PAYROLL SOLUTIONS
Compensation Specialists+

# Evolution Payroll

## User Guide
## (Basic Version)

# Contents

**Please note that this guide is the abbreviated version. It contains precisely enough information to navigate through the system and complete a payroll. A full version is posted on our website and will be updated periodically as new features are added.**


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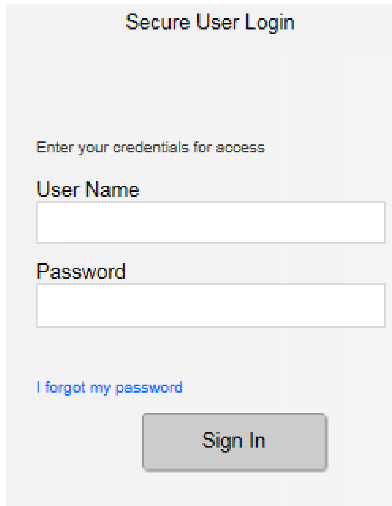
## Logging In

From any computer, go to the Payroll Solutions web site (www.payrollmadeeasy.com). Click the **EVOLUTION PAYROLL** Button.

Log on using a predetermined username and password. You will receive this information from your Implementation Specialist.



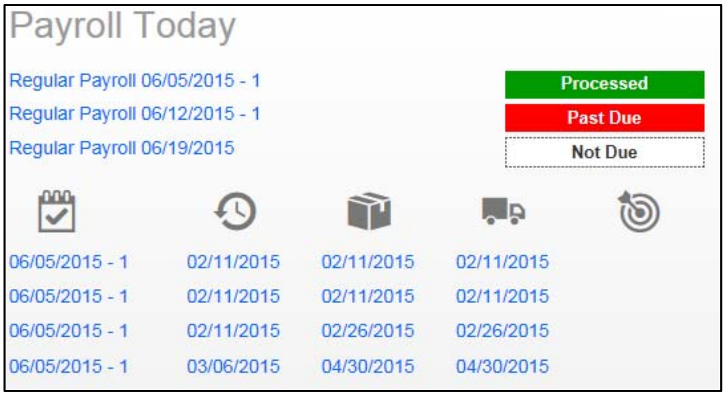


After logging in you will be taken to your payroll dashboard. You can always go back to the dashboard by clicking the Dashboard button from the menu on the left.

## Payroll Today

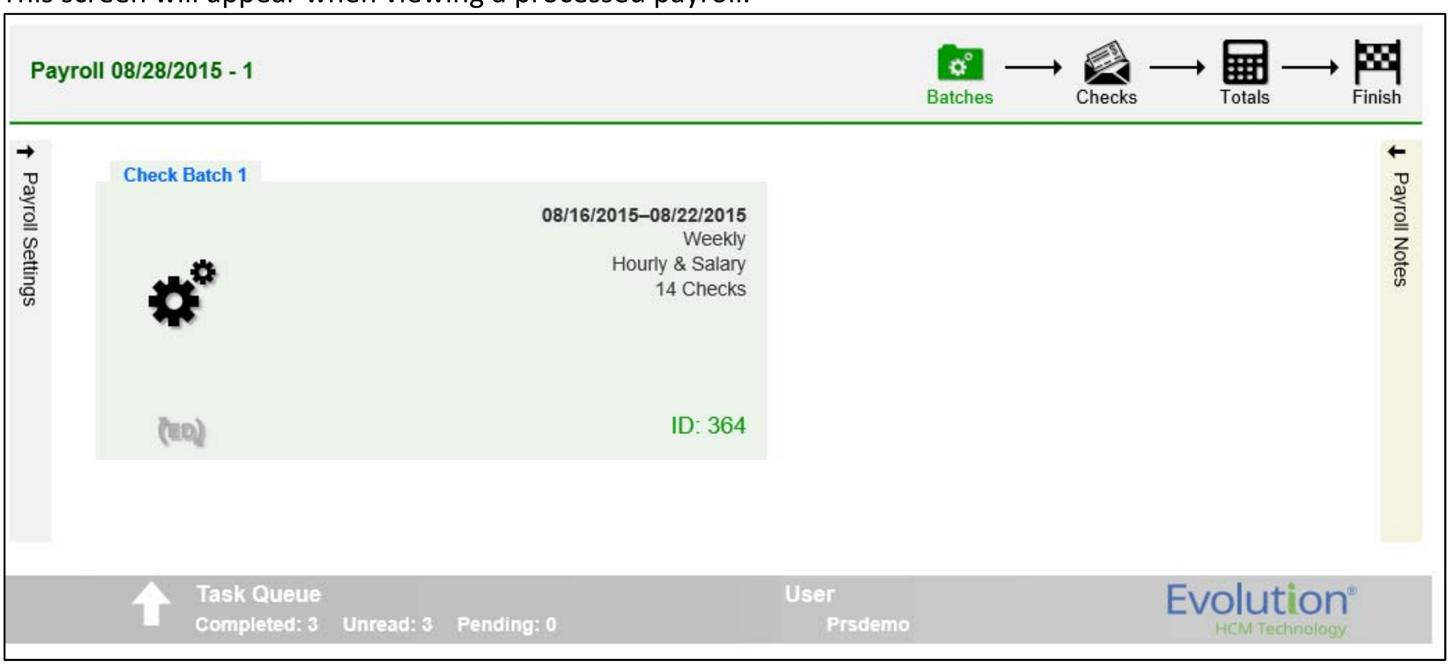
Here you can see all payrolls that have been processed, which are coming due and which are past due.

- **Processed** – Payroll has been processed by Payroll Solutions.
- **Not Started** – Payroll is due but has not been started.
- **Not Due** – Payroll is not scheduled to be processed.
- **Past Due** – Payroll has not been processed and cannot be paid on the scheduled date.

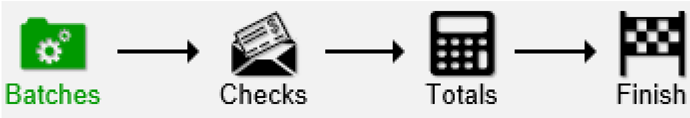



By clicking on any of the dates listed you can access that particular payroll. If the payroll has been processed, you can view details of that payroll. If the payroll has not been processed, you will be given the opportunity to begin a new payroll.

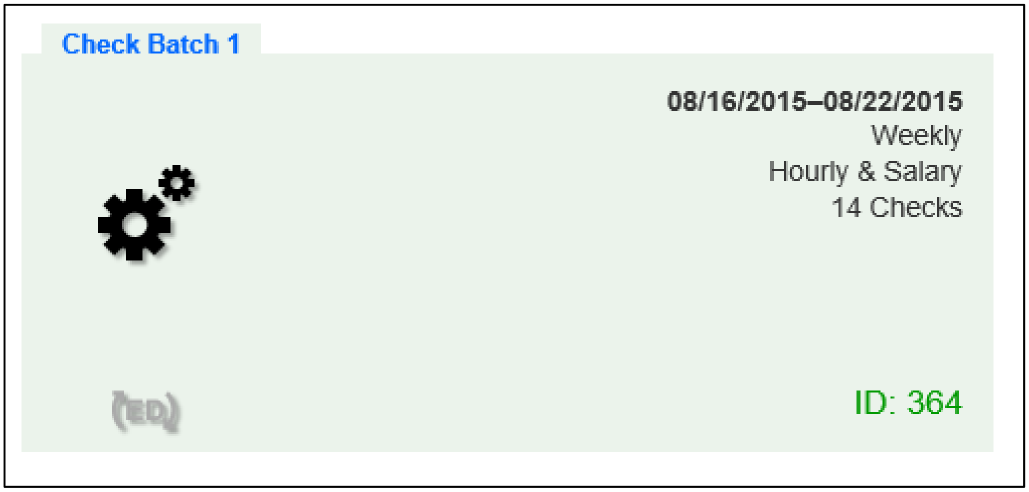
This screen will appear when viewing a processed payroll.



You can choose from four screens to view:




**Batches** – Here you will have the ability to see the period beginning and ending dates, pay frequency, type of pay and number of checks issued.



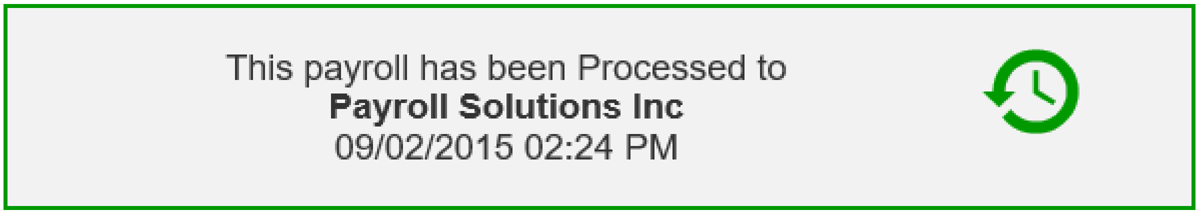

**Checks** – Here you can see the details by check and by employee. The view can be customized and columns can be added based on your preference.


| Type | EE Code | Name | Seq | Total Hrs | Gross Pay | E01 Hrs Regular | E02 Hrs Overtime | E03 Amt Salary | E04 Hrs Vacation |
|---|---|---|---|---|---|---|---|---|---|
| R | 23 | Fontana, Frank | 1 | 56.00 | $0.00 | 40.00 | 16.00 | | |
| R | 8 | Devlin, Brighton K. | 1 | 0.00 | $2,700.00 | | | $2,700.00 | |
| R | 7 | Faircloth, Martin Q. | 1 | 0.00 | $400.00 | | | $400.00 | |
| R | 5 | George Jr, Thomas M. | 1 | 38.63 | $0.00 | 38.63 | | | |
| R | 17 | Hawkins, Winona | 1 | 39.78 | $0.00 | 39.78 | | | |
| R | 16 | White, Walter H. | 1 | 42.00 | $0.00 | 34.00 | | | 8.00 |
| R | 9 | Andrews, Holly A. | 1 | 43.64 | $0.00 | 40.00 | 3.64 | | |
| R | 15 | Best, John | 1 | 40.13 | $0.00 | 32.13 | | | 8.00 |
| R | 2 | Smith, Michael D. | 1 | 0.00 | $1,000.00 | | | $1,000.00 | |
| R | 33 | Brooks, Rachel | 1 | 17.22 | $0.00 | 17.22 | | | |
| R | 6 | Averett, Sam | 1 | 0.00 | $1,250.00 | | | $1,250.00 | |
| R | 12 | Chance, John T. | 1 | 28.17 | $0.00 | 28.17 | | | |
| | | | Totals | 305.57 | $7,016.55 | 269.93 | 19.64 | $7,016.55 | 16.00 |

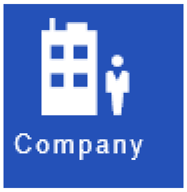
To add and remove columns, simply click the  button at the bottom right. Here you will see two sections, Available Columns and Current Columns. Users can add single or multiple columns by dragging item(s) from the Available Columns section to the Current Columns section and click Apply. To remove columns, do the reverse. You can also reorder the columns by clicking and dragging.

**Totals** – Here you can see the summarized information.

**Finish** – Here you will find the information pertaining to the submission of the payroll to Payroll Solutions for your reference.



## Company Information




Company information, including settings and rules established by the company can be viewed in the Company menu.  This data is read-only.  Any permanent changes must be conveyed to your Payroll Specialist.

You can access basic company information by clicking the **Company** button from the menu on the left.

This will give you access to view the following information:

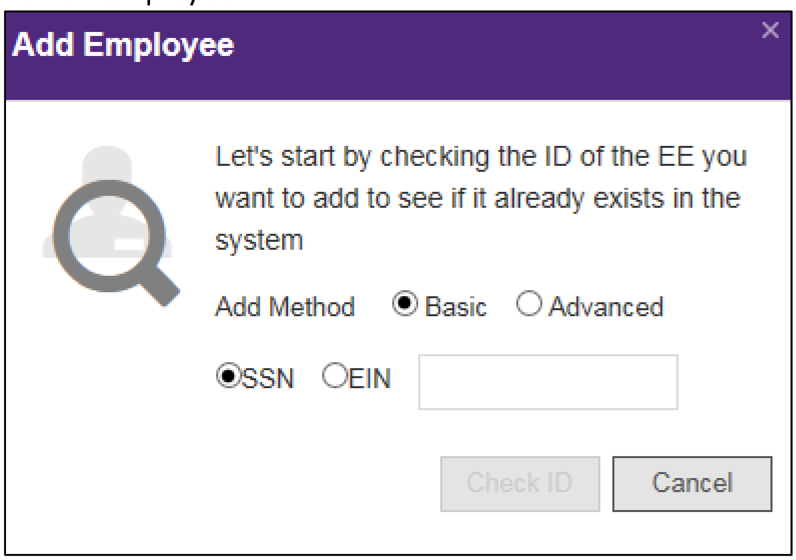
- Company Basics – legal name, address, FEIN, your assigned Payroll Specialist and bank account information
- Organizational Levels – Branches, Departments and Teams
- ED Codes – Earnings and Deduction Codes that have been assigned to your company
- States – List of states assigned to your company along with the appropriate account numbers and rates (if applicable)

## Adding a New Employee


1. Click the **Employees** menu to open. If there are employees already set up, they will appear in the list on the left-hand side of the screen.

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

3. Select the Add Method **Advanced** (Basic is the default) if the information on the Basics screen is not detailed enough for the new employee.




4. Select whether the Tax ID is a SSN or EIN and enter the Social Security Number or Employer Identification Number.

5. Click **Check ID**. If the SSN or EIN is already in the system, the Employees – Basics screen opens with the existing demographic information already copied into the new employee fields. **Important!** If this is the case, do not add the new employee unless you are absolutely sure this is new hire and ***not*** a rehire.

6. You will progress through the following screens during set-up:
   a. Basics
   b. Local
   c. ACA
   d. Child Support
   e. Direct Deposit
   f. Scheduled E/Ds
   g. Time Off Accrual
   h. Notes

Descriptions of each screen are listed below:

**Basics**

This screen contains demographics, status, pay and taxation. All fields marked with * are mandatory.

- Employee Type – *W-2 or 1099*
- EE Code – *Please note that the EE Code will automatically be assigned based on the next available number. It can be changed if applicable.*
- Name, address, phone, birth date, etc.
- Status – *Should be active*
- Hire Date
- Organizational Level
- Employment Type
- Worker's Compensation
- Job
- Frequency – *Company Default (Do NOT Change)*
- Rates – *If multiple rates are to be assigned to the employee, complete Rate 1, Rate 2, Rate 3, etc. as needed*
- Salary Amount
- Fed Marital Status
- Fed Exemptions
- State Marital Status
- State Exemptions

**Local**

This screen only applies if the employee is responsible for local tax withholding. If it does not apply, proceed to next tab. Otherwise, attach the local agency.

**ACA**

This screen applies to Affordable Care Act reporting. If it does not apply, proceed to next tab. Otherwise, a separate ACA training session must be scheduled.

**Child Support**

This is where you would add any Child Support cases.

**Direct Deposit**

This screen is where direct deposit bank information is established.

1. Click the Add button
2. Enter Routing Number (ABA#) – Must be nine digits
3. Enter Account Number
4. Select Account Type (Checking, Money Market or Savings)
5. In Prenote – Select Yes. This will send a test file to the bank to ensure the account information is correct. This employee will receive a live paper check until the account is approved.
6. Repeat steps 1 – 5 to add additional accounts.
7. See **Scheduled E/Ds** to set up the Direct Deposit deduction(s).

## Scheduled E/Ds

This screen is where recurring Earnings and Deductions are set up. Please note that Direct Deposit is a recurring deduction and must be scheduled in this step.

Setting up a Direct Deposit deduction when only one bank account is used.

1. Click the Add button
2. Select Code – Direct Deposit codes are D50 through D59
3. Calculation Method – Set to **None**
4. Always Pay/Deduct – Set to **All Payrolls**
5. Deduct Whole Check – Set to **Yes**
6. Send To – Set to **Direct Deposit**
7. Direct Deposit Account – Select the bank account
8. Save

Setting up Direct Deposit deductions when two or more bank accounts are used.

1. Follow steps 1 – 8 above to set up primary account (remaining net pay)
2. Click the Add button
3. Select Code – Code must be different than one used for primary account
4. Calculation Method – Set to **Fixed**
5. Amount – Set desired amount
6. Always Pay/Deduct – Set to **All Payrolls**
7. Deduct Whole Check – Set to **No**
8. Send To – Set to **Direct Deposit**
9. Direct Deposit Account – Select the bank account
10. Save
11. Repeat if necessary

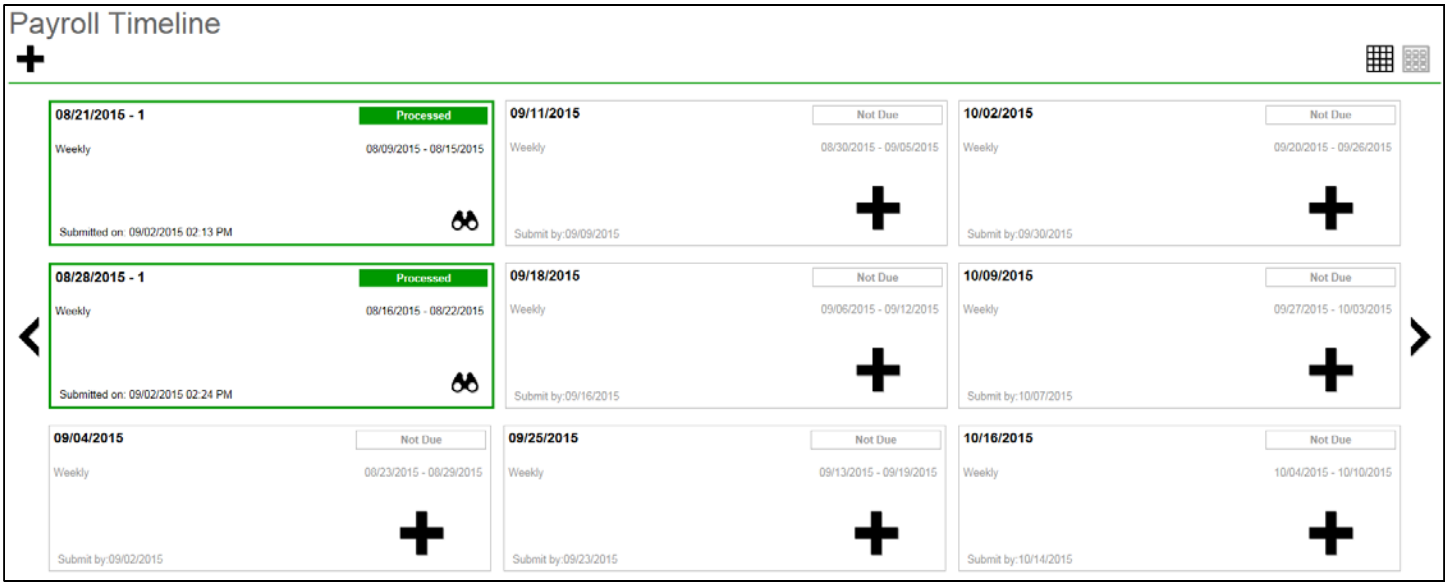
## Time Off Accrual

Contact your Payroll Specialist

## Creating a Scheduled Payroll

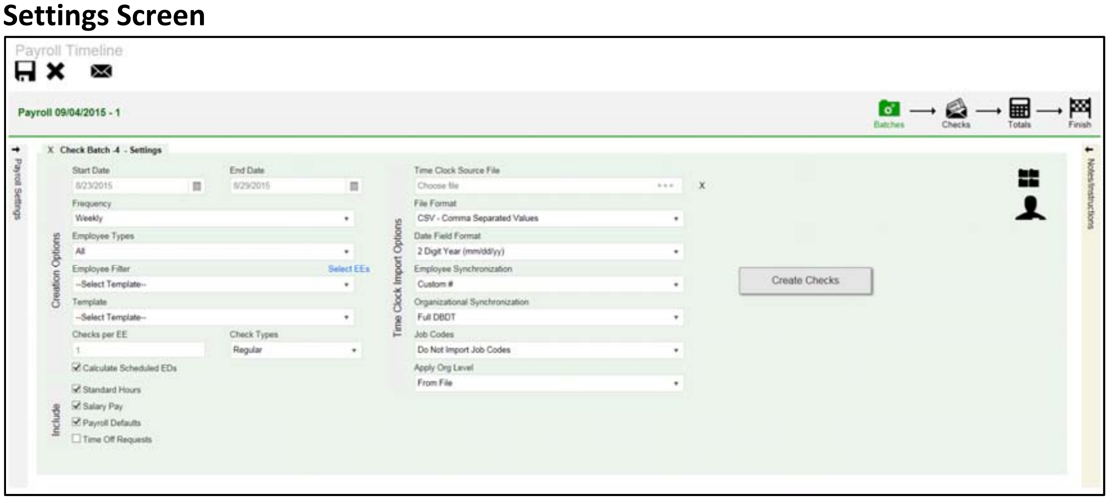

To create a payroll:

1. Click the Payrolls menu, which brings you to the Payroll Timeline screen.



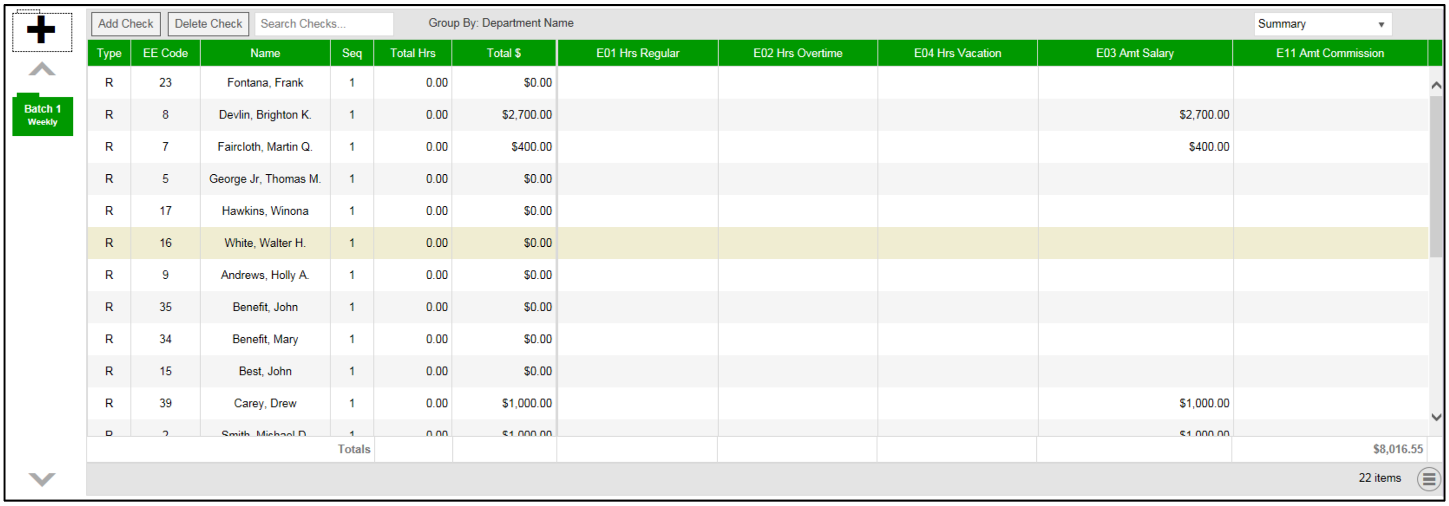

2. Click the large **plus** ✚ **sign** in one of the payroll cards to create payrolls based on the calendar settings.
   **Result:** The Check Batch Settings screen opens.
   **Important!** Review the payroll check date and payroll period dates. This information was established on your initial set-up and should rarely be changed. If this information is not correct make your changes and contact your Payroll Specialist immediately. We will restructure your calendar.

**Check Batch Settings Screen**



1. Complete the required and applicable fields.
2. Select the items to include in the payroll in the **Include** section (most items will default).
3. Complete required and applicable fields in the Time Clock Import Options section.
4. Click the **Create Checks** button.
5. Click OK in the window that confirms the checks have been created.
   **Result**: The Batch Checks Screen opens

### Batch Checks Screen



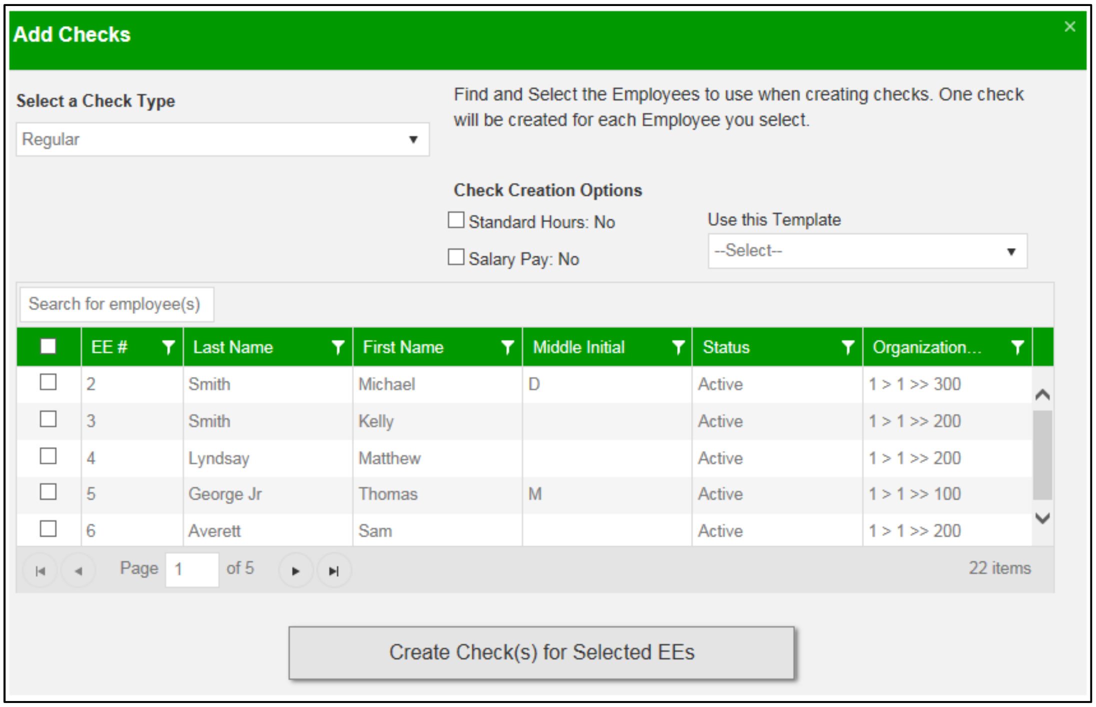

| Type | EE Code | Name | Seq | Total Hrs | Total $ | E01 Hrs Regular | E02 Hrs Overtime | E04 Hrs Vacation | E03 Amt Salary | E11 Amt Commission |
|---|---|---|---|---|---|---|---|---|---|---|
| R | 23 | Fontana, Frank | 1 | 0.00 | $0.00 | | | | | |
| R | 8 | Devlin, Brighton K. | 1 | 0.00 | $2,700.00 | | | | $2,700.00 | |
| R | 7 | Faircloth, Martin Q. | 1 | 0.00 | $400.00 | | | | $400.00 | |
| R | 5 | George Jr, Thomas M. | 1 | 0.00 | $0.00 | | | | | |
| R | 17 | Hawkins, Winona | 1 | 0.00 | $0.00 | | | | | |
| R | 16 | White, Walter H. | 1 | 0.00 | $0.00 | | | | | |
| R | 9 | Andrews, Holly A. | 1 | 0.00 | $0.00 | | | | | |
| R | 35 | Benefit, John | 1 | 0.00 | $0.00 | | | | | |
| R | 34 | Benefit, Mary | 1 | 0.00 | $0.00 | | | | | |
| R | 15 | Best, John | 1 | 0.00 | $0.00 | | | | | |
| R | 39 | Carey, Drew | 1 | 0.00 | $1,000.00 | | | | $1,000.00 | |
| R | 2 | Smith, Michael D. | 1 | 0.00 | $1,000.00 | | | | $1,000.00 | |
| | | | Totals | | | | | | | $8,016.55 |

This screen offers three different viewing options, based upon the level of detail required by the user. The view is selected from the dropdown list in the far right of the Navigation Bar.

### Summary View

Default view, this is the check entry screen, on which the user can add checks and edit information for employee checks. The first six columns are read only. The columns that follow can be edited, as well as having columns added and subtracted.

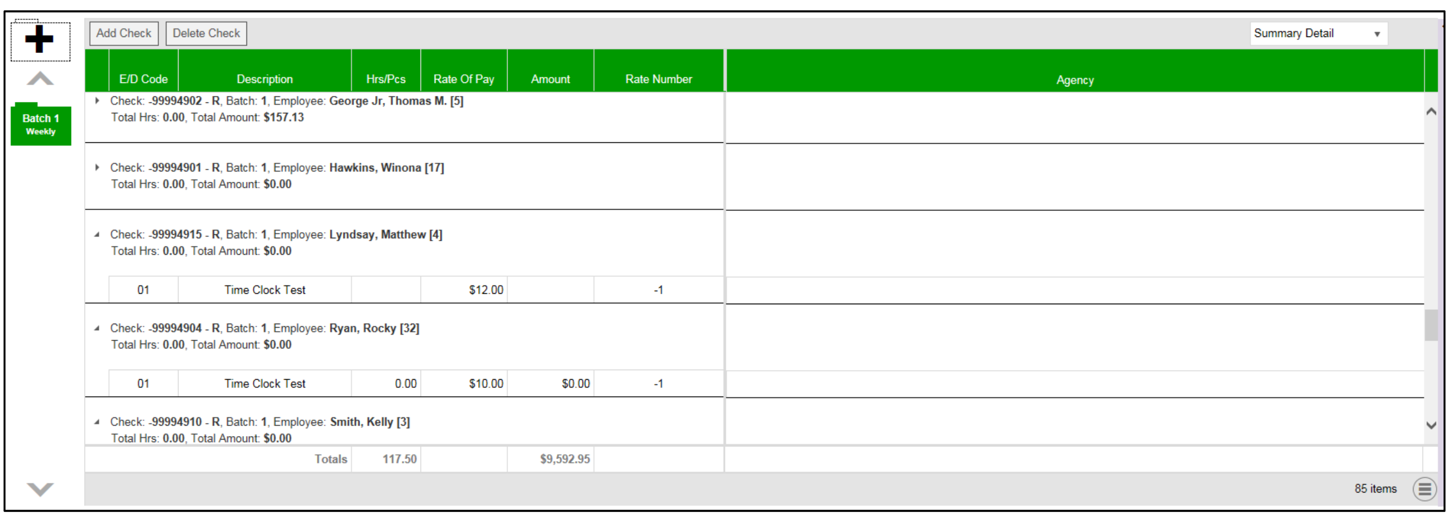
- To add or edit a column:
  1. Click within the column to edit of the check being modified.
  2. Once finished click **Save** in the Header.
- To add a check for employees:
  1. Click the **Add Check** button in the Navigation bar. **Result:** The Add Checks screen opens.
  2. Select the Check Type being created.
  3. Select the employee(s) for whom to create a check.
  4. Click the **Create Check(s) for Selected EEs** button.




- To add additional E/D Codes as columns, click  in the bottom right-hand corner of the screen, and select the E/D Codes from the list. **Important!** Some columns are HOURS and some columns are AMOUNT (dollar amount). Be certain you are selecting exactly what you want and put them in the order you wish to input.

**Summary Detail View**

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




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

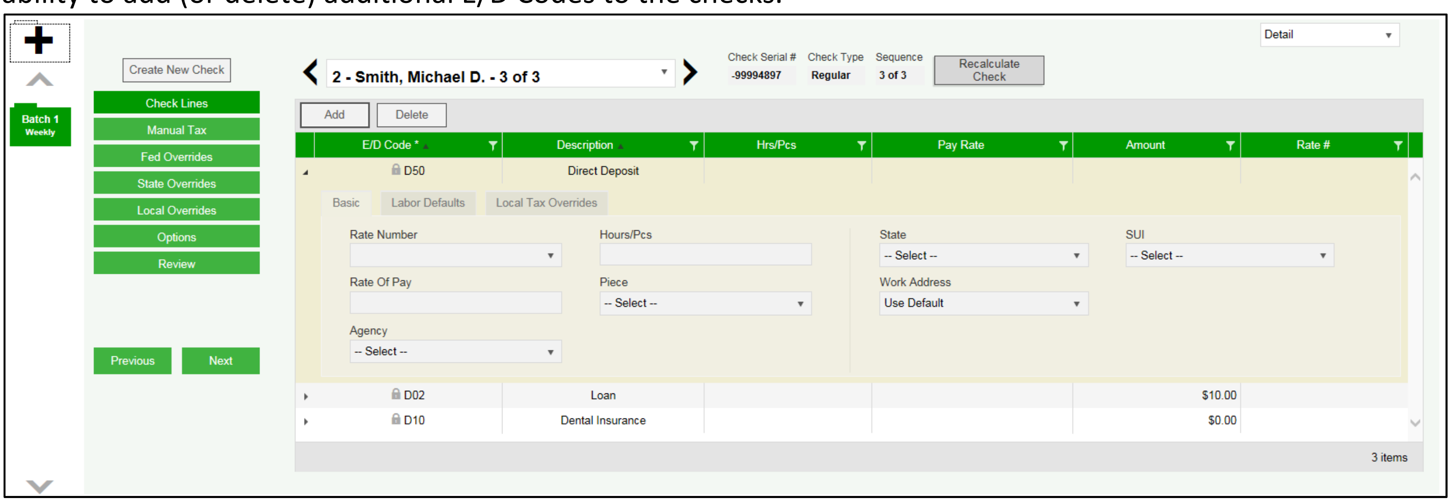
4. Click the **Create Check(s) for Selected EEs** button.

- To add a Check Line click the **Add Check Line** button.
- To add additional columns, click  in the bottom right-hand corner of the screen, and select the desired column(s) from the list.


5. Select an E/D Code from the dropdown list.
6. Click **Save** in the Header.

**Detail View**

The Detail view provides the most detailed view of each check, and offers editing capabilities, as well as the ability to add (or delete) additional E/D Codes to the checks.

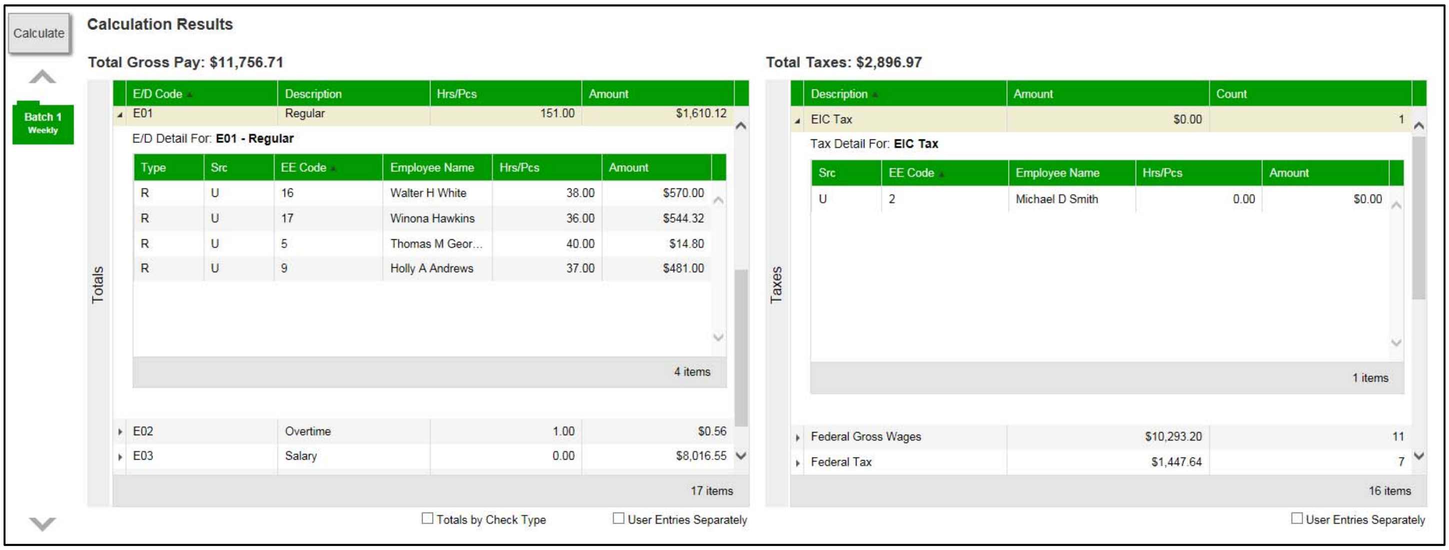


## Calculating and Submitting the Payroll

### Calculation Results screen

Once all payroll check information has been entered (or imported) you will need to check your totals.

Click the Totals button in the header to access the **Calculation Results** screen to review totals of earnings, deductions and taxes. For detailed information about the fields on this screen, refer to the **Payroll-Calculation Results** section in this document.



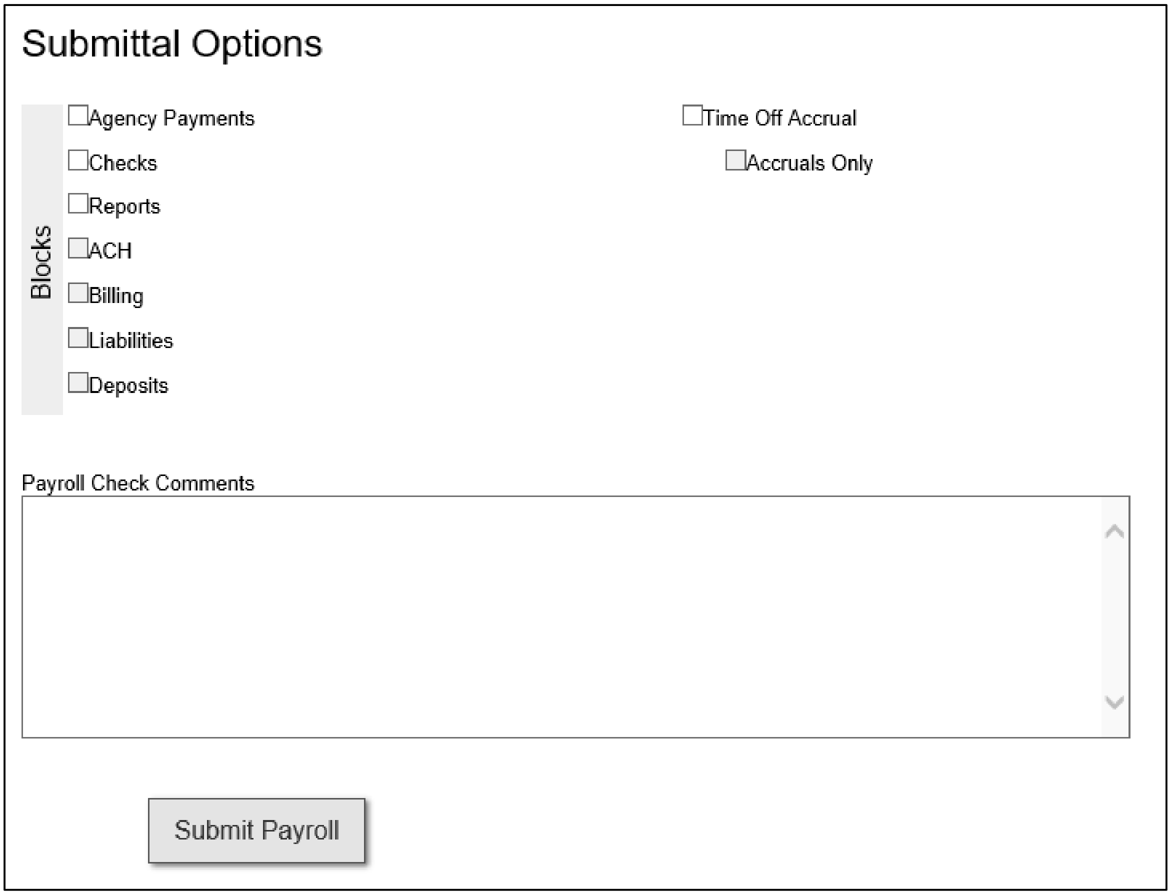

Click the Calculate button at the top left of the Calculation Results screen. **Results**: Your payroll will be "Pre-Processed" and your totals will appear. Depending on the size of your payroll this may take a few minutes. **Important!** Preprocessing is not an option. It is a requirement. Failure to preprocess a payroll could result in incorrect calculations or checks not being produced at all.

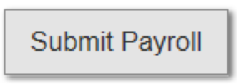
**Please note**: If something needs to be edited, click the Batches or Checks button which will bring you back to the Batch or Checks. Once any changes are made you must calculate your payroll again.

### Submitting the Payroll

Once you prove your totals you are now ready to submit your payroll to Payroll Solutions for processing.

Click the Finish button to access the **Submittal Options** screen. Please note, Payroll Check Comments will be printed on each employees' checks.




If everything is okay, click the 

button. Payroll Solutions will process your payroll.

## The Reports Menu


The Reports menu lets the user see reports that have been published to the portal as well as process additional reports as needed.

There are two report types identified that we refer to:

- Defined Reports (On-Demand)
- Published Reports (Static)

**Defined Reports** are reports that can be generated from Evolution Payroll on demand.
**Published reports** are static reports that are generated by the system and sent to the portal.

**Defined Reports**

Defined reports are the Company level reports that can be generated by the user on demand in Evolution Payroll. Below is list of some of the reports available.

- Payroll Register
- Check Reconciliation
- 401(k) Report
- Direct Deposit
- Cover Letter
- Worker's Compensation

To generate a report from the Defined Reports screen:

1. Select the report from the list of the Reports.
2. Select the payroll(s) from the Payroll Filter.
3. Update the **Starting Date** and **Ending Date.**
4. Click **Apply** to return a list of payrolls within a specific time period. Users can include all payrolls or processed payrolls only. Please note that users must select at least one payroll to be able to select other filters and parameters or generate the report.
5. Click the **EE Filter** tab and the **Org Filter** tab if needed.
6. Click the **Misc. Options** tab to update parameters specific to this report.
7. Click the **Run Report** tab and then click **Run This Report**.
   **Result:** The Run Report tab displays the selected parameters for the report prior to generating.
8. View and print the report from the Task Queue once the report is generated.

**Published Reports**

The Published Reports screen offers access to reports, tax returns and ASCII files generated by the system and sent to the portal.

To view, save, or print a published report:

1. Check the box in the left-hand column of the table to select the report(s) to be viewed, saved or printed and click the Preview Report button.
2. Use the Resizing tools in the preview window, to zoom in or out to preview the report. If more than one report is selected, use the arrows at the bottom of the Preview window to navigate between reports.
3. Click **Save** at the top of the Preview window to save the report(s) to your hard drive and/or to open the report you are currently working on.
   **Result:** The report(s) will be saved to your device as a PDF file.
4. Print as normal from the File menu in the Windows Menu bar.

Please let your Payroll Specialist know if there is any type of report you would like to see added to either list.

## Notes

# Notes

# Payroll Solutions Contact Information

Payroll Solutions Inc
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High Point, NC 27265

336-885-5056

www.payrollmadeeasy.com

Your Sales Representative: ____________________________

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Your Trainer: ____________________________

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Your Payroll Specialist ____________________________

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