1. Cover Letter

DOWNLOAD

+

×

↺

↻

page 1 of 1

### #BDazz1 BDazzled Design Ltd.

Cover Letter (\$193)	
Check Date :	09/05/2019-1
Period Range :	08/29/2019 TO 09/04/2019
Week Number :	Week #36

These global notes display on the cover letter. The Cover Letter is a funding requirement report that includes total payroll liability and billing. Individual notes may be added at the Company level.

Payroll Totals:	# Checks	
Total Regular Checks	10	13246.82
Total Direct Deposits	0	0.00
Total Manual Checks	0	0.00
Total 3rd Party Checks	0	0.00
Total Void Checks	0	0.00

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

### My Task Queue

Search for Task...

Run Report

Todd . Ad Hoc - Employee #1134

▲ Finished with Warnings · Today 3:10 PM

Run Report

BDazz1 . nwe test #1134

▲ Finished with Warnings · Today 3:05 PM

Process Payrolls

BDazz1 Pr:9/12/2019-1

● Finished Successfully · Today 9:54 AM

Preprocess Payrolls

BDazz1 Pr:9/12/2019-1

● Finished Successfully · Today 9:53 AM

Preprocess Payrolls

BDazz1 Pr:9/12/2019-1

● Finished with Exceptions · Today 9:49 AM

Preprocess Payrolls

BDazz1 Pr:9/19/2019-1

● Finished with Exceptions · 9/5/19 4:37 PM

Preprocess Payrolls

BDazz1 Pr:9/19/2019-1

● Finished with Exceptions · 9/5/19 4:33 PM

Preprocess Payrolls

BDazz1 Pr:9/19/2019-1

● Finished with Exceptions · 9/5/19 4:32 PM

Run Report

BDazz1 . Cover Letter

● Finished Successfully · 9/3/19 9:57 AM

Exceptions

Log

Error: "Employee #12 has a local tax, but does not have a corresponding state setup!" while Calculating check for EE #12 (9 of 16)...

Company

#BDazz1 "BDazzled Design Ltd."

datetime

2019-09-05 09:49:58.635ms

computer name

WIN-JDN5P5K6E4A

user name

SYSTEM <admin>

operating system

Windows NT New build 9200

system language

English

system up time

166 days 19 hours

program up time

4 days 10 hours

processors

2x Intel(R) Xeon(R) Platinum 8175M CPU @ 2.50GHz

physical memory

208140336 MB (free/total)

free disk space

(C:) 2.56 GB

display mode

1024x768, 32 bit

process id

\$1a7c

allocated memory

63.63 MB

executable

EvRequestProc.exe

exec. date/time

2019-08-13 11:08

version

19.3.0.5

madExcept version

3.0b

callstack crc

\$160604e4, \$ee41590, \$921699c9

exception number

6

exception class

ElmConsistentData

exception message

Error: "Employee #12 has a local tax, but does not have a corresponding state setup!" while Calculating check for EE #12 (9 of 16)... Company: #BDazz1 "BDazzled Design Ltd."

Global TM: Async ProcessPayroll [09/09/19 09:49:49 979] (\$1a18)

00c62a88 EvRequestProc.exe STaxCalculations

1600 +85 PreparePaTax

00c63744 EvRequestProc.exe SGrossToNet

3462 +205 ProcessLocals

00c6e24c EvRequestProc.exe SGrossToNet

5135 +870 TevGenericGrossToNet Calculate

00cc9870 EvRequestProc.exe SPayrollCalcMod

7120 +13 TevPayrollCalculation GrossToNet

00dbb634 EvRequestProc.exe SProcessingEngine

1669 +456 DoMainProcessing

00da5112 EvRequestProc.exe SPayrollProcessingMod

296 +44 TevPayrollProcessing ProcessPayroll

00a86d47 EvRequestProc.exe EvAsyncFuncMod

470 +10 TevAsyncFunctions ProcessPayroll

00a7e9c0 EvRequestProc.exe EvAsyncCall

237 +51 TevAsyncCalls.ExecInThread

0047e146 EvRequestProc.exe Classes

9372 +7 ThreadProc

004057d4 EvRequestProc.exe System

11554 +33 ThreadWrapper

00451e01 EvRequestProc.exe madExcept

CallThreadProcSafe

00451e09 EvRequestProc.exe madExcept

ThreadExceptFrame


77067c02 KERNEL32.dll

BaseThreadInitThunk

=> created by Async Socket TM: Free Thread (\$1970) at:

005ee575 EvRequestProc.exe isThreadManager

TTaskThread.Create

Click  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 .zip file format.