Remote Software Manual

The following manual is designed to familiarize new users with Evolution and to provide extra knowledge for current users. This manual will focus on the tasks involved with creating or changing employee information and keying payrolls.

There are many terms and abbreviations in this manual that may be unfamiliar to you if you are new to Evolution. You can find information about the terms and abbreviations in the Glossary section at the end of the manual.

This manual is arranged to generally mirror the windows and tabs of Evolution. To find a specific topic from the index, simply click on the topic and you will be brought to the page that contains the information.

Evolution Shortcut Keys

General

Action	Button	Shortcut Key
Filter records to view		CTRL+R
Moves the insertion point from tab to tab on a window.	N/A	CTRL+TAB
Show contents of a drop-down menu	N/A	ALT+DOWN ARROW
Search a browse grid	N/A	CTRL+F
View the details of an item in a browse grid.	N/A	CTRL+ENTER

Toolbar

Action	Button	Shortcut Key
Back to previously viewed window		SHIFT+ALT+LEFT ARROW
Forward to next		SHIFT+ALT+RIGHT ARROW

viewed window		
First record		ALT+HOME
Prior record		ALT+LEFT ARROW
Next record		ALT+RIGHT ARROW
Last record		ALT+END
Create a record		ALT+INSERT
Delete a record		ALT+DEL
View audit history		CTRL+H
Refresh data		F5
As of date editor	10/12/2005	N/A
Post changes		F10
Cancel changes		F2
Commit data changes to database on server		CTRL+S

Abort changes		SHIFT+ALT+BACKSPACE

Employee-Employee window

Action	Button	Shortcut Key
Create an employee		ALT+INSERT
Move insertion point to **Employee Name** box	N/A	CTRL+F12
Move insertion point to **Employee Number** box	N/A	CTRL+F11
Move to previous employee and save changes to current employee		ALT+LEFT ARROW * (asterisk on number pad)
Move to next employee and save changes to current employee		ALT+RIGHT ARROW PLUS SIGN (on the number pad)
Select a DBDT		F4
Start the **Tax**		F9

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Calculator		
Start the **Check Finder**		F12

Navigating to Other Windows

To navigate to other windows, click ALT+ the underlined letter in the window name. Below are some shortcuts typically used from the **Employee – Employee window.**

Go to **Employee – Scheduled E/Ds** window	N/A	ALT+E, then C
Go to **Employee – Pay rate info** window	N/A	ALT+E, then P
Go to **Employee – States** window	N/A	ALT+E, then S
Go to **Payroll – Payroll** window	N/A	ALT+Y, then P

EE Entry Tab

Action	Button	Shortcut Key
Choose a DBDT		F4

Locals	🏛 Locals	N/A

Details Tab

Action	Button	Shortcut Key
Displays year-to-date for employee	⊗ YTD (F3)	F3

Notes Tab

Action	Button	Shortcut Key
Spell check comments	N/A	F7

Payroll – Payroll Window

Action	Button	Shortcut Key
Create a payroll using **Payroll Expert**	📝 New Payroll Expert	N/A
Go to **Payroll – Batch** window	📁 Batch	ALT+Y, then B

| Create a payroll | | ALT+INSERT |
| Go to **Employee – Employee** window | N/A | ALT+E, then E |

Payroll Tab

Action	Button	Shortcut Key
Create a payroll	Create Payroll	ALT+INSERT
Submit payroll to SB for review	SB Review	N/A
Delete a payroll	Delete Payroll	ALT+DEL
Copy Payroll	Copy Payroll	N/A
Pre-process payroll	Pre-Process	N/A
Submit payroll for processing	Submit Payroll	N/A
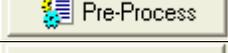
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Notes Tab

Action	Button	Shortcut Key
Spell check comments	N/A	F7

Payroll Batch Window

Action	Button	Shortcut Key
Create a batch		ALT+INSERT
Delete a batch		ALT+DEL
Go to **Payroll – Payroll** window	Payroll	ALT+Y, then P
Create a batch using the **New** Batch Expert	New Batch Expert	N/A
Go to **Check Lines** tab of the **Payroll – Check** window	Check	ALT+Y, then C
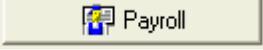
Batch Tab

Action	Button	Shortcut Key
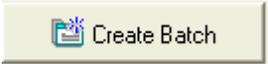
Create a batch	Create Batch	ALT+INSERT
Refresh scheduled E/Ds on all checks	Refresh ED	N/A
Refresh Scheduled E/Ds on all but manual checks	Refresh ED No Man	N/A
Delete a batch	Delete Batch	ALT+DEL
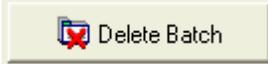
Checks Tab

Action	Button	Shortcut Key
Add a check	N/A	ALT+INSERT
Delete a check	N/A	CTRL+DELETE
Move to next check	N/A	DOWN ARROW
View details of a check (move from	Check	CTRL+ENTER

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Payroll – Batch – Checks tab to **Payroll – Check – Check Lines** tab.)		

Payroll – Check Window

Action	Button	Shortcut Key
Create a check		ALT+INSERT
Tax Calculator		F9
Check Finder		F12
Recalculate check	Recalculate Check	ALT+K
Delete a check		ALT+DEL
Go to **Payroll – Batch** window	Batch	N/A
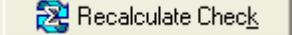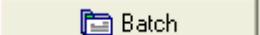
Check Lines Tab

Action	Button	Shortcut Key
Delete a check line	N/A	CTRL+DELETE

Action	Button	Shortcut Key
Add a check line	N/A	INSERT ENTER (from the last cell) DOWN ARROW (from last column)
Preview auto labor distribution	Preview ALD (F6)	F6
Display year-to-date for employee	YTD (F3)	F3
Display locals for employee	Locals (F7)	F7
Choose a DBDT		F4
Add a job		CTRL+J
Calculate a check line on a MANUAL check	N/A	CTRL+F5

Manual Tax Tab

Action	Button	Shortcut Key

Action	Button	Shortcut Key
Add state taxes	🦐 Add States	N/A
Add local taxes	🌿 Add Locals	N/A

General tab

Action	Button	Shortcut Key
Create any type of check for any employee	📋 Create New Check ✚	ALT+INSERT
Apply check template to check	✅ Apply Check Template	CTRL+A
Refresh scheduled E/Ds on current check	🔄 Refresh scheduled E/Ds	N/A
Create the next regular check for the current employee	▶ Create Next Check	CTRL+N
Void the next check for the current employee	❌ Void Next Check	CTRL+V
Create a manual	🖐 Create Manual Check	CTRL+M

check for the current employee		
Spell check comments	N/A	F7

General Navigation in Evolution

Filter button :   CTRL+R displays the **Filter Records to View** dialog, which provides options for filtering the list of items in a Browse Grid. When the list is unfiltered, Evolution displays the button as green . When the list is filtered, Evolution displays the button as red
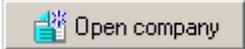
:   Opens the company selected in the Company Browse Grid.

Prior button :   Displays the prior record

Next button :   Displays the next record

Understanding Effective Dates

Evolution tracks the history of each change made to its databases. Each time a change is made to an Evolution database, Evolution creates a new record in the database to mark the change. You can also make changes that take effect in the past or in the future.

To see the audit history, put your cursor on the field you want to see history for.

Put your mouse on the button, and right click. You will be given two options:

- View field audit history – Shows details of the field where your cursor was placed. Example: screenshot below is of the employee's Social Security Number.
- View record audit history – Shows details of any changes to the parent table of the field you had the curser on. Example: cursor was on Social Security Number. When you choose "record audit", it shows all changes to this employee's client person table.

Viewing Effective Dates

Below is an example of the field-audit history using the effective date viewing method described in the prior section
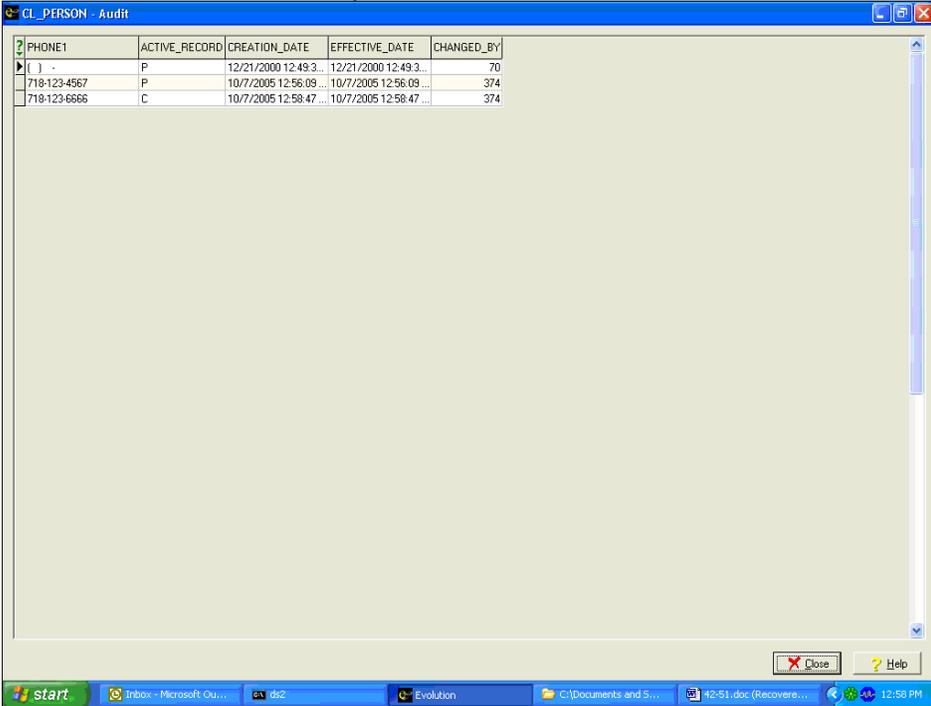
Effective Date: The date a transaction is effective. (This date can be before or after the creation date).

Creation Date: The date the record was created. Each time Evolution performs a transaction, whether data was created, changed, or deleted, Evolution creates a record to show the change. Therefore, in addition to being the date the record was changed, it is also the date the data was changed, created or deleted.

Active Record: Indicates whether the record is the current record.
- "C" indicates the current record.
- "P" indicates a past record.

Changed By: Lists the internal number of the user who made the change to the record.

Examples
New Tax
A tax change is announced that is retroactive back to Jan 1, 2005. To implement the tax, you would enter the new tax and then change its effective date to 01/01/2005. Because you implemented the change today, its creation date would be today. When Evolution next calculated taxes, it would use the tax's effective date to determine the rate to use in its calculation.

SUI Rate Change
- A payroll is processed on 01/05/2005. When processed, the SUI rate is 2%.
- On 02/05/2005 the rate is changed to 3% effective 01/01/2005. After you enter this change in Evolution, there will be a new record with a creation date of 02/05/2005 and an effective date of 01/01/2005.
- The 01/05/2005 payroll, however, still reflects the old rate because it was processed before the rate change. Later, you run a QEC, which looks at the effective date and cleans up the rate discrepancy.

As of Date Editor

Evolution displays the database as of the date listed in the **As of Date Editor** field. This can be helpful but also confusing. The date in this field may be changed for viewing purposes although changes to the database **should not** be made while in this mode. Once you have finished viewing the data, be sure to return the date to the current date and time.

Monitoring the Task Queue

To view the tasks that are on the queue, do the following:

1. Click the **View** button.

2. Evolution displays the **queue tasks** window. This window displays a list of tasks sent to the server for processing and allows you to preview the results of the task.

There are four tabs on this window: The information listed in the top grid pertains to the List, Split, and Detail view tabs.

- List View
- Split View
- Detail View
- Full Screen

> ➤ All jobs, with the exception of tax payments, will remain in the task queue once viewed for three days, unless manually deleted. Tax payments will remain in the queue for ten days, whether or not reviewed. This allows additional time should a roll back be necessary.

List View

This tab displays a list of tasks that were submitted to the server for processing.

User: The login of the user who submitted the task to the server.

Finished: Indicates whether or not the task has been completed.

Priority: The priority assigned to the task. This priority determines in what order Evolution processes the task.

ID: The number identifying the task.

Updated: The time the status of the task was updated.

Status: Indicates the progress of the task, and if it completed successfully.

Description: The type of task. For example, Run Report.

Caption: A description of the task. For example, Payroll Register.

Send Updates to	When set up at SB Admin/SB/Flags and Settings, Evolution will send an email if an exception or message log occurs.
	Displays the results of the first task in the list.
	Displays the results of the previous task in the list.

	Displays the results of the next task in the list.
	Displays the results of the last task in the list.
	Refreshes the list of tasks.
	Deletes a task from the list. If this button is hit while a task is processing, it will cancel the task. **Note:** You may not delete a task during processing.

Split View

This tab displays a list of tasks that were submitted to the server for processing and a preview of the results of the task, as well as details of the task.

Detail View
This tab displays a preview of the results of the task, as well as details of the task.

Full View
Displays the full result of the task.

Adjusting Display Size
You can adjust the display size of the report preview:

- To display a page of the report at its true size, click the **True Size** button. 🔳
- To display the report preview so that you won't need to scroll from side to side, or from top to bottom, to view an entire page of a report, click the **Fit to Window** button. 🔳
- To display the report preview so that you won't need to scroll from side to side to view the entire width of a report page, click the **Fit to Width** button. 🔳

Navigating the Report Preview
To navigate the report, use the following buttons:

🔳	Click this button to display the first page of the report preview.
🔳	Click this button to display the previous page of the report preview.
🔳	Click this button to display the next page of the report preview.
🔳	Click this button to display the last page of the report preview.

Printing Report Previews

You can print report previews. You can either do so with one click or by first setting the printer properties and then printing the report preview.

- To print a report preview with one click, click the **Quick Print**

  button . Evolution prints the report preview using the current settings for printer properties.
- To set the printer properties and then print the report preview,

  click the **Printer Properties** button . Evolution displays the dialog box for the printer properties. Once you've set printer properties, print the document by clicking the Print button (may be an OK or other button on your PC).

Marking Up Report Previews

You can mark up a report preview to aid review by another party. If there was an issue with report data, you could mark up the line, save the report to file, and then file the electronic copy of the report preview or e-mail it to someone for review.

To add a marking to a report preview, do the following:

1.   Click the **Marking On/Off** button .

2.   Evolution is now in **Marking** mode. On the report preview, click and drag the cursor where you want the marking.

3.   Evolution asks you if you want to include a note for the marking.

   - To add a note, type the note in the **Text for the mark** box and click **OK**.
   - To view the note, hover your cursor over the marking.
   - The note does not appear when you print the report.

4.   Evolution draws the oval.

   - To delete the marking, right click on the mark, select Delete **Mark**.
   - To add another marking, repeat steps 2 and 3.

Saving a Report Preview

To save a report preview, do the following:

1. With a report preview open, click the **Save to File** button .

2. Type a File name, select a location, and click the **Save** button. For text output files, you may choose a Save a Type of All Files, which will allow you assign whatever file name and extension you wish. Evolution saves the report preview.

Admin Security

This section describes features used on the **Admin Security** windows.

Viewing Users

To view the users assigned to your client, click **Admin**, click **Security**, and then click **Users**. Evolution displays the **Browse** tab with a list of users.

Browse tab

To access the User's security rights directly, double-click the user in the list.

Detail tab

User ID: The unique identifier for the user.

Last Name: User's last name.

First Name: User's first name.

Initial: User's middle initial.

E-Mail Address: The e-mail address of the user.

User Signature: Service Bureau Use Only.

Accountant: The accountant associated with this user. When this user
                    logs in, the accountant name is displayed on the splash
                    screen instead of the Service Bureaus.

Active User: Yes: The user is an active user.
                    No: The user is not an active user. *Evolution prevents this
                    user from accessing the system.*

Password/
Confirm Password: The user's password

Password
Change Date: The date when the password will have to be changed next.
                   When this date occurs, the user will be prompted to enter a
                   new password.

Security Level: The security level of this user, in regards to changing
                   passwords. Users may only manipulate users at their
                   security level, or below.

Department: The department to which the user is assigned.

User's Stereotype

- S/B Internal: The user is a member of the service
  bureau and does not require remote access to the
  system.
- Web: The user is not a member of the service
  bureau and requires web access to the system.
- Remote: The user is not a member of the service
  bureau and requires remote access to the system.

User's Stereotype
Box: The Client ID of the company the user may access.

Security Rights for Users

To assign or view security (user) rights for an existing user, click on the

 button.

The **Security Rights** window allows you to view the user rights a user has for accessing parts of Evolution and performing various functions.
The **Menus** feature displays the levels evolution.

Security rights

System templates: [▼]   SB templates: [▼]

| Save |
| Cancel |
| Undo |
| Show top |

Show on top
- Menus
- Screens
- Functions
- DB Tables

- ⊞ — Admin (Disabled) (Disabled: 6)
- ⊞ — Aux Payroll (Disabled) (Disabled: 11)
- ⊞ — Bureau (Disabled) (Disabled: 20)
- ⊞ ✚ Client (Enabled) (Enabled: 5; Disabled: 17)
- ⊞ ✚ Company (Enabled) (Enabled: 16; Disabled: 41)
- ⊞ ✚ Employee (Enabled) (Enabled: 27; Disabled: 1)
- ⊞ — Finance (Disabled) (Disabled: 7)
- ⊞ — iSystems (Disabled) (Disabled: 36)
- ⊞ ✚ Misc (Enabled) (Enabled: 1; Disabled: 3)
- ⊞ — Operations (Disabled) (Disabled: 11)
- ⊞ ✚ Payroll (Enabled) (Enabled: 3)
- ⊞ ✚ Reports (Enabled) (Enabled: 1; Disabled: 4)
- ⊞ — S/B Report (Disabled) (Disabled: 3)
- ⊞ — SB Admin (Disabled) (Disabled: 10)
- ⊞ — Tax pmnts (Disabled) (Disabled: 6)
- ⊞ — Tax reports (Disabled) (Disabled: 5)

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Below is a display of the **Screens** within the **Menus** from above. The user can be disabled from seeing individual screens.
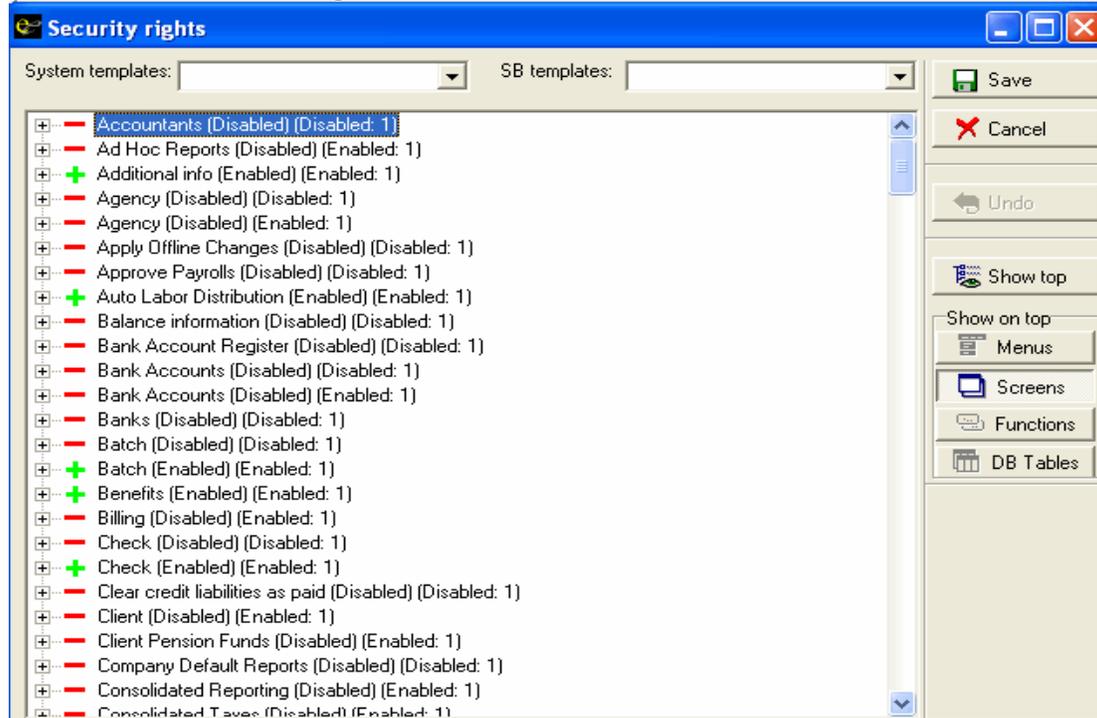
The **Functions tab** allows users to perform specific functions within Evolution.
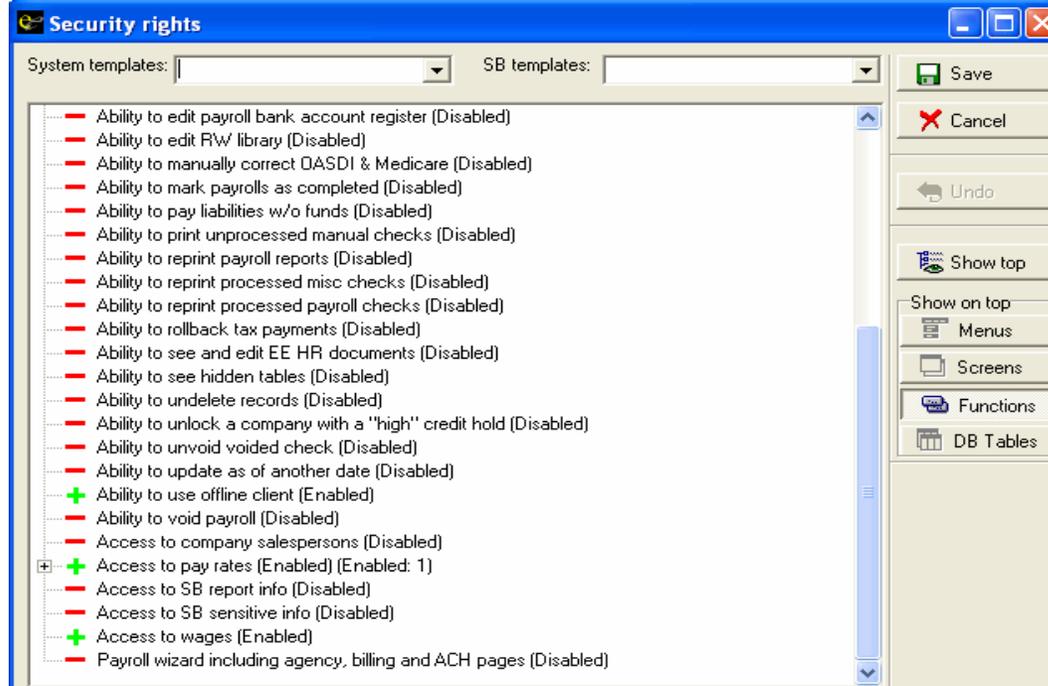
DB Tables are for Service Bureau internal use only.

Creating Users

The Payroll Specialist must set up the initial user. Then if your user ID has the security right, you can create a user. You cannot, however, grant another user more rights than you have. To add a user, perform the following steps:

1. Click **Admin**, click **Security**, and then click **Users**. Evolution displays the Browse tab with a list of users.

2. To create a user, click the **Create record** button . Evolution displays the **Details** tab. Complete the information on this tab.

3. Click the **User Rights** button and assign rights to the user.

   - To change the security rights for a user, right-click the security right you want to change. In addition to enabling or disabling a single right for user, you can enable all of the rights for its children or make the menu or screen read only.   The **Read Only** option may be selected by right clicking on the shortcut menu.
   - To enable a right, right-click on the security right and click **Enabled** on the shortcut menu. This enables only the right-clicked right.

- To enable a right and all of its children, right-click the security right and click **Give max rights to all child atoms** on the shortcut menu. This enables the right-clicked right and it's children rights.
- To disable a right, right-click the security right and select **Disabled**. This disables the right *and* all of its children rights.
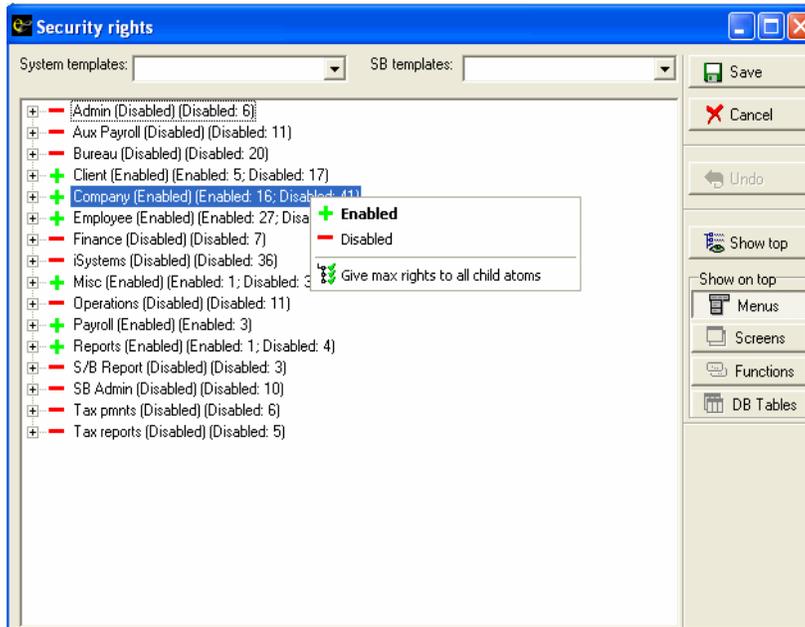
4. Click Save.

Groups Tab

Service Bureau Use Only.

Clients Tab
Click the Clients tab and assign the client to the user.
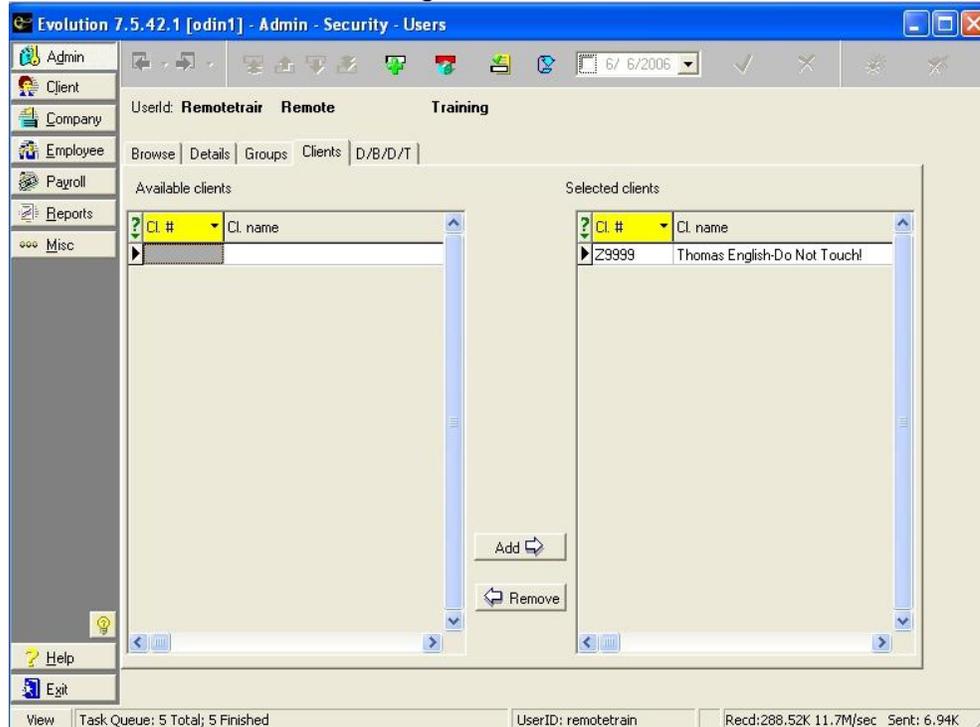
D/B/D/T Tab

To view the divisions, branches, departments, and teams the user is assigned to, click the D/B/D/T tab. If you need to limit access to a division, branch, department or team, click the **D/B/D/T** tab and assign or limit the appropriate rights. The D/B/D/T levels that are checked are disabled.
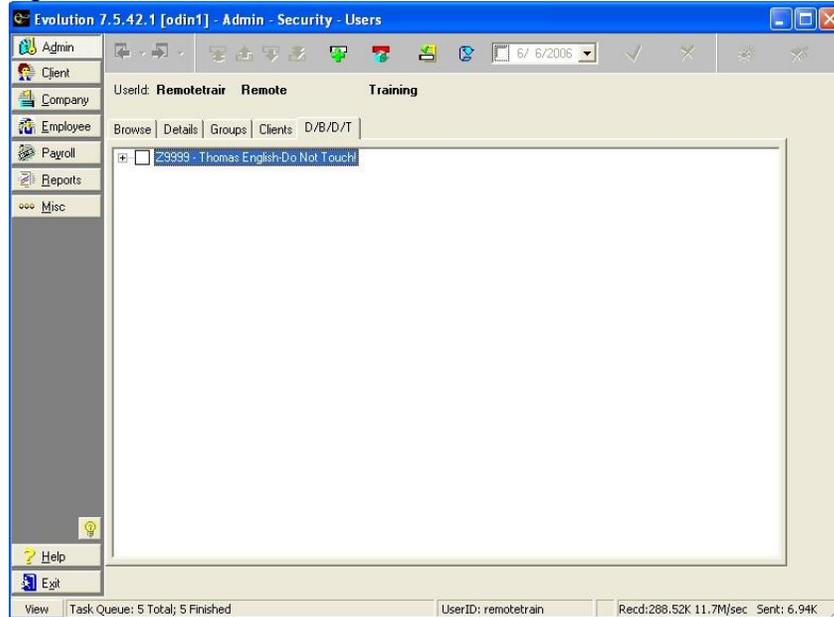
Deleting Users

Because it is important for the system to save a history of all transactions, a user can only be deleted if the user's ID has not been used in any transactions. Once a user ID has been used in a transaction, you can make the user ID inactive. To make a user ID inactive, perform the following steps:

1. Click **Admin**, click **Security,** and then click **Users**. Evolution displays the **Browse** tab with a list of users. Choose the user to deactivate.

2. Click the **Details** tab.

3. Select **No** for **Active User**. Evolution continues to maintain historical transactions performed with this User ID, but prevents any subsequent use of this User ID.

System Information

You can access a summary of your system information, which will include the following types of information:

- Operating system
- CPU
- RAM
- Versions of Evolution components

To access your system information, click **Admin** and click **System Information**.

Workstation Settings

On the **Workstation Settings** window, you can customize how your Evolution works on your local PC. To adjust your workstation settings, do the following:

Printing
Duplex Printing:
Only reports with Duplexing: Evolution determines if the report should be duplexed and prints it accordingly.

Always: Evolution duplexes all reports and payrolls.
Never: Evolution prints all reports and payrolls single sided.

Always do report preview: Select this check box to have Evolution preview all reports regardless of what you specify when you specify at print reports. You can print the report from the task queue later if desired.

Always show ASCII file save dialog: Select this check box to have Evolution always prompt you to save ASCII files when performing processes that produce ASCII files.

Checks Printer
Checks Printer: The printer all checks will be sent to for printing.

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Vertical Offset: The vertical offset.
Horizontal Offset: The horizontal offset.

Reports Printer

Reports Printer: The printer all reports will be sent to for printing.
Vertical Offset: The vertical offset.
Horizontal Offset: The horizontal offset.
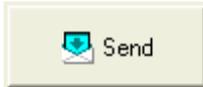
E-mails the settings of the Workstation Settings window to someone, your customer service representative for example, to help you troubleshoot your system.

Jump to Detail Tab Automatically: Select this checkbox to have Evolution display the Detail tab instead of the Browse tab when you open a window. Using this option is helpful when you deal with only one company.

Go Offline & Full Copy: Allows a remote client to work offline, meaning they are not connected to the internet. This is used when a client has a slow internet connection.
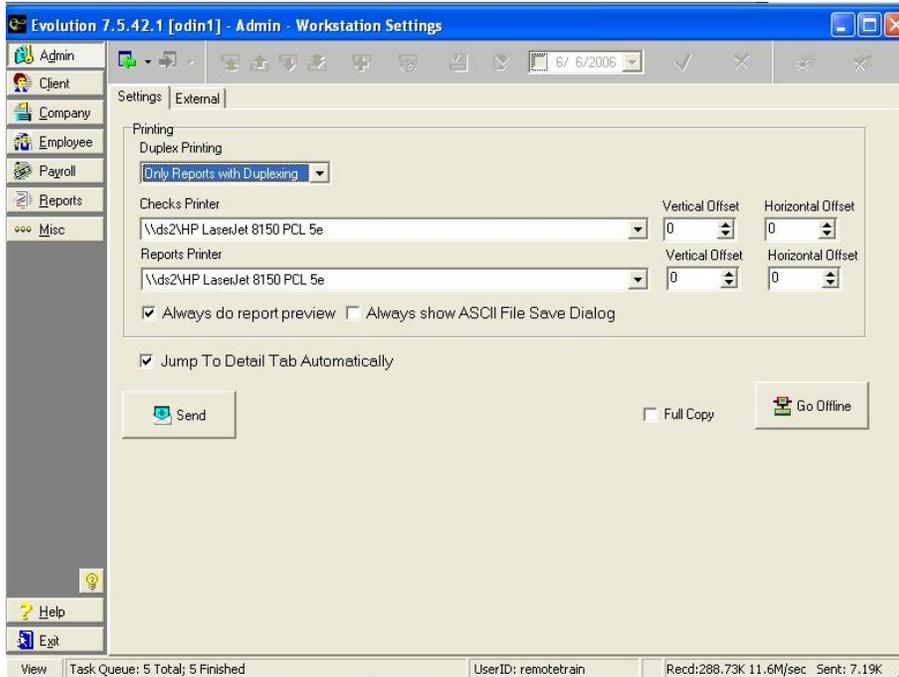
Speed Test

Evolution includes a system speed and load test that is designed to help diagnose performance problems. You can use the results as benchmarks, which you can use as a guide for troubleshooting and tuning your system. To access the speed test, click **Admin** and then click **Speed Test**.

Only run these tests in conjunction with discussions with your Payroll Specialist.

To run the speed tests,

1. Choose the type of test to run:
   - Speed
   - Load. Also select the number of threads to test. The number of threads is the number of test jobs you want to run in parallel.
   - Iterations. The number of times to run the load test in sequence.

2. Click the **Run Tests** button.
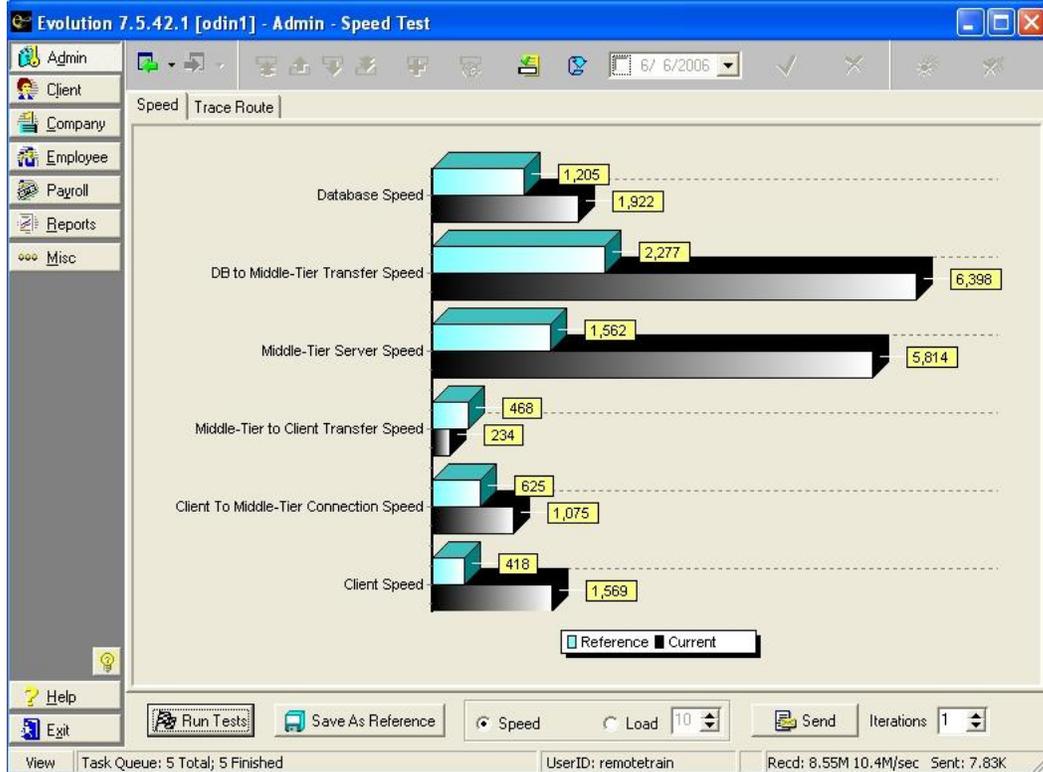
3. Analyze the results.
   - Top bar is reference.
   - Bottom bar displays results of test

Saving as Reference
To save the results of a speed test as a reference for subsequent tests, click the **Save As Reference** button.

Viewing Trace Route
When it runs the Speed Test, Evolution also traces the route the data took between the server and the workstation and the time required at each step of the way.

To view the trace route, click the **Trace Route** tab.

➢ The IP addresses have been commented out for security purposes.

E-mailing Results

To e-mail your test results:

1. Click the **Send** button. Evolution creates a text file and attaches it to an e-mail.

2. Complete the e-mail and send it to your customer service representative for troubleshooting purposes.

Client RW Reports

RW Reports: Accesses the report writing tool within Evolution.

Company-General-Company Summary

The following windows are view only. You must contact the your Payroll Specialist if information needs to be updated.

Address and Bank Accounts tab displays the company demographics and bank account information.

EIN and Rates tab displays all State, SUI, and Local information.

| Browse | Address & Bank Accounts | EIN and Rates | Earning & Deduction Codes | Division, Branch, Department, and Teams |

Federal EIN Number

146592349

?	State ▼	State EIN	State SDI EIN	State SUI EIN	Exempt	SUI Exempt	▲
▶	NY	4852154	453213541	5456454	N	N	

?	SUI Tax Name ▼	State	SUI Rate		▲
▶	NY-Re-Employment	NY	0.00075		
	NY-SUI	NY	0.01625		

?	Locality ▼	State	Local EIN	Exempt	▲
▶	New York City Non-Res.	NY	123456	N	
	NY-NJ Waterfront	NY	123456878	N	

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Earnings & Deductions Codes tab displays all earnings, deductions, and memos set up on the company.

Code	Description	Rate	Rate #	OT Rate *	Def Start Date	Def Amount	Def Rate
D01	Misc.						
D02	Checking Account						
D03	Advance						
D04	Garnish						
D05	Child Support						
D06	401k						
D10	Union Dues						
E01	Salary						
E02	Regular						
E03	Average Overtime			1.50			
E04	Bonus						
E05	Vacation						
M06	Pension Match						

Browse | Address & Bank Accounts | EIN and Rates | Earning & Deduction Codes | Division, Branch, Department, and Teams

Division, Branch, Department, and Teams tab displays the levels set up on the company.

? Combined Number ▼	Combined Name	Home State	OR EE Rate #	OR Pay Rate	Payroll Bank Ac
▶ 1 | 1 | 100	Hide | Hide | Baker	NY			
1 | 1 | 200	Hide | Hide | Decorator	NY			
1 | 1 | 300	Hide | Hide | Delivery	NY			

Browse | Address & Bank Accounts | EIN and Rates | Earning & Deduction Codes | Division, Branch, Department, and Teams

Company-Miscellaneous-Jobs
Details Tab

Job Code: The code identifying the job.

Description: The descriptive name of a job.

Default Workers Comp: The default worker's compensation code for this job.

Rate per Hour: The amount of the pay per hour for this job. If the employee is hourly, enter an *hourly* rate. If the employee is *salaried*, be sure that this box is blank.

Miscellaneous Job Code: Not in use at this time.

G/L Tag: The tag for a general ledger account.

Job Active: Yes: The job is active.
                     No: The job is inactive.

> ➢ The jobs list may be filtered to show only Active Jobs.

Certified:	Yes:	The job is a federally-certified job.
	No:	The job is not a federally-certified job.

State Certified:	Yes: The job is a state-certified job.
	No: The job is not a state-certified job.

Life to Date Info:	Life-to-Date information is used to enter prior job costing history. For example, if a client has just converted to Evolution, the life to date of their jobs may be entered here. The Amount and Hours are entered, along with an E/D code to have them attached to for reporting purposes.

Amount:	The life-to-date amount.

Hours:	The number of life-to-date hours.

E/D Code:	The E/D Code to attach life to date information.

Address:	The address, city, state, and zip code of the job site.

| Client | Z9999 | Thomas English-Do Not Touch! |
| Company | Z9999 | Thomas English-Do Not Touch |

Browse | Details | Locals

? Job Code ▼	Description	Job Active	Certified	State Certified
123-999	Kitchen	Y	N	N
▶ 1456	Retail Store	Y	N	N

Job Code
1456

Rate Per Hour

Life To Date Info

Amount

Hours

Description
Retail Store

Miscellaneous Job Code

E/D Code

Default Workers Comp

G/L Tag

Job Active
⊙ Yes   ○ No

Certified
○ Yes   ⊙ No

State Certified
○ Yes   ⊙ No

Address 1

City

Address 2

State

Zip Code

Locals tab

Insert new record button :   Adds a local tax to the job.

Delete record button :   Deletes the selected local tax from the job

Local Name: The name of the local tax added to this job.
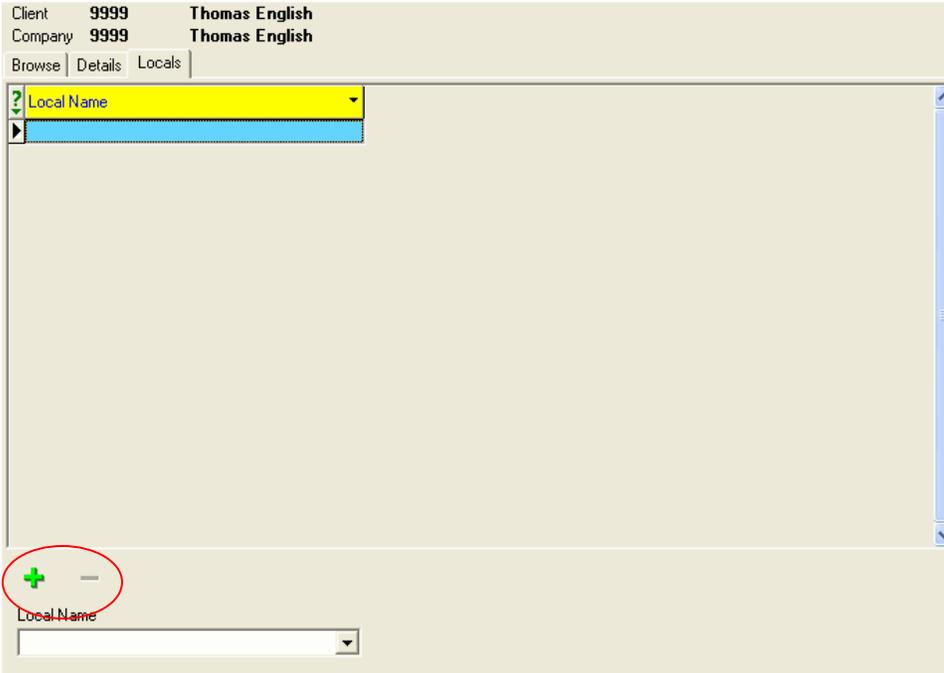
Company-General-Additional Info

Additional information allows you to add customized information about employees. For example, you might create the following types of fields:
- spouse's name
- wedding anniversary
- dog's name
- eye color
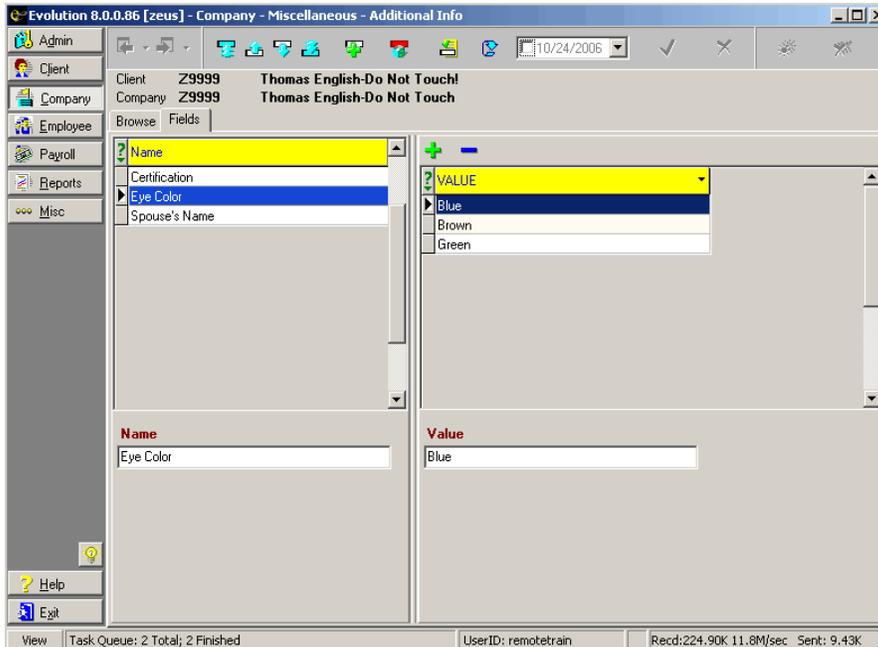
Name: Enter the name for the field you wish to track.

Value: Create the values for the corresponding user defined field name.

➢ For example, the field **Name** is Eye Color, the **Values** might be blue, brown, and green.

In addition, you might use it to track other items unique to a company. For example, a nursing home uses additional information fields to track available beds.

Company-Misc-HR Positions

The browse grid displays the company and general information about the company. The description column lists the HR Positions.

Details Tab

1. Click the **Create New Record** button and enter a descriptive name of a position in the Description field. Click the **Post Changes** button , in the upper right hand corner to save the changes.

Creating Payroll Default E/Ds

You can set up default E/Ds for payrolls and control how they appear. Creating default E/Ds allows you to customize the data entry windows in payroll. Therefore, if you use regular and overtime E/Ds all the time, you can predefine your windows to show regular and overtime in the order you want.

Creating default E/Ds for payroll involves the same steps for companies, divisions, branches, departments, and teams.

Company

To create default E/Ds for a company, perform the following steps:

> 1. Click **Company**, point to **Payroll Defaults**, and then click **Default E/Ds – Company**. Evolution displays the **Browse** tab.

2. Select the company and then click the **Details** tab.

3.   Create a new default E/D by clicking the **Create Record** Button. Evolution creates a new record.

4.   Specify the following for the Default E/D:

E/D Code: Select the **Company E/D Code** to be posted on the Payroll lines.

Override Rate: Enter the **Rate** amount to be used for this E/D.

Override EE Rate Number: Enter the **Rate Number** to be used for this E/D.

Override Hours: Enter the **number of hours** to be posted for this E/D. This function is often used for Holiday hours. If using this function for salaried employees, be sure their Rate 1 (Primary Rate) is $0.00.

➢ Items entered as **Payroll Defaults**, will continue to load in payroll until the item is either manually deleted or changed.

Override Amount: Enter the **flat amount** to be posted for this E/D.

Override Line Item Date: Enter the **Date** for this Line Item for the check. This is often used with Job Costing to associate a date with a line item on a check.

Salary, Hourly, or Both:

- Salary: Apply this default E/D to only salaried employees.
- Hourly: Apply this default E/D to only hourly employees.
- Both: Apply this default E/D to both salaried and hourly employees.

Job: Select the **job** to which this default E/D applies.

5.   Click the **Post Changes** button to save the changes to local memory.

6.   To create additional default E/Ds, repeat steps 4 through 6.

7.   Click the **Commit Changes** button to commit the changes to the database.

Division

Setting up payroll defaults for a division is similar to setting them up for a Company. To create default E/Ds for a division, perform the following steps:

1. Click **Company**, point to **Payroll Defaults**, then click **Default E/Ds- Division**. Evolution displays the **Browse** tab.
2. Select the company and the appropriate division, then click the **Details** tab.
3. Create and specify the default E/Ds as you would for a Company.
4. **Save** and **Commit** the changes.

Branch, Department and Team

Setting up payroll defaults for a Branch, Department and Team is similar to setting them up for a Company. To create default E/Ds for a branch, department, or team perform the following steps:

1. Click **Company**, point to **Payroll Defaults**, then click **Default E/Ds- Branch**. Evolution displays the **Browse** tab.
2. Select the company and the appropriate division, then click the **Details** tab. Repeat this step for the department and team if applicable.
3. Create and specify the default E/Ds as you would for a Company.

4.   **Save** and **Commit** the changes.

Creating Payroll Check Templates

A check template is a customized template that you build with your specific requirements. If you want to block certain weeks on a scheduled E/D, or have other unique set up issues, you can implement these in a check template. Once the template is built, it can be applied to an entire batch or an individual check.

To set up a check template, do the following:

1.   Click the **Company** button, point to **Payroll Defaults**, and then click **Payroll Check Templates**. Evolution displays the **Browse** tab by default.

2.   Click the **Create New Record** button to create a blank template. Evolution displays the **Detail**s tab.

3. Specify the following information:

Name: Give the Check Template a name. For example, Bonus Check.

Tax Supplemental Rate: Yes: Uses the tax supplemental rate from the system table.
No: Will look to the employee setup for taxing purposes.

Federal Override Type: None: Evolution does not override the federal tax.
Regular Amount: Evolution taxes the check the amount entered in the **Federal Override Value** field.

- Regular Percent: Evolution taxes the check the percentage in the **Federal Override Value** field.
- Additional Amount: Evolution taxes the check the regular amount plus the amount entered in the **Federal Override Value** field.

- Additional Percentage: Evolution taxes the check the regular amount plus the percentage entered the **Federal Override**

Value box.

Federal Override Value: If a **Federal Override Type** is selected (other than None), type the amount or percentage for the override.

Override Frequency: Select the frequency for the override.
- Weekly
- Bi-Weekly
- Monthly
- Quarterly
- Semi-Annually
- Annually

Normally, select the same frequency as your payrolls. To withhold more or less taxes, select a different frequency.

Prorate Scheduled E/Ds: Not Currently in Use.

4. Click the **Blocks** tab and specify the items to be blocked.

Admin
Client
Company
Employee
Payroll
Reports
Misc

Client   Z9999   Thomas English-Do Not Touch!
Company   Z9999   Thomas English-Do Not Touch

Browse | Details | Blocks | Taxes | States | Locals |

Block DD
- ⦿ Yes   ○ No

Block DD Except Net
- ○ Yes   ⦿ No

Block Time Off Accural
- ⦿ All   ○ No
- ○ Accrual

Block Auto Distribution
- ⦿ Yes   ○ No

Block Sched E/Ds Except DD
- ⦿ Yes   ○ No

Block Scheduled E/Ds From Agency
- ⦿ Yes   ○ No

Block Sched E/D Except Pension
- ⦿ Yes   ○ No

E/Ds to Block

E/D Code	Description
D02	Checking Account

E/D Code
D02   ➕   ➖

? Help
Exit

View   Task Queue: 5 Total; 5 Finished   UserID: remotetrain   Recd:667.33K 11.7M/sec   Sent: 9.09K

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Block DD: Yes: Blocks direct deposit from the check.
No: Does not block Direct deposit from the check.

Block DD Except Net: Yes: Blocks direct deposit, except net, from the check.
No: Does not block direct deposit, except net, from the check.

Block Time Off Accrual: All: Blocks both accrual and usage of all Time Off Accruals.
No: Time Off Accrual is used and accrued normally.
Accrual: Blocks time off from accruing but still allows time used to be recorded and deducted from the Time Off Accrual balance.

Block Auto Labor Distribution: Yes: Blocks auto labor distribution from the check.
No: Does not block auto labor

distribution from the check.

Block Scheduled E/D Codes:	Yes: Blocks all scheduled E/Ds, except for scheduled E/Ds based on the E/D code type of D1. No: Applies E/D to the check normally.
Block Agency Check Sch. E/Ds:	Yes: Blocks scheduled E/Ds from being applied to agency check. No: Applies E/D to the check normally.
Block Sch. E/Ds except Pension:	Yes: Blocks all scheduled E/Ds, except Pension E/Ds, from the check. No: Does not block scheduled E/Ds, except pension E/Ds, from the check.
E/Ds to Block:	Select the individual **E/D** code that you would like to block. The name of the E/D code set up at the Client level will populate the Description field.

➢ To add an E/D code to the list of **E/Ds to Block**, click the **Add** button on the bottom right hand side of your screen. To delete an individual E/D code from the list of **E/Ds to Block**, click the **Delete** button on the bottom right hand side of your screen. Clicking the **Create Record** button located in your toolbar will create a new check template, not an individual E/D code on the selected template.

Clicking the **Delete Record** button located in your toolbar will delete the entire check template, not just an individual E/D code on the selected template.

5. Click the **Taxes** tab and specify the appropriate information.

Block Federal: Yes: Blocks this tax from the check.
                            No: Does not block this tax from the check.

Block Additional Federal: Yes: Blocks this tax from the check.
                            No: Does not block this tax from the check.

Block EE OASDI: Yes: Blocks this tax from the check.
                            No: Does not block this tax from the check.

Block EE Medicare: Yes: Blocks this tax from the check.
                            No: Does not block this tax from the check.

Block EE EIC: Yes Blocks this tax from the check.
                            No: Does not block this tax from the check.

Block ER FUI: Yes: Blocks this tax from the check.
                            No: Does not block this tax from the check.

Block ER OASDI: Yes: Blocks this tax from the check.
                            No: Does not block this tax from the check.

Block ER Medicare: Yes: Blocks this tax from the check.

No: Does not block this tax from the check.

6.   Click the **States** tab and specify the appropriate information if you wish to create a State tax override. This screen is for overrides only. In order to create an individual state override for your check template, click the **Add** button located on the bottom right hand side of the screen. Clicking the **Create New Record** button in the toolbar will create a new check template. To delete an individual state from your check template, highlight the state you would like to delete and click the **Delete** button located on the bottom right hand side of your screen.

Client   Z9999   **Thomas English-Do Not Touch!**
Company   Z9999   **Thomas English-Do Not Touch**

Browse | Details | Blocks | Taxes | States | Locals |

?	S...	Tax At Supplemental Rate	Block State	Block SDI	Block SUI	State Override Type	State Override Valu
▶							

State
[▼]

Tax at Supplemental Rate
○ Yes   ○ No

State Override Type
[▼]

Block State
○ Yes   ○ No

Block SDI
○ Yes   ○ No

State Override Value
[   ]

Block Additional State
○ Yes   ○ No

Block SUI
○ Yes   ○ No

View | Task Queue: 0 Total; 0 Finished | UserID: remotetrain | Recd:664.97K 10.5M/sec   Sent: 8.61K

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State: Select the State for which you would like to create a taxation override.

State Override Type: Select the type of **State Tax Override** you would like to apply. You have the same options for **State** tax overrides as you do for **Federal** tax. The options are:
- None
- Regular Amount
- Regular Percent
- Additional Amount
- Additional Percentage

➢ If you select an option, you *cannot* use the **Tax at Supplemental Rate** box or the **Block State** options.

State Override Value: If a **State Override Type** (other than None) has been selected, type the amount or the percentage of the override.

Tax at Supplemental Rate: Yes: Taxes are calculated at the

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supplemental wages tax percentage.
No: Taxes are not calculated at the supplemental rate when this override template is being used. They are calculated at the *Override Value* or at their regular rate.

➢ If you select **Yes**, you *cannot* use the **Override Type** box or the **Block State** options.

Block State: Yes: The state tax is blocked.
No: The state tax is included. Therefore, the employee is subject to the tax and the tax will be withheld.

➢ If you select **Yes**, you *cannot* use the **Tax at Supplemental Rate** box from the **Override Type** options.

Block Additional State: Yes: Additional state taxes are blocked when this check template override is used.
No: Additional state taxes are not blocked when this check template override is used.

Block SDI: Yes: The SDI tax is blocked.
                               No: The SDI tax is included.

Block SUI: Yes: The SUI tax is blocked.
                               No: The SUI tax is included.

   7.   Click the **Locals** tab and specify the appropriate information if you
        wish to override **Local** taxes. The screen is for overrides only. In
        order to create an individual local tax override for your check

        template, click the **Add** button on the bottom right of your

        screen. Clicking the **Create Record** button in the toolbar will
        create a new check template. To delete an individual local tax
        from your check template, highlight the local tax and click the

        Delete button located on the bottom right of your screen.

Admin
Client
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Employee
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Misc

5/15/2006

Client   Z9999   Thomas English-Do Not Touch!
Company   Z9999   Thomas English-Do Not Touch

Browse | Details | Blocks | Taxes | States | Locals

Local	Override Amount	Block Local

Local Tax

Override Amount

Block Local
○ Yes   ○ No

Help
Exit

View   Task Queue: 0 Total; 0 Finished   UserID: remotetrain   Recd:664.97K 10.5M/sec   Sent: 8.61K

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Local Tax: Select the **Local** tax you would like to override.

Override Amount: Enter the **Override Amount** for the local tax. Based on the
                      calculation method used by the local tax, this may either be
                      a percentage or a flat amount.

Block Local Tax: Yes: The local tax is blocked.
                      No: The local tax is included.

8.   Click the **Post Changes** button to save changes to local
      memory.

9.   If Evolution hasn't committed the changes to the database, click

      the **Commit Changes** button.

Creating Pay Groups for Payroll Defaults

Every employee belongs to a pay group. You can create pay groups for employees to organize said employees into groups that are exceptions to salary, hourly, and DBDT groupings. Pay groups are used to group employees for payroll batches. You add employees to pay groups on the Details tab of the **Employee-Employee** window.

To create a pay group, perform the following steps:

1. Click **Company**, point to **Payroll Defaults**, and then click **Pay Group**.

2. Evolution displays the **Browse** tab. Select the company and click the **Details** tab.

Admin
Client
Company
Employee
Payroll
Reports
Misc

Client   Z9999   **Thomas English-Do Not Touch!**
Company   Z9999   **Thomas English-Do Not Touch**

Browse | Details

Open company

?	Number	Name	Status
▶	Z9999	Thomas English-Do Not Touch	Active

Help
Exit

View | Task Queue: 0 Total; 0 Finished | UserID: remotetrain | Recd:667.98K 10.5M/sec Sent: 9.40K

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3. Create a new pay group by clicking the **Create Record** button.
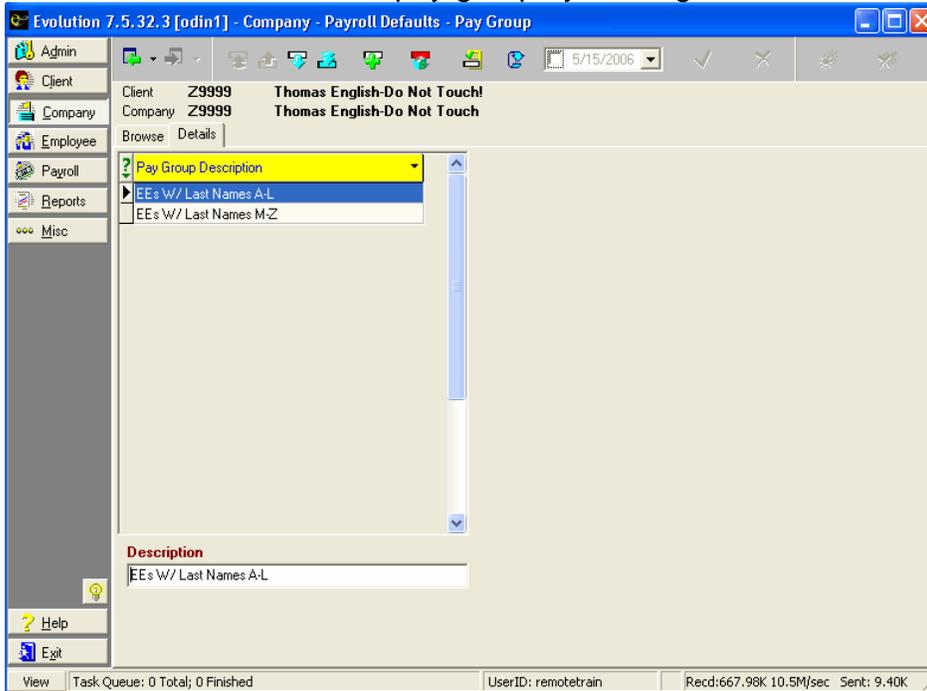
4. For the newly created pay group, type a **Description** (name). Pay Groups are attached to each employee on the **Details** tab of the

Employee-Employee window.

5. Click the **Post Changes** button to save the changes to local memory.

6. Click the **Commit Changes** button to commit the changes to the database.

Creating Payroll Filters for Payroll Defaults

Payroll Filters give you the ability to apply Pay Groups to payroll batches. You may create groupings that allow you key payrolls based on any filter you create. A few examples of said filters are salary, hourly, employees with last names beginning with the letters A-L, and employees with last names ending in M-Z.

To Create a Payroll Filter, perform the following steps:

1. Click **Company**, point to **Payroll Defaults**, and then click **Payroll Filters**.
2. Evolution displays the **Browse** tab. Select the company and click the **Details** Tab.

Client
Company

Browse | Details

Open company

?	Number ▼	Name	Status
▶	29999	Thomas English-Do Not Touch	Active

5/15/2006

View   Task Queue: 0 Total; 0 Finished   UserID: remotetrain   Recd:116.21K 12.0M/sec   Sent: 7.42K

Admin
Client
Company
Employee
Payroll
Reports
Misc

Help
Exit

3. Create a new **Payroll Filter** by clicking the **Create Record** button
.

4. For the newly created Payroll Filter, specify the following:

Name: Enter a descriptive name for the filter to be used to identify the group when keying in payroll.

Division: Select the Division that you would like to associate with this filter.

Branch: Select the Branch that you would like to associate with this filter.

Department: Select the Department that you would like to associate with this filter.

Team: Select the Team that you would like to associate with this payroll filter.

Pay Group: Select the pay group you would like to associate with this filter.

5. Click the Post Changes button to save the changes to local memory.

6. To create additional payroll filters, repeat steps 3-5.

7. Click the **Commit Changes** button to commit the changes to the database.

Employee-Employee window

Generally, you can specify all the required employee information on the **EE Entry** tab. The **EE Entry** tab summarizes the most commonly used information on one tab. If you need to specify more detailed information about an employee, you can do so on the other tabs. For example, if you need to add an alternate address for an employee, you can do so on the **Address** tab.

Remember: Any field that is in red is a REQUIRED field. You will not be able to save the entry until all red fields are populated.

Not all remote users will see an additional tab called Documents. This tab has separate security rights, and must be enabled by your Payroll Specialist for the remote user to access it.

The following toolbar applies to all tabs of this window:

| Last: **Evans** | SSN: **089-50-7691** | Company: **Thomas English-Do Not Touch** |
| First: **Dale** | EE#: **18** | Number: **Z9999** |

| 18 ▾ | Evans Dale ▾ | ◁ Prior | Next ▷ | | 🗩 📑 |

Last:	The last name of the employee whose record is displayed.
First:	The first name of the employee whose record is displayed.
SSN:	The Social Security Number (SSN) of the employee whose record is displayed.
EE#:	The employee code (or number) of the employee whose record is displayed.
Company:	The primary name of the company whose employee records are displayed.
Number:	The code or number used to identify the company.

Employee Code [18 ▼]: To display the record of an employee, select their employee code (or number).

Employee Name
[Evans Dale ▼]: To display the record of an employee, select their name.

[◁ Prior]: Click this button to view the prior employee's record.

[Next ▷]: Click this button to view the next employee's record.

Check Finder [icon]: Starts the Check Finder, F12, which allows you to find and view an employee's processed checks.

Tax Calculator [icon]: Starts the Tax Calculator, F9, which allows you to make net-to-gross and gross-to-net calculations.

Creating an Employee

To create an employee, do the following:

1. Click **Employee** and then click **Employee**.

2. Evolution displays the **Browse** tab. If the company is not open, click the **Open company** button.

3. Evolution opens the company and displays its employees in the employees list.

4. Click the **Create New Record** button to create a new record for new employee.

5. Evolution creates a new employee and displays it in the **EE Entry** tab. Specify the information below as appropriate.

EE Entry Tab

Note: Always type the **SSN** first.

Personal Information

The address information entered on this tab is used as the employee's standard address and is printed on forms, such as W2s and checks. To set up an alternate address for either W2s or checks, or to enter additional address information, click the **Address** tab.

SSN: Type the employee's social security number or EIN. If the employee is a 1099 worker and has an EIN, type their EIN instead of their social security number. You may change the format of the individual ID on the **W2** tab.

EE Code: An alphanumeric code up to nine characters long. Also referred to as an *Employee Number*.

➢   You can set up Evolution to automatically increment a numeric value for the employee code. To set this up, contact your customer service representative who will enter a numeric value in the **EE Auto Increment** box on the **Company-General-Company Info-Misc** tab.

Last Name: Employee's last name.

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First Name: Employee's first name.

MI: Employee's middle initial.

Address 1:   Employee's address.

Address 2:   Employee's address.

City: Employee's city.

State: Employee's state.

Zip Code: Employee's zip code.

County: Employee's county.

Primary Phone: Employee's primary phone.

Ethnicity: Employee's ethnicity. If American Indian is selected, you
                   will be directed to the field to the right of the ethnicity. This
                   field is to be used to record the corresponding tribe.

Date of Birth: The date the employee was born. This field is informational only unless it is required for some calculation based on the employee's setup.

Gender: Employee's gender. This field defaults to N/A; however, upon saving the Employee's record, you will receive a message asking if you would like to assign a gender to the Employee. Although the N/A fulfills the field population requirement, the Gender field is used in the creation on certain reports like the New Hire Report (S1072). For this reason, Evolution verifies that you do not want to record specific data here.

D/B/D/T: Click the D/B/D/T button, or press the F4 key, and select the correct division, branch, department, or team. If a Division, Branch, Department, and/or Team are created for a particular company, every employee entered for that company must be associated with a D/B/D/T level or an error will result.

Current Hire Date: Enter this date even if it is the same date as the Original Hire Date. Time Off Accrual uses this field as its effective date unless overridden at a lower level.

Original Hire Date: Enter this date if it is different from the Current Hire Date. This field is used for informational purposes only.

Current
Termination Date: If the employee has been terminated, enter the effective date.

Re-Hire OK: Informational field only. Can be used to indicate whether the employee is eligible for re-hiring in the future.

Current Status
Code: The current status of the employee.

Pay Frequency: The frequency to pay the employee.

Salary Amount: If the employee is *salaried*, enter an amount. Salaried employees are paid a flat dollar amount. If the employee is *hourly*, be sure this box is blank.

Average Hours: The Salary Amount divided by the Rate Amount. After you enter the Salary Amount, you can enter either the Average Hours and have Evolution calculate the Rate Amount, or you can enter the Rate Amount and have Evolution calculate the Average Hours.

An Average Hours box also appears on the **Details** tab of the **Employee-Pay rate info** window.

Rate Number: By default, Evolution enters 1 (one). Therefore, if an employee has more than one rate, be sure that you enter the number of the employee's primary rate.

Standard Hours: If someone gets paid the same hours every week, you can specify standard hours. The data populated in this field may be used as a default value during the payroll process. For more detail on this topic, see *Payroll*.

Rate Amount: If the employee is hourly, enter an hourly rate. If the employee is *salaried*, be sure that this field is set to 0.00.

Pay Grade: Select a Pay grade. The Pay Grades are stored at **Company-HR-Pay Grades.**

Default WC: Select a default Workers Comp code for the employee. This can be overridden at the payroll level if necessary. Once this field is populated, it will auto-populate the WC Description, and the WC State fields.

Default Job: Select a Default Job number. The Jobs are stored at **Company-Misc-Jobs**.

Federal Marital Status: The employee's marital status for federal taxes.

Federal Dependents: Type the number of dependents the employee claims for federal taxes.

EIC: The status of the employee for Earned Income Credit.

State: *Required.* The employee's home state. This is the same as the Home State on the **Details** tab of the **Employee-**

States window.

SDI: Select the state to which this employee pays SDI. If the state does not have SDI, it will not be calculated.

SUI: *Required*. Select the state to which to report this employee's SUI wages.

State Marital
Status: Select the employee's marital status for this State.

State Dependents: Type the number of dependents the employee claims for state taxes.

Reciprocal Method: *Required*. Select the method this employee uses for state income tax reciprocation.

- Take None: Does not reciprocate.
- Take Difference Between: Takes the difference between the work state and what the reciprocating state would have withheld. For example, NY withholds at a higher rate than VT. So, if you work in VT

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and live in NY it will take the difference between what is withheld in VT and what would have been withheld if the employee were paid in NY.

- Take a Flat Amount: Withholds a flat amount for the reciprocal state.
- Take a Percentage: Withholds a straight percentage for the reciprocal state.
- Take the Full Amount for: Withholds the full amount for both the work state and the reciprocal state.

Reciprocal State: Select the state with which this employee reciprocates. In order for this function to work, the state selected must be set up as one of the company's states.

Locals: Click the **Locals** button to select local taxes for this employee. For more information, see *Locals*.

Details tab

New Hire Report Sent:

- Pending: Until the employee's first payroll, select this option. After the employee's first payroll, Evolution automatically changes it to Completed.
- Completed: If you are using new hire reporting services, the employee has been reported as a new hire.
- Completed by predecessor: The employee was reported as a new hire by another company.

FLSA Exempt:

Yes: For employees who are *exempt* from overtime.
No: For employees who are *not exempt* from overtime.
Not Applicable: FLSA does not apply to the employee.

Time Clock Number:

The ID number of the employee used by the time clock.

Position: The title of the position of the employee. Positions are loaded at **Company-Misc-HR positions.**

Position Effective Date: Select the date the employee's position became effective.

Position Status: The status of the employee in this position.
- N/A: This is the default position status assigned at Employee record creation.
- Full Time: The employee is full time.
- Full Time Temp: The employee is full time, but temporary.
- Part Time: The employee is part time.
- Part Time Temp: The employee is part time, but temporary.
- Half Time: The employee works half time.
- Seasonal: The employee is seasonal.
- Student: The employee is a student.

- 1099: The employee is a 1099. You also need to select 1099 on the **W2** tab of the **Employee-Employee** window.

Highly Compensated:

Yes: Indicates employee is highly compensated.
No: Indicates employee is not highly compensated.

Corporate Officer:

Yes: Indicates employee is a corporate officer.
No: Indicates employee is not a corporate officer.

Labor Distribution Options:

Defaults to the value set as the default on the **Company- General –Company Info, Misc**. *tab. Contact your Customer Service Representative to change this default value if needed.*
The method used to distribute this employee's labor. Earnings are automatically

distributed, but you must specify if you want taxes, deductions, all, or none distributed. This field is used in conjunction with the **Auto Labor Distribution E/D Group** field.

➢ Earnings in the selected group are distributed to all job roles. Taxes and deductions default to the home D/B/D/T. Earning distributions are not affected by tax and deduction distribution options.

- Distribute Taxes: Taxes and earnings are distributed to all job roles.
- Distribute Deductions: Deductions and earnings are distributed to all job roles. Will distribute ALL deductions. It's all or nothing, you cannot specify which deductions to distribute.
- Distribute Both: Deductions, earnings and taxes are all distributed.
- Distribute None: Earnings in the selected group are distributed to all job roles. Taxes and deductions default to the home DBDT. To have nothing

distributed, leave the Default to Distribute Both, but do not populate an Auto Labor Distribution E/D Group.

Auto Labor Distribution
E/D Group:
The E/D group used to define the earnings to be distributed. You cannot put deductions in this group. They will be ignored.

Pay Group:
If applicable, the pay group for the employee, which can be used for grouping during payroll entry or for grouping on Report Writer reports. You can create pay groups for employees to organize said employees into groups that are exceptions to salary, hourly, and DBDT categories. Pay Groups are loaded at **Company/Payroll Defaults/Pay Groups.**

Delivery:
Informational use only.

Group Term Policy Amount:
The full Group Term Policy amount used for

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calculating GTL Deductions.

GTL Hours: The number of hours worked annually by hourly employees. Evolution calculates the GTL policy amount by multiplying the entered number of hours by the employee's Primary Pay Rate.

GTL Rate: The rate used to calculate the GTL amount for salaried employees. Evolution calculates the GTL amount by multiplying the employee's Salary by the entered rate.

Visa Number: If the employee is not a US citizen, the employee's visa number.

On Call From/On Call To: *Informational only. Does not affect calculations.* The dates during which the employee is on call.

G/L Tag: The general ledger tag associated with this

employee.

YTD (F3) button ![YTD (F3)] The Year to Date window displays the following read-only information for an employee:

Description ▼	Hours	Amount	Description ▼	Hours	Amount	Description	Amount
▶ Regular	1,236.50	11,432.83	▶ Checking Ac...		3,907.01	▶ ER FUI	56.00
			Child Support		875.00	ER Medicare	165.78
						ER OASDI	708.83
						Federal	771.31
						Medicare	133.65
						NY-Re-employment	6.37
						NY-SUI	144.39
						OASDI	387.97
						State NY	250.92

| 1,236.5 | 11,432.83 | | 0 | 4,782.01 | | 2,625.22 |

✗ Close   2005 ⬍   ✓ Apply

- The left pane displays the employee's earnings.

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- The center pane displays the employee's deduction.
- The right pane displays all the taxes that are attached to the employee and the specific dollar amounts associated with each tax.

➢ To view a prior year's data, change the year at the bottom of the window.

Tipped Directly: *Defaults to No.*
                              Yes: Indicates employee receives tips directly.
                              No: Indicates employee's tips are pooled or employee does not receive tips.

Ignore FICA on Cleanup Payroll: *Defaults to No*
                              Yes: *Ignore* FICA on QEC's. Generally, select this option for tipped employees you want to report with FICA out of balance.
                              No: *Include* FICA on cleanup payroll.

Combine Returns On This EE: *Defaults to Yes.*

These options are for companies that have different tax IDs, but are allowed to take credit against both companies, such as for a common paymaster. For example, an employee works in both companies, but may only report to one company for tax returns. This setting asks if you want to use the employee on this company's tax returns.

➢ Also, these options are for employees in companies that are in a common paymaster who keeps all the employee's taxes. A common paymaster is an umbrella of companies that are related enough that they can combine wages to reduce their unemployment, OASDI, and Medicare taxes.

Yes: Base the employee's tax returns on this EE Code.

No: *Do not* base the employee's tax returns on this EE Code.

Generate Second Check: Yes: Evolution creates a second check for the employee when the payroll batch is created.

	No: Evolution creates only one check for the employee when the payroll batch is created.
Deductions to Take First:	*Defaults to Child Support, Garnishment.* You can choose the order in which Evolution takes deductions. According to which selection you choose, it will take the indicated deductions in the order listed, then will take any other deductions according to the "**Priority to Include ED in Check**". For example, if you choose "Child Support, Garnishment", it will first take all Child Support deductions, then Garnishments, then any other deductions. Choose from:

- Child Support, Garnishment
- Garnishment, Child Support
- Child Support
- Garnishment
- Use E/D Priorities

➢ When Use E/D Priorities is selected, Evolution will look for the priorities set up on the Scheduled E/D, and take them in that order.

Priority 1 gets taken before Priority 2.

Second Check Template: The template on which to base the second check if Yes is selected for **Generate Second Check.**

| EE Scheduled ED's | : | Takes you to the **Employee/Scheduled E/D's** screen. |

Address Tab
Employees must have at least a Standard Address, but they may also have an Alternate Address. The standard address data is populated from the information you entered in the **EE Entry tab**. If there is other address information you would like to include, you may do so on this tab.
If only a standard address is entered, Evolution prints this address on both W2's and payroll checks. If an alternate address is entered, Evolution prints the standard address on W2's and the alternate address on payroll checks. This feature is especially useful for seasonal employees who have different addresses for W2s and checks.

To enter additional address information for an employee, perform the following steps:

1. Click **Employee** and then **Employee**.

2. Evolution displays the **Browse tab**. Select the employee's record you wish to modify and then click the **Address tab**.

3. On the **Address tab**, specify the following information:

Address 1:   Employee's street address

Address 2:   Additional address field

City: Employee's city

State: Employee's state

Zip Code: Employee's zip code

County: Employee's county

Primary Phone: Employee's primary phone. You can also add a brief description in the adjoining box.

Secondary Phone: Employee's secondary phone. You can also add a brief description in the adjoining box.

Tertiary Phone: Employee's tertiary phone. You can also add a brief description in the adjoining box.

E-mail: Employee's e-mail address

VMR Password: *Service Bureau Use only.*

Country: Employee's country of residence.

Self Serve
Enabled: Yes: The employee is able to access Self Serve.
                   No: The employee cannot access Self Serve.

Print Voucher: Yes: *Default.* Prints a check voucher if the employee has
                   a zero check.
                   No: Does not print a check voucher if the employee has a
                   zero check.

User Name: Selected by either the service bureau or the employee, the
                   user name is populated here and will be used to retrieve
                   documents available through the self-serve feature.

Password: Selected by either the service bureau or the employee, the
                   password is populated here and will be used to retrieve
                   documents available through the self-serve feature.

4. Click the Post changes button to save the changes to

local memory.

5. Click the Commit changes button to commit the changes to database.

W2 tab

This window allows you to specify how the employee's Form W2 is processed.

Social Security Number: The employee's social security number. It is initially entered on the EE Entry tab.

Treat as EIN or SSN: EIN: The number entered in the Social Security Number box is treated as an employee identification number.
SSN: The number entered in the Social Security Number box is treated as a social security number.

1099 or Employee: 1099: Indicates the employee receives a Form 1099.
W2: Indicates the employee receives a Form W2.

➢ When you originally set up the employee, and select 1099, Evolution defaults the employee to tax exempt. If the employee was already set up, and you select 1099, you must exempt the employee from all taxes using an effective date.

First Name: The employee's first name to be printed on the Form W2. If blank, Evolution prints the name entered on the **EE Entry** tab.

Middle Name: The employee's middle name to be printed on the Form W2. If blank, Evolution prints the initial entered on the **EE Entry** tab.

Last Name: The employee's last name to be printed on the Form W2. If blank, Evolution prints the last name entered on the **EE Entry** tab.

Name Suffix: Enter the employee's name suffix to be printed on the Form W2. There is no field for suffix in **EE Entry**.

Annual Form Type: Select the type of Form. If not stated otherwise, this is the type of form needed:
- None
- W2
- 1099
- W2 & 1099
- Puerto Rico

Deceased: *Not used at this time.*

Statutory Employee: Yes: If selected, the Statutory Employee check box
will also be checked on the Form W2.
No: If cleared, the Statutory Employee check box
will *not* be checked on the Form W2.

Legal Rep: *Not used at this time.*

Deferred Compensation: *Not used at this time.*

Pension: Yes: The pension check box is checked on the
Form W2, which indicates that the employee is
receiving pension or 401k benefits outside your
company.
No: The pension check box is not checked on the
Form W2. **Note:** If the employee's pension or 401k
benefits are done through payroll in Evolution, the
pension box will automatically be checked on Form
W2.

Residential State: *Defaults to employee's address state.* The value is

automatically populated with the state entered in the State field on the EE Entry tab of the Employee-Employee window.

I-9 on File: Yes: Indicates that the Form I-9 (Employment Eligibility Verification) is on file. The employee fills out the form within 3 days of hiring so the employer can verify eligibility of employment.
No: Indicates that Form I-9 is *not* on file.

The 1099R fields will be described in the 1099 section found at the end of this topic.

Federal Tax tab
To change federal taxes for an employee, do the following:
1. Click **Employee** and then click **Employee**.

2. Click the **Federal Tax** tab.

3. Specify the type and value of the override

Override Federal Tax Type:

- None: The employee is taxed at the regular rate.
- Regular Amount: The employee's regular tax amount is overridden with the amount in the **Override Fed Tax Value** field.
- Regular Percent: The employee's regular tax amount is overridden with the percentage in the **Override Fed Tax Value** field.
- Additional Amount: Adds the amount in the **Override Fed Tax Value** field to the federal taxes normally withheld.
- Additional Percent: Adds an additional percentage, loaded in the **Override Fed Tax Value** field, to the federal taxes normally withheld.

Override Federal Tax Value: If you did not select None for the **Override Federal Tax Type**, enter a numeric value without the $ (dollar sign) or % (percent symbol).

EIC: Select the status of the employee for Earned Income Credit.

4. Specify the taxes for which the employee is to be exempt.

EE Federal:	Exempt: Not subject to tax. Block: Employee is subject to tax, but the taxes are not withheld. Include: Subject to tax and withheld.
EE OASDI Exempt:	Yes: Employee is exempt from this tax. No: Employee is subject to this tax.
EE Medicare Exempt:	Yes: Employee is exempt from this tax. No: Employee is subject to this tax.
ER OASDI Exempt:	Yes: Employee is exempt from this tax. No: Employee is subject to this tax.
ER Medicare Exempt:	Yes: Employee is exempt from this tax. No: Employee is subject to this tax.

ER FUI Exempt: Yes: Employee is exempt from this tax.

No: Employee is subject to this tax.

➢ The taxes you exempt or override on this tab will affect every check issued to this employee. You can override taxes on individual checks during payroll entry. You cannot, however, override taxes that are exempted or blocked at this level. You can override only taxes that are calculated. Statuses can now only be changed as of the effective (as of) date.

5. If the effective date of the tax needs to be set, contact your Payroll Specialist to make the change for you.

6. You don't need effective dates to do an additional amount or override the amount of tax coming out. Only the exempts and blocks require effective dates.

7. Click the Post changes button [✓] to save the changes to local memory.

8. Click the Commit changes button to commit the changes to the database.

Notes tab

Payroll notes: Any notes entered here are displayed on the **Employee Notes** tab in payroll. The employee is highlighted in yellow alerting the user there are notes associated with this employee.

General Notes: Enter general notes about the employee. These notes are displayed on this screen only.

| Last: | **Evans** | SSN: | **089-50-7691** | Company: | **Thomas English-Do Not Touch** |
| First: | **Dale** | EE#: | **18** | Number: | **Z9999** |

[18 ▼] [Evans Dale ▼] ◁ Prior   Next ▷

Browse | EE Entry | Details | Address | W2 | Federal Tax | Notes | HR | Documents

Payroll Notes

Any info you want displayed in payroll can be entered here.

General Notes

EE is CPR Certified

HR Tab

Allows you to track some basic information if the full Human Resource package is not purchased. This information is optional.

To calculate Federal withholding, in accordance with the IRS Circular E, for Non-Resident Alien employees, Evolution will look to the **VISA Type** field to determine whether or not to apply the additional amount to a non-resident alien employee's wages. If a **VISA Type** other than **None** is populated and the expiration date is less than the employee's check date, Federal withholding will be calculated based on higher taxable wages, according to the table in the Circular E. If a **VISA Type** of **None** is not populated, standard taxable wages will be used for the calculation. A warning will display when a **Visa Type** other than **None** is entered in this field reminding the user of the taxation rules.

Documents Tab
This window allows you to store personal documents for individual employees, for example, their annual review or I9. You can load an unlimited number of documents on this window.

To add a document, follow the steps below.
1. Click the ✚ key and enter a description in the **Description** field.
2. Click the 🗔 Load button. Choose the document to add.
3. Click 🖫 Save .
4. To delete a document, click the ▬ key.

This tab will only be accessible if you have security right to it.

| Last: | Evans | SSN: | 089-50-7691 | Company: | Thomas English |
| First: | Dale | EE#: | 18 | Number: | 9999 |

| 18 | ▼ | Evans Dale | ▼ | ◁ Prior | Next ▷ |

Browse | EE Entry | Details | Address | W2 | Federal Tax | Notes | HR | Documents

?	Description ▼
*	Annual Review

— +

🖫 Load

🖫 Save

🖫 Show

Description   Annual Review

Employee Quick Entry Window

The EE Quick Entry window was created to allow the user to new hire a very basic employee and add up to three different rates of pay.

You cannot change information on this window. If you have entered and saved incorrect information, you must open the Employee-Employee window and correct the information on the appropriate tab.

EE Quick Entry tab

SSN: *Required.* Social security number or EIN. If the employee is a 1099 sub-contractor and has an EIN, type their EIN instead of their social security number. You may change the format to that of an EIN by selecting the EIN flag on the **Treat as EIN or SSN field** of the **W2** tab of the Employee-Employee window.

EE Code: *Required.* The alphanumeric employee code (or number) of the employee. Employee Codes may be up to nine characters long.

First Name: *Required.* The first name of the employee to be added to the selected company.

Last Name: *Required.* The last name of the employee to be added to the selected company.

Employee Address: *Required.* Enter the employee's address using the Address 1, Address 2, City, State, and Zip Code fields.

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Primary Phone: Enter the primary phone number used to contact the
                        employee.

Gender: *Required.* Select the gender of the employee.

Time Clock Number: Enter the employee's time clock number if
                        applicable.

Pay Frequency: *Required.* The frequency the employee will be paid.

Salary Amount: The amount the employee will be paid if they are a
                        salaried employee.

Default WC: The default worker's compensation code for this
                        employee if applicable.

Post & Add Next
Employee: Will save the new employee information and display
                        a blank screen to add the next employee data.

Rate Amount: *Required.* Enter the pay rate amount for the

employee. If the employee is hourly, enter an hourly rate.

➢ If the employee is salaried, then be sure that this box is either blank or the rate entered is $0.00. You must enter the salary amount on the either **EE Entry** tab of the **Employee-Employee** window or the **Details** tab of **Employee-Pay Rate** window.

Rate Amount: Enter a second rate for the employee if applicable.

Rate Amount: Enter a third rate for the employee if applicable.

Ethnicity: *Required.* Select the employee's ethnicity.

Federal Marital Status: *Required.* Select the federal marital status as defined by the employee's W-4 form.

Federal Dependents: *Required.* Enter the number of dependents the employee claims for federal taxes as defined by the employee's W-4 form.

State: Select the employee's home state, the state used

for taxation purposes. It is the state in which the employee's wages are earned, not the state in which the employee resides. This is the default state for taxes.

SDI State: Select the state to which the employee will pay State Disability Insurance, if applicable.

SUI State: *Required.* The state to which to report this employee's SUI wages.

State Marital Status: *Required.* Select the state marital status as defined by the employee.

State Dependents: *Required.* Enter the number of dependents that the employee is claiming on the state level.

Date of Birth: Enter the employee's birth date.

Current Hire Date: Enter the employee's date of hire.

Current Termination Date: If applicable, enter the employee's termination date.

Current Status Code: Select the employee's status. Only active
                        employees are automatically included in Payroll.
                        Options are Active, Involuntary Layoff, Termination
                        due to Layoff, Release without Prejudice, Voluntary
                        Resignation, Termination Due to Retirement,
                        Termination due to Transfer, Military Leave, Leave
                        of Absence, Seasonal, Suspended, Termination
                        Due to Death, and Terminated. Only Active and
                        Seasonal codes, which are associated with the
                        employee on the EE Entry tab of the Employee-
                        Employee window, result in a Status of Active. All
                        other codes result in a status of Inactive.

DBDT Code :   *Required.* Select the Division, Branch, Department,
                        and/or Team to which the employee is assigned that
                        corresponds with the entered Rate Amount.

DBDT Code :   Select a second Division, Branch, Department,
                        and/or Team to which the employee is assigned that

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corresponds with the entered Rate Amount, if applicable.

DBDT Code 🔲:   Select a third Division, Branch, Department, and/or Team to which the employee is assigned that corresponds with the entered Rate Amount, if applicable.

Click the **Ok & Next button** at the bottom of the window to save and add

another employee, or the Post Changes button ✓ , in the upper right side of the window to save the information.

Pay Rate Info window

Salary Amount:	If the employee is paid salary, the amount of the salary paid per pay frequency. When entered with a pay rate average hours, Evolution calculates the hourly pay rate amount.
Annualized Salary:	*Informational Only.* The amount entered will not effect any calculations regarding annualized salary.
Average Hours:	The pay rate salary amount divided by the pay rate amount. After you enter the pay rate salary amount, you can either enter the Average Hours and have Evolution calculate the pay rate amount or you can enter the pay rate amount and have Evolution calculate the Average Hours.
Standard Hours:	The number of hours Evolution enters when auto-populating a check. If an employee is paid the same amount every pay cycle, you can specify standard hours. When you create a payroll, Evolution asks if you want to pay standard hours. Select Yes if you would like to pay this number of hours.

Pay Frequency: The pay cycle associated with this employee and the entered pay rate amount/ salary.

Calculated Annual Salary: Evolution auto-populates this field by calculating the employee's annual salary. If the employee is salaried, it multiples the Salary Amount by the Pay Frequency. If the employee is hourly, it multiples the Rate Amount by the Pay Frequency and by Standard Hours.

Future Raise Date: *Informational only.* The date the future raise will take effect.

Future Raise Amount: *Informational only.* The amount of the raise. You can either use this for salary or hourly employees. If you enter a value in this box, be sure the Future Raise rate is blank.

Future Raise %: *Informational only.* The percentage of the future raise. You can use this for either salary or hourly employees.

Future Raise Rate:　　　*Informational only.* The hourly rate the employee will make following the Future Raise Date.

Workers Comp
Wage Limit:　　　The limit above which Evolution should no longer calculate workers compensation for this employee.

Auto Update Rates:　　　Yes: When the employee's primary pay rate (Evolution defaults the primary rate to be Rate 1) is changed, all other rates that were the same amount before the change will also be updated.
No: If selected, the other rates that are equal to the employee's primary rate (by default, Rate 1) will not be updated.

➢ This only applies to changes of the primary rate. If you change a rate other than a primary rate (Rate 1), this option will not work.

Pay Rate Browse Grid
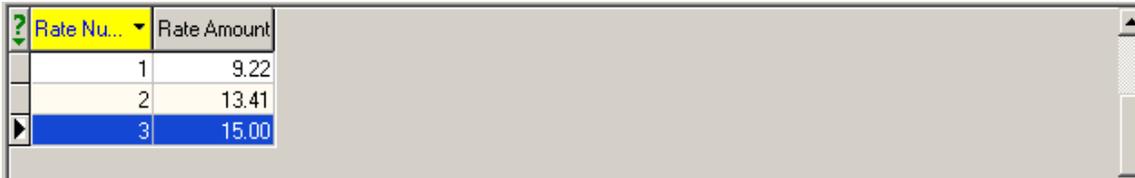
Rate Nu... ▼	Rate Amount
1	9.22
2	13.41
3	15.00

Rate Number: The number of the pay rate pulled from the **Rate Number** field located at the bottom right hand corner of this screen. By default, Evolution enters 1(one). Therefore, if an employee has more than one pay rate, be sure that you enter the number of the employee's primary rate. Any rate number can be selected as the primary rate. Evolution defaults the Rate 1 to be the primary rate. It is also used by the **Auto Update Rates** field when making changes.

Rate Amount: The amount of the pay rate for a pay rate number pulled from the **Rate Amount** field located at the bottom right hand corner of this screen. If the employee is hourly, enter an hourly rate. If the

employee is salaried, then be sure that this box is either blank or the rate entered is $0.00.

Division: The division name associated with selected employee and the corresponding pay rate.

Branch: The branch name associated with selected employee and the corresponding pay rate.

Department: The department name associated with selected employee and the corresponding pay rate.

Team: The team name associated with selected employee and the corresponding pay rate.

DBDT button : Displays the Filter & Select D/B/D/T dialog from which division, branch, department, and/or team can be selected.

Jobs Number: The code identifying the job.

W/C Code: The workers' compensation code used by this

company, as provided by the company's workers' compensation carrier.

Workers Comp: The descriptive name of this workers' compensation code, such as clerical.

State: The state for which this workers' compensation code is valid.

Pay Grade: The description of the salary grade as defined in the user populated table within the Evolution HR module. The HR module is tied to security. Please contact your customer service representative for access.

Primary Rate: All employees must have one and only one primary rate. Any rate number may be selected as the primary rate. Evolution defaults Rate 1 to be the primary rate. The **Auto Update Rates** field also uses it when making changes. When **Yes** is selected, the rate selected is the employee's primary rate. When **No** is selected the rate is not the

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employee's primary rate.

Rate Number:	*Required.* The number of the pay rate. By default, Evolution enters 1 (one). Therefore, if an employee has more than one pay rate, be sure that you enter the number of the employee's primary rate. Any rate number can be selected as the primary rate. The **Auto Update Rates** field also uses it when making changes.
Rate Amount:	*Required.* The dollar amount of the pay rate. If the employee is hourly, enter an hourly rate. If the employee is salaried, then be sure that this box is either blank or the rate entered is $0.00.

Update Rates or Salaries

button Update Rates or Salaries : Displays the Update Rate Amount dialog, which allows you to update pay rates for multiple employees.

Update Rates or Salaries Dialog:

Update: Salaries: When selected, salary amounts for salaried employees will be updated.
Rates: When selected, rates will be updated.

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For Hourly Employees Only: When selected, only rates for hourly employees will be updated. When cleared, pay rate amounts for both salaried and hourly employees will be updated.

Wage Range to
be Modified: The range of the wages to be updated or changed.

Mode: The mode to use to change the wages.

Change by a Fixed
Amount: The pay rate is changed by a fixed amount. For example, if 0.50 is entered, Evolution will change the rates by adding $.50 to each rate.

Change by a Percent: The pay rate is changed by a percentage. For example, if 10 is entered, Evolution will change the rates, increasing them by 10 percent.

Change to an Amount: The pay rate is changed to an amount. For example, if 6.15 is entered, Evolution changes each rate to $6.15.

Select Employees Button
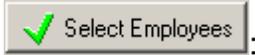
Select Employees : Once you have populated your specific updates in the Update Rates or Salaries dialog, the Select Employees button becomes active. To update employee rates and/or salaries, click this button. A list of active employees will appear.
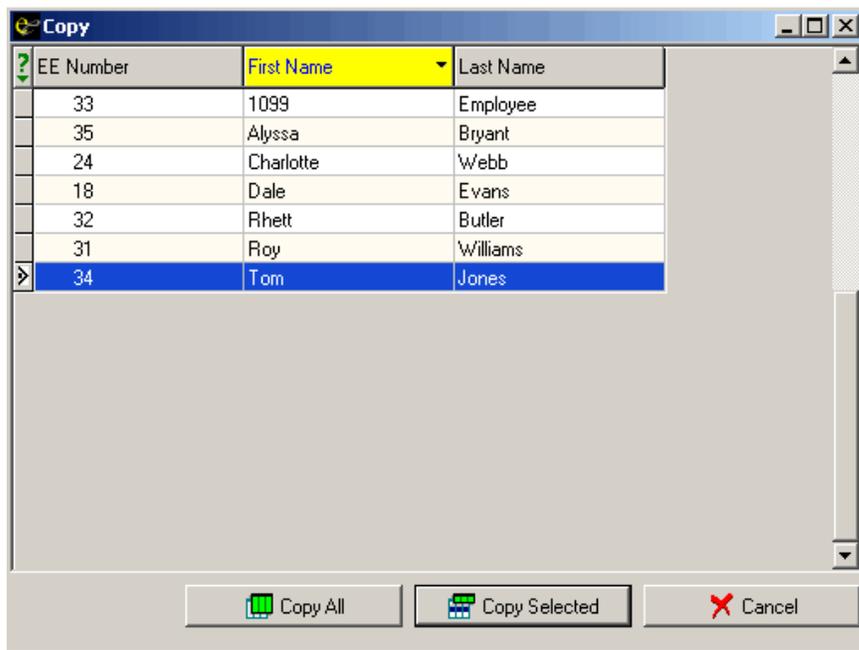
Choose the employees whose rates you would like to update. Copy All allows
you to select all active employees. Once clicked, all employee rates that fit the
parameters you selected on the Update Rates or Salaries dialog will be

updated. By clicking the Copy Selected button, you will only update the employee rates that fit the selected parameters for the employees that you have chosen. Again, once clicked, the rate updates will happen automatically. You will see the following message once you click either the Copy All or the Copy Selected buttons.

Choose Yes to Apply updates. Choose No to cancel your changes and return to the **Employee-Pay Rates** window.

Similarly, clicking the Cancel button [X Cancel] in the Update Rates or Salaries dialog will take you back to the **Employee-Pay Rate** Info window and out of the Update Rates or Salaries dialog completely.

States Window

If you have set up an employee on the **EE Entry** tab, you do not need to use the States windows, unless you want to add an additional state or set up a tax override.

Adding States

To add a state for an employee, do the following:

1. Click **Employee** and then click **States**.

2. Evolution displays the **Browse** tab. Select the company and click the Open Company button.

3. Select the employee you want to edit, and then click the **Details** tab.

4. On the Details tab, click the Create Record button to create a new state for the employee.

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Home State: *Required.* The employee's home state. This state is the same as State on the **EE Entry** tab of the **Employee- Employee** window. Additional states are not shown on the **EE Entry** tab. Each employee can only have one Home State.

5.   For each state, specify the following information:

State: *Required.* Select the state to which this employee pays state taxes.

SDI: Select the state to which this employee pays SDI. If the state does not have SDI, it will not be calculated.

SUI: *Required.* Select the state to which to report this employee's SUI wages.

County: Enter the county for use on the state tax return.

Tax Code: If applicable, type an additional tax code for
                                       the state tax return.

Withholding Allowances: Type the number of withholding allowances
                                       for this employee for this state.

The following Reciprocation options are used for employees who work in one
state, live in another, and want to insure that they have enough taxes withheld
by the end of the year to avoid paying additional taxes. The company must be
set up in this state to use these options.

Reciprocal Amt/Percentage: Type the amount or percentage for
                                       reciprocation used for the Reciprocal Method.

Reciprocal Method: *Required.* Select the method this employee
                                       uses for reciprocation.

- Take None: Does not reciprocate.
- Take Difference Between: Takes the difference between the work state and what the reciprocating state would

have withheld. For example, NY withholds at a higher rate than VT. So, if you work in VT and live in NY, it will take the difference between what is withheld in VT and what would have been withheld if the employee were paid in NY.

- Take a Flat Amount: Withholds a flat amount for the reciprocal state.
- Take a Percentage: Withholds a straight percentage for the reciprocal state.
- Take the Full Amount for: Withholds the full amount for both the work state and the reciprocal state.

Reciprocal State: Select the state that this employee reciprocates with. In order for this function to work, the state must be set up as one of the company's states.

Marital Status: *Required.* Select the employee's marital

status for this state.

Import Marital Status: *Required.* Used for HR Exports when you
                                          need to export a marital status to another
                                          system that will only accept M or S.

6. Click the **Tax Overrides tab.**

7. Specify the following information:

Override State Tax Type:

- None: No state tax override.
- Regular Amount: The employee is taxed the amount in the **Override State Tax Value** field.
- Regular Percent: The employee is taxed the percentage in the **Override State Tax Value** field.
- Additional Amount: The employee is taxed the regular amount, plus the amount in the **Override State Tax Value** field.
- Additional Percentage: The employee is taxed the regular amount, plus the percentage in the **Override State Tax Value** field.

Override State Tax Value: If you did not select *None* for the **Override State Tax Type**, enter a numeric value without the $

(dollar sign) or % (percent symbol).

State Exempt or Block:	Exempt: Not included in wages, and not taxed. Block: Included in wages, but not taxed. Include: Included in wages, and taxed.
EE SDI:	Exempt: Not included in wages, and not taxed. Block: Included in wages, but not taxed. Include: Included in wages, and taxed.
EE SUI:	Exempt: Not included in wages, and not taxed. Block: Included in wages, but not taxed. Include: Included in wages, and taxed.
ER SDI:	Exempt: Not included in wages, and not taxed. Block: Included in wages, but not taxed. Include: Included in wages, and taxed.
ER SUI:	Exempt: Not included in wages, and not taxed. Block: Included in wages, but not taxed. Include: Included in wages, and taxed.

1099 Calculate SUI Taxable Wages:	Yes: Calculate SUI Taxable wages for this employee for this state.
	No: Do not calculate SUI taxable wages for this employee for this state.

8. Click the Post changes button to save the changes to local memory.

9. Click the Commit changes button to commit the changes to the database.

Locals Window

The **Employee – Locals** window provides options for assigning local taxes to an employee. To assign local taxes to an employee, do the following:

1. Click the **Employee** and then click **Locals.**

2. Evolution displays the **Browse** tab. If the company is not

already open, click the **Open Company** button.

3. Select your employee, and click on the **Details** tab.

4. On the **Details** tab, click the **Create record** button .

5. Evolution creates a new record for a local tax. For the local tax, specify the following:

Local: *Required.* Select the local tax. These locals are set up and stored at **Company – Taxes-Local Tax**.

County: *Read-Only*. The county for the local tax will auto-populate based on the system setup.

Tax Code: This field is used for tax returns that require customized information.

Exempt or Block: *Defaults to Include. After the initial set up, if you need to change this option, you must use an effective date.*
Exempt: Employee is not subject to this tax.
Block: Employee is subject to this tax, but the taxes are not withheld.
Include: Employee is subject to this tax, and it is withheld.

Override Tax Type: *Defaults to None.*
None: No tax override.
Regular Amount: The employee is taxed the amount in the **Override Tax Value** box.

Regular Percent: The employee is taxed the percentage in the **Override Tax Value** box.
Additional Amount: The employee is taxed the regular amount, plus the amount in the **Override Tax Value** box**.**
Additional Percentage: The employee is taxed the regular amount, plus the percentage in the **Override Tax Value** box.

Standard Tax Rate: *Defaults to rate set up at Company level.*
Reference only. This is the rate that is loaded at the **Company – Local** level.

Override Tax Value: If an **Override Tax Type** is selected, type the value of the override.

Local Enabled: *Defaults to Yes.*
This only affects screen behavior, not payroll. To affect the payroll, use the **Deduct** flag.

➢   When disabling a local, the **Deduct** flag will be automatically set to Never. The deduct control will be disabled until the local is

enabled again, at which time you will be prompted to choose the Always or No Overrides with an effective date.

➢ When you originally set up a new local, and choose Local Enable **No**, Evolution will not switch the Local **Deduct** to Never. That only occurs when a change is made after the initial setup.

➢ If you effective date into the future to enable a local, it does not prompt you to change the status of the Local **Deduct**. If you effective date into the past, it will prompt you.

Deduct: *Defaults to Always.*
Always: The local tax is always deducted, unless you manually block it on the check or check line. Cannot be overridden, only blocked.
No Overrides: This local tax will be included in local taxable wages, only on check lines that have no local overrides attached. This option gives you the flexibility of overriding the local.
Never: The local tax is not always deducted. This option works with D/B/D/T, job, check and check line overrides. You must select the local tax either as a default for the D/B/D/T or for the job, or to override it on the check or check line. If not set up

as a default, or overridden manually on a check or check line, this tax will not be deducted.

Include pretax deductions in tax wages:	*Defaults to Yes.* Yes: Includes Pre-tax deductions in taxable wages. No: Pre-tax deductions are not included in taxable wages.
Misc Amount:	Type the dollar amount of the tax.
% of Taxable Wages:	Type the percentage of taxable wages. Evolution takes the taxable wages and prorates them by this percentage and only taxes the employee for the prorated percentage of wages.

6. Click the **Post changes** button to save the changes to local memory.

7. If Evolution hasn't committed the changes to the database,

   click the **Commit changes** button .

Scheduled Earnings and Deductions window

This section describes how to set up Scheduled Earnings and Deductions. The beginning of this section discusses a basic set-up. Following that is a quick reference guide on some Scheduled E/Ds that have special set up requirements. For example: Direct Deposit, Child Support, Garnishments and Pensions have special set up rules.

Creating new Scheduled E/Ds
To create a Scheduled E/D for an employee, do the following:

1. Click **Employee** and then click **Scheduled Earnings and Deductions**.

2. Evolution displays the **Browse** tab. If the company is not open, select your company and click the **Open company** button.

3. Select the employee in the list and click the **Create New Record** button .

4. Evolution creates the scheduled E/D and displays it in the **Details**

1 tab. To set up additional details for the employee's E/D, click the **Details 2** tab.

Details 1 tab

E/D Code: The E/D code for the scheduled E/D. This information is loaded at the Client level.

- Calculation Method: The method used to calculate the E/D.
- Fixed: Uses a fixed amount to calculate the E/D. There must be a value in the **Amount** file, and the **%** field must be blank.
- % of Gross: Uses a percentage of the cash gross to calculate the E/D. (It does not use taxable memos, including tips.) There must be a value in the **%** field, and the **Amoun**t field must be blank.
- % of Net: Is a percentage of net wages to calculate the E/D. There must be a value in the **%** field, and the **Amount** field must be blank.
- % of Disposable Earnings: Uses a percentage of disposable earnings to calculate the E/D. There must be a value in the **%** field, and the **Amount** field must be blank.

- Garnishment: Evolution will only display this calculation method if the E/D Code you are setting up is an E/D type of Garnishment.

➤ When using this code type and calculation method, the system looks at the state level for the garnishment maximum. This can be overridden at the employee Scheduled E/D level. You must attach an E/D group to this Scheduled E/D, with gross wages defined.

- Garnishment % of Gross: You will only see this calculation method if the ED Code you are setting up is an E/D type of Garnishment. This calculation method works like a garnishment, except it uses gross wages to define earnings. Gross wages can also be defined using an E/D group.
- % of E/D group Amt: Calculates the amount for the check line based on the amount in the E/D group. For example, if your E/D Group has $100 and the E/D with

this calculation method is set up to take 10% of that, the check line would appear with $10.00.You must also attach an E/D Group to the Scheduled E/D.

- % of E/D Group Hours: Calculates the hours for the check line based on the hours for the E/D group. For example, if your E/D Group has 100 hours and the E/D with this calculation method is set up to take 10% of that, the check line would appear with 10 hours. You must also attach an E/D Group to the Scheduled E/D.

- % of E/D Group Amt and Hours: Calculates the amount for the check line by taking a percentage of both the amount and hours for the attached E/D Group.

- Levy: Allows you to attach a garnishment for unpaid Federal or State taxes, when the take home pay must be no more then a specified amount; you must enter an amount in the **Take Home Pay** field for this to work correctly.

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- Pension Match: Select this option if the Scheduled E/D is a pension match.
- Rate * Hours: Multiplies the hours from the attached E/D group by the Scheduled E/D amount
- Rate * Amount: Multiplies the amounts from the attached E/D group by the Scheduled E/D amount.
- State SDI: This scheduled E/D is for withholding State SDI from the employee. Some states allow the SDI to be withheld from the employee, as opposed to being withheld from the employer as a tax withholding.
- Washington L&I: The scheduled E/D is for Washington L&I.
- None: Use this Calculation Method for Direct Deposit of the net check amount.

Amount: The flat amount of the E/D. If a **Percentage** is specified, this must be blank.

%:   The percentage amount of the E/D. For example,
                            enter 10 for 10%. If an **Amount** is specified, this
                            must be blank.

Frequency: Select the frequency for the E/D.
- Every Pay: Adds the scheduled E/D to every payroll that is created.
- Every Scheduled Pay: Adds the scheduled E/D to every payroll that is scheduled in the company calendar.
- Every Other Scheduled Pay: Adds the scheduled E/D to every other payroll that is scheduled in the company calendar.
- First Scheduled Of Month: Adds the scheduled E/D to the first scheduled payroll of the month.

➢   This is the first scheduled payroll of the month for the company. It is not necessarily the first scheduled payroll of the month for the employee's pay frequency.

- Last Scheduled Of Month: Adds the

scheduled E/D to the last scheduled payroll of the month.

➢ This is the last scheduled payroll of the month for the company. It is not necessarily the last scheduled payroll of the month for the employee's pay frequency.

- Closest Scheduled To 15th of month: Adds the scheduled E/D to the scheduled payroll of the month that is closest to the 15th. If the 15th falls exactly between two pay periods, it will add the scheduled E/D to the later payroll.
- Quarterly: Adds the scheduled E/D to payrolls quarterly. Also select a **Month Number**, and select **Which Payroll**. For example: **Month number** is 2; **Which Payroll** is First would add the scheduled E/D on the first payroll of February, May, August and November.
- Semi-annual: Adds the scheduled E/D to payrolls semi-annually. Also select a **Month**

Number, and select **Which Payroll**. For example: Month number is 3; **Which Payrolls** is Last would add the scheduled E/D on the last payrolls of March and September.

- Annual: Adds the scheduled E/D to payrolls annually. Also select a **Month Number**, and select **Which Payroll**. For example: Month number is 5; **Which Payroll** is Last would add the scheduled E/D on the last payroll of May.
- User Entered: This frequency allows you to do one-time direct deposits or garnishments. You can set up the scheduled E/D with the required information, and then select it when desired.

➢ When a company has multiple frequencies, for example weekly and semi-monthly, with a scheduled E/D frequency of First Scheduled of Month, and the first payroll of the month is a check date for the weekly payroll, the scheduled E/D will not happen for

the semi-monthly employees. The system looks for the first payroll processed in the month. It does not look whether or not "this is the employee's first check of the month."

Month Number: *Defaults to None.*

> If the frequency is Quarterly, Semi-Annual, or Annual, the month in those frequencies that the action is performed is entered here. For example, if Frequency is Semi-Annual, and you select 2 for the Accrual Month Number, then this scheduled E/D would happen in February and August.

Which Payrolls: *Defaults to All.*
Select which payroll of the month to add this scheduled E/D to the payroll:
- First: The E/D will be included in the first payroll of the selected period.
- Last: The E/D will be included in the last payroll of the selected period.
- Closest to 15:The E/D will be included in the payroll closest to the 15th of the month. If the 15th falls exactly between two pay

periods, it will add the scheduled E/D to the later payroll.

- All: The E/D will be included in all payrolls.

E/D Group: If the E/D uses an E/D group, select an E/D Group. For example, the 401K E/D group is calculated on a specific set of earnings.

Agency: To include the E/D on an agency check, select the appropriate agency. For example, child support deductions are often included in an agency check. 401K may also be an agency check.

Effective Start Date: The date the scheduled E/D begins. *Defaults to today's date.* Uses the check date as a reference.

➢ For Pension and Pension Catch Up E/D codes, the **Effective Start Date** field will auto-populate based on the current date, the client E/D default start date, the employee's date of birth, the pension minimum age, and the pension probation period. The latest date will be used as the start date.

Effective End Date: The date the scheduled E/D ends. If you want to
                         stop a scheduled E/D, you would populate an end
                         date. You should never delete scheduled E/Ds, as
                         you will lose any history attached to it. You cannot
                         populate an **Effective End Date** for a Scheduled
                         E/D that is prior to the **Effective Start Date** of said
                         E/D.

Priority: Enter the priority for adding this scheduled E/D.
                         Lower numbers indicates a higher priority. Blank
                         means zero, which is the highest priority. Use this
                         field to indicate which order to add scheduled E/D's.
                         For example, you must make an employee 401K
                         deduction have a higher priority then the match. It
                         needs to calculate the EE 401K, so it knows what
                         number to calculate the match against. Or you may
                         want to make an insurance deduction come out
                         before a loan payback deduction.

➢   Also see **Deductions to Take First** at the **Employee –
        Employee- Details** window for more options.

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Multiple Scheduled
E/D Group: If you have multiple E/Ds that need to be looked at
                               as a whole, so that combined they do note exceed a
                               certain limit, an E/D group would be created and
                               attached to each scheduled E/D that is to be
                               considered for the limit.

For example, this can be used when combining multiple garnishments that
cannot exceed a specified percentage of wages, or for combining multiple
pension deductions that cannot exceed a set annual amount. You may also
use this field when creating pension deductions when employee has both a
standard pension contribution as well as a catch up contribution. Your Payroll
Specialist will create the E/D groups for you to associate in this field.

Child Support Case: If the E/D involves a child support, select
                                       the case number for the child support case.

   ➤   You need to set up the **Child Support Cases** prior to setting up
           the Scheduled E/D.

Garnishment ID:

To print the garnishment ID on agency checks (regardless of the type of E/D), type the Garnishment ID here.

Benefit Reference:

The **Benefit** to which the scheduled E/D is based and dynamically linked. When the benefit is changed on the **Client - Benefits** window, Evolution updates the scheduled E/D.

Benefit Amount Type:

The **Benefit Types** amount to which the scheduled E/D is based and dynamically linked. When the benefit is changed on the Client – Benefits window, Evolution updates the scheduled E/D. When you select a Benefit Reference, and a Benefit Amount Type, the system will populate the Amount or Percentage fields automatically.

EE Direct Deposit:

To direct deposit the scheduled E/D, select the bank account number for the direct deposit.

> ➢ You need to set up the Direct Deposit Account Numbers prior to setting up the scheduled E/D. When a linked employee direct deposit account is updated on the **Direct Deposit** tab of the **Employee-Scheduled E/D** window, said update will automatically be reflected in the EE Direct Deposit field.

Deduct Whole Check: Yes: Deducts the entire net check for direct deposit.
No: *Default*. Deducts a portion of the net check for direct deposit.

Take Home Pay: Enter the amount of take home pay (to be paid in a live check). To set this up, you must also select Yes for **Deduct Whole Check**.

- If the employee would like to take home a certain amount, specify the amount.
- If a person has a levy against them, and you are using a levy-type E/D code, type the amount for the take

home pay. Evolution then calculates the correct levy.

Block Weeks 1 – 5: Yes: Prevents Evolution from performing the E/D for the week selected.
No: Allows Evolution to perform the E/D for the week selected.

For example, many insurance deductions are based on four deductions per month and should not be taken in the fifth week of a month. To prevent the deduction, select Yes for Block Week 5.

The system looks at the **check date** to determine what week it is in.
1st through 7th of month = week 1
8th through 14th of month = week 2
15th through 21st of month = week 3
22nd through 28th of month = week 4
Anything after the 28th would be week 5

Always Pay/Deduct: *Defaults to No.*
No: If the employee has no wages during a pay cycle, Evolution does not pay or deduct the

scheduled E/D, nor does it ever try to make it up. All Payrolls: Evolution processes the scheduled E/D, even if the employee is not otherwise paid in a pay cycle.

➤ If the scheduled E/D is a deduction, Evolution applies it in the next cycle. If there are insufficient earnings, and **Make Up Deductions Shortfall** (at the **Client E/D** level) is set to Yes, Evolution tries to make up the deduction in subsequent pay cycles.

➤ If the scheduled E/D is an earning, it pays the employee, even if they have no other earnings.

Current Payroll: Evolution applies the scheduled E/D only in the current pay cycle, even if the employee has no other earnings. It also applies scheduled deductions if there are no other earnings to be paid. If there are no earnings to deduct from, these deductions will not be taken and never will be taken or made up.

Deductions to Zero: *Defaults to the Value set on the **Misc**. tab of the*

Company-General-Company Info *window.* The parameter selected tells the system whether or not to take partial deductions. The field value is the selection for the specific scheduled E/D you are creating.

Yes: Evolution takes the deduction until the check is zero, even if there are not sufficient funds to take the entire deduction.

No: Evolution takes a deduction only when there are sufficient funds to take the whole deduction.

Employee **:**   Hot key that will advance you to the **Browse** tab of the **Employee–Employee** window.

Details 2 tab

You can specify minimums and maximums for the E/D code to be specified.

E/D codes can have pre-set minimum and maximum dollar amounts. The minimum E/D group sets the bottom limit for dollars that can be taken. The maximum E/D group sets the top limit for dollars taken.

Target Action: *Defaults to None.*
                            None: There is not a target for this scheduled E/D.
                            Reset Balance: Each time the target is met, the **Balance Taken** is reset and the **Number of Targets Remaining** will be reduced. Once the number of targets reaches zero (0), then an **Effective End Date** (the check date) is automatically entered on the Details 1 tab of the scheduled E/D. This will stop the scheduled E/D from occurring beyond that date.
                            Reset Balance and Issue Agency Check: When the target is met, Evolution resets the **Balance Taken** and creates a check for the attached agency.
                            Do Not Reset Balance but Leave Line: When target is met, target balance is not reset, but the

target is still displayed on the **Payroll – Check** window. When the target is met, Evolution will populate the check date in the **Effective End Date** field. This will stop the scheduled E/D from occurring beyond that date.

Do not Reset Balance and Remove Line: When target is met, target balance is not reset, and the Scheduled E/D is not displayed on the **Payroll – Check** window. When the target is met, Evolution will populate the check date in the **Effective End Date** field. This will stop the scheduled E/D from occurring beyond that date.

Number of Targets Remaining:

The number of times you want the target to reset. If a number of targets are entered, and the **Target Action** is Reset Balance, each time the target is met Evolution resets the balance and the reduces the number of targets by one. Once the number of targets reaches zero, Evolution enters an **Effective End Date** on the Details 1 tab, and stops the deduction.

Target Amount:
The total amount that will be taken for a specified scheduled E/D. When adding a target to a Reimbursement (ED code type DO), be sure to enter the target amount as a negative.

Balance Taken:
The amount of money applied to the target.

Maximum Average
Amount E/D Group:
Select the E/D group, which contains the earnings to be considered in Union Dues calculations. See *Setting Up Union Dues.*

Maximum Average
Hours E/D Group:
Select the E/D Group, which contains the hours to be considered in Union Dues calculations.

➢ It is not required that these two groups contain the same E/D codes. You may choose some codes for the earnings and yet different codes for the hours.

Maximum Average
Hourly Wage Rate: Enter the multiplier that is calculated against the
                           Average Hourly Wage, that is not to be exceeded
                           for this Union Due deduction.

> ➢ **Example:** Evolution looks at the Details 1 tab to see what the
>   calculation should be, then looks at this field to verify that the dues do
>   not exceed the limit populated here. If 2.5 is entered in this field,
>   Evolution will verify that this deduction does not exceed 2.5 times the
>   Average Hourly Wage.

Minimum Wage Multiplier: Type a wage multiple to override the standard
                         garnishment calculation.

Maximum Garnish %:   The maximum percentage of the check that can be
                          garnished. The wages are determined by the **E/D
                          Group** attached on **Details 1**.

Minimum E/D Group: Select the E/D group on which to base the
                          Minimum Pay Period %.

Minimum Pay Period %:   The minimum percentage for the E/D for the pay

period. If a **Minimum Pay Period Amount** is specified, this field must be blank.

Minimum Pay Period Amt: The minimum amount for the E/D for the pay period. If a **Minimum Pay Period %** is specified, this field must be blank.

Annual Maximum Amount: The maximum amount the E/D can reach in a calendar year.

Client Annual Max Amt: *For reference only.* If there is an Annual Maximum amount loaded at the client level, it will show here.

Maximum E/D Group: Select the E/D group on which to base the **Maximum Pay Period % or Amount**.

Maximum Pay Period %: The maximum percentage for the E/D for the pay period. If a **Maximum Pay Period Amount** is specified, this box must be blank.

Maximum Pay
Period Amt: The maximum amount for the E/D for the pay

period. If a **Maximum Pay Period %** is specified, this box must be blank.

Threshold E/D Group: Select the E/D group for which the **Threshold Amount** must be reached before this scheduled E/D can begin.

> ➢   Thresholds can be used when a minimum amount of earnings or deductions must be achieved before this scheduled E/D can occur. For example: Employee must have $1000 in YTD wages before an insurance deduction can happen.

Threshold Amount: The amount of the **Threshold E/D Group** that must be reached before this scheduled E/D can occur. This is an annual threshold amount.

Direct Deposits tab

To create direct deposit bank accounts, do the following:

1. Go to the **Employee – Scheduled E/D's** window.

2. If the company is not open, select the company, and click **Open Company**.

3. Select the employee, and click on the **Direct Deposits** tab.
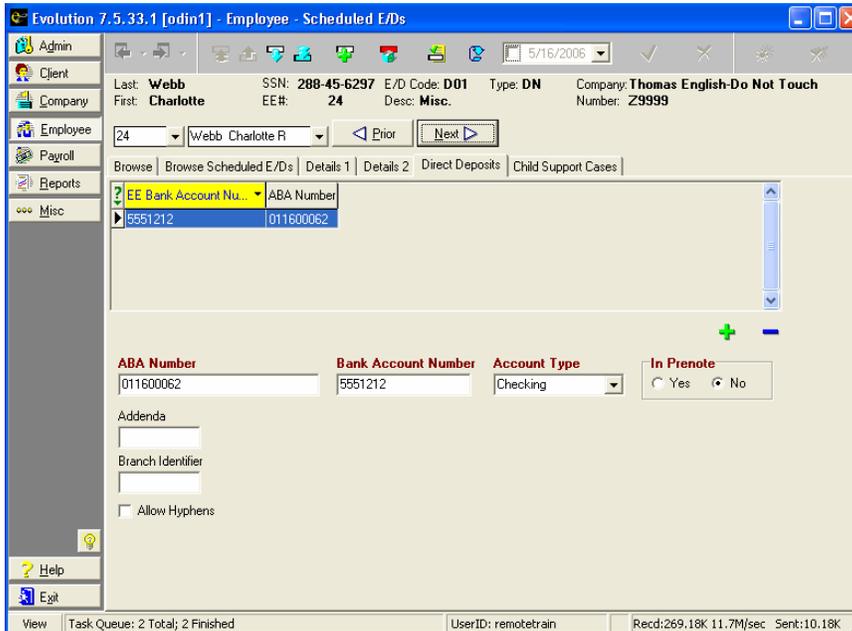
4. Create a new bank account record for the employee by clicking the **Create Record** button ![plus icon]. **Note:** Make sure you use the insert key from the middle of the page, not the one at the top of the page. The insert at the top of the page creates a new scheduled E/D. The one in the middle of the page creates a new direct deposit account number.

5. Type a valid ABA (Routing) number. **Note:** HASH is built into this field, and Evolution will not allow you to enter an invalid ABA (Routing) number. This includes internal bank ABA numbers beginning with the number five (5).

6. Type a valid Bank Account Number.

7. Select an Account Type: Checking, Savings, or Money Market.

8. Select whether the direct deposit is in Pre-note. Pre-noting sends a file through with $0.00 as a way to test the account numbers before live money is transmitted. Remember when pre-noting that it takes one or two weeks before direct deposits take effect.

Weekly payroll clients could wait two payrolls, and bi-weekly clients could wait one or two payrolls. Check with your Payroll Specialist for details on the length of pre-noting.

9. If applicable, enter the bank addenda. This would be an additional identifier supplied by the bank.

10. If applicable, type a Branch Identifier. This would be an additional identifier supplied by the bank.

➢ If applicable, check the box to Allow Hyphens. This box will allow you to save the Bank Account Number in the format you entered. This will save letters, spaces, and/or hyphens. Most banks do not require this, but there are instances where the banks require the hyphens. It is not recommended you use this field unless instructed to do so from your Payroll Specialist, or the bank itself.

11. Click on the **Post Changes** button to save the information to local memory.

12. Click the **Commit Changes** button [icon] to commit the changes to the database.

13. Once you have set up the Bank Account for the employee, you need to set up a scheduled E/D for the employee. See sections on setting up Scheduled E/Ds, and the quick reference guide on setting up Scheduled E/Ds.

➢ When a linked employee direct deposit account is updated on the **Direct Deposit** tab of the **Employee-Scheduled E/D** window, said update will automatically be reflected in the EE Direct Deposit field of the **Details 1** tab of the **Employee- Scheduled E/D** window.

Child Support Cases tab

To create Child Support Cases, do the following:

1. Go to the **Employee – Scheduled E/D's** window.

2. If the company is not open, select the company, and click **Open**

Company.

3. Select the employee, and click on the **Child Support Cases** tab.
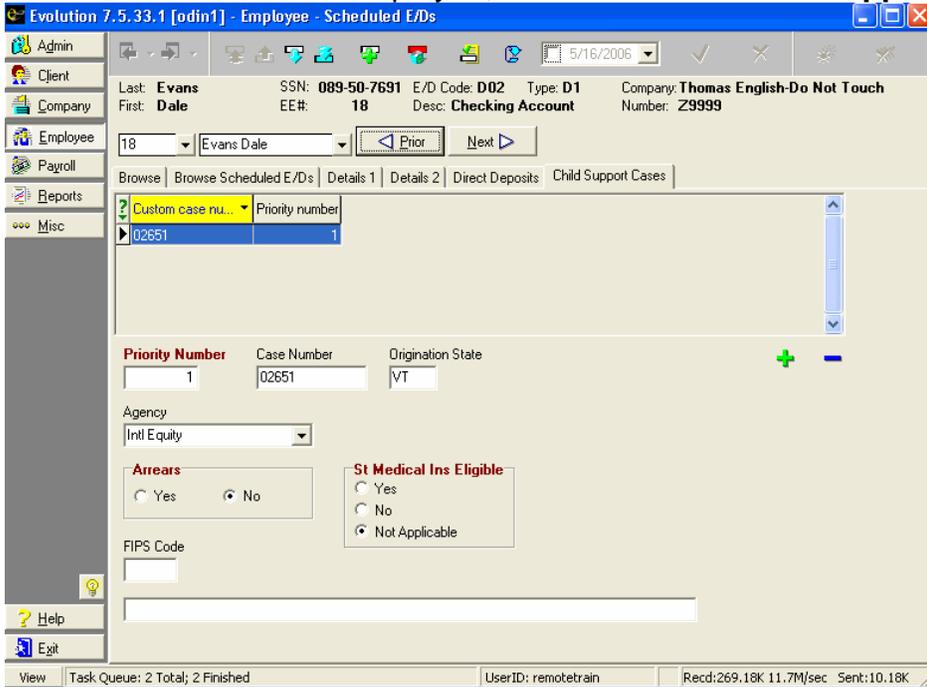
4. Create a new Child Support Case for the employee by clicking the

   Create Record button . **Note:** Make sure you use the insert key from the middle of the page, not the one at the top of the page. The insert at the top of the page creates a new scheduled E/D. The one in the middle of the page creates a new child support case.

5. Enter a **Priority Number**. If there are multiple Child Supports, and the employee doesn't have enough funds to cover all of them, this will determine which to take first. Lower numbers mean higher priority. For example a priority 1 will be deducted before a priority 2.

6. Enter a **Case Number**. This number is provided by the Child Support Agency.

7. Enter an **Origination State**. This is the state that issued the Child Support order.

8. Select an **Agency**. This information is loaded at the **Client** level.

This is who issued the Child Support order, and whom the check/ACH transaction will be issued to.

9. **Arrears:** *Required. Defaults to No.* Used to indicate whether this child support case is in arrears. This is informational only.

10. **St Medical Ins Eligible:** *Required. Defaults to Not Applicable.* Select if this Employee is eligible for medical insurance. The Y for yes, or N for no will appear in the child support payment that is being directly deposited.

11. Enter a **FIPS (Federal Information Processing Standard) code** if necessary. Some agencies require this code when the payments are made electronically. The additional unlabeled field below the FIPS code is for additional information that needs to be sent to the agency regarding this Child Support Case. This information is supplied by the agency. If direct depositing the child support payment to the agency, this is required.

Agency checks display the **EE Code, Name, SSN, Case Number, FIPS code,** from the **Details 1 Tab** on the **Employee-Scheduled E/D** window unless the line items out number the

space available on the check stub. If this is the case, the check stub will read, "This check reflects payments on behalf of XX employees."

12. Click on the **Post Changes** button to save the information to local memory.

13. Click the **Commit Changes** button to commit the changes to the database.

14. Once you have set up the Child Support Case for the employee, you need to set up a scheduled E/D for the employee. See sections on setting up Scheduled E/Ds, and the quick reference guide on setting up Scheduled E/Ds.

Viewing Scheduled E/Ds

To view an employee's scheduled E/Ds, click **Employee** and then click **Scheduled E/Ds**.

Evolution displays the **Browse** tab. If the company is not open, select your company and click the **Open company** button.

To view the Scheduled E/Ds for an employee, select the employee in the list, and click the Browse Scheduled E/Ds tab. Evolution displays a list of the Scheduled E/Ds for the employee.

Last: **Evans** SSN: **089-50-7691** E/D Code: **D02** Type: **D1** Company: **Thomas English-Do Not Touch**
First: **Dale** EE#: **18** Desc: **Checking Account** Number: **Z9999**

18 ▾ Evans Dale ▾ ◁ Prior Next ▷

Browse | Browse Scheduled E/Ds | Details 1 | Details 2 | Direct Deposits | Child Support Cases

?	E/D Code ▾	Description	Calculation Type	Amount	Percentage	Frequency	Eff Start Date	Eff End Date
▶	D02	Checking ...	Z			P	8/5/2005	
	D05	Child Supp...	F	125.00		D	8/9/2005	
	D06	401k	F	50.00	50.00	D	1/31/2006	
	M06	Pension M...	S			D	1/31/2006	

View Task Queue: 2 Total; 2 Finished UserID: remotetrain Recd:269.18K 11.7M/sec Sent:10.18K

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To view the details of an employee's Scheduled E/D, select the scheduled E/D and click the **Details 1** tab.

To view additional details for the employee's E/D, click the **Details 2** tab.

Creating Specific Scheduled Earnings and Deductions
Setting Up Child Support (DQ)

This topic highlights the tasks for setting up a scheduled E/D for Child Support, which uses the E/D code type of DQ. The following child support scenarios are detailed:

- Single Child Support Orders
    - Fixed Amount
    - % (Percentage) Based
- Multiple Child Support Orders
    - Fixed Amount
    - % (Percentage) Based
- Pro-Rating Multiple Child Support Orders

➢ If your Payroll Specialist has set up the child support E/D to Make-up Deduction Shortfalls at the Client level, Evolution will try to make it up on the next payroll.

➢ Please Note: When creating a Scheduled E/D for Child Support deductions, you must first create the Child Support Case on the

Child Support Cases tab of the **Scheduled E/Ds** window in order to attach the information on the **Details 1** tab of the **Scheduled E/D** window. *For more information, see Child Support Cases tab.*

Single Child Support Order
Fixed Amount:
To create a Scheduled E/D for a child support deduction, specify the following data on the **Details 1 tab** of the **Employee-Scheduled E/Ds** window:

E/D Code: Select the E/D code for the employee's deduction for child support created by your Payroll Specialist.

Calculation Method: Select Fixed.

Amount: Type the amount to be withheld as determined by the child support order.

%:   Leave blank.

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Frequency: Select the frequency for the deduction. Generally, this will be Every Pay.

E/D Group: Leave blank.

Agency: Select the agency to which the payment is being sent.

Child Support Case: Select the appropriate child support case.

On the **Details 2 tab** of the Employee-Scheduled E/Ds window, specify the following data:

Maximum E/D Group: Select the E/D group that defines disposable earnings for the child support order.

➢ Evolution automatically accounts for taxes.

Maximum Pay Period %:   Enter the maximum percentage of disposable earnings as specified in the

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child support order.

> You only need to enter the **Maximum E/D group** and the **Maximum Pay Period % (percentage)** if the employee's court order dictates a fixed amount but limits the percentage of disposable earnings that can be taken. **Example:** Employee Smith is ordered to have $200 deducted per pay period but the total amount should not exceed 40% of disposable earnings. In this case, the data should be keyed on the **Details 2** tab of the **Employee-Scheduled E/D** window as described above.

Percentage
To create a Scheduled E/D for a child support deduction, specify the following data on the **Details 1 tab** of the **Employee-Scheduled E/Ds** window:

E/D Code: Select the E/D code for the employee's deduction for child support created by your Payroll Specialist.

Calculation Method: Select % of E/D Group Amount.

Frequency: Select the frequency for the deduction.

Generally, this will be Every Pay.

Amount: Leave blank.

%: Enter the percentage to be deducted as specified by the child support court order.

E/D Group: Select the E/D Group that defines disposable earnings for the child support order.

➢ Evolution automatically accounts for taxes.

Agency: Select the agency to which you are sending the payment.

Child Support Case: Select the appropriate child support case.

Multiple Child Support Orders
Multiple Fixed Amounts
You must create a Scheduled E/D for each Child Support Deduction. Your Payroll Specialist will have previously created these codes. To illustrate, Child

Support Deduction 1 may be code CS1, Child Support deduction 2 may be code CS2, etc. If your employee has more deductions than you have codes, contact your Payroll Specialist. For each deduction, specify the following data on the **Details 1 tab** of the **Employee-Scheduled E/Ds** window:

E/D Code: Select the E/D code for the employee's deduction for child support created by your Payroll Specialist.

Calculation Method: Select Fixed.

Amount: Type the amount to be withheld as determined by the child support order.

Frequency: Select the frequency for the deduction. Generally, this will be Every Pay.

%: Leave blank.

E/D Group: Leave blank.

Agency: Select the agency to which you are

sending the payment.

Multiple Scheduled E/D Group: Select the E/D Group that links all the child support deductions together.

Priority: Enter the Priority for this child support case as dictated by the child support court order. (Priority 1 gets paid first.)

Child Support Case: Select the appropriate child support case.

On the **Details 2 tab** of the **Employee-Scheduled E/D**s window, specify the following data:

Maximum E/D Group: Select the E/D group that defines disposable earnings for the child support order.

Maximum Pay Period %:   Enter the total percentage of disposable earnings for all the child support cases as specified in the child support orders.

Multiple Percentages

You must create a Scheduled E/D for each Child Support Deduction for this employee. Each deduction should have its own E/D code. Your Payroll Specialist will have previously created these codes. To illustrate, Child Support Deduction 1 may be code CS1, Child Support deduction 2 may be code CS2, etc. If your employee has more deductions than you have codes, contact your Payroll Specialist. For each deduction, specify the following data on the **Details 1 tab** of the **Employee-Scheduled E/Ds** window:

E/D Code: Select the E/D code for the employee's deduction for child support created by your Payroll Specialist.

Calculation Method: Select % of E/D Group Amount.

Amount: Leave blank.

%: Enter the percentage to be deducted as specified by the child support court order.

Frequency: Select the frequency for the deduction. Generally, this will be Every Pay.

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E/D Group: Select the E/D Group that defines
                                    disposable earnings for the child
                                    support order.

Agency: Select the agency to which you are
                                    sending the payment.

Priority: Enter the Priority for this child support
                                    case as dictated by the child support
                                    court order. (Priority 1 gets paid first.)

Multiple Scheduled E/D Group: Select the E/D Group that links all the
                                    child support deductions together.

Child Support Case: Select the appropriate child support
                                    case.

On the **Details 2 tab** of the Employee-Scheduled E/Ds window, specify the
following data:

Maximum E/D Group: Select the E/D group that defines

disposable earnings for the child support order.

Maximum Pay Period %:   Enter the total percentage of disposable earnings for all the child support cases as specified in the child support orders.

Pro-Rating Multiple Child Support Orders
To pro-rate child support amongst more than one child support case, you must do the following:
1. Create the **Scheduled E/D** for the Child Support deduction.
2. On the **Child Support tab** of the **Employee-Scheduled E/Ds** window, enter the pro-ration in the **Priority Number** field.
   ➢ Pro-rations are based on a percentage of the child supports and are entered as ***negative numbers***. Child support cases with positive pro-rations will not be pro-rated.
3. Save the changes to the Child Support case.

Examples:
• If you have three (3) child support cases with fixed amounts of

$70, $20, $10, then your pro-rated percentages would be –70, -20, and –10 respectively.

- If you have child support payments of $200 and $100, the pro-rated percentages would be –67 and –33 respectively.

➢ When there are not enough funds to fully pay all of the child supports, the amount that is taken is prorated based on these percentages. For example, if you had an employee with two child support deductions of $200 and $100 as described in example 2 above, but said employee only had $200 available to be used for child supports (perhaps due to a percentage of disposable earnings cap), the amounts taken would be $134 and $66 dollars respectively.

Setting Up Garnishments (DR)
This topic highlights the tasks for setting up a scheduled E/D for Garnishments, which use the E/D code type of DR. The following garnishment scenarios are detailed:

- Single Garnishments
  - Fixed Amount
  - % (Percentage) Based

- Multiple Garnishments
  - Fixed Amount
  - % (Percentage) Based
- Overriding State and Federal Guidelines

➢ If your Payroll Specialist has set up the garnishment E/D to Make-up Deduction Shortfalls at the Client level, Evolution will try to make it up on the next payroll.

Single Garnishments
Fixed Amount
To create a Scheduled E/D for a garnishment deduction, specify the following data on the **Details 1 tab** of the **Employee-Scheduled E/Ds** window:

E/D Code: Select the E/D code for the
                                           employee's deduction for garnishment
                                           created by your Payroll Specialist.

Calculation Method: Select Garnishment. When using this
                                           code and calculation method, the
                                           system looks at the State level for the
                                           garnishment maximum. Some states

follow federal maximums, in which case the federal guidelines are loaded at the State level.

Amount: Type the amount to be deducted.

%:   Leave blank.

Frequency: Select the frequency for the deduction. Generally, this will be Every Pay.

E/D Group: Leave blank.

Agency: Select the agency to which you are sending the payment.

Garnishment ID: Enter the Garnishment identification code.

Percentage:
To create a Scheduled E/D for a garnishment deduction, specify the following data on the **Details 1** tab of the Employee-Scheduled E/Ds window:

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E/D Code:	Select the E/D code for the employee's deduction for garnishment created by your Payroll Specialist.
Calculation Method:	Select Garnishment. When using this code and calculation method, the system looks at the State level for the garnishment maximum. Some states follow federal maximums, in which case the federal guidelines are loaded at the State level.
Amount:	Leave blank.
%:	Enter the percentage to be deducted as specified by the garnishment.
Frequency:	Select the frequency for the deduction. Generally, this will be Every Pay.
E/D Group:	Select the E/D Group that defines

	disposable earnings for the garnishment.
Agency:	Select the agency to which you are sending the payment.
Garnishment ID:	Enter the Garnishment identification code.

Multiple Garnishments
Fixed Amounts
You must create a Scheduled E/D for each Garnishment Deduction for this employee. Each deduction should have its own E/D code. Your Payroll Specialist will have previously created these codes. To illustrate, Garnishment Deduction 1 may be code G01, Garnishment Deduction 2 may be code G02, etc. If your employee has more deductions than you have codes, contact your Payroll Specialist.

For each deduction, specify the following data on the **Details 1 tab** of the Employee-Scheduled E/Ds window:

E/D Code:	Select the E/D code for the employee's deduction for garnishment

created by your Payroll Specialist.

Calculation Method: Select Garnishment.

Amount: Type the amount to be withheld as determined by the garnishment.

%:   Leave blank.

Frequency: Select the frequency for the deduction. Generally, it will be Every Pay.

E/D Group: Leave blank.

Agency: Select the agency to which you are sending the payment.

Priority: Enter the Priority for this garnishment case as dictated by the garnishment. (Priority 1 gets paid first.)

Multiple Scheduled E/D Group: Select the E/D Group that links all the Garnishment deductions together.

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Garnishment ID: Enter the appropriate Garnishment ID.

On the **Details 2 tab** of the Employee-Scheduled E/Ds window, specify the
following data:

Maximum E/D Group: Select the E/D group that defines
                                                        disposable earnings for the
                                                        garnishment.

Maximum Pay Period %:   Enter the total percentage of
                                                        disposable earnings for all the
                                                        garnishments as specified in the
                                                        garnishments.

Multiple Percentages
You must create a Scheduled E/D for each Garnishment Deduction for this
employee. Each deduction should have its own E/D code. Your Payroll
Specialist will have previously created these codes. To illustrate, Garnishment
Deduction 1 may be code G01, Garnishment Deduction 2 may be code G02,
etc. If your employee has more deductions than you have codes, contact your
Payroll Specialist. For each deduction, specify the following data on the **Details**

1 tab of the **Employee-Scheduled E/Ds** window:

E/D Code: Select the E/D code for the employee's deduction for garnishment created by your Payroll Specialist.

Calculation Method: Select % of E/D Group Amount.

Amount: Leave blank.

%: Enter the percentage to be deducted as specified by the garnishment.

Frequency: Select the frequency for the deduction. Generally, this will be Every Pay.

E/D Group: Select the E/D Group that defines disposable earnings for the garnishment.

Agency: Select the agency to which you are sending the payment.

Priority: Enter the Priority for this garnishment.
                                             (Priority 1 gets paid first.)

Multiple Scheduled E/D Group: Select the E/D Group that links all the
                                             garnishments together.

Garnishment ID: Enter the appropriate garnishment ID.

On the Details 2 tab of the Employee-Scheduled E/Ds window, specify the
following data:

Maximum E/D Group: Select the E/D group that defines
                                             disposable earnings for the
                                             Garnishment.

Maximum Pay Period %:   Enter the total percentage of
                                             disposable earnings for all the
                                             garnishments.

State and Federal Guidelines & Maximums
To take the maximum amount allowed by law, leave both the Amount and the % boxes blank. Evolution will use the state and federal maximums to calculate the garnishment.

Overriding the State and Federal Guidelines
If for some reason the state and federal guidelines for garnishments are not used, you can override them for the percentage garnishments. On the **Details 2** tab of the **Employee-Scheduled E/Ds** window, specify the following information:

Minimum Wage Multiplier: Enter the maximum multiplier for the minimum wages.

Maximum Garnish %:   Enter the maximum percentage to be taken for all the garnishments.

Setting Up Group Term Life Insurance
This topic highlights the tasks for setting up a Scheduled E/D for Group Term Life, which is only a taxable memo. The following Group Term Life scenarios are detailed:

- Automatic Calculation (ED Code Type E3)
- Fixed Calculation (ED Code Type E7)

Automatic Calculation (E3)
To set up an automatic calculation for Group Term Life, you must do the following:

1. Confirm the employee's birth date is entered in the **Date of Birth** field on the **EE Entry** tab of the **Employee-Employee** window.
2. Click the **Details** tab.
3. On the **Details** tab, type the total amount of the policy in the **Group Term Policy Amount** field.
4. Create the Scheduled E/D for the employee.

➢ Be sure that the E/D code type is E3.

Fixed Calculation (E7)

To set up a fixed calculation for Group Term Life, you must do the following:

1. Confirm the employee's birth date is entered in the **Date of Birth** field on the **EE Entry** tab of the **Employee-Employee** window.
2. Click the Details tab.
3. On the **Details tab**, type the total amount of the policy in the **Group Term Policy Amount** field.
4. Create the Scheduled E/D for the employee. Be sure that the E/D code type is E7.
5. When setting up the Scheduled E/D for the employee, attach the fixed calculation amount.

Setting Up Pensions

This topic highlights the tasks required to set up Scheduled E/Ds for Pensions, which may be created with or without an Employer match. The following Pension scenarios are detailed:

- Percentage Based
- Fixed Amount

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Percentage Based
Employee Contribution

Create a Scheduled E/D for the employee deduction. On the **Details 1** tab of the **Employee-Scheduled E/Ds** window, specify the following data:

E/D Code: Select the E/D code for the employee's deduction for the pension created by your Payroll Specialist.

Calculation Method: Select % of E/D Code Group.

> ➢ You can also use % of gross, but we discourage this because Evolution defines gross as cash gross, not all earnings.

Amount: Leave blank.

%: Enter the percentage to be deducted for the Pension contribution.

Frequency: Select the frequency for the deduction. Generally, this will be Every Pay.

E/D Group: Select the E/D Group that defines all earnings for the
                    pension.

Priority: Enter the Priority for this deduction. (Priority 1 gets
                    calculated first.) For pensions with an employer match, we
                    advise that the Employee contribution have a lower
                    number than the Employer match.

Employer Match

Create a Scheduled E/D for the employer memo. On the **Details 1** tab of the
Employee-Scheduled E/Ds window, specify the following data:

E/D Code: Select the E/D code for the employer's match for the
                    pension created by your Payroll Specialist.

Calculation Method: Select Pension Match.

Amount: Leave blank.

%:   Leave blank. The percentage is set at the client level.

Frequency: Select the frequency for the deduction. Generally, this will be Every Pay. The frequency selected should match the frequency selected for the Employee deduction.

E/D Group: Select the E/D Group that is defined for employer pensions.

Priority: Enter the Priority for this deduction. (Priority 1 gets calculated first.) For pensions with an employer match, we advise that the Employee contribution have a lower number than the Employer match.

**Fixed Amount
Employee Contribution**

Create a Scheduled E/D for the employee deduction. On the **Details 1** tab of the **Employee-Scheduled E/Ds** window, specify the following data:

E/D Code: Select the E/D code for the employee's deduction for the pension created by your Payroll Specialist.

Calculation Method: Select Fixed.

Amount: Enter the amount of the pension deduction.

%:   Enter the maximum percentage of the Employer match.

Frequency: Select the frequency for the deduction. Generally, this will
                        be Every Pay.

E/D Group: Select the E/D Group that is defined for employee
                        pensions.

Priority: Enter the Priority for this deduction. (Priority 1 gets
                        calculated first.) For pensions with an employer match, we
                        advise that the Employee contribution have a lower
                        number than the Employer match.

Employer Match

Create a Scheduled E/D for the employer memo. On the Details 1 tab of the
Employee-Scheduled E/Ds window, specify the following data:

E/D Code: Select the E/D code for the employer's match for the pension created by your Payroll Specialist.

Calculation Method: Select Pension Match.

Amount: Leave blank.

%: Leave blank.

Frequency: Select the frequency for the deduction. Generally, this will be Every Pay. The frequency selected should match the frequency selected for the Employee deduction.

E/D Group: Select the E/D Group that is defined for employer pensions.

Priority: Enter the Priority for this deduction. (Priority 1 gets calculated first.) For pensions with an employer match, we advise that the Employee contribution have a lower number than the Employer match.

On the **Details 2** tab of the Employee-Scheduled E/Ds window, specify the

following data:

Maximum E/D Group: Select the E/D group that is defined for employer pensions.

Maximum Pay Period %:   Enter the percentage matched by the Employer. For example, if the employee's deduction is 5% and the employer matches all of the deduction, you would enter 100 in this field.

Pension Fund Splits
After pension fund split memo E/Ds are created by the Payroll Specialist, they need to be attached to individual employees. This is done from the **Employee-Scheduled E/Ds** screen.

From this screen, add a new Scheduled E/D for each fund into which this employee contributes. Follow the rules below to set up these memo E/Ds correctly.

There are 3 fields that must be populated correctly in order for these pension fund split memo E/Ds to calculate as they should. They are:

1. Calculation Method - This field must be set to % of ED Group Amt.

2. % (immediately below Calculation Method) - This field must be set to 100.

3. E/D Group - This field must reference the appropriate E/D group.

If there are multiple agencies that money must be paid to for this pension, each fund's respective agency needs to be selected here. In that case, the agency on the employee and employer contribution E/D codes would be blank.

If all the money is going to the same agency, you can populate the agency on the employee and employer contributions and leave it blank on the fund split scheduled E/D's.

Last: **Fund Split** SSN: **118-11-8118** E/D Code: **M10** Type: **M1** Company: **Sample Client**
First: **Pension** EE#: **330** Desc: **EE Fund A** Number: **Alpha**

330 ▼ | Fund Split Pension ▼ | ◁ Prior | Next ▷

Browse | Browse Scheduled E/Ds | Details 1 | Details 2 | Direct Deposits | Child Support Cases |

E/D Code
M10 ▼ EE Fund A

Calculation Method
% of E/D Group Amt ▼

Amount %
100.00

Frequency
Every Pay ▼

Month # **Which Payrolls**
None ▼ All ▼

E/D Group
EE Fund Split ▼

Agency
▼

Effective Start Date **Effective End Date**
3/27/2006 ▼ ▼

Priority Multiple Scheduled E/D Group
▲▼ ▼

Child Support Case
▼

Garnishment ID

Benefit Reference
▼

Benefit Amount Type
▼

EE Direct Deposit
▼

Deduct Whole Check
○ Yes ⦿ No

Take Home Pay

Block Week 1
○ Yes ⦿ No

Block Week 2
○ Yes ⦿ No

Block Week 3
○ Yes ⦿ No

Block Week 4
○ Yes ⦿ No

Block Week 5
○ Yes ⦿ No

Always Pay/Deduct
No ▼

Employee

To enter the pension fund split scheme, do the following:

1. Click **Employee** and then click **Pension Fund Splits**.

2. Select the employee in the browse grid.

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3. On the **Details** tab, click on the green + button, or Alt + Insert, to create a new record.

4. Select the fund.

5. Select the appropriate E/D code (pay attention to whether you're selecting the EE or ER codes).

6. Enter the percentage of the pension contribution that will be contributed to this fund. The percentage of contributions must total 100% for all Employee fund splits, and 100% for all employer fund splits.

7. Select if this is an Employee contribution, or an Employer contribution.

8. Click the green check mark to save the changes.

9. Follow steps 3-8 for all fund splits.

Results:

The fund splits will show on the employee's check stub, as well as in the payroll register.

Dept One
123 Main Street
Burlington, VT 05401

Check Date
4/18/2006

Check Number 893

$******295.26

Pay *Two Hundred Ninety-Five Dollars and Twenty-Six Cents*

To the Order of:
1   330   893
Pension Fund Split   Void After 60 Days
3 Fund Split Way
Pension, VT 12345

Authorized Signature

⑈000893⑈ ⑆011800062⑇ 123456⑈

Pension Fund Split   **Dept One**

Company	Period Begin 4/9/2006	Division
Alpha Number	Period End 4/15/2006	Branch
330 Social Security #	Check Date 4/18/2006	Department 1
Hire Date 1/1/2006	Check Number 893	Team

Sick 1 =0.75

Earnings / Deductions

Description	Location / Job	Rate	Hours	Current	Year To Date	Description	Current	Year To Date
Regular Earnings		10.00	40.00	400.00	1200.00	Fed (S /0) (1140.00)	42.29	126.87
MEMOS						OASDI (1200.00)	24.60	74.40
401K ER Pension Ma			0.00	20.00	60.00	Medicare (1200.00)	5.80	17.40
EE Fund A			0.00	10.00	30.00	VT (S /0) (1140.00)	11.85	35.55
EE Fund B			0.00	5.00	110.00	401k EE Deduction	20.00	60.00
EE Fund C			0.00	5.00	110.00			
ER Fund A			0.00	10.00	30.00			
ER Fund B			0.00	5.00	15.00			
ER Fund C			0.00	5.00	15.00			
Total Earnings			40.00	400.00	1200.00	Total Deductions	104.74	314.22
NET PAY	295.26	**Total Direct Deposits**		0.00	**Check Amount**		295.26	885.78

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#Alpha Sample Client

Employee Name				Social Security Number		Salary		Frequency	Check Number	Check Date	Check Type	
Earnings Description	Rate of Pay	Current		YTD		Deductions Description	Current Amount	YTD Amount	Taxes Description	Current Amount	YTD Ar	
		Hours	Amount	Hours	Amount							
Department:	**1 - Dept One**											
330 – Fund Split, Pension – 118-11-8118				VT	VT	0.00		Weekly	893	04/18/2006	Regular	
01 Regular Earni	10.00	40.00	400.00	120.00	1,200.00	05 401k EE Deductic	20.00	60.00	Federal (S/0)	42.29	126.87	
10 EE Fund A-M	0.00	0.00	10.00	0.00	30.00	06 401K ER Pensior	20.00	60.00	OASDI	24.80	74.40	
11 EE Fund B-M	0.00	0.00	5.00	0.00	110.00				Medicare	5.80	17.40	
12 EE Fund C-M	0.00	0.00	5.00	0.00	110.00				State VT (S /0)	11.85	35.55	
13 ER Fund A-M	0.00	0.00	10.00	0.00	30.00							
14 ER Fund B-M	0.00	0.00	5.00	0.00	15.00							
15 ER Fund C-M	0.00	0.00	5.00	0.00	15.00							
Check Totals:		40.00	440.00	120.00	1,510.00		40.00	120.00		84.74	254.22	

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Setting up Washington L & I (DY, M7)

This topic highlights the tasks required to set up a Scheduled E/D for Washington L&I.

- For private workers' compensation plans, use the normal procedure for creating scheduled E/Ds.
- For state plans, use this method.

To set up scheduled E/Ds for Washington L&I, you must do the following:

1. Create the Scheduled E/D for the employee. You will need to attach a Scheduled E/D for both the EE and the ER deduction.
2. On the **Details 1** tab of the **Employee Scheduled E/Ds** window, specify the following information:

E/D Code: Select the appropriate E/D code created by your Payroll Specialist. The E/D code for the EE deduction must use the E/D code type of DY.

Calculation Method: Select Washington L&I.

Frequency: Select Every Pay.

Amount: Leave blank.

%: Leave blank.

➢ On the **Details** tab of the **Employee-Pay Rate Info** window, attach the L&I code in the W/C Code field to the correct pay rate.

3. Create the Scheduled E/D for the Employer.
4. On the **Details 1** tab of the **Employee-Scheduled E/Ds** window, specify the following data:

E/D Code: Select the appropriate E/D created by your Payroll Specialist. The E/D code must use the code type of M7.

Calculation Method: Select Washington L&I.

Frequency: Select Every Pay.

Amount: Leave blank.

%:   Leave blank.

5.   When you key in the hours for the employee, Evolution
        automatically makes the employee and employer deductions
        based on the hours in the E/D group specified for the workers
        compensation code as created by your Payroll Specialist. This
        E/D Group is set up at the Worker's Compensation window on the
        company level, not at the employee scheduled E/D level.

➢   In order for the return to calculate properly, if the employee is
        salaried, you must enter a dollar amount in the **Rate** field on the
        EE Entry tab of **the Employee-Employee** window. The system
        will then divide it by the salary to get the average hours
        computation on the Washington L&I. Washington L&I does not
        look at an effective date.

Time Off Accrual window

Time Off Accruals are created at the company level. This window is used to assign an accrual to an individual employee or to manipulate an assigned accrual associated with an individual employee.

To assign time-off accrual to an employee, do the following:

1.   Click **Employee** and then click **Time Off Accrual**.

2.   Evolution displays the **Browse** tab. Select the company in the left pane and then select the Employee Number (EE Code) in the right pane.

3. Click the **Details** tab.

4. Evolution displays the **Details** tab for that employee.

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5. Any accruals set to auto-enlist at the company level will be listed here if the employee's record was entered after the Time Off Accrual was created.

6. To manually add an accrual to an employee, click the **Create Record** button .

7. Select the **Type** of Time Off Accrual.

8. Type the number of hours accrued by the Employee in the **Current Accrued** box. This defaults to zero (0).

9. Type the number of hours used by the Employee in the **Current Used** box. This defaults to zero (0).

➢ For Evolution to be able to calculate the **Current Balance**, you must enter a number, even if it is zero, into the **Current Accrued** and the **Current Used** boxes.

10. Upon creation of a new accrual for an employee, the **Active** Record flag is marked **Yes**. Confirm that this is the active accrual for this employee. By selecting **No** for the Active record flag, you are telling Evolution that you do not want the accrual to accrue. In addition, the accrual will not be reduced by corresponding hours entered in payroll, nor will any information on this accrual print on

employee paychecks.

11. You may enter an **Override Accrual Maximum** amount for this employee if applicable. The Accrual Maximum amount is set at the company level. This override applies until it is manually changed.

12. You may enter an **Override Rate** for this employee if applicable. The accrual rate is set up at the company level. If you specify this rate, TOA is still calculated using the **Calculation Method** set up for the company on the **Company-Miscellaneous-Time Off Accrual** window, but it uses this rate instead of what is set up in the **Rates** table. For example, if the **Calculation method** is **Accrue by Frequency** and the frequency is **Per Pay Period**, and you enter 10 for the **Override Rate**, then 10 hours will be accrued every time this employee is paid. This override applies until it is manually changed.

13. You may enter an **Override Rollover Type** for this employee if applicable. This will override what has been set up at the company level unless the Rollover was created with the option of **If Set on EE level/None**. If rollovers are used, select the type of

accrual that the current selected accrual will rollover into. Rollovers allow this time off accrual to be changed to another time off accrual on a specified date. It will move the balance to the receiving Time Off Accrual and change this accrual flag to active **No**. It will begin to calculate the new Time Off.

14. Enter an **Override Effective Date**, if applicable. This date will override the **Current Hire Date** from the **EE Entry** tab of the **Employee-Employee** window, which is the effective date for which Time Off Accruals are based. For example, if the company's current time off accrual begins six (6) months after hire date and this employee should start accruing and receiving time off immediately, enter a date that is 6 months prior to the Employee's hire date.

15. You may enter an **Override Rollover date** for this employee if applicable. This will override the date the rollover occurs.

16. To view the history of this accrual for this employee, select the Time Off Accrual from the grid, and click the **Show TOA History** button ![Show TOA History button]. This will display the **History** tab of

the **Employee-Time Off Accrual** window. You may also double-click the accrual in the grid to view the history of said accrual.

17. Click the **Post Changes** button [✓] to save changes to local memory.

18. If Evolution hasn't committed the changes to the database, click the **Commit Changes** button. [☀]

➢ When updating the balance of an individual time off accrual by manipulating either the **Current Accrued** or the **Current Used** fields, Evolution requires the user to enter a reason for the adjustment to the **Accrual**. Below the **Active** record flag, a **Reason** box will appear. The user should enter the reason for the adjustment. Once the adjustment has been saved, this reason will show on the **History** tab of the **Employee-Time Off Accrual** window.

Evolution 7.0.16.4 [DS2] - Employee - Time Off Accrual

Admin
Finance
Bureau
Client
Company
Employee
Payroll
Reports
Misc

1/30/2006

Last: **Evans**   SSN: **089-50-7691**   Company: **Thomas English-Do Not Touch**
First: **Dale**   EE#: **18**   Number: **Z9999**

18   Evans Dale   ◁ Prior   Next ▷   ☑ Active TOA Only

Browse   Details

? Type	Balance	Accrued	Used	Override Eff Date	Override Accrual Maximum	Ove
Vacation	160.00	300.00	140.00			

Type
Vacation

Override Accrual Maximum

Show TOA History

Current Accrued   Current balance
300.00   160.00

Override Rate

Current Used
140.00

Override Rollover Type

Active
● Yes   ○ No

Override Eff Date   Override Rollover Date

Reason
test adjustment

Help
Exit

View   Task Queue: 0 Total; 0 Finished   UserID: remotetrain   Recd:866.06K 11.3M/sec   Sent:15.56K

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Viewing Time Off Accrual History

By default, the date range for **Show transactions in period from**: is the beginning of the current quarter, to one week from the current date. To change these dates, select your new start and end dates and click Refresh [Refresh]. This will update the Time Off Accrual transactions shown in the grid.

Transactions
This browse grid displays the individual entries of time-off accrual transactions.

Accrual Date: The date to which the transaction relates. It is like an effective date for the transaction. For example in the screenshot above, the Accrual date is the date the adjustment was made. It does not relate to a check date as it would if the adjustment had been system generated.

Accrued: The amount of time-off accrual expected to be applied in the transaction.

Accrued Capped: The amount of time-off accrual actually applied in the transaction.

Used: The amount of time-off accrual actually deducted during

the transaction.

Note: A note generated by Evolution that shows the details of a time-off accrual operation for an employee. The system-generated note consists of three parts; the type of operation, the payroll in which the operation occurred, and a summary of the formula used to calculate the time-off accrual for the employee. If a user has manually adjusted an accrual, the information keyed in the Reason field will show here.

Created: The date and timestamp of the transaction.

Changed By: The user ID of the person who modified the transaction.

Check Date: The check date in which the transaction occurred.

Run #: The run number of the payroll in which the transaction occurred.

Check #: The serial number of the check in which the employee was notified of the transaction.

> ➤ Both the **Adjustments** and the **Connected Transaction** tables are used for advanced troubleshooting of individual time off accrual transactions. Please contact your Payroll Specialist representative for more information. The **Adjustments** table is for Your Payroll Specialist use only. The **Connected Transactions** table will show you where an outgoing rollover was transferred.

Shifts window

Shifts apply differentials to an employee's rates. To create a shift, do the following:

1. Click **Employee** and then click **Shifts**. Evolution displays the **Browse** tab. Choose the employee, then click the **Create record** button .

2. Evolution creates a blank shift and displays the **Details** tab.

3. Select a **Shift**. Shifts are created at the **Company** level on the **Company-General-Shifts** window and may be up to forty characters long.

4. To select a default shift for the employee, select an **Auto-Shift**. When payroll is keyed, Evolution automatically assigns this shift to the earnings. If this field is left blank, the person entering payroll would have to manually pull the shift into the check lines.

5. Enter the differential **Shift Rate** or **%.** The Shift Rate field may accept values that contain three decimal places.

6. Click the **Post changes** button [✓] to save the changes to local memory.

7. If Evolution hasn't committed the changes to the database, click the

   Commit changes [☀] button.

Auto-Labor Distribution window

When an employee works for a company and holds more than one position in the company, their earnings and/or deductions and taxes can be distributed across the employee's various job roles.

With Auto Labor Distribution, Evolution automatically distributes time amongst locations that are the same for each pay period for an employee.

Evolution automatically performs the labor overrides so that you do not need to enter them manually when keying payroll.

Verify with your customer service representative that your account is set up for auto labor distribution.

To set up Auto Labor distribution for an employee, do the following:

1. Click **Employee** and then click **Auto Labor Distribution**.

2. Evolution will display the **Browse** tab. Choose the employee, then click the **Create Record** button .

3. Evolution creates an auto labor distribution record and displays the **Details** tab. Select the **Division, Branch, Department, and/ or Team** to which the selected Auto Labor Distribution **E/D Group** should be distributed.
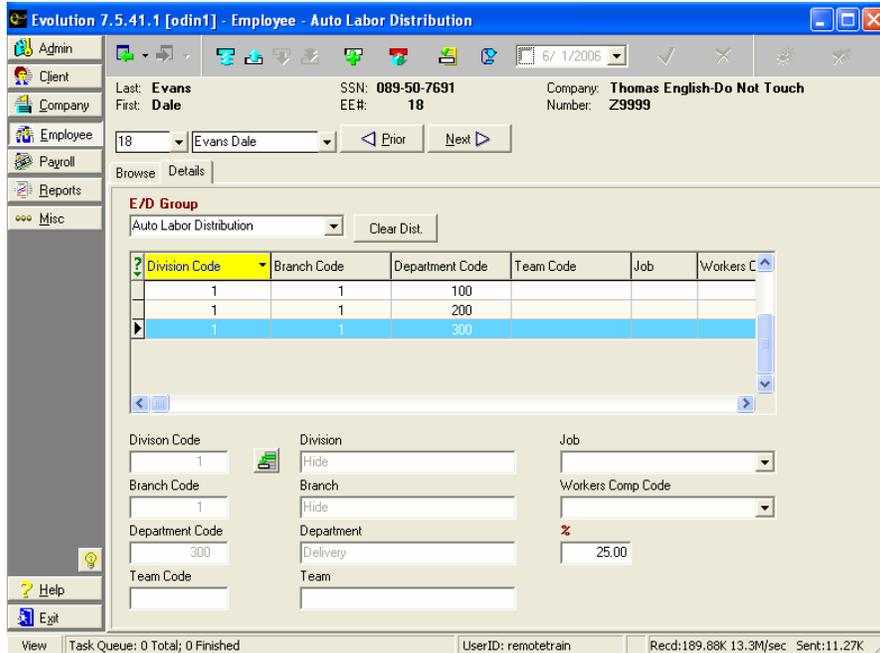
4. Select the **% (percentage)** of the selected E/D Group that should be distributed to the selected levels. Each employee must have his or her distributions total 100%.

5. If appropriate, select a **Job**.

6. If appropriate, select a **Worker's Compensation Code**.

7. Click the **Post Changes** button to save the changes to the local memory.

8. If Evolution hasn't committed the changes to the database, click the

   Commit Changes button .

Pension Fund Splits window

Pension fund splits are used to show how employee and employer portions of pension monies can be distributed between various funds.

Attaching Pension Fund Split Memo E/Ds to an Employee

After pension fund split memo E/Ds are created, they need to be attached to

individual employees. This is done on the **Employee-Scheduled E/Ds** window and the **Employee-Pension Fund Splits** window. After the scheduled E/Ds are created the splits need to be set up at the **Employee-Pension Fund Splits** window.

Pension Fund Splits Setup
To enter the pension fund split scheme, do the following:

1. Click **Employee** and then click **Pension Fund Splits**.

2. Select the employee in the browse grid.

3. On the **Details** tab, click on the green **+** button, or Alt + Insert, to create a new record.

4. Select the fund.

5. Select the appropriate E/D code (pay attention to whether you're selecting the EE or ER codes).

6. Enter the percentage of the pension contribution that will be contributed to this fund. The percentage of contributions must total 100% for all Employer fund splits, and 100% for all employee fund

splits.

7. Select if this is an Employee contribution, or an Employer contribution.

8. Click the green check mark to save the changes.

9. Follow steps 3-8 for all fund splits.

Piecework window

1. Click the **Employee** and then click **Piecework**. Evolution displays the **Browse** tab.

2. Select an **EE Number (EE Code)** and click the **Create Record** button .

3. Evolution displays the **Details** tab and creates a piecework entry for the selected employee. The default values for the individual pieces are loaded at the **Client** level. You may override these values on this window if you so choose. If the **piece** that you would like to select in

not an available option, please contact your Payroll Specialist representative. Using the drop down box, select the appropriate piece for this employee.

Piece: Select the piece. (Pieces are set up at the Client level.)

Rate Amount: Enter the amount to be paid for each **Rate Quantity**
                     completed by the employee. (The default value will be
                     pulled in when the piece is selected.)

Rate Quantity: Enter the quantity of pieces for this piecework rate. This is
                     the number of pieces that need to be completed in order
                     for the employee to be paid the **Rate Amount.**

4. Click the **Post Changes** button to save changes to local
   memory.

5. If Evolution hasn't committed the changes to the database, click the

   Commit Changes button .

Example
Employee Dale Evans will be paid $.50 for every 12 muffins he makes. We
know this based on the following specifications:

Piece	Muffins
Rate Amount	$.50
Rate Quantity	12.00

Additional Info window

Additional information allows you to add customized information about employees. This information is stored in customizable fields and user-defined values, which are set up on the **Company-Miscellaneous- Additional Info** window. For example, you might create the following type of fields:

- Spouse's name
- Wedding
- Anniversary
- Dog's Name

In addition, you might use it to track other items unique to your company. For example, a nursing home may use additional information to track available beds.

Applying Additional Info to Employees

To attach additional information about an employee, perform the following steps:

1. Click **Employee** and then click **Additional Info**.

2. Evolution displays the **Browse** tab. Select the company and then click the **Open Company** button if the company is not already open.

3. Evolution opens the company and displays its employees in the right pane. Select an employee and click the **Values** tab.
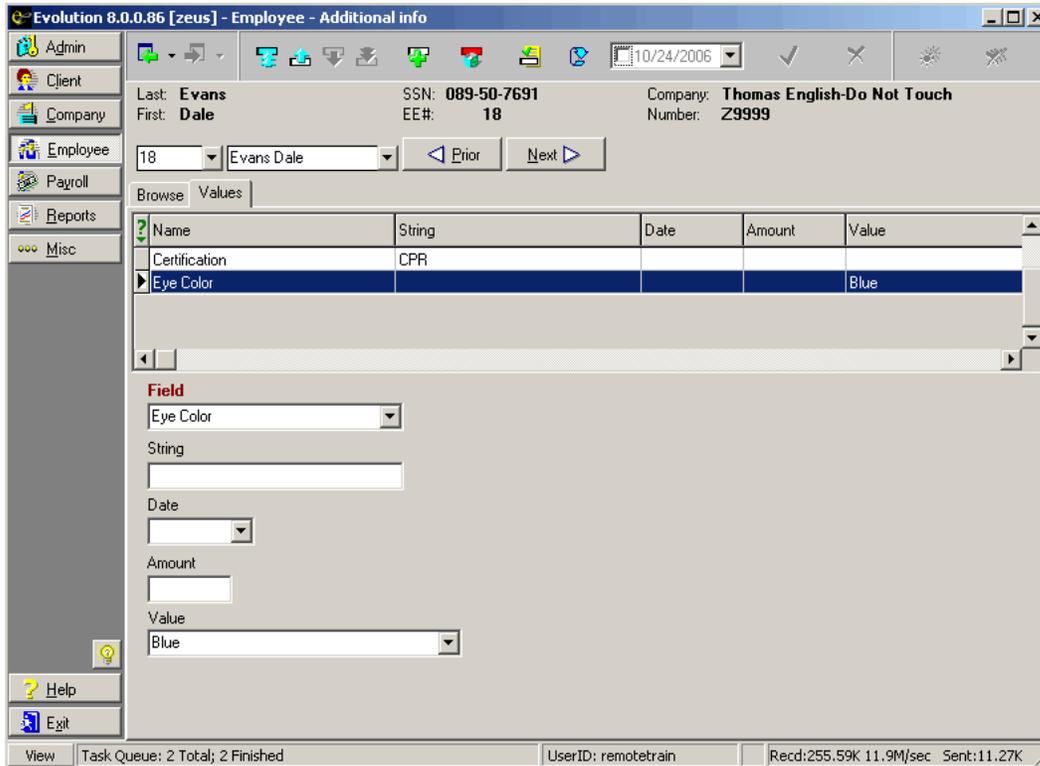
4. On the **Values** tab, click the **Create New Record** button 🔁 to

create an additional information field for the employee.

5. For the new field, specify the following information:

Field: Select a field.

String: Enter a value for the field.

Date: If applicable, enter a date.

Amount: If applicable, enter an amount.

Value: If applicable, select the valid option for the field.

6.   Click the **Post Changes** button to save the changes to local memory.

7. If Evolution hasn't committed the changes to database, click the

    Commit Changes button.

Miscellaneous
Terminating an Employee

To terminate an employee, do the following:

1. Click **Employee** and then click **Employee.**

2. Evolution displays the **Browse tab**. If the company is not open, select the company and click the **Open company** button.

3. Evolution opens the company. Select the employee, then click the **EE Entry** tab.

4. On the **EE Entry tab**, enter the termination date of the employee in the **Current Termination Date** field.

5. Select the new **Current Status Code** for the employee. For example, change the status from Active to Terminated.

6. Click the **Post changes** button to save the changes to local memory.

7.   If Evolution hasn't committed the changes to the database, click

the **Commit changes** button .

Check Finder

Use the Check Finder or F12 to find and research a certain check without running a report. The Check Finder finds any processed checks based on the filters in the windows. You can access the Check Finder from the **Employee-Employee** window.

To locate a check or checks, do the following:

1. Click the **Check Finder** button.

2. Evolution displays the **Check Finder** window.

Specify the following criteria for the check or checks you want to locate:

Begin Check Date: The beginning of the range of dates in which you want to locate checks.

End Check Date: The end of the range of dates in which you want to locate checks.

Run #: The number of the payroll run for the checks.

Check Serial #: The serial number of the check that you are searching for.

Employee Number: The number (code) of the employee whose check you are searching for.

3. Click the Filter button.

4. Evolution displays the list of checks that meet the criteria.

5. To display a check, select the check and click the **Show** button.

6. To preview the check, click the **Preview Check** button. When done, click the **Close** button.

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Thomas English-Do Not Touch
6 Mifflin Lane
Crown Point, NY 12992

No Bank, NA
Burlington, VT

Check Date
12/23/2005

Check Number   Memo

$************

Pay No Dollars and No Cents

To the Order of:
                 100   18   -99999577

Dale   Evans
123 Main Street
Staten Island, NY 10301   NON NEGOTIABLE

Authorized Signature

Dale   Evans   Thomas English-Do Not Touch

Company	Period Begin	Division
75555	9/18/2005	
ID Number	Period End	Branch
18	9/22/2005	
Social Security #	Check Date	Department
089-90-7491	12/23/2005	100
	Check Number	Token
911/997	-99999577	

Fed OR #1000
Vacation = 195.00 Bal HOURS

Earnings

Description	Location-Job	Rate	Hours	Current	Year To Date			Amount	Year To Date
Regular		9.22	80.00	737.60	11432.89	Fed (S/2) (11432.89)		10.20	77.91
						OASDI (6257.63)		387.97	
						Medicare (9217.63)		19.59	133.65
						NY (S/0) (11432.89)			250.92
						Checking Account XX71218		592.67	3907.01
						Child Support		125.00	875.00

| Total Earnings | | 80.00 | 737.60 | 11432.89 | Total Deductions | | 737.60 | 5232.90 |
| NET PAY | 592.67 | Total Direct Deposits | 592.67 | Check Amount | 0.00 | 5135.91 |

Thomas English-Do Not Touch
6 Mifflin Lane
Crown Point, NY 12992

                 100   18   -99999577

Dale   Evans
123 Main Street
Staten Island, NY 10301

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Tax and Check Line Calculator

You can access the **Tax and Check Line Calculator** from both the employee and the payroll levels by clicking the **Tax and Check Line Calculator** button. It gives you the ability to perform gross-to-net or net-to gross calculations on a check. You may include scheduled E/Ds, but any changes will not be permanent. Taxes are specified on the **Tax** tab. The calculations and taxes are located on the **Check Preview** tab.

Tax tab

On the Tax tab of the Tax and Check Line Calculator, you have the ability to apply tax overrides and blocks on a single check. You may also manipulate the Scheduled E/Ds on the created check. Any changes made to the taxes and the Scheduled E/Ds will only be applied the created check and will not become permanent. You have the ability to create either a manual or a regular check using the Tax and Check Line Calculator. You may also Disable Shortfalls and YTDs. A created check may be copied into a new payroll or into an existing payroll and/or batch.

To copy this manual or regular check to a payroll, click the **Copy to payroll** button or **F8.**

When using the Net to Gross function in the Tax and Check Line Calculator,

there are instances where the desired net amount can not be achieved down to the penny. If the calculated net is off by a penny, a warning will now display suggesting that you manually adjust and then plug the taxes so that you can get the net amount.

Check Preview Tab

To print the information on the **Check Preview** tab, right-click the **Check Preview** tab and click on **Print Results** or press **F7.**

Payrolls Tab

The **Payroll tab** displays any waiting payrolls in the payroll queue. You may attach this check to the waiting payroll, in a new batch or an existing batch; or create a New Payroll. If you choose to create a New Payroll, you will be prompted to enter a check date, batch period begin and batch period end dates. If you create a manual check, you will also be prompted to enter a check number.

Overriding Employee Federal Taxes
Scenarios in which you might override federal tax types are infrequent. A few examples are:

- When a priest is exempt from certain taxes vs. church's other administrative employees who are not clergy.

- A company who uses contractors would be exempt from paying federal taxes on these workers. The contractors are technically considered their own business and are federally taxed as a company.

Setting Up 1099R Employees
First, you must set up a separate EE Code for each distribution code that needs to be reported. When setting up an EE Code, be sure to note the

following on the W2 tab of the Employee-Employee window:

1099 or Employee: Select 1099

Distribution Code: Type the distribution code assigned by the IRS. Evolution prints this code in the corresponding box on the Form 1099R.

Tax Amount Determined: Yes: The Taxable Amount not Determined check box is *selected* in box 2b on the Form 1099R.
No: The Taxable Amount not Determined check box is *cleared* in box 2b on the Form 1099R.

Total Distribution: Yes: The Total Distribution check box is *selected* in box 2b on the 1099R form.
No: The Total Distribution check box is *cleared* in box 2b on the 1099R form.

Pension Plan: Select the type of pension plan:

- None
- IRA
- SEP
- Simple

Setting Up 1099M Employees

File Form 1099-MISC, Miscellaneous Income, for each person to whom you have paid during the year one or more of the following:

- At least $10 in royalties or broker payments in lieu of dividends or tax-exempt interest (see Box 8 on page MISC-6);
- At least $600 in rents, services (including parts and materials), prizes and awards, other income payments, medical and health care payments, crop insurance proceeds, cash payments for fish (or other aquatic life) you purchase from anyone engaged in the trade or business of catching fish, or, generally, the cash paid from a notional principal contract to an individual, partnership, or estate;
- Any fishing boat proceeds; or
- Gross proceeds to an attorney.

➢ If you would like to create a 1099 if the worker is paid less than $600.00, please contact your customer service representative. Your Payroll Specialist will make the change (shown below) required by the system at the Company level.

➤ Your Payroll Specialist will create a 1099 Earning code, using the EW code type. This will automatically exempt all taxes.

Enter the worker's information on the **EE Entry** tab of the **Employee-Employee** window. Next, select the **W2** tab. In the **Treat as EIN or SSN** field, select whether to format the number in the **Social Security Number** field as an EIN or SSN. In the **1099 or Employee** box, choose1099. Evolution will default the **Annual Form Type** to 1099.

If Treat as EIN is selected, the Social Security number field is formatted as shown below.
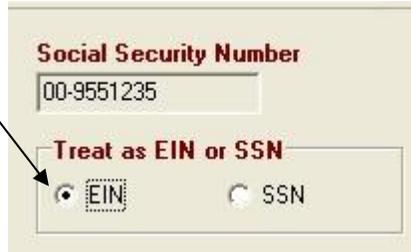
Social Security Number

00-9551235

Treat as EIN or SSN

⦿ EIN　　○ SSN

The worker is then paid using the 1099 Earnings code.

	E/D Code	E/D Description	Hours/Pieces	Rate of Pay	RATE NBR	Amount
I	E62	1099 Earnings				10,000.00

Controls above table: 13 | Pippen Scotty | Regular | -99998770 | 1P 0.00 | $0.00 | Batch 12/10/2005-12/18/2005 Check 1 of 1

Tabs: Check Lines | Manual Tax | General | Tax Overrides | Preview | Employee Notes

No taxes are deducted. The worker is responsible for filing all necessary returns to the appropriate agencies.

| 13 ▼ | Pippen Scotty ▼ | Regular ▼ | -99998770 | 1P   0.00 ▼ |

Check Lines | Manual Tax | General | Tax Overrides | Preview | Employee Notes |

EARNINGS:	DEDUCTIONS:
E62 1099 Earnings = $10,000.00	FEDERAL TAXES:
Earnings SubTotal = $10,000.00	
	Taxes SubTotal = $0.00
MEMOS:	
	Net Amount = $10,000.00

If a worker started out as a 1099, and then was hired as an employee, change the **Treat as EIN or SSN** if applicable. Change the **1099 or Employee** to W2 and change the **Annual Form Type** to W-2 &1099. This instructs Evolution to produce both a 1099 and a W-2 for this employee. The 1099 will report all the exempt earnings. The W2 will report all taxable wages, taxes, etc.

Setting Up Reciprocal States

Reciprocal states are used when employees work in states that are different than their resident states and they want to prevent owing state income taxes at the end of the year. In order to have the reciprocal state income taxes withheld, the employer must register and receive an employer ID number with the state in which an employee resides.

1. Ensure that employer has established an ID for reciprocating taxes with the state.

2. Contact your Payroll Specialist if additional states are needed.

3. On the **Details** tab of the **Employee-States** window, select the employee's home state for the State, SDI, and SUI boxes. If the ID number for the employer has not been entered, the state will not be available.

4. Select the appropriate Marital Status for the employee.

5. Save the changes.

Examples

Employee Lives in a Taxable State (VT), Works in Non-Taxable state (NH)

1. Ensure that both NH and VT have been added to the employee.

2. On the **Details** tab for the non-taxable state (NH), specify the following attributes:
   - Home State   Select NH
   - Reciprocal Method   Select Take Difference Between
   - Reciprocal State   Select VT

3. On the **Details** tab for the taxable state (VT), specify the following:
   - Home State   Select NH
   - Reciprocal Method   Select Take None
   - Reciprocal State   Leave blank

Employee Lives in Taxable State (NY), Works in Taxable State (VT)

1. Ensure that both NY and VT have been added to the employee.

2. On the **Details** tab for the taxable state in which the employee works (VT), specify the following attributes:

- Home State   Select VT
- Reciprocal Method Select Take Difference Between
- Reciprocal State   Select NY

3.   On the **Details** tab for the taxable state in which the employee resides (NY), specify the following:
- Home State   Select VT
- Reciprocal Method Select Take None
- Reciprocal State   Leave blank

Employee Lives in Non-Taxable State, Works in Two States
In this example, the employee resides in NH (non-taxable), but works in both VT (taxable) and NH (non- taxable).

1.   Ensure that both NH and VT have been added to the employee.

2.   In this example, you do not need to enter anything in the **Reciprocal Method** or **Reciprocal State** because Evolution knows to withhold the correct state tax depending on where the wages are earned.
- If the wages are earned in NH, no tax is needed, as the employee is a NH resident.

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- If the wages are earned in VT, then the system will correctly withhold the tax.

3. On the **Details** tab for VT, specify the following attributes:
   - Home State   Select the state in which the employee works most.
   - Reciprocal Method Select Take None
   - Reciprocal State   Leave Blank

4. On the **Details** tab for the taxable state in which the employee resides (NH), specify the following:
   - Home State   Select the state in which the employee works most.
   - Reciprocal Method Select Take None
   - Reciprocal State   Leave blank

5. When keying the payroll, be sure to attach NH to the **SUI** field of each check line, whenever the employee worked in NH.

Employee Lives in Taxable State (MA), Works in Taxable State (NY), Specifies Extra Tax.

In this example, the employee resides in MA (taxable), works in both NY (taxable) and MA (taxable), and specifies that $10 extra in tax be withheld.

1. Ensure that both MA and NY have been added to the employee.
2. On the **Details** tab for NY, specify the following:
    - Home State   Select NY
    - Reciprocal Method   Select Take Flat Amount
    - Reciprocal State   Select MA
    - Reciprocal Amount/Percent   Enter 10.00

3. On the **Details** tab for MA, specify the following:
    - Home State   Select NY
    - Reciprocal Method   Select Take None
    - Reciprocal State   Leave Blank

4. When keying the payroll, override the check lines whenever the employee works in NY.

Setting Up Locals

There are two methods for setting up locals for employees:

- From the **EE Entry** tab of **Employee –Employee** window.
- From the **Employee – Locals** window (as detailed in the prior section).

However, most employees can be set up from the **EE Entry** tab of **Employee – Employee** window.

Employee – EE Entry window

Use this method if you are setting up a basic local. This method is a quick entry method. If you have to enter any overrides, use the Employee – Locals method. There are some fields in the Employee – Employee -local's grid that can only be populated from the Employee – Locals window.

To assign local taxes to an employee, do the following:

1. Click **Employee** and then click **Employee**.

2. Click the **EE Entry** tab.

3. Click the **Locals** button to select local taxes for this

employee.

4. Evolution displays the **Locals** window. Select a local tax in the Company Local Tax pane and click the **Add** button .

5. Specify the following data for the local:

County: *Read-Only*. The county for the local tax will auto-populate based on the system setup.

% of Taxable Wages: Type the percentage of taxable wages. Evolution takes the taxable wages and prorates them by this percentage and only taxes the employee for the prorated percentage of wages.

Always Deduct: Always: The local tax is always deducted, unless you manually block it on the check or check line. Cannot be overridden, only blocked.
No Overrides: This local tax will be included in local taxable wages, only on check lines that have no local overrides attached. This option gives you the flexibility of overriding the local.
Never: The local tax is not always

deducted. This option works with D/B/D/T, job, check and check line overrides. You must select the local tax either as a default for the D/B/D/T or for the job, or override it on the check or check line. If not set up as a default, or overridden manually on a check or check line, this tax will not be deducted.

6. Click on the **OK** button to save the new local.

Misc

Sort by County/Local: Selected: Will sort the Employee Locals first by County, then by Local within that county.
Not Selected: Will sort the Employee Locals in alphabetical order.

Remove button **:**
Select a local in the Employee Locals pane, and click on the Remove button, and it will remove that local from the employee.

Payroll
Using the Payroll Expert to Create a Payroll
Evolution provides a wizard called the **Payroll Expert** to help you create a payroll. To use this wizard to create a payroll, do the following:

1. Click **Payroll**.
2. Evolution displays the **Payroll** tab of the **Payroll-Payroll** window. Click the **New Payroll Expert** button.
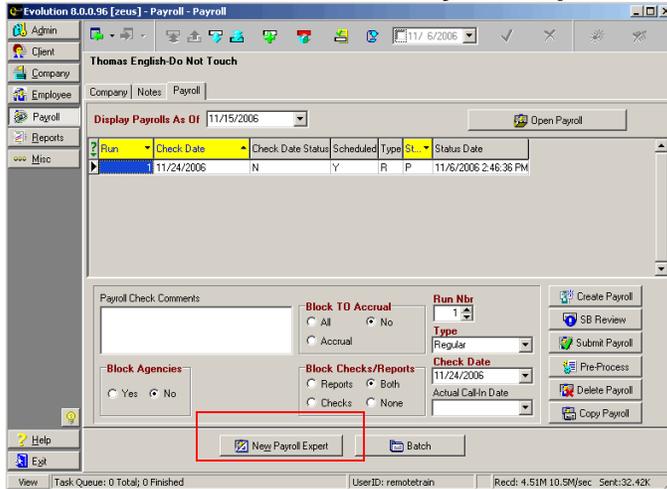
3. Evolution starts the **Payroll Expert**. Specify the following information as requested by the **Payroll Expert**:

Evolution displays the payroll notes. These notes may include items such as special procedures for running the payroll.

Payroll Expert

Notes Entered on the Co-General, Co Info, General Business tab in the Payroll Notes Field will show on the Notes tab of the Payroll, Payroll window.

Next ▶
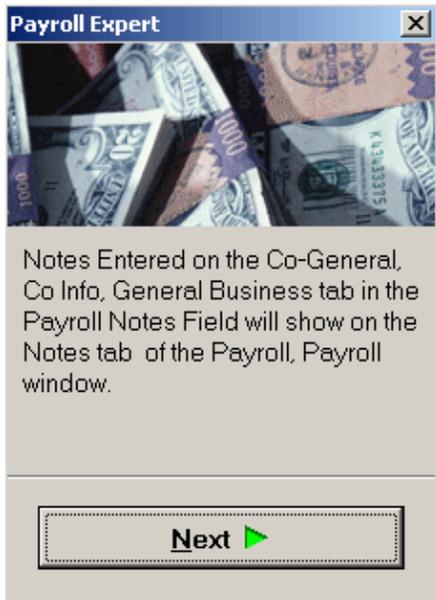
Type any payroll comments you wish to appear in the check comments (memo section) of the check stub of each check within this payroll. You may also change or add to these comments on the individual employee checks.

Payroll Expert ✕

Please, enter payroll check comments below.

Next ▶

For the type of payroll, select **Regular**.

Payroll Expert ☒

Please, choose payroll type.

Regular ▼

Next ▶
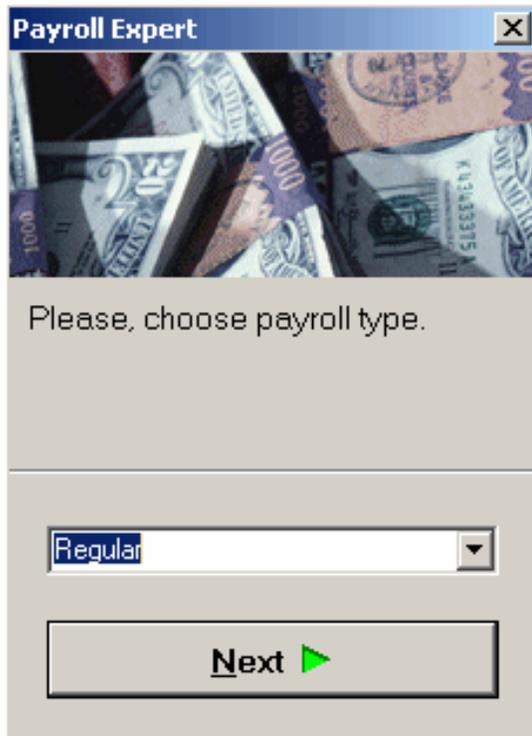
The Wizard then confirms the Scheduled Payroll Date. This date is generated

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by a calendar administered by your customer service representative. You may change this date, and it will be updated on your Calendar. However, if you need to add a new date, you need to contact your customer service representative.
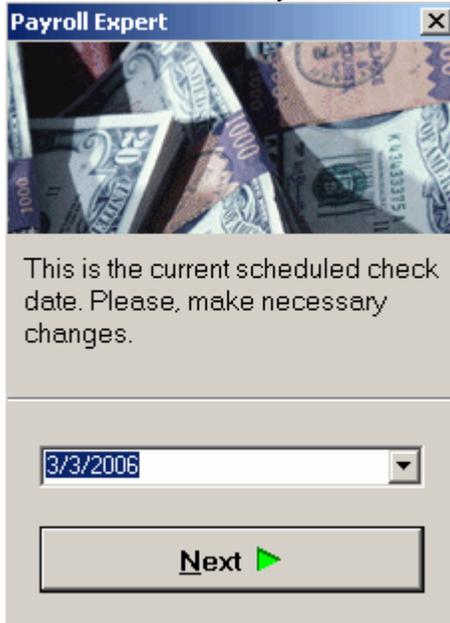
Select whether or not to block agencies. If **Yes** is selected, no agency checks

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will be created. If **No** is selected, all agency checks will print.

Payroll Expert

Block all agencies?

○ Yes   ● No

Next ▶

Select whether or not to block checks or reports. If **Reports** is selected, all reports that would normally print with the payroll will be blocked. If **Checks** is selected, all checks created in this payroll will not print. If **Both** is selected, checks and reports associated with the payroll will be blocked. If **None** is Selected, all checks and reports associated with this payroll will print. **None** is the *default* selection.

Select whether or not to block Time Off Accrual. If **All** is selected, all accrual and usage of time off will be blocked. Time Off Accrual balances will neither increase nor decrease in this payroll. If **Accrual** is selected, time taken from time off accruals will be recorded but time off will not accrue during this payroll. Balances will not increase. If **None** is selected, time off will accrue and reduce normally. **None** is the *default* selection.

Evolution now begins to create the batch.
Select the pay frequency of the batch, if your company uses more than one pay frequency.
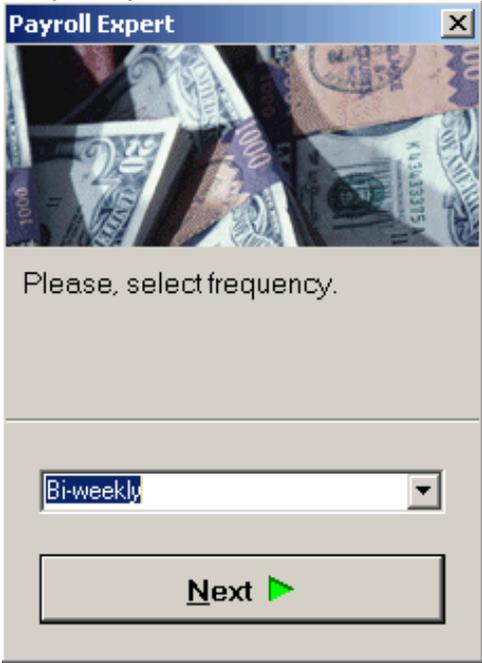
Select the beginning date of the batch. For the default value, Evolution calculates the next scheduled check period begin date. If you change this date, Evolution will ask you if the changed date is the new scheduled date. If you select **Yes**, the begin dates for this and all subsequent batches will be based on the new date.
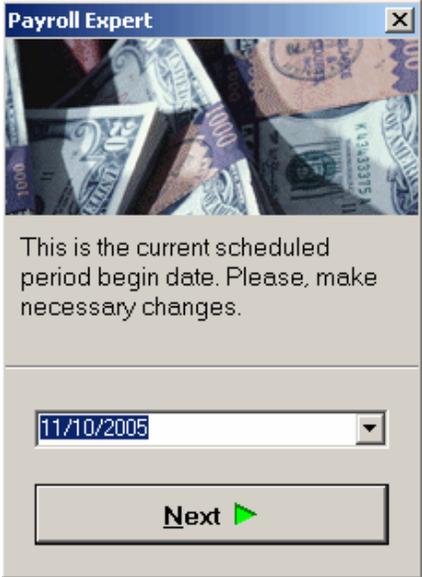
Select the end date of the batch. For the default value, Evolution calculates the next scheduled check period end date. If you change this date, Evolution will ask you if the changed date is the new scheduled date. If you select **Yes**, the end dates for this and all subsequent batches will be based on the new date.
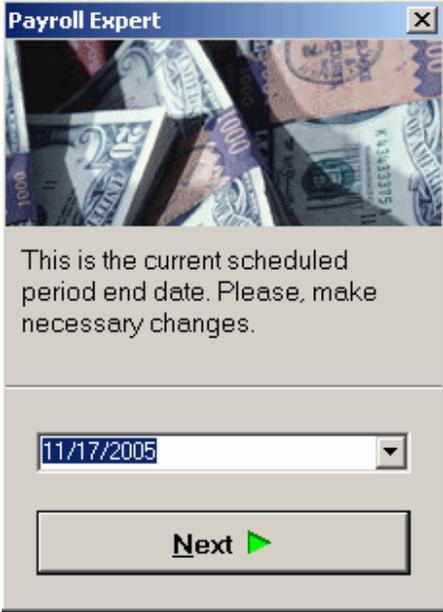
Select whether or not to pay salary. Evolution will pull the salary amount populated on the **EE Entry** tab of the **Employee-Employee** window. The *default* selection is **Yes.**
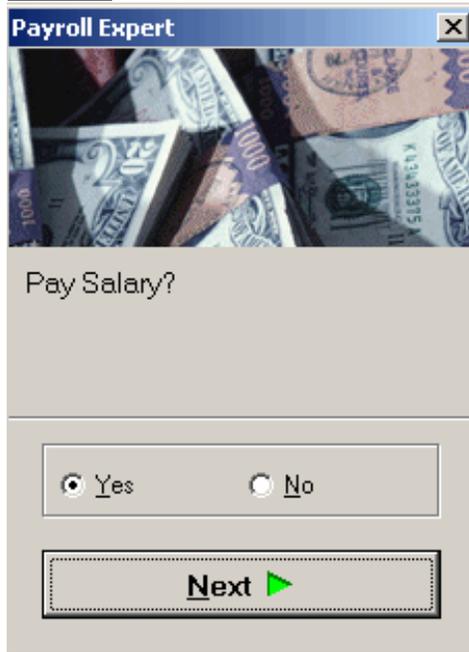
Select whether or not to pay standard hours. If **Yes** is selected, Evolution will pull the amount populated in the **Standard Hours** field of the **EE Entry** tab of the **Employee-Employee** window and will apply this amount on the check to the Regular Hours E/D code. If **No** is selected, Standard hours will not be applied to the Regular Hours E/D code and will not be brought into the checks. The *default* selection is **Yes.**
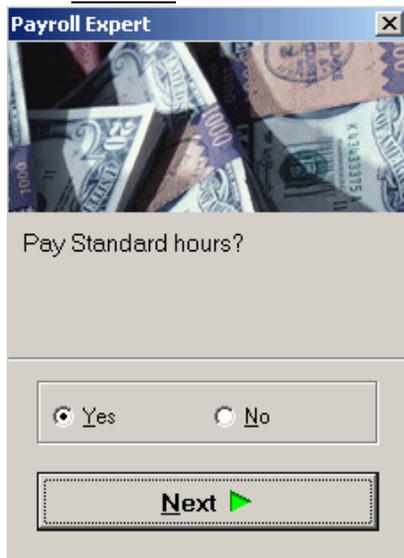
Select whether or not to load payroll defaults. If **Yes** is selected, Evolution uses the E/D defaults set up for this company when it creates checks for this batch. If **No** is selected, Evolution will not use the E/D defaults set up for this company when it creates checks. The *default* selection is **Yes.**
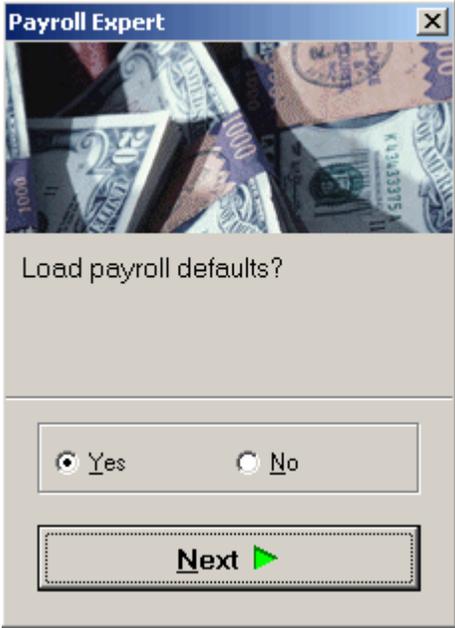
If desired, select a default check template for the batch (i.e. Bonus Check).
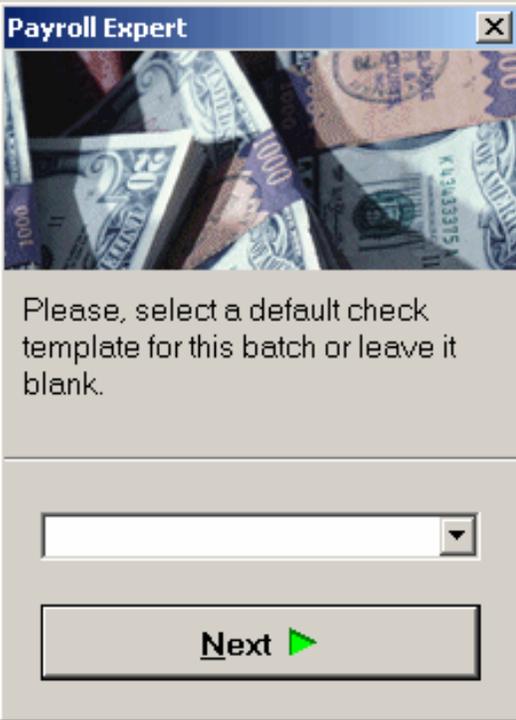
Payroll Expert

Please, select a default check template for this batch or leave it blank.

Next ▶

If desired, select a payroll filter.

Payroll Expert ✕

Please, select a payroll filter for this batch or leave it blank.

| |▼|

Next ▶

Select whether or not to auto-create checks. If **Yes** is selected, Evolution will automatically create checks for active employees in the previously selected frequency. If **No** is selected, Evolution will not auto-create checks. You will have to create each check individually after the batch is created.
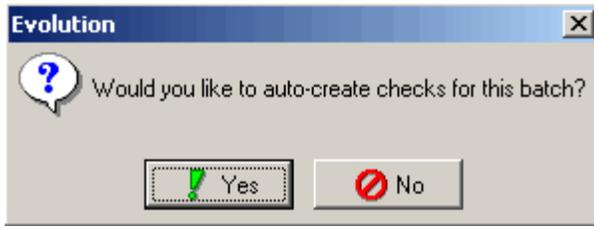
Evolution displays the newly created batch. To key checks, click either the
Quick Entry button or the **Checks** button and begin.

Creating the Payroll Using the Create Payroll Button

1. Click **Payroll**.
2. Evolution displays the **Company** tab of the **Payroll-Payroll** window. If the company is not open, click the **Open Company** button.
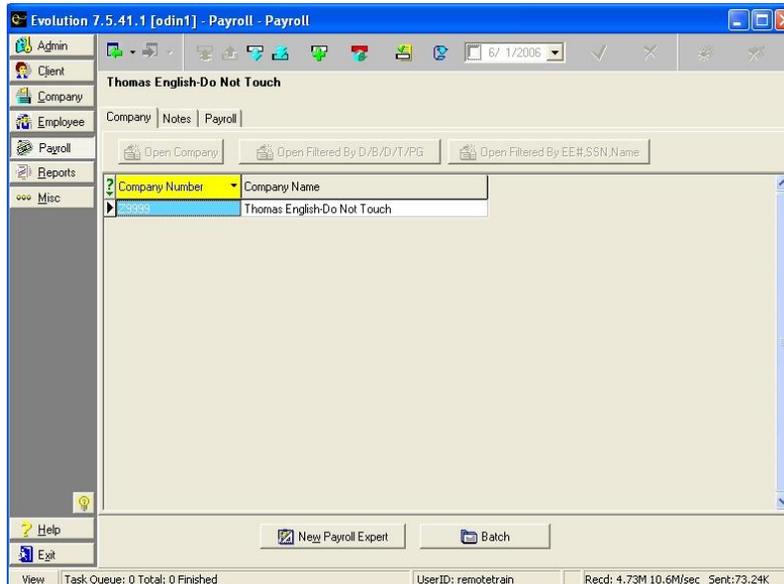
3. Click the **Payroll** tab.

4. On the **Payroll** tab, which lists the payrolls for the company, click the **Create Payroll** button.
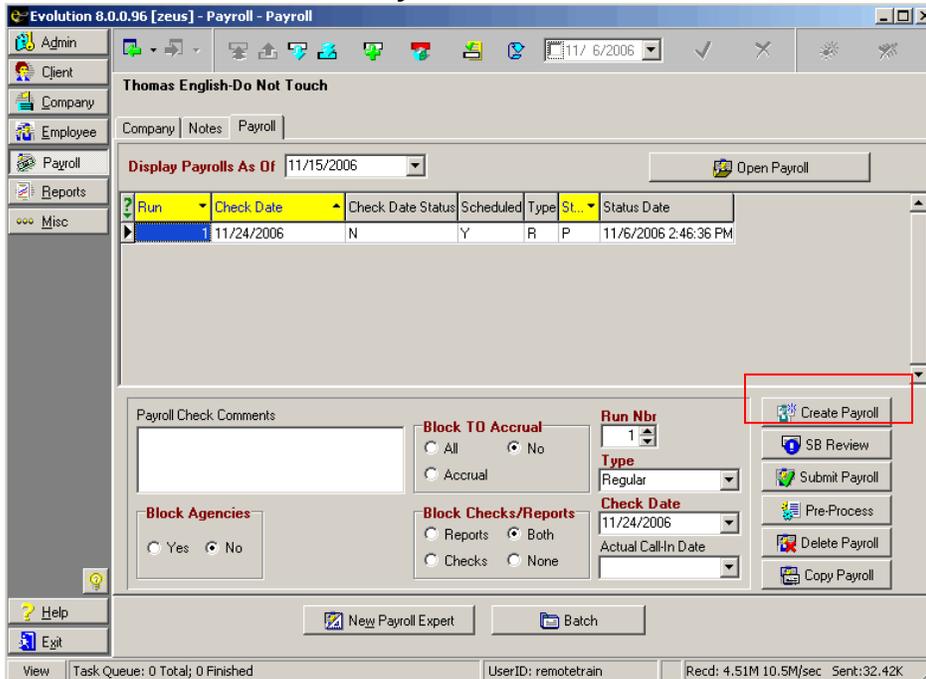
5.   Specify the information for the payroll. For more information about creating payrolls, see the following sections.

6.   Click the **Post Changes** ✓ button. Evolution posts and commits the payroll. It displays the **Batch tab** of the **Payroll-Batch** window.

Creating the Batch

You can create one or more batches for a payroll. Most payrolls require only one batch. You may want to create more than one batch for the following reasons:

- To pay hourly and salary employees separately.
- To pay employees with different pay frequencies in the same payroll.
- To allow different users to key different batches.
- To apply a template to a batch.

1.   Click the **Create Batch** button (or press ALT+INSERT).

2.   Evolution creates the batch and loads the default data. Specify the information for the batch.

3. Click the **Post Changes** ✓ button to save the changes to local memory.

4. Evolution asks if you want to automatically create checks. Click **YES** to auto-create checks in most situations.
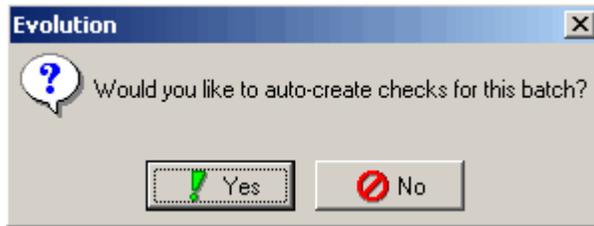
5. Evolution creates checks for the batch. To create additional batches, repeat steps 1 through 4 for each batch.

6. If you want to import time-entry data, such as from a time clock, click the **Import** tab and import your data.

7. Click the **Quick Entry** button. Evolution displays the **Quick Entry** tab of the **Payroll-Batch** window.

Keying the Checks

Click on the **Quick Entry** Tab and do the following for each check:

1. Verify that the sorting order is appropriate for entering your check data. The default sort order is set up at the company level.

    - To change default sort order, contact your CSR.

    - To sort the current list differently, click the label of the column you want to sort by. The first click sorts the list in ascending order, the second click sorts the list in descending, and the third click will sort the data as it was originally displayed.

2. Type the Amounts or hours for each check.

    - To move to the next column in a check, press ENTER or the Right Arrow. From the last column, press ENTER to move to the first column of the next row.

    - To move to the next check, press the Down Arrow key. If it is the last row, Evolution creates a new check.

➢   The Amt Salary, Hrs Regular, and Amt Regular columns are shown by default. Right click the list to add or delete other E/Ds.

3.   If necessary, display the **Payroll-Check** window to be able to enter additional detail for the check. To display the **Payroll-Check** window, do any of the following:

- Double-click the check.

- Select the check and click the **Check** button.

- Select the check and press CTRL+ENTER.

4.   Evolution displays the **Payroll-Check** window. If necessary, enter the detailed data for the check.
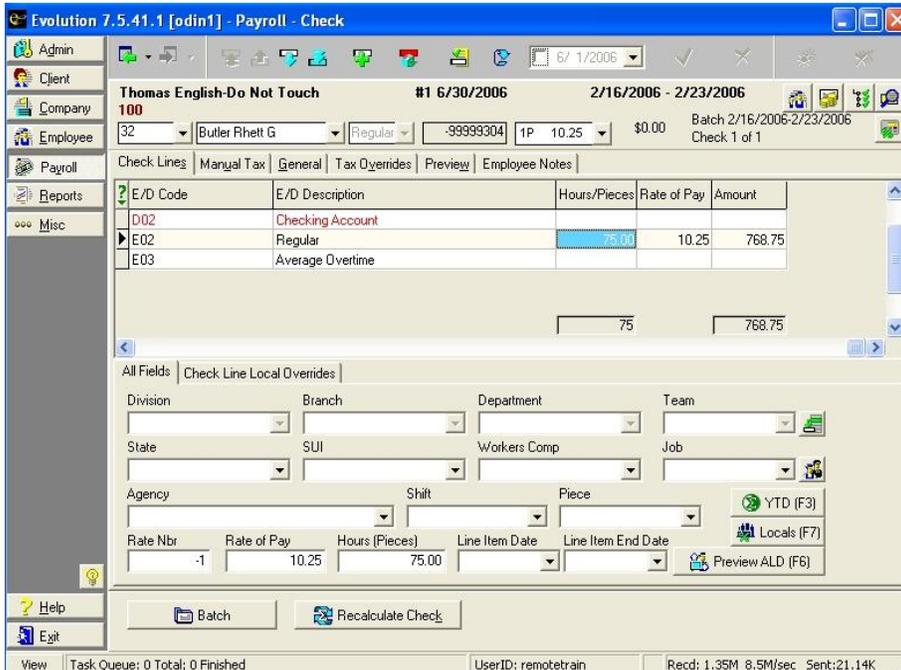
5. Click the **Batch** button to return to the **Quick Entry** tab of the **Payroll-Batch** window.

6. On the **Payroll-Batch** window, click the **Batch Totals** button. Evolution displays the **Earnings and Deductions** tab. Verify the totals for each E/D code for the batch and the number of checks.

If the totals or the number of checks are incorrect, do the following:

a. Select the E/D code with the incorrect amount from the left pane.
b. Select the employee in the right pane.
c. Press CRTL+ENTER to display the **Check Lines** tab of the **Payroll-Check** window.
d. Correct the check.
e. Click the **Batch** button to return to the **Payroll-Batch** window

> ➢ You can filter the list and move its columns to aid in verifying the totals.

f. Click the **Complete Payroll** button to go to the **Payroll-Payroll** window.

Pre-Processing the Payroll

Pre-processing allows you to check the totals of the payroll without actually processing the payroll. However, pre-processing does not update liabilities, targets, or time off accruals. To pre-process the payroll, do the following:

1. Open the **Payroll-Payroll** window and click on the **Payroll** tab.

2. Click the **Pre-Process** button. Evolution will display the following message. Select OK.
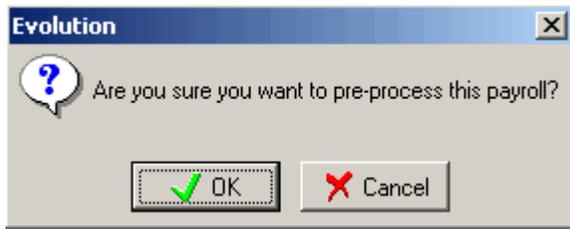
3. Evolution pre-processes the payroll. Verify the totals.

Submit the Payroll

Submitting the payroll puts the payroll in a queue so that it may be processed by a CSR. There are two methods for submitting the payroll.

- If you do not need your Payroll Specialist to review the payroll, click the **Submit Payroll** button on the **Payroll** tab of the **Payroll-Payroll** window. The Payroll Specialist then processes the payroll normally.

- If you need your Payroll Specialist to review the payroll, click the **SB Review** button on the **Payroll** tab. Evolution submits the payroll, but puts it on hold and prompts you to email your Payroll Specialist. The Payroll Specialist then reviews the payroll, addresses any issues, and processes the payroll.

Once the Payroll is submitted and waiting to be processed, Evolution locks the Employee windows until it is processed to protect the integrity of the data in the payroll.

You can verify the status of the payroll, on the **Payroll** tab of the **Payroll-Payroll** window.

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Payroll-Payroll Window

This section describes the data and functions of the **Payroll-Payroll** window. Each window of the Payroll level of Evolution will be discussed prior to the description of how to create, key, and submit a payroll for processing by your Payroll Specialist. It is advisable to read through the whole topic before proceeding.
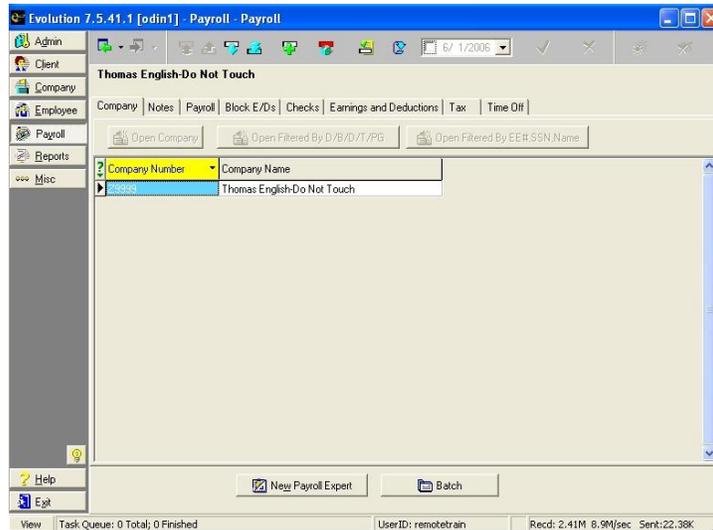
Company Tab

Upon entering the **Payroll-Payroll** window, the first tab is the **Company** tab. This tab allows you to select the company for which you wish to key a payroll. There are three ways that you may choose to open a **Company** using the buttons located above the Company grid. They are:

Open Company   Clicking this button loads all of the data for the Company selected in the Company grid and displays the corresponding **Details** tab. In payroll, you will either be directed to the **Notes** tab or the **Payroll** tab. Where you are directed is based on whether or not there are payroll notes loaded for the company by your Payroll Specialist on the **General Business** tab of the **Company General- Co Info** window.

Open Filtered By D/B/D/T/PG   Clicking this button allows you to filter the selected company data by division, branch, department, team, or pay group. Once you click on this button, a dialog box will appear and then you may enter the text you wish to match. An example of such text is department code.

Open Filtered By EE#,SSN,Name   Clicking this button allows you to filter the selected company data by employee number (employee code), social security number,

or employee name. Once you click on this button, a dialog box will appear and then you may enter the text you wish to match. An example of such text is an employee last name like Evans.

The Company Grid allows you to view all of the companies for which you have access. The grid lists each company by Company Number and Company Name.

New Payroll Expert Button
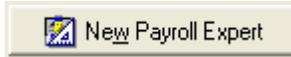
Click this button to start the Payroll Expert, which is a wizard that helps you create a Payroll. For more information, see *Using the Payroll Expert to Create a Payroll.*

Batch Button

Click this button to display the batches for the selected payroll.

Notes Tab

Any Notes associated with payroll may be entered here. Additionally any notes entered by your Payroll Specialist in the **Payroll Notes** field of the **General Business** tab of the **Company-General -Co Info** window will also display here. These notes may include details regarding special procedures for running a company's payroll that a processor should be aware of before keying payroll.

Payroll Tab

Display Payrolls As Of
Select a date to filter the Payroll List grid. Payrolls with a check date that falls before the date selected will not be displayed.

 Click this button to load the data for the payroll selected/ highlighted in the Payroll List grid.

Payroll List Grid

Run: The run number of the payroll.

Check Date: The check date of the payroll.

Check Date Status: I: Informational only *(Do not use)*
                              N: Informational Only *(Do not use)*

Scheduled: Y: The payroll is a scheduled payroll.
                              N: The payroll is not a scheduled payroll.

Type: A: Quarter End Cleanup (QEC)
                              B: Service Bureau Correction

C: Client Correction
D: Tax Deposit
E: Set Up Run
I: Import
M: Misc. Check Adjustment
R: Regular
T: Tax Adjustment
V: Void/ Reversal

➢ Payroll types and their applications will be discussed in a later section.

Status: C: Completed and on the queue waiting to be processed.
                          H: On Hold for SB approval
                          I: On the Task Queue being processed
                          P: Processed
                          V: Void
                          W: Waiting to be submitted for processing.
                          Y: Payroll is on the queue pre-processing

Status Date: The date and time the status was last changed.

As with other grids, you can filter the payroll list by clicking the Filter List

button. You will then need to specify the parameters of your filter.

You can view the specific details of each payroll by selecting it in the grid and viewing the information below the Payroll List grid.

Payroll Check Comments:
Enter the comments that you would like to appear on each check stub in this payroll.

Block Agencies:
Required.
Yes: No agency checks will be created.
No: All agency checks will print.

Block TO Accrual:
Required.
All: Blocks both accrual and usage of all Time Off Accruals.
No: Time Off Accrual is used and accrued normally.
Accrual: Blocks time off from accruing but still allows time used to be recorded and deducted from the Time Off Accrual balance.

Block Checks/Reports:
Required.

Reports: Block the printing of reports with this payroll.

Checks: Blocks the printing of checks with this payroll.

Both: Blocks the printing of both checks and reports with this payroll.

None: Prints checks and reports with this payroll.

Run Nbr:

Required.
The run number of the payroll. *Defaults to the next available number*.

Type:

Required. Select the type of Payroll:

- Regular: A normally scheduled payroll.
- Supplemental: Not a regular payroll, such as for commissions, bonuses, etc.
- Reversal: A payroll that voids another payroll.
- Client Correction: A payroll used to

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correct another payroll because of a client initiated change.

The following Payroll types are for Service Bureau use only:

- Set Up Run
- Misc. Check Adjustment
- SB Correction
- Tax Adjustment
- Wage Adj with Qtr
- Wage Adj no Qtr
- Tax Deposit
- Import
- Backdated Set Up

Check Date: *Required.*
Defaults to the next available check date. To select a check date for payroll, right –click somewhere in the grid or the check date field and a list of scheduled check dates will appear for you to make your selection.

Actual Call In Date: *Informational Only.*
                         Does not affect calculations. Enter the date
                         the payroll was actually called in.

Function Buttons

[Create Payroll] Click this button to create a new payroll.

[SB Review] Click this button to put selected payroll on hold until reviewed
by the Payroll Specialist.

[Submit Payroll] Click this button to submit the selected payroll to the Payroll
Specialist for processing.

[Pre-Process] Click this button to pre-process the selected payroll. Once a
payroll is pre-processed, you can run any report that does not use liabilities
processing to confirm the validity of the payroll data.
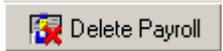
[Delete Payroll] Click this button to delete the selected payroll. Only non-

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processed payrolls can be deleted. Once deleted, this payroll cannot be recovered.
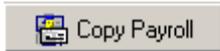
Copy Payroll Click this button to create a copy of the selected payroll.

➢ To open an existing payroll, select it from the Payroll List grid and click the **Open Payroll** button. The following tabs will be visible:
- Block E/Ds tab
- Checks tab
- Earning and Deductions tab
- Tax tab
- Time Off tab

Block E/Ds tab

This tab allows you to block specific scheduled earnings and deductions on all checks within a particular payroll prior to processing the payroll. You may also block individual E/Ds on individual employee checks on the **General** tab of the **Payroll-Check** window. To add or delete from the E/Ds List grid, use the Add

or Delete buttons located on the right side of your screen. Using the

Create Record button will create a new payroll, not an individual entry to

this list. Using the Delete Record from the toolbar at the top of your screen will delete the entire payroll, not an individual entry from this list.

1. Using the Add Button , create a new entry to the E/Ds List grid.
2. In the **EE Scheduled E/D Code** field, select an E/D that you would like to add to the list.
3. Select the Block option you would like to associate with the selected E/D. The Block flag defaults to Yes, which will exclude the E/D from the payroll. If you select No, the E/D will be included in the payroll.

4. Post changes to local memory.
5. Repeat steps 1-4 until all E/Ds you wish to block are added to the

grid.

6.   If Evolution has not already done so, click the **Commit Changes**

 button to commit your changes to the database.

7.   To Delete an E/D from the list, highlight the E/D you wish to remove on the grid. Click the **Delete** button.

8.   Save and Commit changes.

➢   It is not necessary to add all E/Ds associated with your company to this list. It is sufficient to only load the exceptions or the E/Ds you would like to block on all checks.

Button Toolbar
An additional option has been added to the button toolbar located at the bottom of your screen.

 Clicking this button will take you back to the **Payroll-Payroll** window.

Checks tab

This tab is a summary of all checks within a selected payroll, including checks in all batches associated with each payroll (check date). All checks created within the selected payroll are listed on the Checks grid. To view individual check details, double click the check line on the grid.

Check Grid

Batch: The batch in which the check was created. This number is assigned by the system and cannot be changed.

EE Code: The employee number (Code) for the employee; originally entered on the **Employee-Employee**, **EE Entry** tab.

Employee Name: The name of the employee for whom the check was written.

Gross Wages: The gross wages on a check. This figure will only populate if a processed or pre-processed payroll has been selected.

Net Wages: The net wages on a check. This figure will only
                    populate if a processed or pre-processed payroll
                    has been selected.

Check Type: The type of check created for each employee.

- Regular: A standard payroll check.
- Manual: A payroll voucher that updates YTD
  information for an employee that was paid
  outside of Evolution.
- Void: A check that nullifies a previous check.
- 3rd Party: A payroll voucher that updates
  year to date information for an employee who
  was paid disability wages outside of
  Evolution.

Serial Nbr: The serial number of the check.

➢   Checks resulting in a net direct deposit have a unique identifying
     number. To differentiate these unique numbers for direct deposits, these
     serial numbers are assigned a negative number (ex. –164).

Check Status: The status of the check. The options are as follows:

- Outstanding
- Cleared
- Void
- Write-Off

Earnings and Deductions tab

This tab displays E/Ds applied to a payroll. This tab is best used for confirming user-entered data. To use it to verify all E/Ds applied within a payroll, you must pre-process the payroll.

Display User Entries Separately
When selected, this checkbox displays the **Sched** column, which displays the data and sorts it based on how it was entered. Data is sorted in the following categories:

U The E/D was entered the line by the user. Timeclock imports and auto-posting are considered to be user-generated lines.

S The E/D was entered by the system.

Display Totals By Check Type
When selected, this checkbox displays the **Check** column, which displays the totals by each check type. For example, regular and manual check type totals are shown separately. See the previous description of *Check types.*

E/D Browse Grid
This is the grid on the left hand side of the screen. This browse grid displays a list of all E/D codes included in the payroll.

E/D Code: The identifying earning or deduction code.

Description: The name of the E/D created at the **Client** level

Hours/Pieces: The total hours or pieces for the selected E/D code that were applied in the payroll.

Amount: The total dollar amount for the selected E/D code that was applied in the payroll.

Count: The number of checks to which the E/D code was applied.

Employee Browse Grid
This is the grid on the right hand side of the screen. This browse grid displays a list of employees to whom the E/D code was applied in the payroll.

EE Nbr: The identifying employee number (code).

Employee Name: The employee to whom the E/D was applied.

Hour/Pieces: The number of hours or pieces to which the E/D code was

applied in the payroll.

Amount: The amount of the E/D code applied to the employee

Tax tab

This tab is a summary of the total taxes calculated within a selected payroll, including taxes in all batches associated with each payroll (check date). All calculated taxes applied within the selected payroll are listed on the Tax grid. To view individual tax details, click the tax line on the grid. This tab is best used for identifying system-generated information versus user-entered data. To use it to verify taxes applied within a payroll, you must pre-process the payroll.

Display User Entries Separately
When selected, this checkbox displays the **OVRD** column, which displays the data and sorts it based on how it was entered. Data is sorted in the following categories:

Y	The tax was overridden by a user.
N	The tax was not overridden by a user.

Tax Browse grid *(left pane)*

OVRD: Indicates whether or not the tax figure was overridden.

Description: The description of the Tax applied to the payroll.

Amount: The total amount of the tax calculated in the payroll.

Count: The number of checks that composed the total amount of the calculated tax.

Employee Browse Grid *(right pane)*

EE Code: The identifying employee number (code).

Employee Name: The name of the employee.

Amount: The tax amount calculated within the selected payroll for the employee.

Time Off tab

Because the *time clock-import* process does not involve actually keying check lines, it does not activate the Check Time-Off Balance function. (Check Time Off Balance flag on the **Details** tab of the **Company-Miscellaneous-Time Off Accrual** window) This tab, therefore, is helpful when importing time clock data. It displays employees who have checks in the payroll that cause the employee to exceed the Current Balance available on the **Details** tab of the **Employee-Time Off Accrual** window. The payroll does not need to have been pre-processed or processed for this to run.

Click the ![Run Balance Check] button to perform this function. If there are any results generated, an employee browse grid with two columns will display. The first column will list the EE Code of all individual employees who have exceeded their Current Available time off accrual balance. The second column will list the Serial Nbr of the check in which the employee has exceeded their Current Available balance for time off accrual.

Payroll-Batch Window

This section describes the data, features and functions of the Payroll-Batch window. Each window of the Payroll level of Evolution will be discussed prior to the description of how to create, key, and submit a payroll for processing by your Payroll Specialist. It is advisable to read through the whole topic before proceeding.
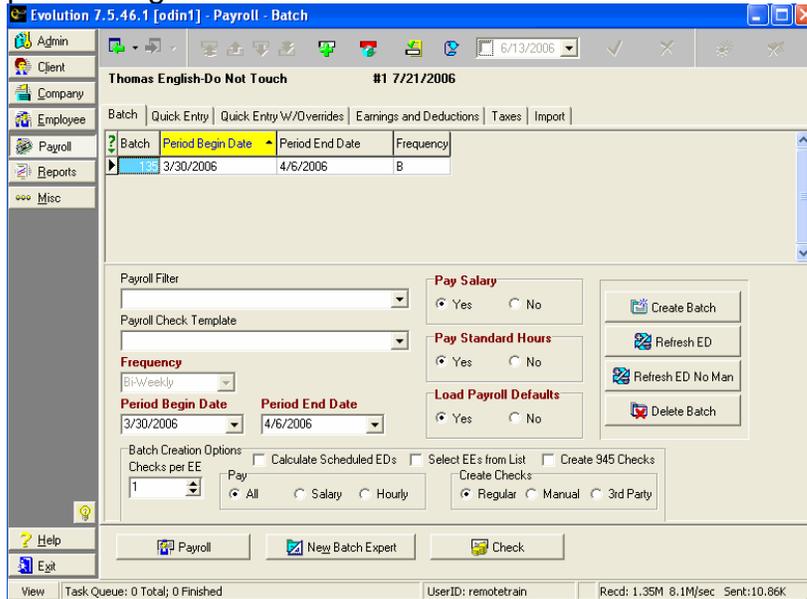
Batch: The number used and generated by Evolution to identify batches.

Period Begin Date: For the default value, Evolution calculates the next scheduled check begin date. If you change this date, Evolution will ask if the changed date is the new scheduled date. If you select **Yes**, begin dates for this and all subsequent batches will be based on the new date.

Period End Date: For the default value, Evolution calculates the next scheduled check end date. If you change this date, Evolution will ask if the changed date is the new scheduled date. If you select **Yes**, end dates for this and all subsequent batches will be based on the new date.

Frequency: The batch frequency. Options are:
- Daily
- Weekly
- Bi-Weekly
- Semi-Monthly

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- Monthly
- Quarterly

➢   Once the checks have been either auto created or manually
      generated, Evolution will not allow the frequency to be changed.

Batch Details

Payroll Filter: The name of the payroll filter applied to the batch.

➢ Filters give you the ability to have salary checks and hourly checks in
   separate batches or to create different batches for different division,
   branch, department, or teams. These are created at the Company level.
   Contact your Payroll Specialist if needed.

Payroll Check Template: The check template applied to the batch.

Frequency: The frequency of the batch. Default value
                            pulls from the Company level. Only employees with
                            this frequency will be pulled into the batch.

Period Begin Date: The beginning date of the pay period of the
                            batch.

Period End Date: The ending date of the pay period of the batch.

Pay Salary: Yes: Salaried employees are paid in this batch.
No: Salaried employees are not paid in this batch.

Pay Standard Hours: Yes: Hourly employees are paid their standard hours.
No: Hourly employees are not paid their standard hours.

Load Payroll Defaults: Yes: Evolution uses the E/D defaults set up when it creates checks for this batch.
No: Evolution does not use the E/Ds defaults set up for this company when it creates checks for this batch.

Create Batch   Creates a new batch for the selected payroll.

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Refresh ED

Refreshes the scheduled E/Ds by reloading the default E/Ds. Typically, you would refresh scheduled E/Ds in the following situations:

- When copying a payroll from another payroll, but the scheduled E/Ds are different.

- When you realize after you have created the batch that you didn't set the defaults for the scheduled E/Ds correctly and you would like to correct them.

Refresh ED No Man
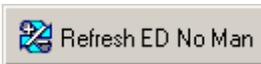
When selected, Evolution will refresh all the scheduled E/Ds that were deleted or changed on check lines for regular check types only. It will not refresh a manual check type.
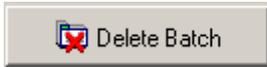
Delete Batch   Deletes the batch for the selected payroll.

> ➢ You can only delete a batch from a non-processed payroll. If a batch is deleted, it cannot be restored.

Batch Creation Options

Checks Per Employee: The number of checks to create for each employee in this batch.

Calculate Scheduled E/Ds: When selected, Evolution calculates the scheduled E/Ds while creating the batch. When cleared, Evolution does not calculate the scheduled E/Ds while creating the batch.

> ➢ Clearing this flag speeds up batch creation by 10%.

Select EEs from List: When selected, the user may select the employees to create checks for in this batch. The user may select from a list including active and terminated employees.

Create 945 Checks: When selected, 945 checks will be created.

Pay: When selected, each flag performs the following function:
- All: Pays all employees in this batch
- Salary: Pays only salaried employees in this batch
- Hourly: Pays only hourly employees in this batch

Create Checks: The type of checks to be auto created in the batch.
- Regular: Evolution creates regular checks in this batch
- Manual: Evolution creates manual checks in this batch.
- 3rd Party: Evolution creates 3rd party checks in this batch.

Payroll: Clicking this button will take you back to the payroll this batch is a part of on the Payroll tab of the Payroll-Payroll window.

New Batch Expert Button: Click this button to start the Batch Expert, which is a wizard that helps you create a batch. For more information, see *Using the Payroll Expert to Create a Batch.*

Check Button: Click this button to display the Check Lines tab of the Payroll-Check window for the selected batch.

Once a new batch has been created and saved, the button toolbar will also include the **Quick Entry** button ⬚Quick Entry ⬚. The **Quick Entry** button is displayed only when creating a batch to help guide you through the payroll process. Clicking this button will display the **Quick Entry** tab.

Quick Entry Tab

The **Quick Entry** tab is for quick entry of check data. By default, it allows you to enter the following data:

- Salary Amount
- Regular Hours
- Regular Amount

You can, however, change these columns by adding or deleting columns by right clicking the list.

Quick Entry Browse Grid

Type: The type of check created in this batch.

Notes: Y: The employee has notes.
                               N: The employee does not have notes.

EE Code: The identifying employee number.

Name: The employee to whom the check belongs.

Amt Salary: The amount of salaried earnings.

Hrs Regular: The number of the hours.

Amt Regular: The amount of the earnings

> ➢ Checks highlighted in Yellow have employee notes associated. Employee notes are loaded at the Employee level.

Employee button :   Clicking this button will display the Employee-Employee window.

Employee Rates :   Clicking this button will display the Employee-Pay Rate Info window.

Button Toolbar

An additional option has been added to the button toolbar located at the bottom of your screen.

 This button is displayed only when creating a batch to help guide you through the payroll process. Clicking this button will display the **Earnings and Deductions** tab.

Quick Entry W/Overrides tab

Evolution 7.5.41.1 [odin1] - Payroll - Batch

Thomas English-Do Not Touch   #1 6/9/2006   Checks: 6

Batch | Quick Entry | Quick Entry W/Overrides | Earnings and Deductions | Taxes | Import

32   Butler Rhett G

?	Type	Notes	EE Code	Name	Check #	Amt E01 Salary	Hrs E01 Salary	Hrs E02 Regular	Job	D/B/D/T
▶	R	N	32	Butler Rhett G	1			75.00		
	R	N	33	Employee 1099	1			0.00		
	R	Y	18	Evans Dale	1			80.00		
	R	N	34	Jones Tom	1			80.00		
	R	N	34	Jones Tom	1	5,000.00	0.00			
	R	Y	24	Webb Charlotte R	1			80.00		
	R	N	31	Williams Roy M	1			80.00		

| | | 5,000.00 | 0.00 | 395.00 | |

Payroll | New Batch Expert | Check

View | Task Queue: 2 Total; 2 Finished | UserID: remotetrain | Recd: 5.19M 9.0M/sec Sent:82.64K

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The **Quick Entry W/Overrides** tab allows a user to override D/B/D/T assignments, job codes, shifts, and various other fields on a grid instead of keying the data on the **Check Lines** window. The tab is basically a quick entry screen with override capability.

Each user workstation can be customized by company. Evolution will hold the settings. To customize the grid, right click and choose the appropriate field to add. Once added, the columns may be dragged and dropped to further customize the order and placement of the columns.

To view the detail of a check, double click the grid lines and it will bring you to the actual check lines.

Earnings and Deductions tab

This tab displays E/Ds applied to a batch. See previous section for a detailed explanation of each field.

Taxes tab

This tab is a summary of the total taxes calculated within a selected batch. See previous section for a detailed explanation of each field.

Import Tab

This tab is for importing time entry data, such as from time-clocks or spreadsheets.

➢ Import data must comply with Evolution formats.

Source File Name: The full path of the file to import.

Browse button [...] : Click to locate the source file.
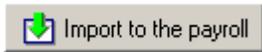
[↓] Import to the payroll   Click this button to import the data to the payroll.

Exception Report File
Name: The full path of the file to be used for the exception report, which denotes data that could not be imported.

Browse button [...] Click to locate the exception report file.

[◨] View the report file   Click button to display the exception report file.

Look EE up by:	Select the unique identifier used to match the import data with Evolution's data.

- Custom #
- Name
- SSN

DBDT match:	**Full (faster):** Evolution uses a faster algorithm to match the DBDT data from the import to the DBDT data in Evolution. Select this option for single tier DBDTs or multi-tier DBDTS with unique names.
	Partial (slower): Evolution uses a more robust algorithm to match DBDT data from the import to DBDT data in Evolution. Select this option for multi-tier DBDTs with the same names.
File format:	Select format for the import file.

- Fixed positions
- Comma-delimited

Use four digits for year:	The import data has four digit years.

Auto Import job codes: When selected, job codes are automatically imported.

Use employee pay rate: When selected, Evolution will look at the DBDT in the import file, match the DBDT level to the EE Rates screen and assign the associated rate to the hours.

Auto Refresh E/Ds: When you import a time clock file that includes any employees that did not previously have a check in the batch, selecting this flag will pull the Scheduled E/Ds associated with the employees into the newly created check(s). If cleared, the Scheduled E/Ds will not be pulled into the newly created check(s).

➢ You can attach the State and Workers Compensation code when using the time clock import to enter employee data. When matching W/C codes, Evolution will look to the full six characters used for workers compensation in the import file. If there is no state attached, Evolution will apply the first matching code. To illustrate, in the time clock import, rather that just pulling 8810, you can now select 8810VT and Vermont's 8810 code will be attached.

Payroll-Check Window

This section describes the data, features and functions of the **Payroll-Check** window. Each window of the Payroll level of Evolution will be discussed prior to the description of how to create, key, and submit a payroll for processing by your Payroll Specialist. It is advisable to read through the whole topic before proceeding.

To access the **Payroll-Check** window, starting at the **Payroll- Batch** window, you must do the following:

- If there is a payroll with only one batch open, click **Payroll** and then click **Check**.
- If there are multiple batches, you must open the payroll, choose the batch, and then view the checks.

➢ Each tab will be described respectively in the following section.

Check Lines tab

Toolbar

The following toolbar will appear above each tab of this window.

The toolbar is composed of the following parts (the corresponding examples from the toolbar above will appear in italics):

Company Name	*Thomas English- Do Not Touch*
Run Number	*#1*
Check Date	*3/3/2006*
Begin/End Dates of Payroll	*11/10/2005-11/17/2005*
EE Code	*24*
Employee Name	*Webb, Charlotte R*
Check Type	*Regular*
Check Number	*-999999489*
Rate Number & Rate Amount	*1P 10.00*
Salary Amount	*$0.00*
Begin/End Dates of Batch	*Batch 11/10/2005-11/17/2005*
Check Count for the employee	*Check 3 of 3*

Function Buttons

The following hot buttons are located at the right of every tab in this window:

Employee button :

Clicking this button will display the **Employee-Employee** window.

Employee Rates button :

Clicking this button will display the **Employee-Pay Rate Info** window.

Scheduled E/Ds button :

Clicking this button will display the **Employee-Scheduled E/Ds** window, with the current employee selected

Check Finder button :

Clicking this button will display the **Check Finder** utility.

Tax Calculator button :

Clicking this button will display the **Tax and Check Line Calculator**.

Check Line Grid

E/D Code: The unique identifier for the Earning or Deduction code created at the Client level.

E/D Description: The name of the Earning or Deduction created at the Client level.

➢ Scheduled E/Ds will post as red check lines. They may not be edited. You may, however, delete the check line containing the E/D and re-add the E/D in a new check line manually making any modifications you require. Check lines that are black may be edited or deleted.

Hours/ Pieces: The corresponding hours/ pieces pertaining to the E/D code.

Rate of Pay: The corresponding rate of pay pertaining to the E/D code.

Amount: The total amount of the hours/pieces multiplied by the corresponding rate of pay for the E/D code.

All Fields tab

This section first describes data that is normally posted by Evolution. Then it describes the data that is normally keyed by the user. Finally it describes methods for navigating the window and keying data.

Data Normally Posted By Evolution

If your company or payroll uses the features below, Evolution enters default data for them except hours and amount, which can be set up to auto-post by Evolution.

Division: The Division code selected using the **DBDT picker** , for override purposes.

Branch: The Branch code selected using the **DBDT picker** , for override purposes.

Department: The Department code selected using the **DBDT picker** , for override purposes.

Team: The Team code selected using the **DBDT picker** , for override purposes.

State: The two-letter abbreviation identifying the state associated with this employee.

SUI: The state to which to report this employee's SUI wages.

Workers' Comp: The default Workers' Comp code associated with this employee

Job: The code identifying the job. If the job you wish to associate with the check line is unavailable, click the Add Job button, to add a new code for the check line.

Agency: The name of the agency associated with the check line.

Shift: The descriptive name of the shift assigned to the
                   employee.

Piece: The name of the piecework item.

Line Item Date: The begin date regarding this line item for the check. This
                   field is used in certified payrolls and Time Off Accrual
                   through the HR module. Contact your Payroll Specialist
                   representative for more information.

Line Item End Date: The end date regarding this line item for the check. This
                   field is used in certified payrolls and Time Off Accrual
                   through the HR module. Contact your Payroll Specialist
                   representative for more information.

Data Normally Keyed by User
Rate Nbr: The number of the rate of pay associated with the
                   employee and the corresponding check line. Any Rate
                   Nbr set up on the **Employee-Pay Rate Info** screen may

be pulled in. Evolution defaults to Rate Nbr one (1).

Rate of Pay: Defaults to the pay rate hourly amount associated with the pay rate. To override, type a rate of pay. Evolution will delete the Rate Nbr.

Hours (Pieces):   Type the number of hours or pieces to apply to this check line. This can be set up to auto-post by creating a payroll default or by specifying Pay Standard Hours during Batch creation. Note: Rate Nbr or Rate of Pay is required with hours (pieces).

Amount: Type the amount for the check line.
- If Hours (Pieces) is specified, leave this blank to allow the system to calculate it.
- For salaries, however, you can enter a Rate Nbr of 0 (zero) and an Amount.

Functions: Displays the **Employee Year to Date** window.

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Locals (F7) Displays the Select and Add Dialog, which allows you to add a local tax to a check line. See *Adding Local Taxes on a Check Line.*

Preview ALD (F6) Allows you to preview auto-labor distribution. To use this utility, ALD must first be set up for this employee.

Check Line Local Overrides tab

All Fields	Check Line Local Overrides

?	Local Name	▼	Exclude
▶		▼	

This tab allows you to block or exempt local taxes for each check line.

Local Name: The name of the local tax.

Exclude: How the local should be treated for the
                       corresponding check line
                       - Include: The employee is subject to the tax
                         and the tax will be taken.
                       - Block: The employee's tax amount will be
                         calculated based on taxable wages, but the
                         amount will not be taken.
                       - Exempt: The employee's wages are not
                         subject to the tax and no amount will be
                         calculated or taken.

Batch Button: Click this button to display the **Quick Entry tab** of
                       the **Payroll-Batch** window for the selected batch.

Recalculate Check: Click this button to individually pre-process the
                       selected employee's check.

Quick Entry: Click this button to display the **Quick Entry** tab of
                       the **Payroll-Batch** window

Manual Tax tab

This tab allows you to override a tax for this check.

Row: *Read only.* The row number.

Description: The descriptive name of the federal, state, or local tax.

Amount: To override the amount of the federal, state, or local tax, type the
                  amount of the override.

Please note the following:
To prevent Evolution from changing the tax, you must enter an amount. If you
want no tax, you must enter 0.00. If left blank, Evolution calculates the tax.

Once a manual check is printed, it is frozen and cannot be altered. Prior to
printing, it can be altered up to the point of being processed.

Recalculating a manual check does not override the taxes. Recalculating gives
you a tentative total that you can then enter, modify, or reject.

> ➢   For certain taxes, if there is a minimum or
> maximum amount for the YTD total, and the manual
> tax violates it, Evolution either recalculates the tax

to meet the limit or it doesn't let you enter it. The Calculate Override Taxes field fixes this issue.

Calculate Override Taxes: *Default* Yes: calculates the tax amount. This may be different than what the user entered, depending on limits and/or shortfalls.

No: Uses the taxes entered on this tab, whether they are correct or not. For example, if the employee will reach their OASDI limit with $10 in taxes, but you enter $20 in taxes, Evolution still takes the $20, even though it puts the employee over their limit. The exception to this is if it is a live check and the taxes entered will make the check negative. If this is done, you will not be able to leave that check until you either change the taxes, or make the Calculate Override Taxes = Yes, which will make the taxes shortfall. A manual check can have a negative net amount.

Reciprocate SUI: Yes: The employee is setup to reciprocate SUI with another state.
No: The employee does not reciprocate SUI.

Prorate FICA

Enter the total FICA amount in the OASDI field, and then click the **Prorate FICA** button. The system will calculate and then apply the correct amounts to the **OASDI** and **Medicare** fields. This can be done on setup runs, backdated setup runs, and regular payroll types.

Functions
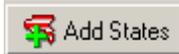
Add States

Click this button to add state taxes to the check that may not already be displayed. This will only show states that are set up on the employee.

Add Locals

To override, click this button to add local taxes to the check that may not already be displayed. This will only show locals that are set up on the employee.

407

General tab

This tab allows you to block various scheduled earnings and deductions on individual employee checks. To save yourself from making the following changes for each check, you can create a check template that makes the appropriate blocks.

> ➢ E/D code types are not the same as E/D codes. E/D codes are based on E/D code types.

Block Direct Deposit: *Defaults to No.*
Yes: Blocks all deductions based on the E/D code type of D1.
No: Applies D1-type deductions normally.

Block DD Except Net: *Defaults to No.*
Yes: Blocks all deductions based on E/D Code types of D1, except for scheduled E/D's that have **Deduct Whole Check** set to Yes on the **Details 1** tab of the **Employee-Scheduled E/Ds** window.
No: Applies D1-type deductions normally.

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Block Time Off Accrual: *Defaults to No.*
All: Blocks accruals on all hourly based time
off accrual and blocks usage on all accruals.
Accrual: Blocks hourly based time off from
accruing, but still records time taken.
No: Allows all time off to accrue and show
taken amounts.

Block Auto Distribution: *Defaults to No*
Yes: Blocks the automatic distribution of
labor.
No: Performs the automatic distribution of
labor normally.

Block Sched E/Ds except DD: *Defaults to No*
Yes: Blocks all scheduled E/Ds, except for
scheduled E/Ds based on the E/D code type
of D1.
No: Applies scheduled E/Ds to the check
normally.

Block Sched E/Ds
except Pensions: *Defaults to No*
                                      Yes: Blocks all scheduled E/Ds, except
                                      for pension scheduled E/Ds.
                                      No: Applies scheduled E/Ds to the check
                                      normally.

Block Sched E/Ds from Agency: *Defaults to No.*
                                      Yes: Blocks scheduled E/Ds from being
                                      applied to agency checks.
                                      No: Applies scheduled E/Ds to agency
                                      checks normally.

945 Check: Select the type of special check:
                                      - None
                                      - 945
                                      - 943
                                      - Guam
                                      - Virgin Islands
                                      - Puerto Rico

Current Check Comments: Type the comments you want to appear on

the check stub. These comments add to the comments entered in the **Payroll Check Comments** box on the **Payroll** tab of the **Payroll-Payroll** window.

Functions

Create New Check

Clicking this button will launch the Payroll Expert to help you create a check for any employee.

Apply Check Template

Click this button to apply a check template to the check. You can set up check templates to apply blocks and defaults automatically for various types of checks. To apply a check template, perform the following:

- Click the **Apply Check Template** button.
- Evolution displays the Apply Template dialog box. Select the template you wish to apply.
- Click OK.

Refresh scheduled E/Ds

Reloads the default scheduled E/Ds for this check.

Create Next Check

Creates another regular check for this employee.

Void Next Check

Brings up the **Void Check** dialog box for this employee.

Create Manual Check

Creates a manual check for this employee.

413

Tax Overrides tab

This tab allows you to block or override taxes on the individual employee check.

Tax Frequency: To override the tax, select the frequency on which you want to base all taxes for this check.

Tax Supplemental Rate: *Defaults to No*
                               Yes: Uses tax supplemental rate from the system table.
                               No: Does not use the tax supplemental rate from the system table.

Federal Type: *Defaults to No.*
                               None: No overrides.
                               Regular Amount: Overrides the amount of federal taxes withheld with the amount in the **Federal Value** field.
                               Regular Percentage: Overrides the percentage used to withhold federal taxes with the percentage keyed the **Federal Value** field.
                               Additional Amount: Adds the amount in the **Federal Value** field to the federal taxes withheld.

Additional Percentage: Increase the percentage used to withhold federal taxes by the percentage keyed in the **Federal Value** field.

Federal Value: If a **Federal Type** other than **None** is selected, enter the amount or percent of the override.

Blocks

Federal: *Defaults to No*
Yes: Federal taxes are blocked from this check.
No: Federal taxes are applied normally to this check.

Additional Fed: *Defaults to No*
Yes: Additional federal taxes are blocked from this check.
No: Additional federal taxes are applied normally to this check.

EE OASDI: *Defaults to No*
Yes: Employee OASDI taxes are blocked from this check.
No: Employee OASDI taxes are applied normally to

this check.

ER OASDI: *Defaults to No*
                        Yes: Employer OASDI taxes are blocked from this
                        check.
                        No: Employer OASDI taxes are applied normally to
                        this check.

EE Medicare: *Defaults to No*
                        Yes: Employee Medicare taxes are blocked from
                        this check.
                        No: Employee Medicare taxes are applied normally
                        to this check.

ER Medicare: *Defaults to No*
                        Yes: Employer Medicare taxes are blocked from
                        this check.
                        No: Employer Medicare taxes are applied normally
                        to this check.

EE EIC: *Defaults to No*

Yes: Employee EIC taxes are blocked from this check.
No: Employee EIC taxes are applied normally to this check.

ER FUI: *Defaults to No*
Yes: Employer FUI taxes are blocked from this check.
No: Employer FUI taxes are applied normally to this check.

State overrides: Can be manipulated in the same manner as federal taxes as described above.

Local overrides: Can be manipulated in the same manner as federal taxes as described above.

Preview tab

The Preview tab displays a preview of the check. To ensure current data, click the Recalculate Check button. The example above displays the preview of a check after recalculating the check. As you can see, taxes have been applied.

Clicking the button after recalculating the check, Evolution will direct you to the Manual Tax tab, allowing you to adjust and/or apply tax overrides to the check.

Employee Notes tab

Type any notes regarding this employee that a data processor should be aware of while keying payroll. The notes are stored with the employee data. Any notes loaded in the **Payroll Notes** box of the **Notes** tab of the **Employee-Employee** window will post here by default. Employees with notes will appear as yellow line items on the **Quick Entry** screen. When deleting a note, be sure to delete all spaces.

Creating Additional Regular Checks

There are two methods for creating additional regular checks:

- Using the Create Next Check button
- Using the Payroll Expert

The two methods are similar, but using the **Payroll Expert** generally requires a few more steps. You can, however, use it from any tab on the **Payroll –Check** window. You can access the Payroll Expert by clicking the **Create New Record** button or ALT+Insert and by clicking the **Create New Check** button on the **General** tab of the **Payroll-Check** window. If you create a new check using the **Payroll Expert**, you may create a check for any active employee associated with the company. If you create a new check using the **Create Next Check** button, you may only create another check for the employee in which you are currently working. This document assumes that the **Payroll-Check** window is the starting point.

6/ 2/2006

Thomas English-Do Not Touch   #1 7/7/2006   3/16/2006 - 3/23/2006

100

32   Butler Rhett G   Regular   -99999263   1P   10.25 $0.00   Batch 3/16/2006-3/23/2006
Check 1 of 1

Check Lines | Manual Tax | General | Tax Overrides | Preview | Employee Notes

Block DD
○ Yes   ⦿ No

Block Sched E/Ds Except DD
○ Yes   ⦿ No

Block DD Except Net
○ Yes   ⦿ No

Block Sched E/Ds Except Pension
○ Yes   ⦿ No

Block Time Off Accrual
○ All   ⦿ No
○ Accrual

Block Scheduled E/Ds From Agency
○ Yes   ⦿ No

Block Auto Distribution
○ Yes   ⦿ No

945 Check
None

Current Check Comments

Create New Check

Apply Check Template

Refresh scheduled E/Ds

Create Next Check

Void Next Check

Create Manual Check

Help
Exit

Batch   Recalculate Check   Quick Entry

View   Task Queue: 2 Total; 2 Finished   UserID: remotetrain   Recd: 2.53M 9.0M/sec Sent:27.33K

Using the Create Next Check Button

To create an additional regular check from any tab on the **Payroll-Check** window, do the following:

1. Click the **General** tab.

2. Click the **Create Next Check** button or press CTRL+n.

3. Evolution displays the Create Next Check dialog box.
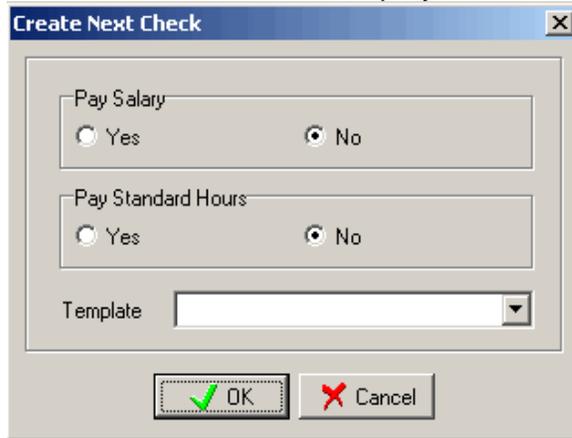
Specify the following:

Pay Salary: Yes: Pays salary on the check by applying the salary entered in the **Salary** field on the **Employee EE Entry tab**.
No: Does not pay the salary on the check.

Pay Standard Hours: Yes: Pays standard hours on the check by applying the regular hours entered in the **Standard Hours** field on the **Employee EE Entry tab**.
No: Does not pay the standard hours on the check.

Template: If applicable, select a check template on which to base the check.

4. Click OK.

5. Evolution displays the created check. Specify any other information for the check, as necessary.

Creating a Manual Check

There are three methods for creating manual checks:

- Using the Create Manual Check button
- Using the Payroll Expert
- Creating Multiple Manual Checks

The methods are similar, but using the **Payroll Expert** generally requires a few more steps. You can, however, use it from any tab on the **Payroll –Check** window. You can access the Payroll Expert by clicking the **Create New Record** button or ALT+Insert. The **Create Manual Check** button is located on the **General** tab of the **Payroll-Check** window. This document assumes that the **Payroll-Check** window is the starting point.

Admin
Client
Company
Employee
Payroll
Reports
Misc

6/ 5/2006

Thomas English-Do Not Touch   #1 7/21/2006   3/30/2006 - 4/6/2006
100

Regular   -99999251   1P   10.25 $0.00   Batch 3/30/2006-4/6/2006
Check 1 of 1

Check Lines | Manual Tax | General | Tax Overrides | Preview | Employee Notes

Block DD
○ Yes   ● No

Block Sched E/Ds Except DD
○ Yes   ● No

Block DD Except Net
○ Yes   ● No

Block Sched E/Ds Except Pension
○ Yes   ● No

Block Time Off Accrual
○ All   ● No
○ Accrual

Block Scheduled E/Ds From Agency
○ Yes   ● No

Block Auto Distribution
○ Yes   ● No

945 Check
None

Current Check Comments

Create New Check
Apply Check Template
Refresh scheduled E/Ds
Create Next Check
Void Next Check
Create Manual Check

Help
Exit

Batch   Recalculate Check   Quick Entry

View | Task Queue: 2 Total; 2 Finished | UserID: remotetrain | Recd: 1.44M 11.7M/sec   Sent:23.97K

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Using the Create Manual Check Button

To create an additional check from any tab on the Payroll-Check window, do the following:

1. Click the **General** tab.

2. Click the Create **Manual Check** button or press CTRL+m.

3. Evolution displays the Create Manual Check dialog box.

Create Manual Check ✕

Check Type

◉ Manual   ◯ Third Party

Check Number 1234

✓ OK   ✗ Cancel
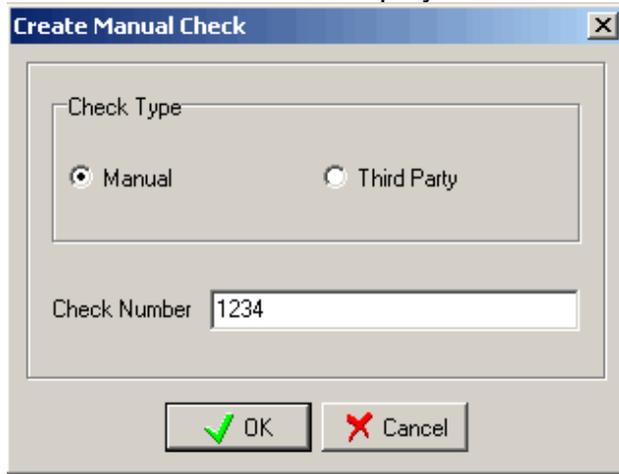
Specify the following:

Check Type: Select Manual.

Check Number: Type a check number for the check. If left blank the system will assign a check number.

4. Click OK.

5. Evolution displays the created check. Specify any other information for the check, as necessary.

Create Multiple Manual Checks
Create a batch and save it. Check the Select EE's from List box, in the Create Checks section, check the manual check box, and keep the Calculate Scheduled E/D's box marked.
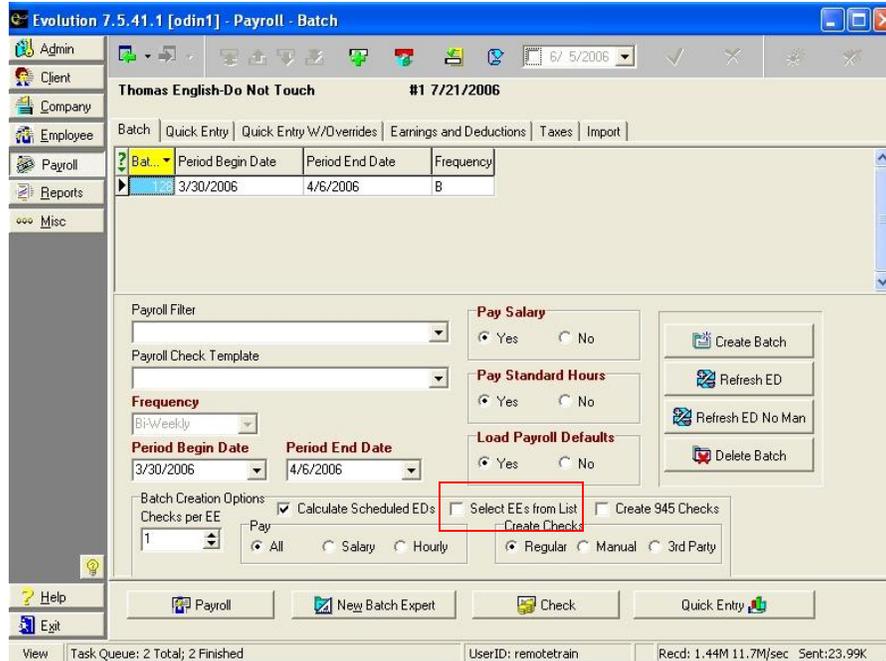
A dialog box will display with a list of EE's. Select the EE(s) you are creating manual checks for. Click OK.
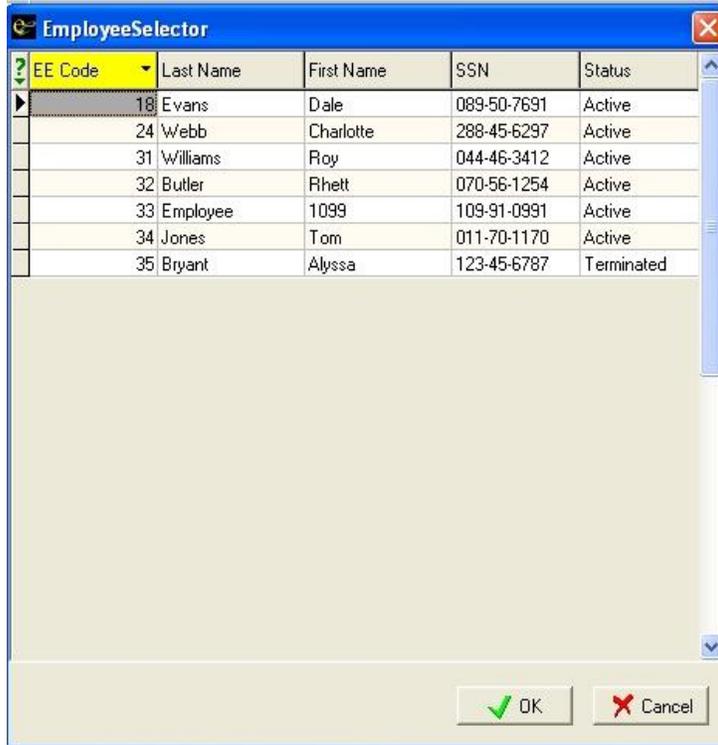
Go to the **Check Lines** tab and enter the values. Repeat for all checks.
Click Save. Check lines that are red cannot be altered. You must delete the line
and re-add it if a different amount is needed.

Modifying the Check

Once you have created the check, you may want to do the following

- To override taxes, click the **Manual Tax** or **Tax Overrides** tab. To block a tax, click the **Tax Overrides** tab and select Yes for each tax that you would like to block. Or, you can click the **Manual Tax** tab and enter a 0 (zero) to block a tax. Please be sure to set the Calculate Override Taxes flag to No. (If a field is blank, Evolution still calculates the tax.)

- Manual checks do not automatically calculate the Amount for each check line when hours are entered. To calculate the amount, type the Amount or press CTRL+F5.

- To refresh scheduled E/Ds on a manual check, click the **General** tab and click the **Refresh Scheduled E/D** button.

To verify that the check is calculated correctly, click the **Recalculate Check** Button or press SHIFT +ALT+U.

Creating 3rd Party Checks

There are two methods for creating third party checks:

- Using the Create Manual Check button (Third party checks are a type of manual check), in this case you could choose Third Party instead of Manual Check.
- Using the Payroll Expert

Voiding Checks

Evolution voids a check by doing the following:

- Creates a new record that negates the value of the voided check.
- Changes the status of the voided check to Void.
- Disables the voided check to protect the integrity of the data.

There are two methods for voiding checks:

- Using the Void Next Check button
- Using the Payroll Expert

The two methods are similar, but using the **Payroll Expert** generally requires a few more steps. The **Void Next Check button** is located on the **General tab** of the **Payroll Check** window.
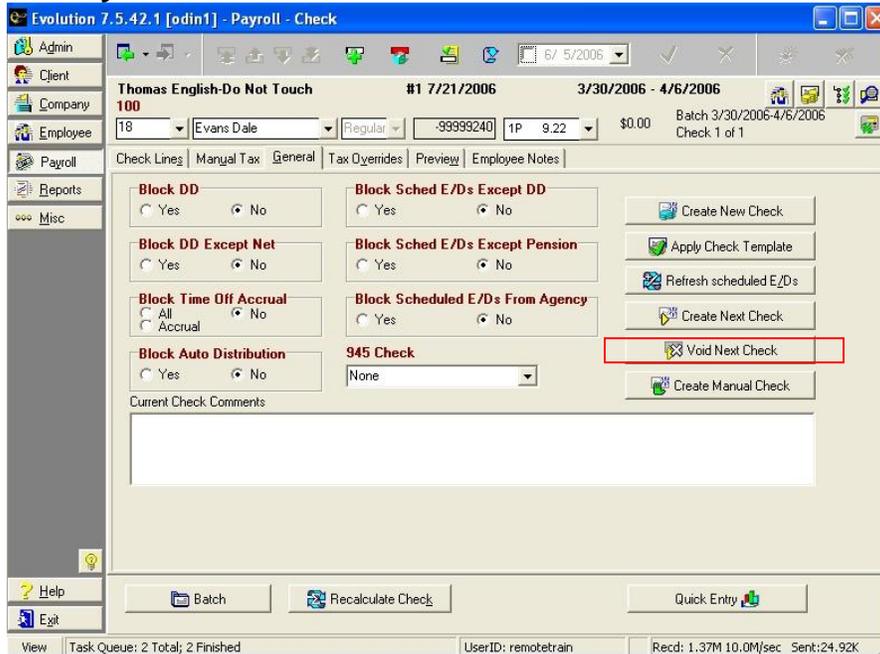
Using the Void Next Check Button
To void a check from any tab on the **Payroll-Check** window, do the following:

1. Click the **General** tab.

2. Click the **Void Next Check** button.

3. Evolution displays the **Check Finder**.

Specify the criteria to find the check to void.

- Employee Number defaults to the number of the employee of the check.
- The beginning and ending dates default to the current quarter.
- For more information, see **Check Finder**.

4. Click the **Filter** button.

5. The **Check Finder** displays a list of checks that meet the criteria. Select the check and click OK.

6. Evolution displays the voided check.

Using the Payroll Expert
To use the Payroll Expert to void a check, do the following:

1. Start the **Payroll Expert** by using either one of the following:

   - From any tab of the **Payroll -Check** window, click the

Create Record button. Evolution displays the **Payroll Expert.**

- On the **General** tab of the **Payroll-Check** window, click the **Create New Check** button.

1. Evolution displays the **Payroll Expert** and asks you what type of check you would like to create.

Payroll Expert

Please, choose check type.

Void ▼

Next ▶

Select Void.

2. Evolution displays the **Check Finder**. Enter the search Criteria for locating the check you want to void and click the Filter button.

3.   Evolution displays a list of checks that match the criteria. Select the check you want to void and click OK.

Check Finder dialog box showing:

Begin Check Date	End Check Date	Run #	Check Serial #	EE Code
7/ 1/2006	9/30/2006			18

Filter | Show | OK | Cancel

Check Date	Run #	Employee #	Employee Name	Check Number	Gross	Net	Status
2/3/2006	1	18	Dale Evans	-99999530	737.60	0.00	Outstanding
3/31/2006	2	18	Dale Evans	-99999359	737.60	0.00	Outstanding

➢   The check must be in the current year to be able to void it. If the check is from current year but not the current quarter, Evolution warns you.

4.   Evolution voids the check by doing the following:

- Creates a new record that negates the value of the voided check.

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- Changes the status of the voided check to Void.
- Disables the voided check to protect the integrity of the data.

5. Once Evolution has voided the check, it displays the void record.

➢ Until the payroll is processed, you can change the status of the check from Void (by deleting the record that voids the check). Once the payroll is processed, the status of the check is locked.

6. If appropriate click the Post Changes ![checkmark button] button to save the changes to local memory.

7. If Evolution hasn't committed the changes to the database, click the Commit Changes ![commit button] button.

Miscellaneous
Using the Keyboard to Navigate
There are some shortcuts for using the keyboard to navigate the list of payroll checks:

To move the arrow to the next column in a check, press Enter or the Right Arrow (From the last column, you move to the first column in the next row.) To move to the next check, press the Down Arrow key. (If it is the last row, Evolution creates a new check.)

Adding Columns
To add a column to the list, right-click the list, click Add, and click the column you would like to add.

Deleting Columns
To delete a column in the list, right click the list, click Delete, and click the column you would like to delete.

Viewing the Check Detail
Detail data for the check is displayed on the **Payroll-Check** window. To view the detailed data for the check, do any of the following:

- Double-click the check.
- Select the check and click the Check button.
- Select the check and press CTRL+ENTER.

Adding Checks
You can add checks to the batch, but only regular checks. To add a check, do any of the following:

- Click the last check in the list and press the Down Arrow key.

- Click the last column of the last check and press ENTER.

➢ Because this is the **Payroll-Batch** window, clicking the **Create Record** button creates a new batch.

Deleting Checks

- To delete a check, select the check and press Delete.

➢ Because this is the **Payroll-Batch** window, clicking the **Delete Record** button deletes the batch.

Adding a Check Line

To add a check line, do any of the following:

- Click the list and press INSERT.
- Click the last check in the list and press the Down Arrow.
- Click the last column of the last check line and press ENTER.

➢ Because this is the **Payroll-Check** window, clicking the **Create Record button** creates a new check.

Preview ALD (F6) Button

To display a preview of the auto labor distribution for the check, click the Preview ALD (F6) button or press F6.

To use auto labor distribution, it must be set up on the employee.

YTD (F3) Button

To display YTD data, click the YTD (F3) button or press F3.

Reports-Run Reports Window

On this window, you can select reports for printing as needed. You may print reports that are scheduled to run with payrolls or miscellaneous reports to view using a customized timetable and various other parameters. Any parameters selected here will only be applied one time. After the report is run or the user leaves the screen, the parameters will default back to what is set as default parameters on the **Set Up Reports** window.

Browse Tab

The Browse tab lists the companies and their reports.

Open Company button: Opens the selected company.

Set Up Reports button: Displays the **Browse** tab of the **Reports-Set Up Reports** window.

Company Pane
Number: The number used to identify the company.

Name: The name of the company.

Status: The status of the company.

Select Check Boxes
button: When the user clicks on the button, the following options will be displayed:
- Select All
- Unselect All
- Reverse Selection

Report Name: The name of the report.

Click on the checkbox next to the report you want to run. Then click on the **Report Parameters** tab to specify the details of the report, such as check date.

Report Parameters Tab

This tab allows the user to specify the report parameters for the reports selected on the **Browse** tab of the **Reports-Run Reports** window. The parameters for a report vary depending on the type of report being specified and on the individual report itself. For example, payroll reports have different types of parameters than employee reports. In addition, individual reports may have parameters unique to them. For example, some employee reports may include pay rate parameters while others do not.

Payrolls Tab

Check Date	Run #	Processed	Status	Type
3/31/2006	1	2/17/2006 8:42:30 AM	P	T
3/17/2006	1		W	R
3/3/2006	1		W	R
2/17/2006	2	2/17/2006 8:47:29 AM	P	A
2/17/2006	1	2/2/2006 10:44:13 AM	P	R
2/15/2006	1	2/15/2006 6:01:14 PM	P	D
2/3/2006	1	2/2/2006 10:44:48 AM	P	R
2/2/2006	1	2/2/2006 3:40:54 PM	P	D
1/25/2006	1	1/25/2006 7:00:07 PM	P	D

Check Date Period
Year: 2006
☑ 1st Quarter ☑ 3rd Quarter
☑ 2nd Quarter ☑ 4th Quarter
From: 1/ 1/2006   To 12/31/2006

Select Payrolls for
☐ 1st Quarter ☐ 3rd Quarter
☐ 2nd Quarter ☐ 4th Quarter
☐ Year
☐ Show Processed Only   ☐ Consolidation

Tabs: Payrolls | Misc | Employee Filter | DBDT Filter

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The Payrolls tab allows you to select the payrolls to include in a report.

Check Date Period Section
These options set the parameters for the payrolls to be displayed in the Payrolls browse grid from which you can select the payrolls to include in the report.

Year: The year for the check date period.

Quarter 1 check box: Displays the payrolls from the first quarter of the
                               Year.

Quarter 2 check box: Displays the payrolls from the second quarter of the
                               Year.

Quarter 3 check box: Displays the payrolls from the third quarter of the
                               Year.

Quarter 4 check box: Displays the payrolls from the fourth quarter of the
                               Year.

From: The beginning date for the check date period used

to customize a date range.

To: The ending date for the check date period used to
                             customize a date range.

Select Payrolls for Section
These options specify which payrolls to include in the report. They will display
and select the range specified.

Year: Displays and selects all payrolls for the year.

Quarter 1 check box: Displays and selects all the payrolls from the first
                             quarter of the Year.

Quarter 2 check box: Displays and selects all the payrolls from the
                             second quarter of the Year.

Quarter 3 check box: Displays and selects all the payrolls from the third
                             quarter of the Year.

Quarter 4 check box: Displays and selects all the payrolls from the fourth
                             quarter of the Year.

Show Processed Only: Select this check box to display only processed payrolls.

Consolidation: Selected: Consolidates the reporting under the company. When selected, new payroll dates appear. These are the payroll dates from all of the consolidated companies. To distinguish between companies, look at the Run #. The main company keeps the original run number, such as 1. The first secondary company will have 100 added to the run number, so its run 1 becomes run 101. The next company has 200 added to its run number; its run 1 would become 201. If that company had a run 2, it becomes run 202. Select your dates as you normally would. After you run the report, the word *Consolidated* appears in the upper-left corner of that report.

Cleared: Does not consolidate the reporting. Reports are generated normally.

Payrolls Browse Grid
This grid displays a list of the payrolls to include in the report.

Select Check Boxes button: When the user clicks on the button,
the following options will be displayed:
- Select All
- Unselect All
- Reverse Selection

Check Date: The check date of the payroll.

Run #: The run number of the payroll.

➢ When the Consolidation check box is selected, Evolution modifies
the run numbers to distinguish amongst the payrolls of the
consolidated companies.

Processed: The date and time the payroll was
processed.

Status: The status the payroll is in.

Misc Tab

This tab allows you to override various parameters. The overrides on this tab vary based on the report selected. For a list of the Misc tabs for various reports, contact your customer service representative.

Grouping and Sorting
Generally, reports that list employees have sorting and grouping. You may choose to group on company and then sort on employee parameters. Generally, if you are listing employees and grouping, use Summary Detail. If you are running a report in summary that does not list employees, choose Summary.

Group Level: Select at what level to group the
                                                 report. Options:
- Company
- Division
- Branch
- Department
- Team

Group Type:

- Summary Detail: The groups in the report contain both

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summary totals and detailed information.

- Summary: The groups in the report contain only summary totals, but no detailed information.
- Detail: The groups in the report contain detailed information, but no summary totals.

Group Sort: Each group has a name and a code used to identify it. Select how to sort each group. Options:
- Group Code
- Group Name

Detail Sort: Select how to sort the details of the report. Options:
- Employee Last Name
- Employee SSN
- Employee Code

Page Break After Each Group: Selected: Insert a page break after each group.
Cleared: Does not include a page break after each group.

Show Terminated Employees: Selected: Includes data from terminated employees in the report.
Cleared: Excludes data from terminated employees from the report. Only data from active employees will be shown.

Mask Sensitive Information: Selected: Blocks the Social Security number from being displayed on the report by printing xxx-xx-xxxx in the place of the SSN.
Cleared: *Defaults.* Prints the Social Security Number (SSN) on the report.

Employee Filter tab

The **Employee Filter** tab allows you to include specific employees in the report.

When no employees are selected on this tab (all employee check boxes are cleared), the report will include all employees based on the previous selection on the "Show Terminated Employees" checkbox.

When one or more employees are selected on this tab, reports include only those selected employees.

Select Check Boxes button: When the user clicks on the button, the following options will be displayed:
- Select All
- Unselect All
- Reverse Selection

On the individual employee line item, when the employee check box is selected, the employee will be included in the report. When cleared, the employee will be excluded from the report.

➢ If all employee check boxes are cleared, Evolution includes all employees.

EE Code: The identifying number of the employee.

SSN: The Social Security Number of the employee.

First Name: The employee's first name.

Last Name: The employee's last name.

DBDT Filter tab

?⬚	Division	Division #	Branch	Branch #	Department	Department #
▶☐	Hide	1	Hide	1	Baker	100
☐	Hide	1	Hide	1	Decorator	200
☐	Hide	1	Hide	1	Delivery	300

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The **DBDT filter** tab allows you include specific division, branches, departments, and /or teams in the report.

When no divisions, branches, departments, and/ or teams are selected on this tab (all check boxes are cleared), reports include all divisions, branches, departments, and/or teams.

DBDT Level: The level of division, branch, department, or team to display.

Select Check Boxes: When the user clicks on the button, the following options will be displayed:
- Select All
- Unselect All
- Reverse Selection

On the individual DBDT line item, when the division, branch, department, and/or team check box is selected, the DBDT will be included in the report. When cleared, the DBDT will be excluded from the report.

➢   If all DBDT check boxes are cleared, Evolution includes all divisions, branches, departments and/or teams.

Division: The name of the division.

Division #:   The number (code) identifying the division.

Branch: The name of the branch.

Branch #:   The number (code) identifying the branch.

Department: The name of the department.

Department #:   The number (code) identifying the department.

Team: The name of the team.

Team #:   The number (code) identifying the team.

This section describes some commonly used parameters.

Override default parameters as: Displays the type of report parameters to override. When more than one report is selected on the **Browse** tab and they have different parameters (a payroll and an employee report, for instance), you need to tell Evolution which set of report parameters you want to override.

Restore Defaults: Restores the filters to the default parameters specified in the report.

Print/Preview drop down box: Print: Sends the report to the printer Preview: Previews the report on the workstation. After previewing the report, you may either choose to save or print the report. Previewing the reports gives you the option to print out only certain pages of the selected report(s).

Run through the Queue checkbox: Selected: Evolution submits the report to the server to be processed. Therefore, you

may perform other tasks in Evolution while it is being processed. When completed, it displays it in the your **Task Queue** window.

Cleared: Evolution processes the report locally. Therefore, you may not perform other tasks in Evolution while it is being processed. When completed, it is displayed immediately on your workstation.

Run Reports button: Runs the selected report(s).

Reports- Set up Reports Window

On this window, you set up reports for companies. You may set up reports that are scheduled to run with payrolls or miscellaneous reports to view using a customized timetable and various other parameters. You may also create default parameters for each report.

Browse Tab
This tab lists the companies and their reports.

Open Company button opens the selected company.

Company Pane

Number: The number used to identify the company.

Name: The name of the company.

Status: The status of the company.

Reports Pane

Report Print Name: The name of the report. It also includes the
                                 identifying number of the report in parentheses.

Report Description: Displays details regarding the selected report.

Report Print Priority: Displays the priority assigned to each report. The lower the number, the higher the priority of the report; therefore, reports with lower priority numbers assigned will print first.

Details Tab

Report: Select the report name as it appears in the list of service bureau or client reports.

Report Browse button: Displays the Choose Report Dialog, which helps you select a report.

Report Print Name: The name of the Report as it appears on the company reports list. You may customize this report name by company should you so choose.

Notes (not labeled):   Notes regarding the selected report, usually including specific instructions regarding running the selected report. These notes may only be updated

through Report Writer Designer.

Payroll Processing Print Settings
Print Frequency:

- Every Pay: Performs the action with every payroll.

- Every Scheduled Pay: Performs the action with each scheduled payroll.

- Monthly: Performs the action monthly. Also select a Week Number to specify when during the month.

- Quarterly: Performs the action quarterly. Also, select a Month Number and a Week Number to specify when during the quarter.

- Semi-Annually: Performs the action semi-annually. Also, select a Month Number and Week Number to specify when during the half year.

- Annually: Performs the action annually. Also, select a Month Number and a Week Number to specify when during the year.

- Run Once: Set up a report with a frequency of Run Once with the number of copies set to 1, the report will print with the next payroll then Evolution changes the number of copies to 0, thus preventing the report from running with other payrolls.

Month Number: If the frequency is Quarterly, Semi-Annual, or Annual, select month in those frequencies that you wish the action to be performed. For example, if a report has a frequency of Quarterly and you select a Month Number of 2, the report will print in February, May, August, and November.

➢ You must also select a Week Number to specify exactly when the report should print during the month.

➢ If selecting Monthly, Quarterly, Semi-Annually, or Annual frequencies, and you would like to see amounts for the entire period, you need to check the **Summarize** check box. If you do not check this box, the report will only show amounts associated with the payroll for which it was run not the entire time period.

Week Number:

If the frequency is monthly, quarterly, semi-annually, or annually, select the week in the chosen month to run the report. Options are:

- First Scheduled of the Month: Performs the action with the first scheduled payroll of the month.
- Last scheduled of the Month: Performs the action with the last scheduled payroll of the month.
- Closest to the 15th of the Month: Performs the action with the scheduled payroll that is closest to the 15th of the month. If the 15th of the month falls directly between

two payrolls, the report will print with the first payroll.

Priority to Print: Select the priority for printing. For example, if you select 2, Evolution prints this report in the second group of reports. With that group, Evolution prints the reports alphabetically, if there is more than one report in that group.

Number of Copies: The number of copies to print.

Summarize check box: When selected, includes all the data for the Print Frequency selected. When cleared, includes data only for a specific payroll.

Duplexing check box: When selected, instructs the printer to duplex the report. When cleared, instructs the printer to print the report single sided.

Output ASCII file name: If this report should be saved to a file, enter the complete file name and path of the output file.

Add to Existing File
check box: When selected, Evolution adds a plus sign (+)
                                    to the end of the file path entered for the output
                                    ASCII file name. It is this plus sign (+) that tells
                                    Evolution to append to the file. You can also
                                    type the plus sign (+) yourself. If the plus sign
                                    (+) is not added to the file path entered in the
                                    output **ASCII file name**, Evolution overwrites
                                    the existing file with the report data. When
                                    cleared, Evolution creates a new file. If a file
                                    already exists, Evolution overwrites it.

Report Parameters button: Displays the **Report Parameters** dialog box.
                                    All parameters set at this point will become
                                    default parameters when running this report.
                                    See Report Parameters Dialog Box for more
                                    information.

Go to Run Reports button: Displays the **Browse** tab of the **Reports-Run
                                    Reports** window.

Report Parameters Dialog Box
This dialog allows the user to specify the default report parameters for the reports selected on the **Details** tab of the **Reports-Set Up Reports** window. The parameters for a report vary depending on the type of report being specified and on the individual report itself. For example, payroll reports have different types of parameters than employee reports. In addition, individual reports may have parameters unique to them. For example, some employee reports may include pay rate parameters while others do not.

This section describes some commonly used parameters.

Tabs
The **Report Parameters** dialog box allows you to customize the parameters of the selected report. You may do so using the options on the following tabs:

Misc tab

This tab allows you to override various parameters. The overrides on this tab vary based on the report selected. For a list of the **Misc** tab parameters for various reports, contact your customer service representative.

Grouping and Sorting
Generally, reports that list employees have sorting and grouping. You may choose to group on company and then sort on employee parameters. Generally, if you are listing employees and grouping, use Summary Detail. If you are running a report in summary that does not list employees, choose Summary.

Group Level: Select the appropriate level to group the report. Options:
- Company
- Division
- Branch
- Department
- Team

Group Type: Summary Detail: The groups in the report contain both summary totals and detailed information.

	Summary: The groups in the report contain only summary totals, but no detailed information.
	Detail: The groups in the report contain detailed information, but no summary totals.
Group Sort:	Each group has a name and a code used to identify it. Select how to sort each group.
	Options:

- Group Code
- Group Name

Detail Sort:	Select how to sort the details of the report.
	Options:

- Employee Last Name
- Employee SSN
- Employee Code

Page Break After Each Group:	Selected: Insert a page break after each group.
	Cleared: Does not include a page break after each group.

Show Terminated Employees: Selected: Includes data from terminated employees in the report.
Cleared: Excludes data from terminated employees from the report.

Mask Sensitive Information: Selected: Blocks the Social Security number from being displayed on the report by printing xxx-xx-xxxx in the place of the SSN.
Cleared: *Defaults.* Prints the Social Security Number (SSN) on the report.

Show only Summary for
Multiple check dates: Applies only to payrolls with a frequency of monthly, quarterly, semi-annual or annual. Evolution includes all payrolls in the frequency period of the payroll.

Show Home DBDT for
Each employee: Displays the home D/B/D/T for the employee.

Include Memos in Totals: Displays the amounts on the report and

includes them in the company totals.

Include Taxable Memos
in Totals: Displays the amounts on the report and
includes them in the company totals.

Include Pieces from
Piecework Table: Includes pieces in the totals.

Break Employees between
Pages: Inserts a page break between each
employee's data.

Employee Filter tab

?	☑	EE Code ▼	SSN	First Name	Last Name
▶ ☐		1	056-56-5620	Sara	Lee
☐		2	111-22-3333	Thomas	Jemima
☐		3	088-99-6547	Angel	Butterworth
☐		4	007-14-7410	April	Pearson
☐		5	125-42-5142	June	Kelley
☐		6	110-32-0320	May	West
☐		7	001-21-2453	July	South
☐		8	145-21-3620	March	East
☐		9	002-44-4444	Marjorie	Adams
☐		10	102-10-2101	Ernie	Bert
☐		11	104-41-4141	Earl E.	Riser
☐		12	125-12-5125	Mister	Goodbar
☐		13	111-44-5245	Sarah	Therrien
☐		14	102-45-9696	Apple	McIntosh
☐		15	066-15-1456	Francis Scott	King
☐		16	102-42-4210	Mary	Campbell
☐		17	131-32-1321	Gary	North
☐		18	089-50-7691	Dale	Evans

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The **Employee Filter** tab allows you to include specific employees in the report.

When no employees are selected on this tab (all employee check boxes are cleared), reports will include all employees.

When one or more employees are selected on this tab, reports include only those selected employees.

The Select Check Boxes button: When the user clicks on the button, the following options will be displayed:
- Select All
- Unselect All
- Reverse Selection

EE Code: The identifying number of the employee.

SSN: The Social Security Number of the employee.

First Name: The employee's first name.

Last Name: The employee's last name.

DBDT Filter tab

? ⊞	Division	Division #	Branch	Branch #	Department	Department #
▶□	Hide	1	Hide	1	Baker	100
□	Hide	1	Hide	1	Decorator	200
□	Hide	1	Hide	1	Delivery	300

DBDT Level: Department

Misc | Employee Filter | DBDT Filter

OK   Cancel

The **DBDT Filter** tab allows you include specific division, branches, departments, and /or teams in the report.

When no divisions, branches, departments, and/ or teams are selected on this tab (all check boxes are cleared), reports include all divisions, branches, departments, and/or teams.

DBDT Level: The level of division, branch, department, or team to display.

Filter button :   The filter button that may be used to narrow DBDT selection options.

Select Check Boxes button: When the user clicks on the button, the following options will be displayed:
- Select All
- Unselect All
- Reverse Selection

On the individual DBDT line item, when the division, branch, department, and/or team check box is selected, the DBDT will be

included in the report. When cleared, the DBDT will be excluded from the report. Note: If all DBDT check boxes are cleared, Evolution includes all divisions, branches, departments and/or teams.

Division: The name of the division.

Division #:   The number (code) identifying the division.

Branch: The name of the branch.

Branch #:   The number (code) identifying the branch.

Department: The name of the department.

Department #:   The number (code) identifying the department.

Team: The name of the team.

Team #:   The number (code) identifying the team.

Setting Up Company Reports

This Section describes how to set up reports for a company. To add a report to a company, do the following:

1. Click **Reports** and then click **Set Up Reports**.

2. Evolution displays the **Browse** tab. If the company is not open, click the **Open Company** button.

3. Click the **Details** tab.

4. Click the **Create Record** button to add a report.

5. Evolution creates a new report. Specify the information for the report. For more information, see the **Reports-Set Up Reports** window section.

6. Click the **Post Changes** button to save the changes to local memory.

7. Click the **Commit Changes** button to commit the changes to the database.

Running Company Reports

This section describes how to run company reports.

For more information, see **Reports- Run Reports** window.

To run one or more reports for a company, perform the following steps:

1. Click **Reports** and then click **Run Reports**.

2. Evolution displays the **Browse** tab. If the company is not open, select the company and click the **Open Company** button.

3. Select the company from the list of companies (left pane) and then select one or more of the reports from the list of reports (right pane).

You must select at least one report before clicking the **Report Parameters** tab.

If the report is not in the list, then the report needs to be added to the company.

4.   Click the **Report Parameters** tab.

5.   Evolution displays the parameters of the reports.

The **Report Parameters** tab allows you to customize the parameters of the selected reports. Depending on the type of reports selected, there are four tabs on the **Report Parameters** tab.

- Payrolls
- Misc
- Employee Filter
- DBDT Filter

Evolution displays a tab only when it is appropriate for a selected report. It displays the **Misc** tab for all reports. The parameters displayed on the Misc tab also vary based on the selected report. For example, for a payroll report, Evolution would display all four tabs. In contrast, for an employee report, it might only display the **Misc, Employee Filter,** and **DBDT Filter** tabs.

If more than one report was selected and they have different parameters, select

the set of parameters to use in the Override Default parameters as check box.

6. To have Evolution produce a preview of the report(s), select Preview from the Print/Preview field (unlabelled).

7. If applicable, click the **Payrolls** tab and specify the payrolls to include in the report.

8. If applicable, click the **Misc** tab and specify any overrides of the miscellaneous parameters of the report.

9. If applicable, click the **Employee Filter** tab and override the employees to be included in the report.

10. If applicable, click the **DBDT Filter** tab and override the divisions, branches, departments, and/or teams included in the report.

11. To have Evolution process the report on the server (the Queue), select the Run through the Queue check box. Generally, select this option for large reports that would tie up your workstation.

12. Click the **Run Reports** button.

13.   Evolution processes the report.

- If the Run through the Queue check box was cleared, Evolution previews or prints the report.
- If the Run through the Queue was selected, click the **View** button to view the report.

Appending Report Data to ASCII Files
To configure a report to append its results to an ASCII file, perform the following steps:

1.   Click the **Reports** and then click **Set Up Reports**.
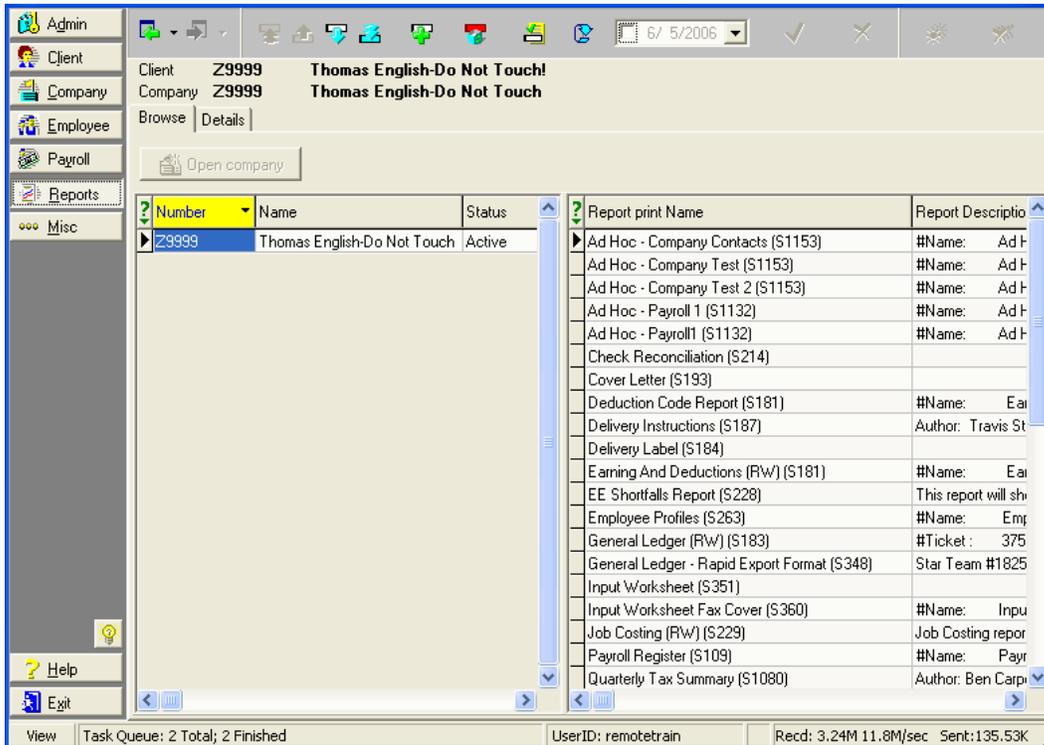
2.   Evolution displays the **Browse** tab. Select the company and click
      Open Company.

3.   Select the report and click the **Details** tab.
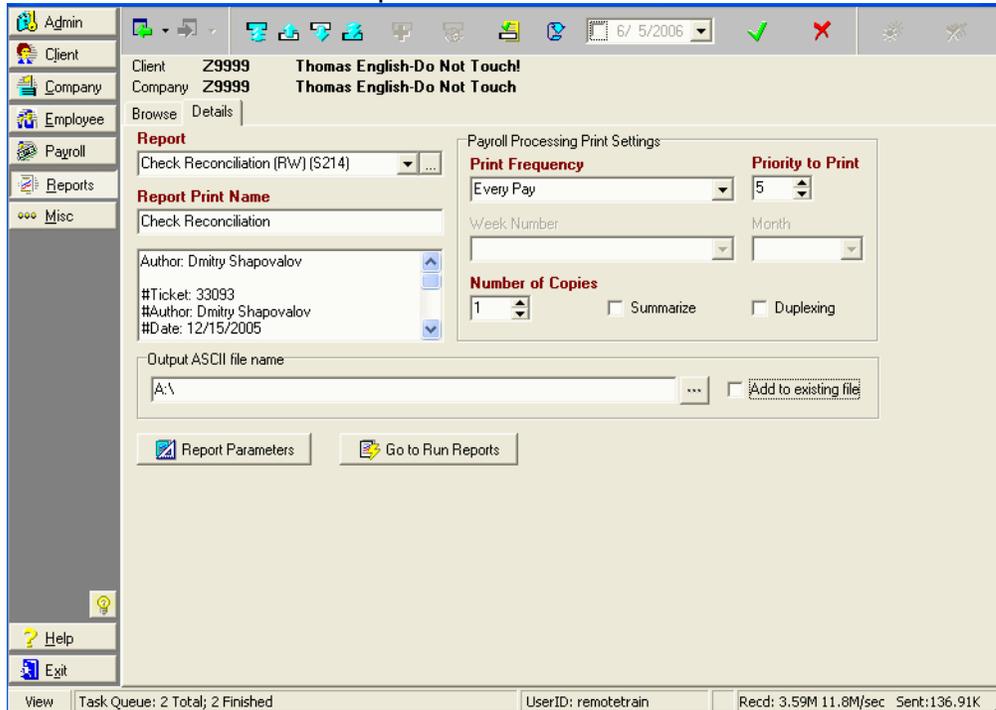
4.   On the **Details** tab, type the full path of the file name for the

report in the Output ASCII file name box. You can also click the **Browse** button to enter the path to the directory containing the report file and then add the name of the file to the directory path.

5.   To have Evolution append the report data to the ASCII file, select the Add to Existing file check box. Evolution adds a plus sign (+) to the end of the file path entered in the Output ASCII file name box. It is this plus sign (+) that tells Evolution to append the file. You can also type the plus sign (+) yourself.

WARNING: If the plus sign (+) is not added to the file path entered in the Output ASCII file name box, Evolution overwrites the existing file with the report data.

6.   Click the **Post Changes** button [✓] to save the changes to local memory.

7.   Click the **Commit Changes** button [✷] to commit the changes to the database.

Using the Certified Payroll Report

The Certified Payroll report is used to report to state or federal agencies that require reporting of payrolls for a project.

Setting up the Company

To be able to use the Certified Payroll, you need to ensure that the company is set up appropriately. For more information, contact your customer service representative.

Jobs

The Certified Payroll report compiles payroll data based on job code. To be able to run the report, do the following:

1. Click **Company**, point to **Miscellaneous**, and click **Jobs**. Evolution displays the **Browse** tab.

2. Click the **Details** tab.

3. Set up the jobs required for the Certified Payroll report.

4. For each job used in the report, ensure you do the following:

- If the job is a certified federal job, select Yes for Certified.
- If the job is a certified state job, select Yes for State Certified.

5. Click the **Post Changes** button .

6. Click the **Commit Changes** button .

Setting Up the Payroll
To be able to use the Certified Payroll report, payrolls need to be set up appropriately.

Batch
Because the Certified Payroll report shows the payroll for the week, you need to ensure that even if the Frequency is not weekly, that the period covered by the batch is only one week. To do so,

1. Click **Payroll**.

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2.	Click the **Payroll** tab.

3.	Select the payroll from the list of payrolls.

4.	Click the **Batch** button.

5.	Click the **Batch** tab.

6.	Ensure that the dates entered in the Period Begin Date and Period End Date do not span more than a week.

7.	Click the **Post Changes** button .

8.	Click the **Commit Changes** button .

Check Lines

To be able to run the Certified Payroll Report for a payroll, do the following:

1. Click **Payroll**.

2. Click the **Payroll** tab.

3. Select the payroll from the list of payrolls and Click the **Open Payroll** button.

4. Evolution opens the payroll. Click the **Checks** tab.

5. On the **Checks** tab, double-click a check from the list of checks.

6. Evolution displays the check in the **Check Lines** tab of the **Payroll-Check** window. On the **Check Lines** tab, do the following:

Select a Team.   This value is used to determine the work
                         classification in the report.

Select a Job.   The job is set up on the **Company- Miscellaneous-**

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Jobs-Browse tab.

Select a Line Item Date: Enter a date that is between the beginning and the ending date of the payroll.

Confirm the Rate of Pay: This report uses the Rate of Pay on the check line by default not the employee's primary rate.

7.   Click the **Post Changes** button .

8.   Click the **Commit Changes** button .

9.   To process another check, click the **Back** button and repeat steps 5 through 8.

Running the Certified Payroll Report
Once the company and batch are set up, you can run the report. To run the
Certified Payroll report,

     1.   Click **Reports** and then click **Run Reports**.

2.	Evolution displays the **Browse** tab. If the company is not open, select the company and click the **Open Company** button.

3.	Select the company and then select the Certified Payroll report from the list of reports. If the report is not on the list, the report needs to be added to the company.

4.	Click the **Report Parameters** tab.

5.	On the **Report Parameters** tab, select the payrolls to include in the report. For more information, s*ee the Running Company Reports and Reports-Run Reports window sections.*

Browse | Report Parameters

Override default parameters as

Certified Payroll Report (S518) [v]   [📊 Restore Defaults]

Print [v]
[v] Run through the Queue   [⚡ Run Report(s)]

Payrolls | Misc

Check Date Period

Year
2006 [v]

[v] 1st Quarter   [v] 3rd Quarter
[v] 2nd Quarter   [v] 4th Quarter

From 1/ 1/2006 [v]   To 12/31/2006 [v]

Select Payrolls for
[ ] 1st Quarter   [ ] 3rd Quarter
[ ] 2nd Quarter   [ ] 4th Quarter
[ ] Year

[ ] Show Processed Only   [ ] Consolidation

?	☑	Check Date ▲	Run # ▲	Processed	Status	Type
❯	☑	5/30/2006	1	4/26/2006 9:39:17 AM	P	R
	☐	5/23/2006	1	4/21/2006 11:02:52 ...	P	R
	☐	5/16/2006	1	4/21/2006 10:56:45 ...	P	R
	☐	5/9/2006	1	4/21/2006 10:38:32 ...	P	R
	☐	5/2/2006	1	4/21/2006 10:26:23 ...	P	R
	☐	4/25/2006	1	4/21/2006 10:22:12 ...	P	R
	☐	3/21/2006	1	2/21/2006 2:23:42 PM	P	R
	☐	3/7/2006	1	3/1/2006 12:51:48 PM	P	R
	☐	2/28/2006	1	2/16/2006 7:46:08 AM	P	R
	☐	2/21/2006	2	2/15/2006 4:06:43 PM	P	R
	☐	2/21/2006	1	2/15/2006 2:40:42 PM	P	R

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6. Click the **Misc** tab.

7.   There are two optional columns on the Certified Payroll Report. You can include information from an E/D group in each column.

To include optional information in the first optional column, select E/D Group #1.

To include optional information in the second optional column, select E/D Group #2.

8.   To prevent printing the employees' names and addresses on the Certified Payroll report, select the **Don't print Employee's name and address** check box. You may also choose to group the report by a user-defined number of job description symbols. If you so choose, enter the number of symbols in the Group…field.

9.   Because of the length and complexity of the report, it should generally be submitted to the task Queue for processing. To run the report locally, which ties up the workstation, clear the Run through the Queue check box.

10.   Click the **Run Reports** button .
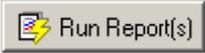
11.   Evolution processes the report.

If the Run through the Queue check box was cleared, Evolution previews or prints the report.

If the Run through the Queue check box was selected, click the View button to view the report. For more information, see *Monitoring the Task Queue.*

Previewing Reports

Evolution allows you to preview a report before printing it. You can also use the utility RWPreview.exe to preview reports outside of Evolution.

Displaying a Report Preview

To open a report preview, do the following:

1.   Click the **Open** from file button.

2.   Evolution asks you which file to open. Locate the report preview and click the **Open** button. Evolution displays the report preview.

Adjusting Display Size

You can adjust the display size of the report preview:

To display a page of the report at its true size, click the **True Size** button .

To display the report preview so that you won't need to scroll from side to side or from top to bottom to view an entire page of a report, click the **Fit to Window** button .

To display the report preview so that you won't need to scroll from side to side to view the entire width of a report page, click the **Fit to Width** button .

Navigating the Report Preview

To navigate the report, use the following buttons:

Click this button to display the first page of the report preview

Click this button to display the previous page of the report preview.

Click this button to display the next page of the report preview.

Click this button to display the last page of the report preview.

Printing Report Previews
You can print report previews. You can do so either with one click, or by first setting the printer properties and then printing the report preview.

To print a report preview with one click, click the Quick Print button . Evolution prints the report preview using the current settings for printer properties.

To set the printer properties and then print the report preview, click the **Printer Properties** button . Once you have set printer properties, print the document by clicking the Print button (this may be an OK, or other button on your PC).

Marking Up Report Previews
You can mark up a report preview to aid review by another party. For example, the Company Totals amount has been marked up in the report shown below.

D06	401k	
Totals for D06		25.00

D10	Union Dues	
Totals for D10		65.00

E01	Salary	
Totals for E01		5000.00

E02	Regular	
Totals for E02		3746.35

M06	Pension Match	
Totals for M06		3.13
Company Totals		11888.24

If there were an issue with the report data, you could mark up the line, save the report to file, and then file the electronic copy of the report preview or email it to someone to review.

To add a marking to a report preview, do the following:

1. Click the **Marking On/Off** button .

2.   Evolution is now in Marking mode. On the report preview, click and drag the cursor where you want the marking.

3.   Evolution asks if you want to include a note for the marking. To add a note, type the note in the Text for the mark box and click OK. To view the note, double-click the marking. The note does not appear when you print the report.

4.   Evolution draws the oval. To delete the marking, click the **Delete Last Marking** button. To add another marking, repeat steps 2 and 3.

Saving a Report Preview
To save a report preview, do the following:

1. With the report preview open, click the **Save to File** button .

2. Type a File name, select a location and click the save button. Evolution saves the report preview.

Technical Support
Installing Evolution on a Remote Workstation

To install Evolution on a remote client's workstation, perform the following steps:

1. Copy or download the EvoRMT.exe installer to the remote computer.
2. Run EvoRMT.exe to install Evolution.

Troubleshooting Printing

Reports don't print properly on inkjet printers:
Most reports are written to fit on a laser printer page. Ink Jets have a smaller printable page.

Glossary

1099R: Form 1099R

ABA Number: A routing number assigned by the American Bankers Association. See http://www.aba.com/products/ps98_routing.htm

ACH: Automated Clearing House. A network for making interbank electronic fund (ACH) transfers. For more information, see the Federal Reserve's web site at http://www.frbservices.org/ach/franch.cfm or the NACHA's web site at http://www.nacha.org/About/what_is_ach.htm

As-Of Date: No longer used. See Effective Date.

Auto Labor Distribution: When employees work for a company and hold more than one position in the company, each employee's earnings, deductions and taxes can be distributed across the employee's various job roles. With auto-labor distribution, Evolution automatically distributes time amongst locations that are the same for each pay period for an employee.

Backdated Setup Payroll: A regular payroll that can be backdated so that you can date the payroll prior to the company being converted to Evolution.

Batch: Payrolls are divided into one or more batches to allow different users to key different parts of the payroll or to included employees with different pay frequencies, but have the same check date. The batch houses the pay period begin and end dates for a particular check date.

Block: An employee is subject to tax, but the tax is not withheld.

Check Template: You use check templates when you have a defined type of a check that you use regularly, such as a bonus or vacation check. You can create a template that predefines the attributes of the check, such as how the check is taxed and what is blocked. Then you can just select the template and attach it to a batch of checks or an individual employee check.

Client Correction Payroll: A payroll used to correct another payroll because of a client initiated change.

Common Paymaster: An umbrella of companies that are related enough that they can combine wages to reduce their unemployment, OASDI, and Medicare taxes. For more information, refer to the IRS.

Consolidated Client: A client with multiple companies with multiple taxpayer

identification numbers.

Conversion: The process of transferring a new client's payroll data from another Service Bureau or another payroll system to Evolution.

Creation Date: The date a record in the database was created. Each time you change data, Evolution creates a new record to record the change.

CSR: Customer Service Representative. The person responsible for the handling of client accounts.

E/D: Earnings and Deductions. Earnings define an employee's pay. Deductions are amounts subtracted from an employee's gross pay to attain net pay. Taxable Memos add to taxable wages but are not included in the gross-to-net calculation. Also referred to as E/D Code. A user-defined code used to identify an E/D.

E/D Code Type: A code defined by Evolution that classifies an E/D and controls its behavior.

E/D Group: An E/D group consists of various E/Ds. E/D groups are used to group related E/Ds, such as regular, overtime, and other such earnings for

calculations and reporting purposes. E/D groups may be attached to another E/D, such as pensions, garnishments, and child supports that require the earnings and/or deductions be considered together.

EE: Employee. One employed by another, usually for wages or salary and in a position below the executive level. *[Source: Merriam Webster]*

Effective Date: The date a changed record in the database takes effect. Effective Dates replaced As-Of Dates. For more information, see Understanding Effective Dates.

EFT: Electronic funds transfer. "Any transfer of funds initiated through an (EFT) electronic terminal, telephone, computer, or magnetic tape. The term includes, but is not limited to, Automated Clearing House (ACH) transfers Fedwire transfers, and transfers made at automated teller machines and point-of –sale terminals. For purposes of 31 CFR Part 208, the term 'electronic funds transfer' also applies to credit card payments." *[Source: FMS]*

EFTPS: Electronic Federal Tax Payment System. An electronic system for paying taxes. For more information, see the Electronic Federal Tax Payment System's web site at http://www.fms.treas.gov/eftps/

EIN: Employer Identification Number. An employer identification number (EIN) is a nine-digit number the IRS issues. Its format is 00-0000000. It is used to identify the tax accounts of employer and certain other organizations and entities that have no employees. *[Source: IRS]*

Employee Code: The number used by Evolution to identify an employee uniquely. Also called employee number.

Employee Number: See *employee code*

ER: Employer. A person or business that employs one or more people for wages or salary; the legal entity responsible for payment of quarterly unemployment insurance taxes or for reimbursing the state fund for unemployment insurance benefit costs in lieu of paying the quarterly taxes. *[Source: BLS]*

Evolution: A quality, Internet-capable, fully auditable, payroll and human resource software system.

Exempt: An employee is not subject to a tax.

Federal Information Processing Standard (FIPS): Standards for information

processing issued by the National Bureau of Standards in the US Department of Commerce *[Source: BLS]*

FEIN: Federal Employer Identification Number. See employer identification number.

FICA: Federal Insurance Contributions Act

FIPS: Federal Information Processing Standard

FIPS Code: A numeric designation for geographic areas, such as states, counties and metropolitan areas. *[Source: BLS]*

FLSA: Fair Labor Standards Act

Form 1099R: An IRS form. See http://www.irs.gov/pub/irs-pdf/f1099r02.pdf

Form I-9: Employment Eligibility Verification form from the Immigration and Naturalization Service. See http://www.ins.usdoj.gov/graphics/formsfess/form/I-9.htm

Form W-2: An IRS form. See http://www.irs.gov/pub/irs-pdf/fw2_02.pdf

FUI: Federal unemployment insurance

GL: General ledger

GTL: Group Term Life. Life insurance offered to an employee by the company and paid for in part or in full by the company.

Import Payroll: A payroll generated by the system during the importation of legacy data.

Liabilities: The amounts owed for each instance of taxes. There are separate liabilities, due dates, and totals for each employee and payroll.

Local Workstation: A personal computer

Magmedia: Alternate method of filing taxes using magnetic media instead of paper.

Mass Tax Credit: A Massachusetts tax credit that rounds taxes to the nearest dollar

MICR: Magnetic Ink Character Recognition. A type of printer ink used to print

checks.

Misc Check Adjustment Payroll: A payroll that voids and issues miscellaneous checks, such as for: agencies, taxes, or billing

Missouri Tax Credit: Gives employers a tax credit based on how much in withholding they have. Evolution calculates this amount at the end of the quarter and issues the employer a credit. Basically any quarterly tax cleanup issues are done with tax correction type payrolls.

Multiple Worksite Report: The Multiple Worksite Report (MWR) form asks most multi-location employers to provide employment and wage data for all of their establishments covered under one Unemployment Insurance (UI) account in a State. Most multi-location employers with a total of 10 or more employees combined in their secondary locations are required or requested to complete the MWR. An employer's primary location is the location with the most employment in a State. All other locations within the State are secondary locations. *[Source: BLS]* For more information, see the BLS website.

NYS-45-CC-MN: Quarterly Supplemental Return for Construction Employers

OASDI: Old Age, Survivors, and Disability. "The Social Security programs that

provide Disability Insurance monthly cash benefits to retired worker beneficiaries and their dependents, to surviving dependents of deceased insured workers, and to disabled worker beneficiaries and their dependents." *[Source: SSA Glossary]*

OBC: Official Bank Check

Payroll Expert: A wizard in Evolution that helps you create payrolls, batches, and checks.

Payroll Processing Queue: The list of payrolls ready for processing displayed in the Operations-Process Payroll window.

Pre-Processing: A process in Evolution performs on a company to prepare for its processing of quarterly and annual tax returns.

Primary Key: "One or more fields (columns) whose value or values uniquely identify each record in a table. A primary key cannot allow Null values and must always have a unique index. A primary key is used to relate a table to foreign keys in other tables." *[Source: MSDN]*

Queue Task: A task submitted by a user to the Task Queue to be processed.

Regular Payroll: A normally scheduled payroll.

Remote Client: A client of a service bureau who enters their own payroll data.

Remote Client Workstation: A workstation running Evolution and configured to be used by a remote client. It operates online or offline. When online, it connects to the service bureau via the Internet.

Reversal Payroll: A payroll that voids another payroll.

RW: Report Writer. A tool in Evolution that creates custom reports.

SB: Service Bureau. A business that process payrolls and performs other services for other businesses.

SB Correction Payroll: A payroll used to correct another payroll because of a service bureau initiated change.

Scheduled E/D: Scheduled E/Ds are created so they will regularly default into payroll runs after they are set up. An E/D code is entered into the employee's

scheduled E/Ds. The applicable E/D group is attached to that specific earning or deduction code. An E/D should be included in a scheduled E/D group, if it is a recurring action.

SDI: State Disability Insurance

Setup Run Payroll: A payroll that is used to set up payroll data imported from another payroll system.

SSN: Social Security Number. A 9-digit number assigned by the Social Security Administration, used to uniquely identify an employee.

SUI: State Unemployment Insurance. In general, the Federal-State Unemployment Insurance (SUI) Insurance Program provides unemployment benefits to eligible workers who are unemployed through no fault of their own (as determined under State law), and meet other eligibility requirements of State law. *[Source: Department of Labor]*

Supplemental Payroll: A payroll, which is not a regular payroll, used for supplemental items such as commissions and bonuses.

SUTA: State Unemployment Tax Authority. See State Authority

Unemployment Insurance (SUI).

Target: The dollar cap of a recurring deduction

Task Queue: A function within the Registration Daemon manages queue tasks sent to the server for processing. A list of these tasks may be displayed by clicking the View button. For more information, see Monitoring the Task Queue.

Tax Adjustment Payroll: A quarter-end cleanup payroll

Tax Calculator: A utility in Evolution that allows you to perform gross-to-net and net-to-gross calculations

Tax Correction Payroll: A payroll in which Evolution fixes rounding adjustments or applies state tax credits like those for Missouri.

Tax Deposit Payroll: A payroll generated by the system while creating tax checks.

TIN: Taxpayer Identification Number. "A nine digit number, which is either an Employee Identifying Number assigned by the Internal Revenue Service (IRS)

or a Social Security Number assigned by the Social Security Administration (SSA)." *[Source: FMS.]*

TOA: Time Off Accrual. The tracking of time-off accrued by an employee.

UI: Unemployment Insurance

W/C Code: Workers' Compensation Code

W-2: Form W-2

Washington L&I: Washington State's Department of Labor and Industry.

Workers' Compensation: A type of insurance that employers take out to pay the cost of work related injuries of employees.

YTD: Year to Date