

E/D code Type	E/D code Type	Scheduled E/Ds?
Benefits/Deductions	Health Insurance; Dental Insurance; EE 401(k) contributions, EE 401(k) catchup contributions, Flexible Spending Accounts, Dependent Care	Yes
Memo Codes (money that is set aside by the employer for the employee)	401(k) match, ER paid insurance contributions	Yes
Direct Deposits	Employee bank accounts	Yes
Agency-paid	Child support, garnishments, tax levies	Yes
Static Earnings	Auto allowance, severance pay	Yes
Loan Payments	401(k) loans, company loans	Yes
Salary	N	No
Hourly		No
Sick		No
Vacation		No
Paid Time Off		No
Bonuses		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 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	
D01	401(k) EE Contribution	Fixed		0	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

Send to

- Agency **Send To**
- Client / Company **Send To**
- Direct Deposit **Send To**

Schedule

ADD CANCEL EXPORT TO EXCEL

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

Effective Starting: 09/04/2019

Affects Payrolls Affected: All

Frequency: Every Pay

Blocks Block Based On: Custom Defined

Weeks blocked: 1 2 3 4 5

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

The screenshot shows the 'Limits' tab selected. The 'Limits' tab is highlighted with a red box. The form contains the following sections:

- Minimums:** E/D Group (dropdown), Pay Period % (text), Pay Period \$ (text).
- Maximums:** E/D Group (dropdown), Pay Period % (text), Pay Period \$ (text), EE Annual \$ (text), Client Annual \$ (text, value: 1,500.00).
- Maximum Averages:** Amount E/D Group (dropdown), Hours E/D Group (dropdown), Hourly Rate (text).

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

The screenshot shows the 'Thresholds' tab selected. The 'Thresholds' tab is highlighted with a red box. The form contains the following sections:

- Targets:** Action (dropdown, value: None), Remaining (text), Balance Taken (text), Amount \$ (text).
- Thresholds:** E/D Group (dropdown), Amount \$ (text), Use Pension Limit.

Table at the bottom:

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	

- 2. Click **Save** when you have completed entering information on this screen.
 - 2. Click the **Next** button.
- Result:** The Employees Delivery screen opens.