



Remote Payroll

User Guide



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.

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Evolution Shortcut Keys.....	11
General Navigation in Evolution	22
Understanding Effective Dates	23
Viewing Effective Dates.....	24
As of Date Editor	27
Monitoring the Task Queue	28
List View.....	30
Split View	33
Detail View	34
Full View	35
Printing Report Previews	37
Marking Up Report Previews	37
Saving a Report Preview.....	39
Admin Security	42
Browse tab	42
Detail tab.....	43
Security Rights for Users.....	46
Creating Users.....	50
Groups Tab	52
Clients Tab.....	53
D/B/D/T Tab	54
Deleting Users.....	55

System Information.....	56
Workstation Settings.....	58
Printing	58
Checks Printer.....	58
Reports Printer	59
Speed Test.....	61
Client RW Reports.....	65
Company-General-Company Summary	66
Company-Miscellaneous-Jobs	70
Company-General-Additional Info.....	74
Company-Misc-HR Positions	76
Creating Payroll Default E/Ds	78
Creating Payroll Check Templates	83
Creating Pay Groups for Payroll Defaults	100
Creating Payroll Filters for Payroll Defaults	103
Employee-Employee window.....	107
Creating an Employee.....	116
EE Entry Tab	117
Details tab	127
Address Tab	138
W2 tab.....	144
Federal Tax tab	148

Notes tab	154
HR Tab.....	156
Documents Tab	157
Employee Quick Entry Window.....	159
Pay Rate Info window.....	168
States Window	181
Locals Window	189
Scheduled Earnings and Deductions window.....	196
Details 1 tab	202
Details 2 tab	219
Direct Deposits tab.....	226
Child Support Cases tab.....	231
Viewing Scheduled E/Ds	236
Creating Specific Scheduled Earnings and Deductions.....	259
Setting Up Child Support (DQ)	259
Pro-Rating Multiple Child Support Orders.....	268
Setting Up Garnishments (DR).....	269
Setting Up Group Term Life Insurance	279
Setting Up Pensions	280
Setting up Washington L & I (DY, M7).....	293
Time Off Accrual window	296
Viewing Time Off Accrual History	304

Shifts window	307
Auto-Labor Distribution window	310
Pension Fund Splits window	312
Piecework window.....	314
Additional Info window.....	317
Applying Additional Info to Employees.....	318
Miscellaneous	321
Terminating an Employee.....	321
Check Finder.....	322
Tax and Check Line Calculator	327
Check Preview Tab.....	330
Overriding Employee Federal Taxes	332
Setting Up 1099R Employees.....	332
Setting Up 1099M Employees.....	335
Setting Up Reciprocal States	341
Payroll.....	350
Using the Payroll Expert to Create a Payroll.....	350
Creating the Payroll Using the Create Payroll Button.....	368
Creating the Batch	370
Keying the Checks	373
Pre-Processing the Payroll	380
Submit the Payroll	381


Payroll-Payroll Window	382
Notes Tab.....	385
Payroll Tab.....	387
Block E/Ds tab.....	395
Checks tab.....	398
Earnings and Deductions tab	402
Tax tab	406
Time Off tab.....	409
Payroll-Batch Window	411
Quick Entry Tab.....	419
Quick Entry W/Overrides tab	422
Earnings and Deductions tab	425
Taxes tab.....	425
Auto Reduction tab.....	430
Payroll-Check Window.....	435
Check Lines tab	436
All Fields tab.....	440
Manual Tax tab	446
General tab.....	450
Tax Overrides tab.....	456
Preview tab	461
Employee Notes tab	463

Creating Additional Regular Checks	465
Using the Create Next Check Button.....	467
Creating a Manual Check	469
Using the Create Manual Check Button	471
Create Multiple Manual Checks	473
Modifying the Check	476
Creating 3 rd Party Checks	477
Voiding Checks.....	477
Using the Payroll Expert.....	480
Miscellaneous	486
Using the Keyboard to Navigate.....	486
Adding Columns	487
Deleting Columns	487
Viewing the Check Detail.....	487
Adding Checks.....	487
Deleting Checks	488
Adding a Check Line	488
Preview ALD (F6) Button	489
YTD (F3) Button	489
Reports-Run Reports Window	489
Browse Tab	490
Report Parameters Tab.....	493



Payrolls Tab	495
Misc Tab	500
Employee Filter tab.....	504
DBDT Filter tab	507
Reports- Set up Reports Window	512
Browse Tab	513
Details Tab.....	514
Misc tab.....	521
Employee Filter tab.....	526
DBDT Filter tab	528
Setting Up Company Reports	531
Running Company Reports.....	532
Appending Report Data to ASCII Files	535
Using the Certified Payroll Report	539
Previewing Reports.....	549
Printing Report Previews	551
Marking Up Report Previews	552
Saving a Report Preview.....	554
Technical Support.....	555
Installing Evolution on a Remote Workstation	555
Troubleshooting Printing	555
Glossary	556














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 viewed window		SHIFT+ALT+RIGHT ARROW

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		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 Calculator		F9
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

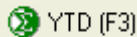
Employee – Employee window.

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		N/A

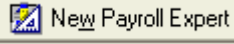
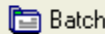

Details Tab

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


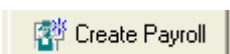





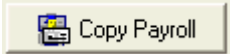

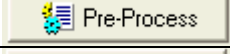

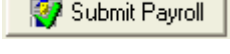
Notes Tab

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	 	ALT+INSERT
Submit payroll to SB for review	 	N/A
Delete a payroll	 	ALT+DEL
Copy Payroll	 	N/A
Pre-process payroll	 	N/A
Submit payroll for processing	 	N/A




Notes Tab



Action	Button	Shortcut Key
Spell check comments	N/A	F7

Payroll Batch Window

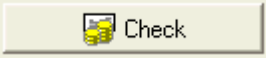
Action	Button	Shortcut Key
Create a batch		ALT+INSERT
Delete a batch		ALT+DEL
Go to Payroll – Payroll window	 Payroll	ALT+Y, then P
Create a batch using the New Batch Expert	 New Batch Expert	N/A
Go to Check Lines tab of the Payroll – Check window	 Check	ALT+Y, then C

Batch Tab




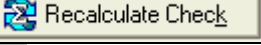

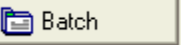
Action	Button	Shortcut Key
Create a batch	  Create Batch	ALT+INSERT
Refresh scheduled	 Refresh ED	N/A

E/Ds on all checks		
Refresh Scheduled E/Ds on all but manual checks		N/A
Delete a batch		ALT+DEL

Checks Tab

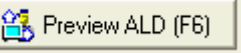

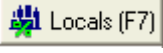


Action	Button	Shortcut Key
Add a check	N/A	ALT+INSERT
Delete a check	N/A	CTRL+DELETE
Move to next check	N/A	DOWN ARROW
View details of a check (move from Payroll – Batch – Checks tab to Payroll – Check – Check Lines tab.)		CTRL+ENTER

Payroll – Check Window

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

Check Lines Tab

Action	Button	Shortcut Key
Delete a check line	N/A	CTRL+DELETE
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
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 check for the current employee	 Create Manual Check	CTRL+M
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 .

 Open company:

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.

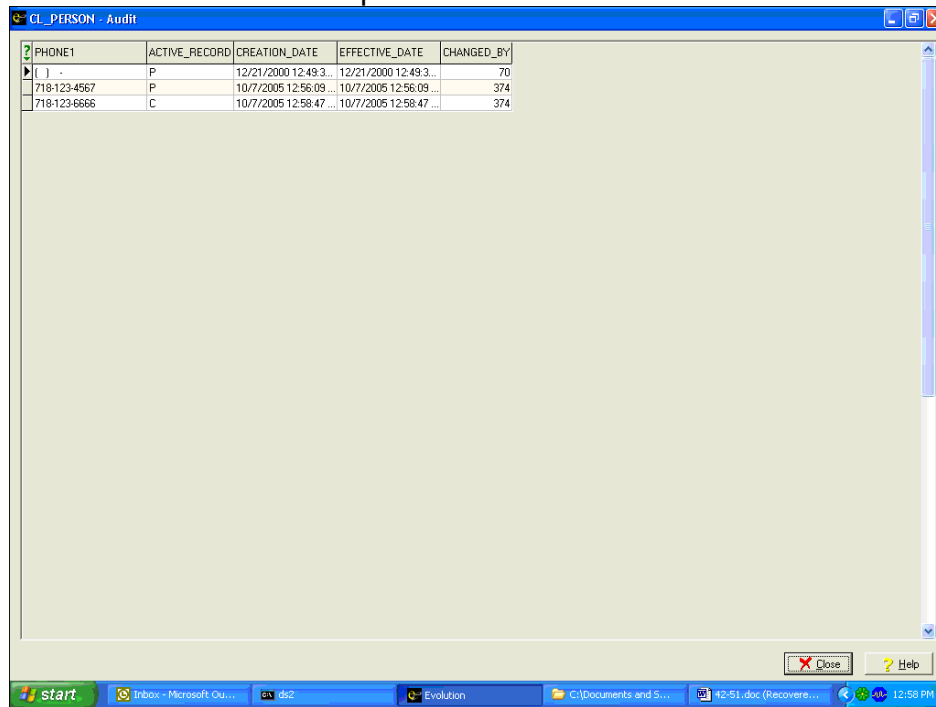


Put your mouse on the button, and right click. You will be given two options:

- 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 cursor 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



PHONE1	ACTIVE_RECORD	CREATION_DATE	EFFECTIVE_DATE	CHANGED_BY
PHONE1	P	12/21/2000 12:49:3...	12/21/2000 12:49:3...	70
718-123-4567	P	10/7/2005 12:56:09...	10/7/2005 12:56:09...	374
718-123-6666	C	10/7/2005 12:58:47...	10/7/2005 12:58:47...	374

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

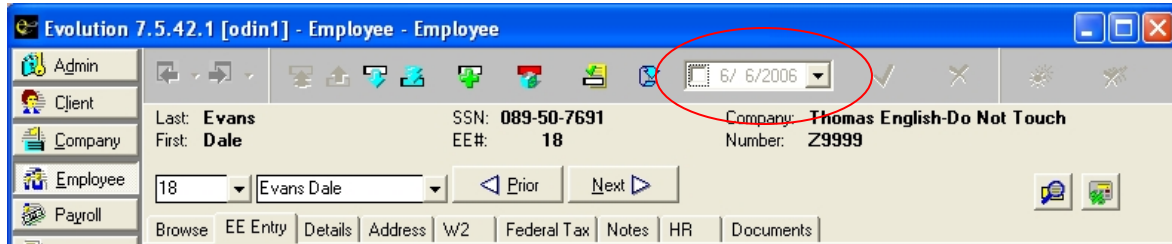
A tax change is announced that is retroactive back to Jan 1, 2005. To implement the tax, you would enter the new tax and then change its effective date to 01/01/2005. Because you implemented the change today, its creation date would be today. When Evolution next calculated taxes, it would use the tax's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

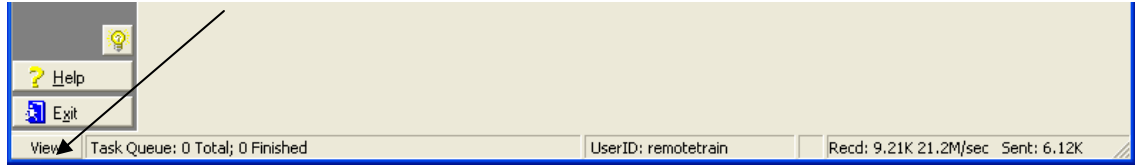
Evolution displays the database as of the date listed in the **As of Date Editor** field. This can be helpful but also confusing. The date in this field may be changed for viewing purposes although changes to the database **should not** be made while in this mode. Once you have finished viewing the data,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

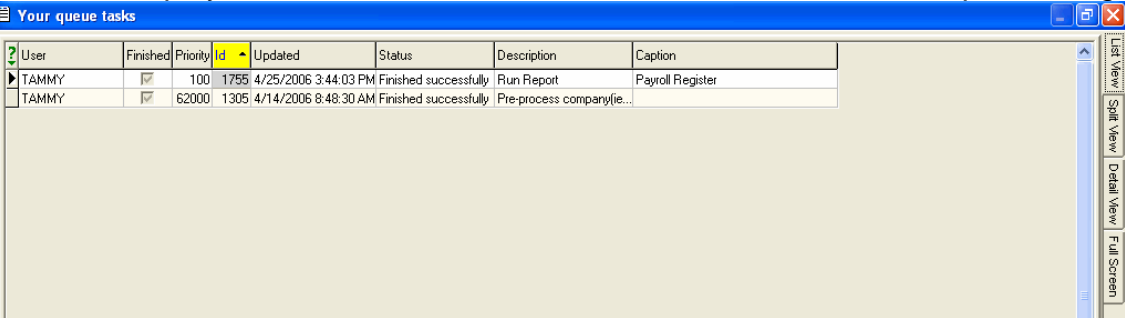
There are four tabs on this window: The information listed in the top grid pertains to the List, Split, and Detail view tabs.

- 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.
- Only a user with Admin rights can delete an executing job. This should only be done in the case of an emergency, as the deleted job will continue to consume resources in the background, and can cause other sporadic problems. If you encounter a situation that requires this, contact your Service Bureau.

List View

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



The screenshot shows a window titled "Your queue tasks" with a table of tasks. The table has columns: User, Finished, Priority, Id, Updated, Status, Description, and Caption. There are two rows of data. The first row shows a task for user "TAMMY" with priority 100, ID 1755, updated on 4/25/2006 at 3:44:03 PM, status "Finished successfully", description "Run Report", and caption "Payroll Register". The second row shows a task for user "TAMMY" with priority 62000, ID 1305, updated on 4/14/2006 at 8:48:30 AM, status "Finished successfully", description "Pre-process company(e...", and caption "Payroll Register". The table is part of a larger application window with a sidebar on the right containing buttons for "List View", "Split View", "Detail View", and "Full Screen".

User	Finished	Priority	Id	Updated	Status	Description	Caption
TAMMY	<input checked="" type="checkbox"/>	100	1755	4/25/2006 3:44:03 PM	Finished successfully	Run Report	Payroll Register
TAMMY	<input checked="" type="checkbox"/>	62000	1305	4/14/2006 8:48:30 AM	Finished successfully	Pre-process company(e...	Payroll Register

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.

The screenshot shows a window titled "Your queue tasks" with a task list and a preview of the results for the selected task.

Task List:

Use	File	Pos	Id	Updated	Status	Description	Caption
TJHADMIN	11000	297	9/3/2002 12:05:42 PM	Finished successfully	Run Report	Birthday Report	
TJHADMIN	11000	306	9/3/2002 12:59:38 PM	Finished successfully	Run Report	Delivery Label(RW)	
TJHADMIN	11000	307	9/3/2002 1:05:01 PM	Finished successfully	Run Report	Birthday Report	
TJHADMIN	11000	308	9/3/2002 1:06:01 PM	Finished successfully	Run Report	Cover Letter(RW)	

Task Details (Selected Task: 308):

Description: Run Report
Caption: Cover Letter(RW)
Status: Finished successfully
Changed: 9/3/2002 1:06:01 PM
Message: Server Updated to T-Junction 2002.01.04.01

Preview of Results:

#5004 Football Factory

Cover Letter(RW)

Check Date:	01/01/2002-1 TO 11/11/20
Period Range:	07/01/2001 TO 10/30/20
Week Number:	Week: 046

Dear PayData Client,

Vermont Department of Tax is not processing Q1 01 million payments for Vermont withholding. PayData marks all of our tax clients' payments.




Results

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

34





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.

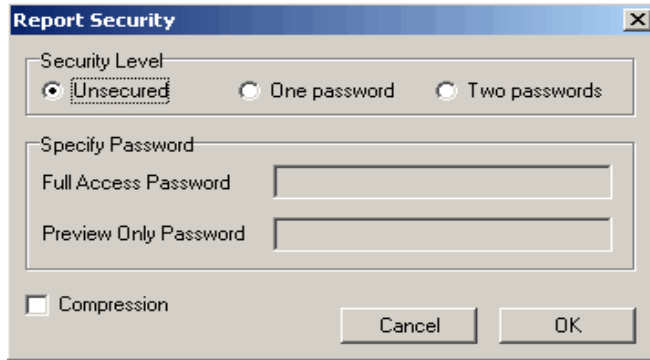
Saving a Report Preview

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.

To password protect a report preview, do the following:

1. With a report preview open, click the **Security Options** button .
2. The **Report Security** dialog box will display. Specify the following information as appropriate.



Security Level:

Only one security level may be selected per report

- Unsecured: When selected, the report is not password protected. It can be previewed or edited by anyone with Evolution or EvRWPreview.exe.
- One Password: The report is password protected. By entering the Full Access Password, a user has full access to the report.
- Two Passwords: The report is protected at two levels.

- By entering the Full Access Password a user has full access to the report.
- By entering the Preview Only Password, a user can view the report, but not edit it.

Full Access Password:

The password that allows a user full access to the report.

Preview Only Password:

The password that allows a user read-only access to the report.



When selected, the report is saved in a compressed file format. When cleared, the report is not saved in a compressed file format. Cleared is the *default* selection.



Click this button to save any changes made and close the dialog box.



Click this button to abort any changes, and close the dialog box.

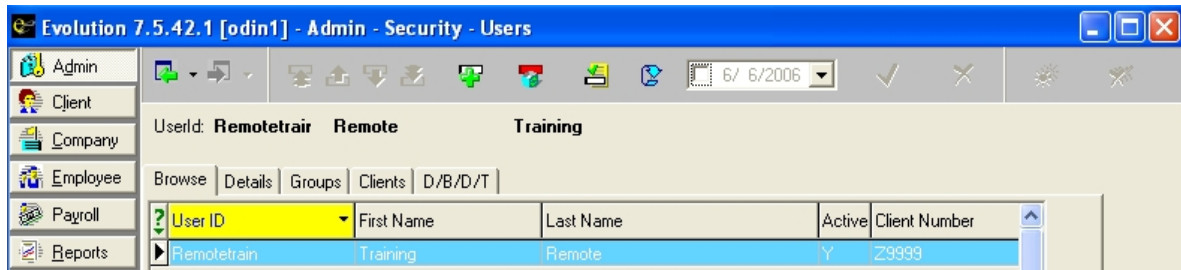
Admin Security

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

Evolution 7.5.42.1 [odin1] - Admin - Security - Users

Admin Client Company Employee Payroll Reports Misc

User ID: Remotetrain Remote Training

Browse Details Groups Clients D/B/D/T

User ID
Remotetrain (no spaces allowed)

Last Name
Remote

First Name Initial
Training

E-mail Address

User Signature

Accountant

Active User
☒ Yes ☐ No

Password **Confirm Password**

Password Change Date **Security Level**
11/8/2007 User

Department
Client

User's stereotype
☐ S/B internal
☐ Web
☒ Remote Z9999

User rights

View Task Queue: 5 Total; 5 Finished UserID: remotetrain Recd: 1.02M 11.5M/sec Sent:13.33K

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. <i>Evolution prevents this user from accessing the system.</i>
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.

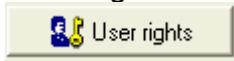
User's Stereotype

Box:

The Client ID of the company the user may access.

Security Rights for Users

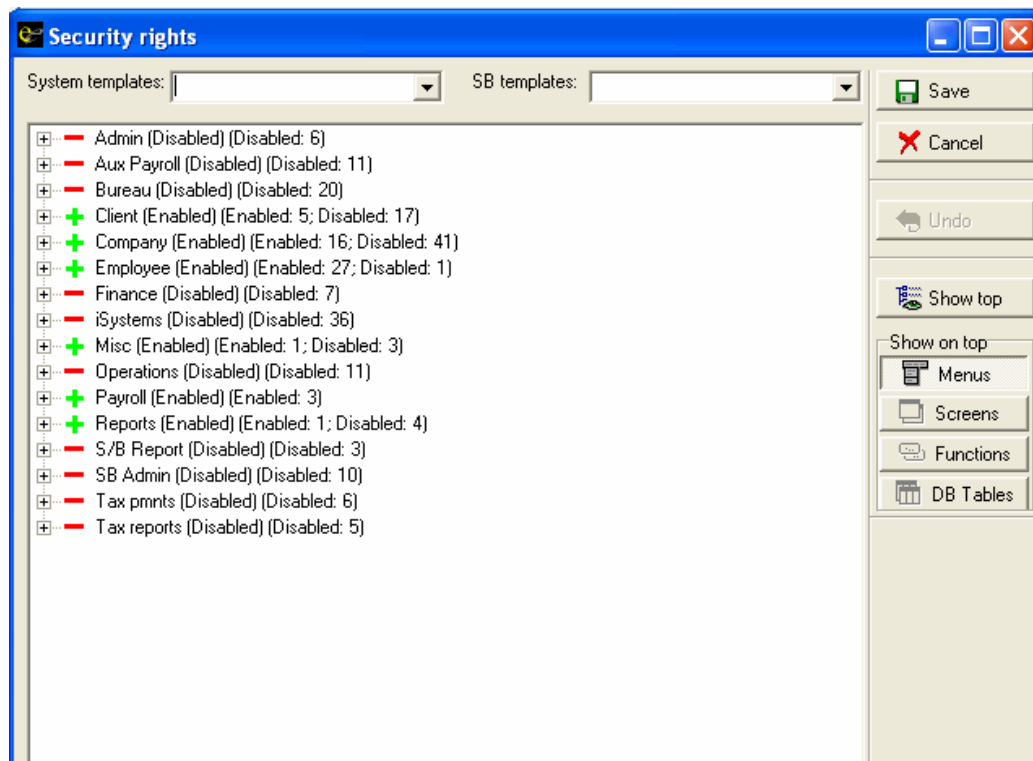
To assign or view security (user) rights for an existing user, click on the



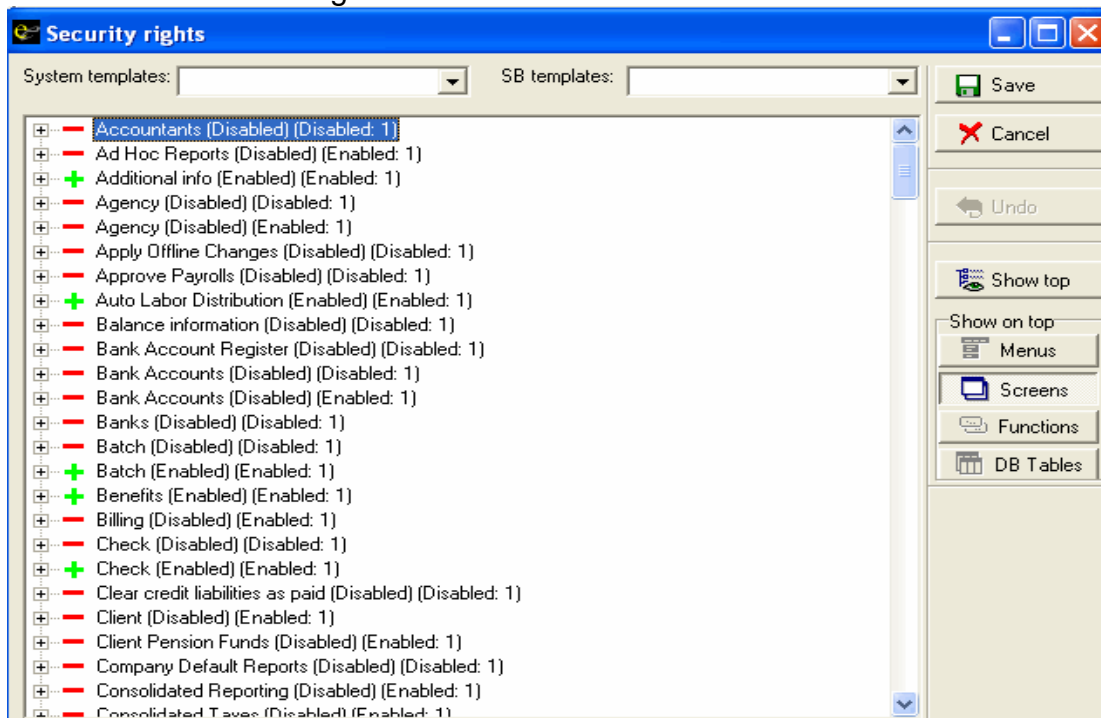
button.

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

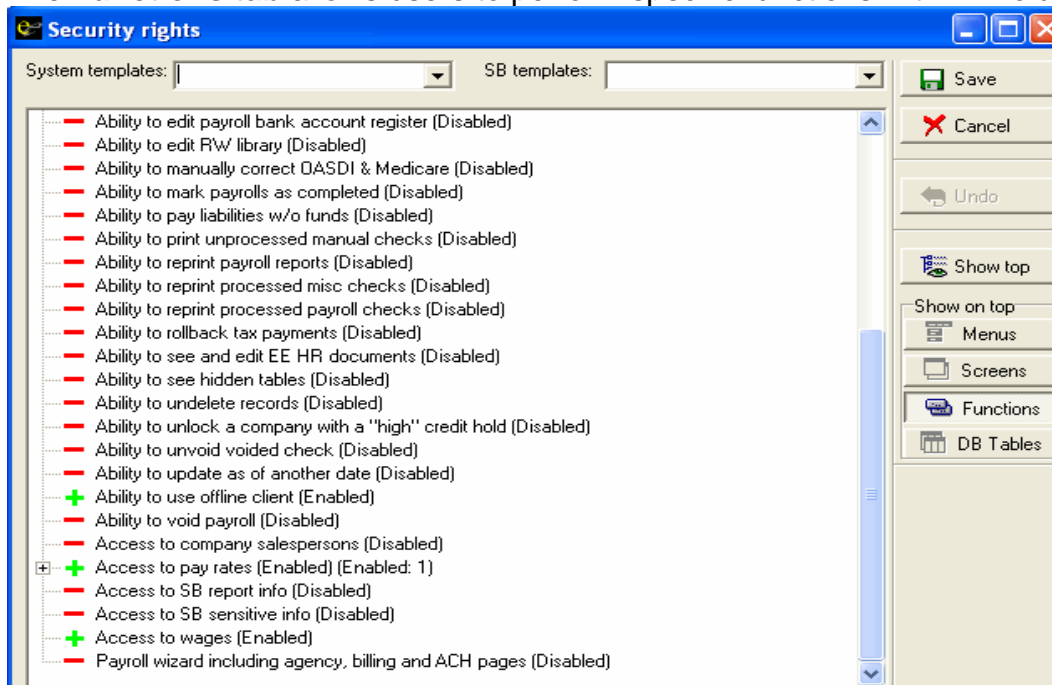
The **Menus** feature displays the levels evolution.



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.



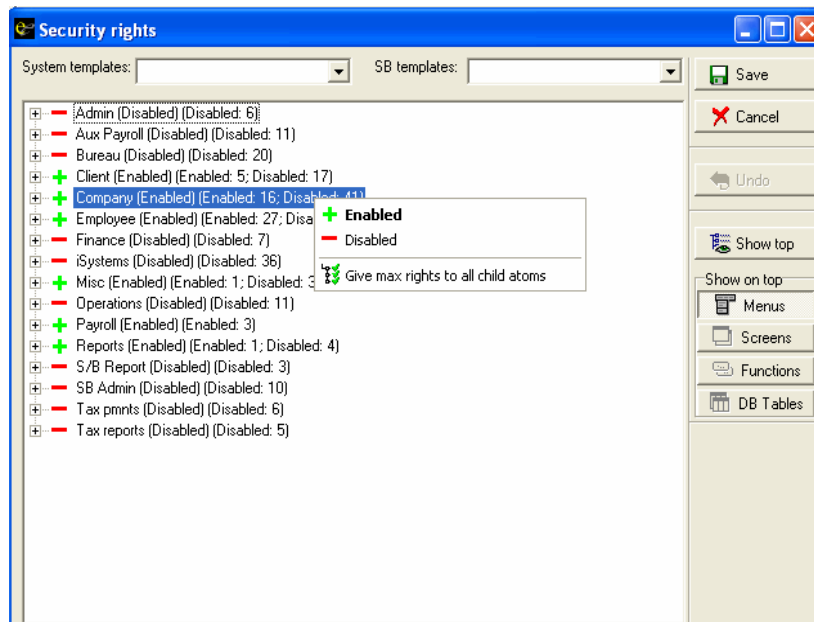
DB Tables are for Service Bureau internal use only.

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 its children rights.
- To disable a right, right-click the security right and select **Disabled**. This disables the right *and* all of its children rights.



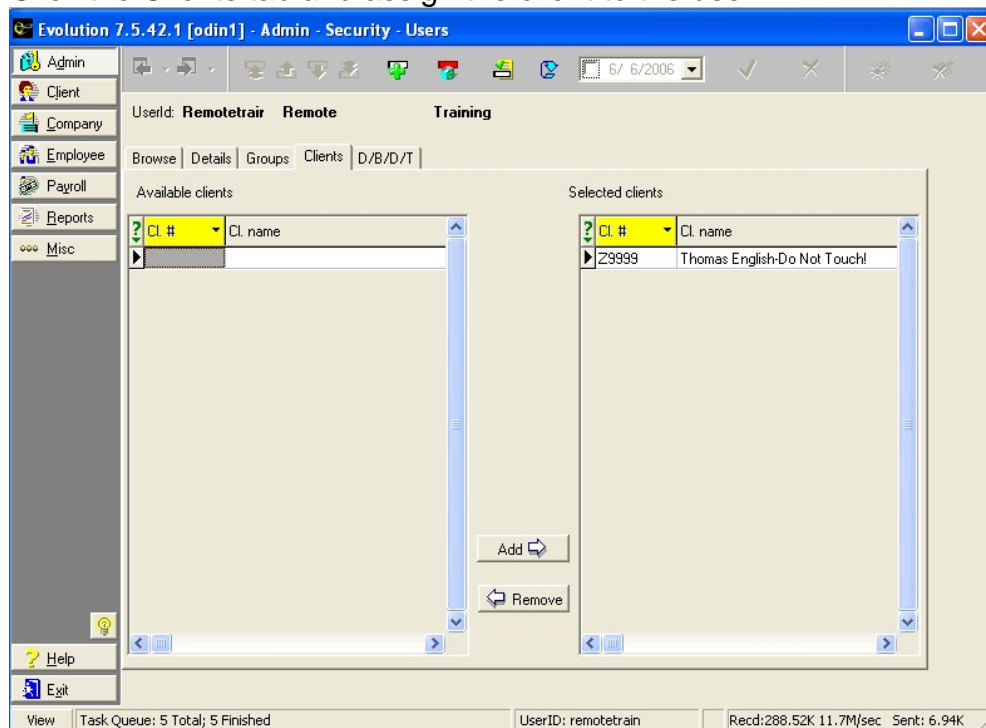
4. Click Save.

Groups Tab

Service Bureau Use Only.

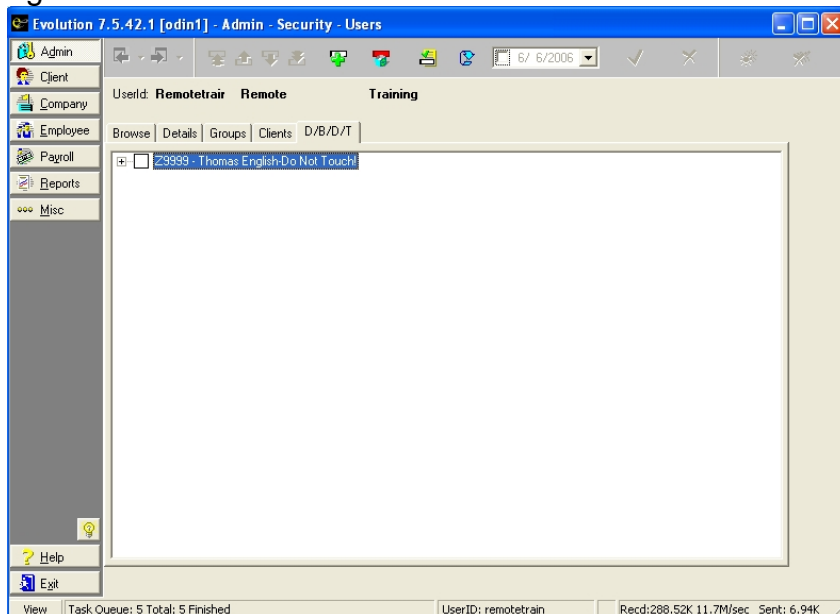
Clients Tab

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**.

Evolution 7.5.42.1 [odin1] - Admin - System Information

6/ 6/2006

Admin

Client

Company

Employee

Payroll

Reports

Misc

Generated 6/6/2006 3:38:18 PM

Service Bureau Irasburg

User name remotetrain

Server name odin1

Compression & Encryption False

Uncompressed data (Sent/Recd) 7,237 b/ 295,512 b

CPS 0 Kb/s

System Database Version 7.5.43.695

OS Microsoft Windows XP Version 5.1.2600 Service Pack 2

Processor 0 ~2794.0 MHz x86 Family 15 Model 4 Stepping 1 GenuineIntel

Free (Total) Physical Memory 137,212 (522,224) Kb

Free (Total) Paging File 889,648 (1,278,632) Kb

Free (Total) Space Drive C 59,834,732 (75,176,164) Kb

Printer 0 \\ads3\HP_8150_2

Printer 1 \\ads2\HP LaserJet 4100 PCL 5e

Printer 2 \\ads2\HP LaserJet 8150 PCL 5e (default)

Printer 3 Mimeo Printer

Printer 4 Microsoft Office Live Meeting Document Writer

Printer 5 Microsoft Office Document Image Writer

Printer 6 HP LaserJet 8100 Series PCL

Printer 7 ActiveTouch Document Loader

Printer 8 1-Step RoboPDF

evd\mr.bpl \\odin2\evolution\client\ 7.5.42.1

evd\taxreports.bpl \\odin2\evolution\client\ 7.5.42.1

evd\taxpayments.bpl \\odin2\evolution\client\ 7.5.42.1

evd\system.bpl \\odin2\evolution\client\ 7.5.42.1

evd\sbreports.bpl \\odin2\evolution\client\ 7.5.42.1

evd\win\calreports.hnl \\odin2\evolution\client\ 7.5.42.1

Help

Exit

Send

View Task Queue: 5 Total; 5 Finished UserID: remotetrain Recd:288.73K 11.6M/sec Sent: 7.19K

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.

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

Reports Printer

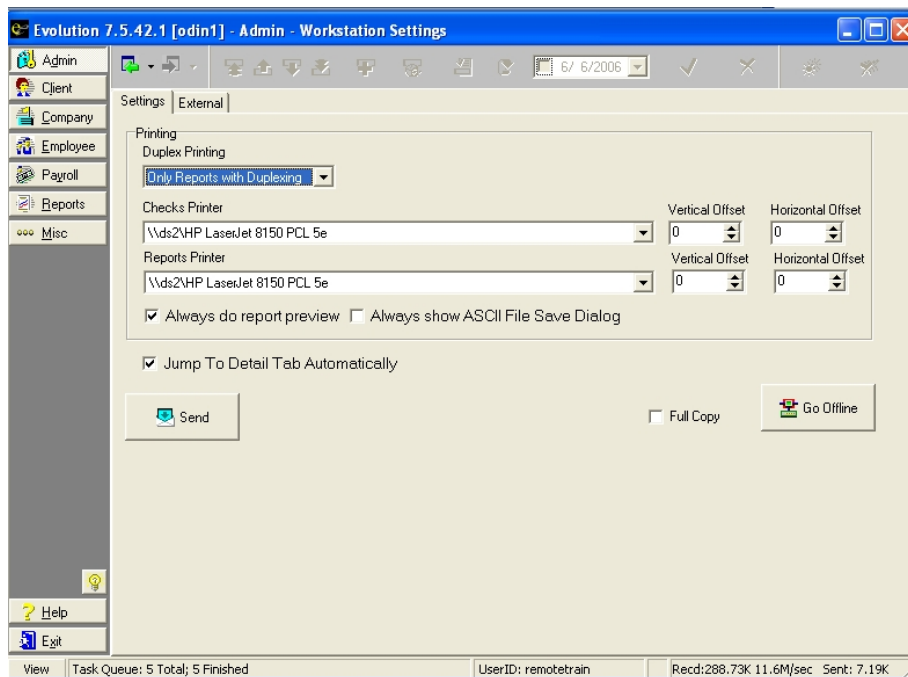
Reports Printer: The printer all reports will be sent to for printing.
Vertical Offset: The vertical offset.
Horizontal Offset: The horizontal offset.



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

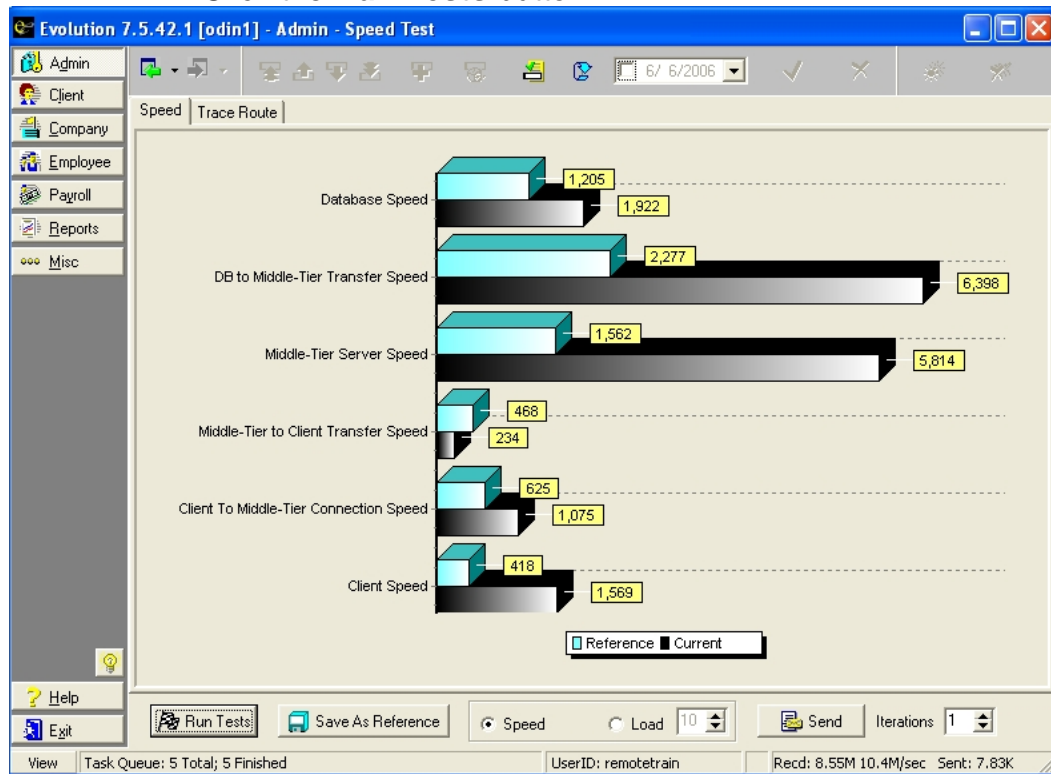
Evolution includes a system speed and load test that is designed to help diagnose performance problems. You can use the results as benchmarks, which you can use as a guide for troubleshooting and tuning your system. To access the speed test, click **Admin** and then click **Speed Test**.

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

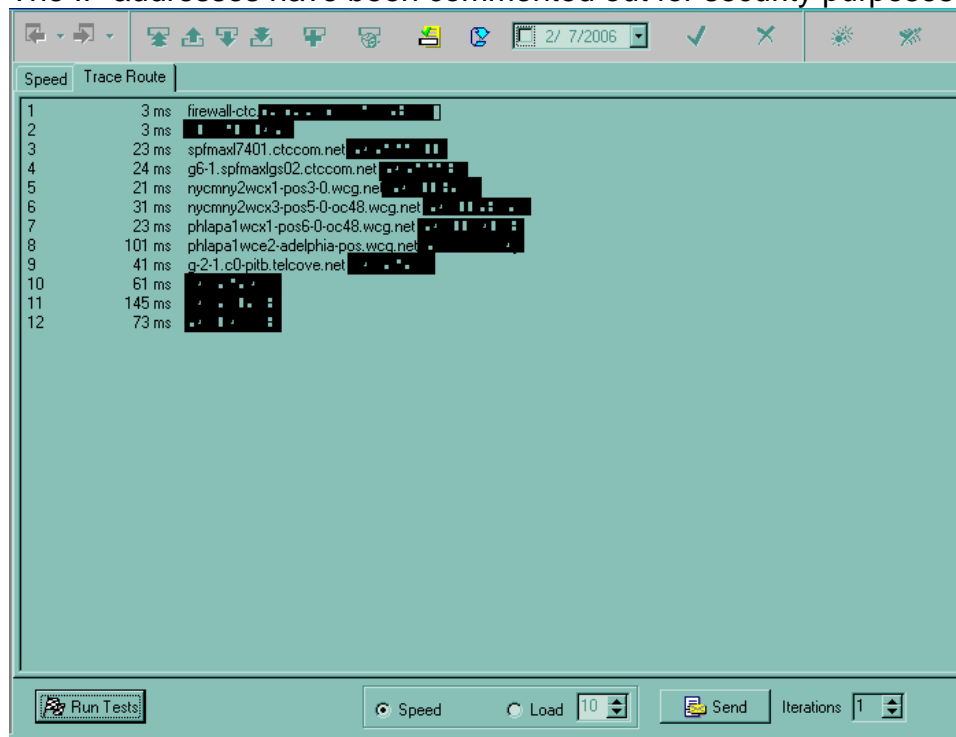
To save the results of a speed test as a reference for subsequent tests, click the **Save As Reference** button.

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.

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

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

Company Number		Legal Name	
Z9999			
Name		Legal Address 1	
Thomas English-Do Not Touch			
DBA		Legal Address 2	
Address 1		Legal City	
6 Muffin Lane		Legal State	
Address 2		Legal Zip Code	
City	State	Payroll Bank Account Nbr	
Crown Point	NY	605984	
Zip Code	County	Tax Bank Account Nbr	
12992		605984	
E-mail		Workers Comp Bank Account Nbr	
		605984	
Customer Service Team		Billing Bank Account Nbr	
Team B		605984	
Customer Service Rep		DD Bank Account Nbr	
		605984	

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



146592343

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

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

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

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

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

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 <i>hourly</i> rate. If the employee is <i>salaried</i> , 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

Description

Default Workers Comp

Rate Per Hour

Miscellaneous Job Code

G/L Tag

Life To Date Info

Amount	Hours
<input type="text"/>	<input type="text"/>
E/D Code	
<input type="text"/>	

Job Active

☒ Yes ☐ No

Certified

☐ Yes ☒ No

State Certified

☐ Yes ☒ No

Address 1

Address 2


City

State Zip Code

Locals tab

Insert new record button :

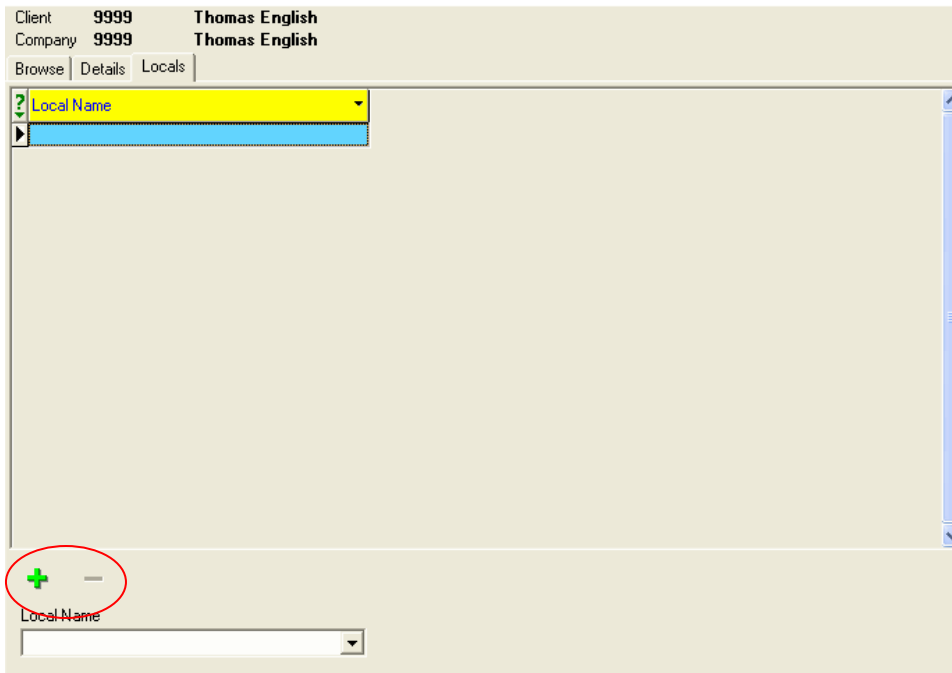
Adds a local tax to the job.

Delete record button :

Deletes the selected local tax from the job

Local Name:

The name of the local tax added to this job.



Client 9999 Thomas English
Company 9999 Thomas English

Browse Details Locals

? Local Name

Local Name

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

Evolution 8.0.0.86 [zeus] - Company - Miscellaneous - Additional Info

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

Browse Fields

Name	VALUE
Certification	Blue
Eye Color	Brown
Spouse's Name	Green

Name: Eye Color
Value: Blue

View Task Queue: 2 Total; 2 Finished UserID: remotetrain Recd:224.90K 11.8M/sec Sent: 9.43K

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.

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
		 Description
		 Director
		Manager
		Supervisor

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.

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

Browse Details

Description

Director
Manager
Supervisor

Description Director

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.

Evolution 7.5.43.1 [odin1] - Company - Payroll Defaults - Default E/D's -- Company

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

Browse Details

Co E/D Codes	Salary, Hourly	Override Rate	Override EE Rate Nbr	Override Hours	Override Amount	Override Line Item Date
E03	H					
E04	B				100.00	
E05	B					

E/D Code
E03

Override Rate
[]

Override EE Rate Nbr
[]

Override Hours
[]

Override Amount
[]

Override Line Item Date
[]

Salary, Hourly or Both
☐ Salary
☒ Hourly
☐ Both

Job
[]

Help
Exit

View Task Queue: 5 Total; 5 Finished UserID: remotetrain Recd:130.22K 12.8M/sec Sent: 7.54K

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 **Details** tab.

Evolution 7.5.43.1 [odin1] - Company - Payroll Defaults - Payroll Check Templates

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

Browse Details Blocks Taxes States Locals

Name
Annual Bonus

Tax Supplemental Rate
☒ Yes ☐ No

Federal Override Type
Regular Percent

Federal Override Value
28.00

Override Frequency
Annual

Prorate Scheduled E/Ds
☐ Yes ☒ No

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

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.

Evolution 7.5.43.1 [odin1] - Company - Payroll Defaults - Payroll Check Templates

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 Accrual
☒ 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

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

Block DD:	<p>Yes: Blocks direct deposit from the check.</p> <p>No: Does not block Direct deposit from the check.</p>
Block DD Except Net:	<p>Yes: Blocks direct deposit, except net, from the check.</p> <p>No: Does not block direct deposit, except net, from the check.</p>
Block Time Off Accrual:	<p>All: Blocks both accrual and usage of all Time Off Accruals.</p> <p>No: Time Off Accrual is used and accrued normally.</p> <p>Accrual: Blocks time off from accruing but still allows time used to be recorded and deducted from the Time Off Accrual balance.</p>
Block Auto Labor Distribution:	<p>Yes: Blocks auto labor distribution from the check.</p> <p>No: Does not block auto labor</p>

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.

Evolution 7.5.32.3 [odin1] - Company - Payroll Defaults - Payroll Check Templates

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

Browse Details Blocks Taxes States Locals

Block Federal
☐ Yes ☒ No

Block ER FUI
☐ Yes ☒ No

Block Additional Federal
☐ Yes ☒ No

Block ER OASDI
☐ Yes ☒ No

Block EE OASDI
☐ Yes ☒ No

Block ER Medicare
☐ Yes ☒ No

Block EE Medicare
☐ Yes ☒ No




Block EE EIC
☐ Yes ☒ No

Admin Client Company Employee Payroll Reports Misc Help Exit

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

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.

Evolution 7.5.32.3 [odin1] - Company - Payroll Defaults - Payroll Check Templates

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 Value

State

State Override Type

State Override Value

Tax at Supplemental Rate
☐ Yes ☐ No

Block State
☐ Yes ☐ No

Block SDI
☐ Yes ☐ No

Block Additional State
☐ Yes ☐ No

Block SUI
☐ Yes ☐ No

Help
Exit

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

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

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.

Evolution 7.5.32.3 [odin1] - Company - Payroll Defaults - Payroll Check Templates

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

? 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

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.

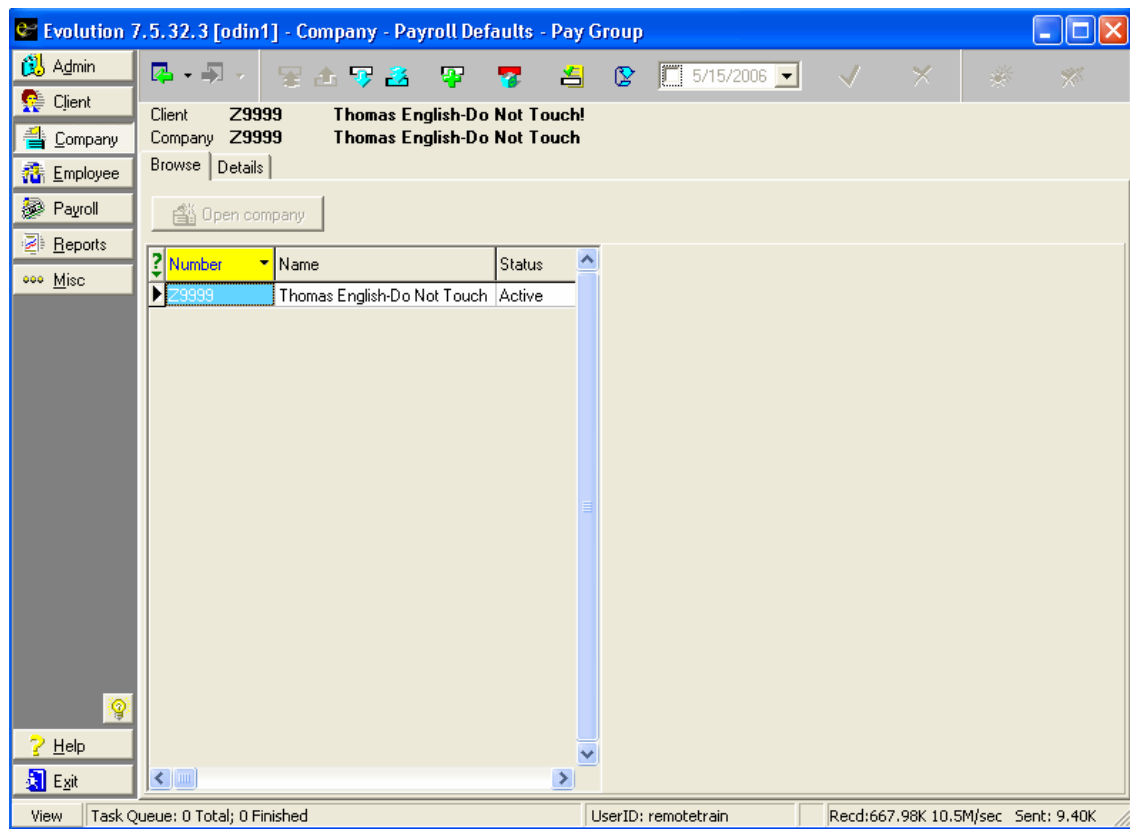
9. If Evolution hasn't committed the changes to the database, click the **Commit Changes**  button.


Creating Pay Groups for Payroll Defaults

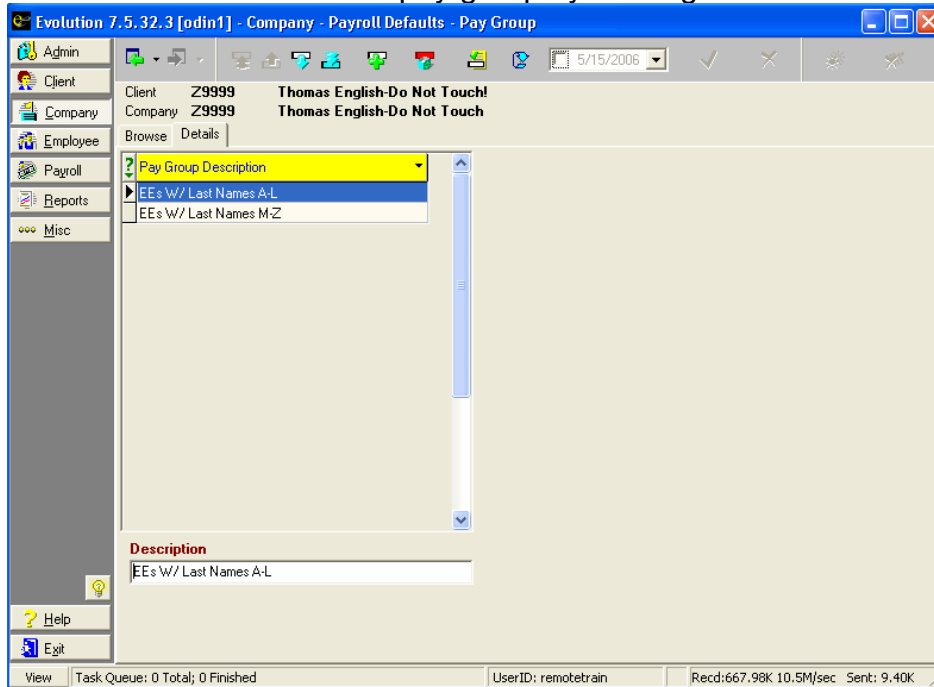
Every employee belongs to a pay group. You can create pay groups for employees to organize said employees into groups that are exceptions to salary, hourly, and D/B/D/T groupings. Pay groups are used to group employees for payroll batches. You add employees to pay groups on the Details tab of the **Employee-Employee**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



3. Create a new pay group by clicking the **Create Record** button .



Evolution 7.5.32.3 [odin1] - Company - Payroll Defaults - Pay Group

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

Browse Details



Pay Group Description
EEs W/ Last Names A-L
EEs W/ Last Names M-Z

Description
EEs W/ Last Names A-L

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

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.

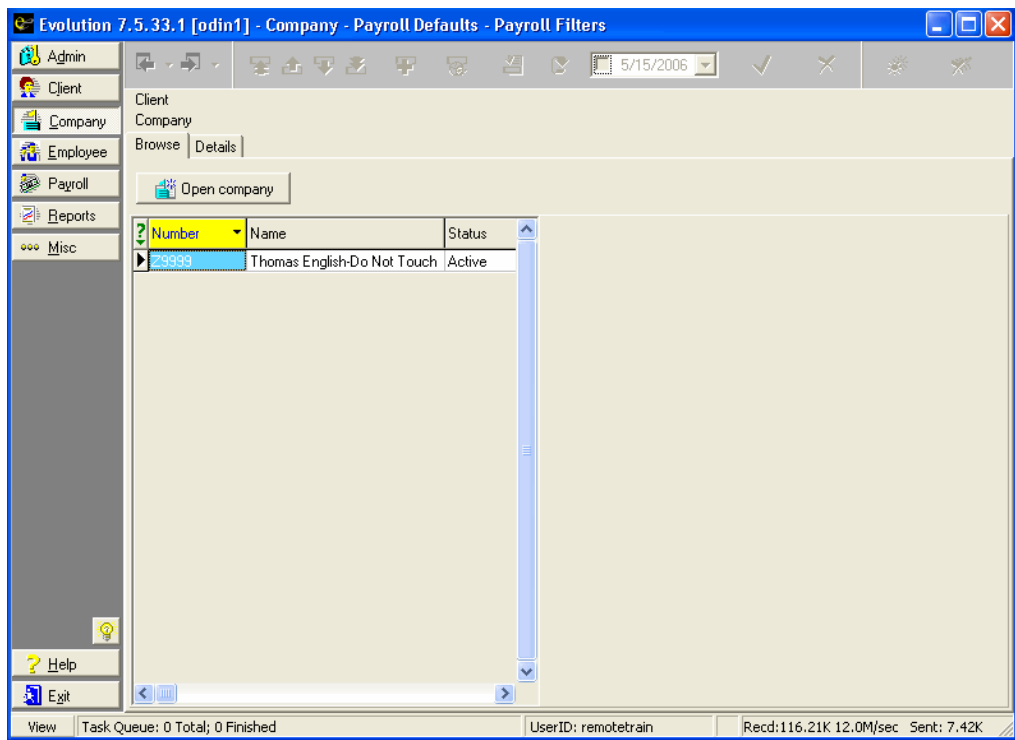
5. Click the **Post Changes** button  to save the changes to local memory.
6. Click the **Commit Changes** button  to commit the changes to the database.

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.



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

Evolution 7.5.33.1 [odin1] - Company - Payroll Defaults - Payroll Filters

Client Z9999 Thomas English-Do Not Touch!

Company Z9999 Thomas English-Do Not Touch

Browse Details

Name	Division	Branch	Department	Team	Pay Group
A-L Bakers	1	1	100		EEs W/ Last Names A-L
A-L Decorators	1	1	200		EEs W/ Last Names A-L
A-L Delivery	1	1	300		EEs W/ Last Names A-L
M-Z Bakers	1	1	100		EEs W/ Last Names M-Z
M-Z Decorators	1	1	200		EEs W/ Last Names M-Z
M-Z Delivery	1	1	300		EEs W/ Last Names M-Z

Name A-L Bakers

Division 1 Hide

Branch 1 Hide

Department 100 Baker


Team


PayGroup EEs W/ Last Names A-L

View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd:133.87K 12.1M/sec Sent: 7.87K

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	 

- 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 : To display the record of an employee, select their employee code (or number).

Employee Name
:

To display the record of an employee, select their name.




Click this button to view the prior employee's record.



Click this button to view the next employee's record.

Check Finder :

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

Tax Calculator :

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

Browse tab

Evolution 9.0.2.9 [st3] - Employee - Employee

Admin Client Company Employee Payroll Reports Misc

Last: **Butler** SSN: **070-56-1254** Company: **Thomas English**
First: **Rhett** EE#: **32** Number: **9999**

32 Butler Rhett G <Prior Next>

Browse EE Entry Details Address W2 Federal Tax Notes HR

Open company Open Filtered By D/B/D/T/PG Open Filtered By EE#,SSN,Name Removed EEs Send E-mail

Number	Name	Status	EE Code	Last Name	First Name	MI	SSN
32	Thomas English	Active					
18	Evans	Dale					089-50-
24	Webb	Charlotte	R				288-45-
31	Williams	Roy	M				044-46-
32	Butler	Rhett	G				070-56-
33	O'Hara	Scarlett					145-25-
35	Eve	Adam					104-78-

This tab allows you to view a list of all employees.

Open Filtered by D/B/D/T/PG: Use this option to view employees who are associated with a particular Division, Branch, Department, Team or Pay Group.

Open Filtered by EE#, SSN, Name:	Use this option to view an employee record based on employee code, social security number, or name.
Removed EE s check box:	Select this option to view records for employees who have been removed from view. An employee record may be hidden if the employee does not have any current year-to-date information.
Send Email Button:	Sends an email to the selected employees, if the employee has an email address entered as part of their employee address.

The **Browse** tab of the **Employee-Employee** window is also used to globally update the Healthcare Coverage field. To update the employee **Healthcare Coverage** field for one or more employees, do the following:

1. Right click the Employee grid, and select **Update Healthcare Coverage**.

Evolution 9.0.2.9 [st3] - Employee - Employee

Admin Client Company Employee Payroll Reports Misc

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

Open company Open Filtered By D/B/D/T/PG Open Filtered By EE#,SSN,Name Removed EE's Send E-mail

Number	Name	Status	EE Code	Last Name	First Name	MI	SSN
9999	Thomas English	Active					
31	Williams	Roy					
32	Butler	Rhett					
33	OHara	Scarlett					
35	Eve	Adam					

2. The Healthcare Coverage dialog will display.

Healthcare Coverage

Date

☐ 10/1/2007

☐ 7/1/2007

☒ 4/1/2007

☐ 1/1/2007

☐ 10/1/2006

☐ 6/19/2007

Value

No ER Paid Ins./Not Eligible

Eligible/Not Covered

Eligible/Covered

OK

Cancel

Select the **Effective Date** and the **Value**. The effective date should be the 1st of the quarter in which the value applies to the employee(s). The options for the **Value** are:

- No ER Paid Ins/Not Eligible: All employees of employers who do not offer insurance. Employee of employers who offer insurance to some employee, but who are not eligible themselves.
- Eligible/Not Covered: Employees who are eligible for coverage through their employer plans, but chose not

to enroll, and are uninsured.

- Eligible/Covered: Employer offers insurance and employee is covered. This option is not included in the assessment calculation.

3. Click **OK**. An Employee dialog box will display, select the employees that correspond to the Value chosen in the previous step. Click **Update**. If all employees have the same value, click **Update for All**.


EE Code	Last Name	First Name	MI	SSN
18	Evans	Dale		089-50-7691
24	Webb	Charlotte	R	288-45-6297
31	Williams	Roy	M	044-46-3412
32	Butler	Rhett	G	070-56-1254
33	O'Hara	Scarlett		145-25-8966
35	Eve	Adam		104-78-5236

Update for all Update Cancel

You can view the option on the **EE Entry** tab or the **EE Quick Entry** Window of the **Employee-Employee** window.

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

Evolution 9.0.2.9 [st3] - Employee - Employee

Admin Client Company Employee Payroll Reports Misc

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

18 Evans Date < Prior Next >

Browse EE Entry Details Address W2 Federal Tax Notes HR

Always key SSN first

SSN **089-50-7691**

EE Code **18**

Last Name **Evans**

First Name **Date** MI

Address 1 **PO Box 705**

Address 2

City **Plattsburgh** State **NY**

Zip Code **12934** County

Primary Phone **802-555-1212**

Ethnicity **Not Applicable**

Date of Birth

Gender **Male** D/B/D/T

Division

Branch

Department **200** Decorator

TEAM

Current Hire Date Original Hire Date
 5/1/1997 5/1/1997

Current Termination Date Rehire OK
☒ Yes ☐ No

Current Status Code
 Active

Federal Marital Status
☒ Single ☐ Married

Federal Dependents
 2

Pay Frequency
 Bi-Weekly

Salary Amount Average Hours **0.00**

Rate Number **1** Standard Hours **80.00**

Rate Amount **9.25** Pay Grade

Default WC **8810** Description **Clerical** State **NY**

Default Job

State
 NY

SDI **NY**

SUI **NY**

State Marital Status State Dep
 S 0

Healthcare Coverage
 No ER Paid Ins/Not Eligible

Reciprocal Method
 Take None

Reciprocal State Locals

View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd:737.33K 8.8M/sec Sent:12.75K

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.

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. This 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:	<i>Required.</i> 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.

Healthcare Coverage: *Required.* Select the healthcare coverage level for the employee. Options are:

- No ER Paid Ins/Not Eligible: All employees of employers who do not offer insurance. Employee of employers who offer insurance to some employee, but who are not eligible themselves.
- Eligible/Not Covered: Employees who are eligible for coverage through their employer

plans, but chose not to enroll, and are uninsured.

- Eligible/Covered: Employer offers insurance and employee is covered. This option is not included in the assessment calculation.

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 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

Evolution 9.0.2.9 [st3] - Employee - Employee

Admin Client Company Employee Payroll Reports Misc

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

New Hire Report Sent
Completed
FLSA Exempt
☐ Yes
☐ No
☒ Not Applicable
Time Clock Number
Position
Position Effective Date

Position Status
Full Time
☐ Highly Compensated
☒ Yes
☐ No
☐ Corporate Officer
☒ Yes
☐ No

Labor Distribution Options
Distribute None
Auto Labor Distribution E/D Group
Pay Group
Delivery
Group Term Policy Amount
GTL Hours GTL Rate
On Call From On Call To
G/L Tag

Tipped Directly
☐ Yes
☒ No
Ignore FICA on Cleanup Payroll
☐ Yes
☒ No
Combine Returns On This EE
☒ Yes
☐ No
Generate Second Check
☐ Yes
☒ No
Deductions To Take First
Child Support, Garnishment
Second Check Template
EE Scheduled ED's
Apply for New Position

YTD (F3)

View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd:737.33K 8.8M/sec Sent:12.75K

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:	<p>The status of the employee in this position.</p> <ul style="list-style-type: none"> • 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:

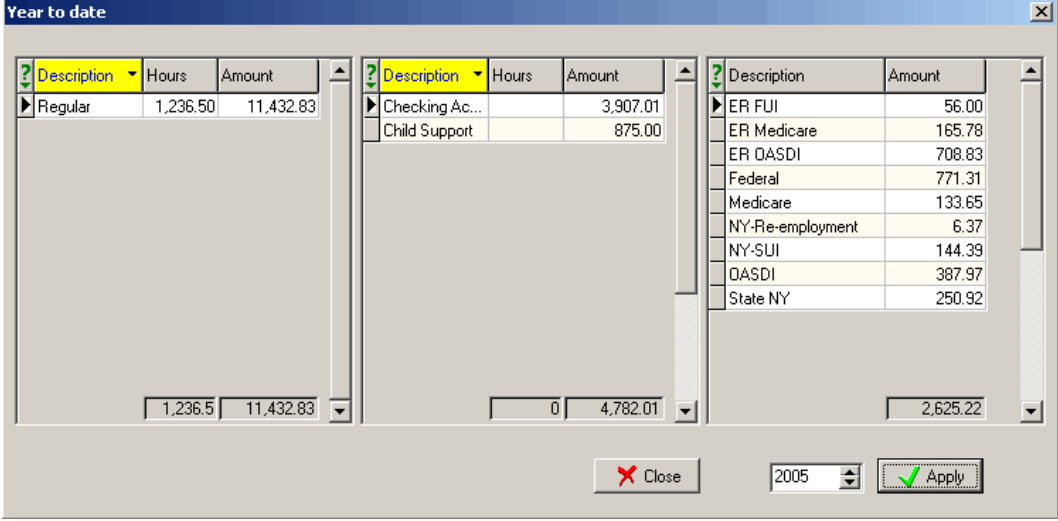
The full Group Term Policy amount used for

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:	<i>Informational only. Does not affect calculations.</i> 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:



The screenshot shows a 'Year to date' window with three panes. The left pane shows earnings for 'Regular' work. The center pane shows deductions for 'Checking Ac...' and 'Child Support'. The right pane shows a list of deductions including ER FUI, ER Medicare, ER OASDI, Federal, Medicare, NY-Re-employment, NY-SUI, OASDI, and State NY. At the bottom, there are 'Close' and 'Apply' buttons, and a year selector set to '2005'.

Description	Hours	Amount
Regular	1,236.50	11,432.83

Description	Hours	Amount
Checking Ac...		3,907.01
Child Support		875.00

Description	Amount
ER FUI	56.00
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

Summary Totals:

Hours	Amount
1,236.5	11,432.83
0	4,782.01
	2,625.22

Buttons: Close, 2005, Apply

- The left pane displays the employee's earnings.
- 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.

Apply for New Position

A new Applicant record will be created for the employee on the **Employee-HR Applicant** window if the HR Module has been enabled for your company. For more information on the HR Module, contact your Service Bureau.

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:

Evolution 8.0.0.84 [zeus] - Employee - Employee

Admin Client Company Employee Payroll Reports Misc

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

**Standard Address --
(For Mailing W2's)**

Address 1

Address 2

City

State

Zip Code

County

Primary Phone

Secondary Phone

Tertiary Phone

E-mail

VMR Password

Country

**Alternate Address --
(For Mailing Payroll Checks)**

Self Serve

Enabled ☒ Yes ☐ No

Print Voucher ☒ Yes ☐ No

User Name

Password

View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd:819.93K 11.8M/sec Sent:16.27K

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.

Evolution 7.5.33.1 [odin1] - Employee - Employee

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

Social Security Number 089-50-7691	Annual Form Type W-2	Residential State NY
Treat as EIN or SSN <input type="radio"/> EIN <input checked="" type="radio"/> SSN	Deceased <input type="radio"/> Yes <input checked="" type="radio"/> No	I-9 on File <input checked="" type="radio"/> Yes <input type="radio"/> No
1099 or Employee <input type="radio"/> 1099 <input checked="" type="radio"/> W-2	Statutory Employee <input type="radio"/> Yes <input checked="" type="radio"/> No	1099R Distribution Code
First Name Middle Name Last Name Name Suffix	Legal Rep <input type="radio"/> Yes <input checked="" type="radio"/> No	Tax Amount Determined <input type="radio"/> Yes <input checked="" type="radio"/> No
	Deferred Compensation <input type="radio"/> Yes <input checked="" type="radio"/> No	Total Distribution <input type="radio"/> Yes <input checked="" type="radio"/> No
	Pension <input type="radio"/> Yes <input checked="" type="radio"/> No	Pension Plan None

View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd:748.58K 11.3M/sec Sent:12.56K

- 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:	<p>Select the type of Form. If not stated otherwise, this is the type of form needed:</p> <ul style="list-style-type: none"> • None • W2 • 1099 • W2 & 1099 • Puerto Rico
Deceased:	<i>Not used at this time.</i>

Statutory Employee:	<p>Yes: If selected, the Statutory Employee check box will also be checked on the Form W2.</p> <p>No: If cleared, the Statutory Employee check box will <i>not</i> be checked on the Form W2.</p>
Legal Rep:	<i>Not used at this time.</i>
Deferred Compensation:	<i>Not used at this time.</i>
Pension:	<p>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.</p> <p>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.</p>
Residential State:	<i>Defaults to employee's address state.</i> 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.

Evolution 9.0.2.9 [st3] - Employee - Employee

Admin Client Company Employee Payroll Reports Misc

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

Use Effective Dates to Change Tax Statuses

Override Fed Tax Type
Regular Amount

Override Fed Tax Value
10.00

EIC
None

FUI Rate Credit Override

EE Federal
☐ Exempt ☐ Block ☒ Include

EE OASDI Exempt
☒ Yes ☐ No

EE Medicare Exempt
☒ Yes ☐ No

ER OASDI Exempt
☐ Yes ☒ No

ER Medicare Exempt
☐ Yes ☒ No

ER FUI Exempt
☐ Yes ☒ No

View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd:823.39K 7.4M/sec Sent:15.56K

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.

FUI Credit Override:

Enter the amount of the FUI Credit override for the employee. When set to Zero, payroll will calculate the FUI rate at 6.2% instead of .8%. The FUI Credit override will be effective as of the date selected when the credit override value is entered.

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, set the Effective date to the date on the updated W4. If you have any questions regarding Effective dates, 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

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

Payroll notes: Any notes entered here are displayed on the





Employee Notes tab in payroll. The employee is highlighted in yellow alerting the user that there are notes associated with this employee.

General Notes:

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

HR Tab

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



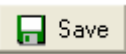
Last: Evans		SSN: 089-50-7691	Company: Thomas English			
First: Dale		EE#: 18	Number: 9999			
18	Evans Dale	Prior	Next	 		
Browse EE Entry Details Address W2 Federal Tax Notes HR Documents						
<div>Picture </div> <div></div> <div>Badge ID <input type="text"/></div> <div>Security Clearance <input type="text"/></div> <div>Supervisor <input type="text"/></div> <div>EEO Code <input type="text"/></div>		<div>Recruiter <input type="text"/></div> <div>Referral <input type="text"/></div> <div>Automobile Reliable Vehicle <input checked="" type="radio"/> Yes <input type="radio"/> No</div> <div>Drivers License Number <input type="text"/> D/L Expiration <input type="text"/></div> <div>Insurance Carrier <input type="text"/></div> <div>Insurance Policy Number <input type="text"/></div> <div>Policy Expiration <input type="text"/></div> <div>Smoker <input type="radio"/> Yes <input checked="" type="radio"/> No</div>			<div>Performance Rating <input type="text"/></div> <div>Review Date <input type="text"/></div> <div>Next Review Date <input type="text"/></div> <div>Veteran <input type="radio"/> Yes <input checked="" type="radio"/> Not Applicable <input type="radio"/> No</div> <div>Discharge Date <input type="text"/></div> <div>Vietnam Veteran <input type="radio"/> Yes <input checked="" type="radio"/> Not Applicable <input type="radio"/> No</div> <div>Disabled Veteran <input type="radio"/> Yes <input checked="" type="radio"/> Not Applicable <input type="radio"/> No</div> <div>Military Reserve <input type="radio"/> Yes <input checked="" type="radio"/> Not Applicable <input type="radio"/> No</div>	
		<div>VISA VISA Number <input type="text"/></div> <div>VISA Type <input type="text"/></div> <div>Expiration Date <input type="text"/></div>				


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** and **H1B Res** 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** or **H1B Res** is 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  button. Choose the document to add.
3. Click .

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

Evolution 9.0.2.9 [st3] - Employee - Employee Quick Entry

Admin Client Company Employee Payroll Reports Misc

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

18 Evans Dale < Prior Next >

Browse EE Quick Entry

First Name Dale Last Name Evans Address 1 PO Box 705 Address 2 City Plattsburgh State NY Zip Code 12934 Primary Phone 802-555-1212 Gender Male Time Clock Number	Federal Marital Status Single Federal Dependents 2 State NY SDI State NY SUI State NY State Marital Status S St Dep 0 Healthcare Coverage No ER Paid Ins/Not Eligible Date of Birth Current Hire Date 5/1/1997 Current Termination Date Current Status Code Active
--	---

Pay Frequency Bi-Weekly Salary Amount Default WC 8810	Rate Amount 9.25 Rate Amount Rate Amount	DBDT Code DBDT Code DBDT Code
--	---	--

Post & Add Next Employee EE Scheduled ED's

View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd:823.26K 8.0M/sec Sent:15.24K

SSN:	<i>Required.</i> 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:	<i>Required.</i> The alphanumeric employee code (or number) of the employee. Employee Codes may be up to nine characters long.
First Name:	<i>Required.</i> The first name of the employee to be added to the selected company.
Last Name:	<i>Required.</i> The last name of the employee to be added to the selected company.
Employee Address:	<i>Required.</i> Enter the employee's address using the Address 1, Address 2, City, State, and Zip Code fields.

Primary Phone:	Enter the primary phone number used to contact the employee.
Gender:	<i>Required.</i> Select the gender of the employee.
Time Clock Number:	Enter the employee's time clock number if applicable.
Pay Frequency:	<i>Required.</i> 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:	<i>Required.</i> 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:	<i>Required.</i> Select the employee's ethnicity.
Federal Marital Status:	<i>Required.</i> Select the federal marital status as defined by the employee's W-4 form.
Federal Dependents:	<i>Required.</i> 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.
- Healthcare Coverage: *Required.* Select the healthcare coverage level for the employee. Options are:
- No ER Paid Ins/Not Eligible: All employees of employers who do not offer insurance.
Employee of employers who offer insurance

to some employee, but who are not eligible themselves.

- Eligible/Not Covered: Employees who are eligible for coverage through their employer plans, but chose not to enroll, and are uninsured.
- Eligible/Covered: Employer offers insurance and employee is covered. This option is not included in the assessment calculation.

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 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

Evolution 8.0.0.84 [zeus] - Employee - Pay rate info

Admin Client Company Employee Payroll Reports Misc

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

Evans Date Prior Next Update Rates or Salaries

Browse Details

Salary Amount Standard Hours Future Raise Date Future Raise Rate Auto update rates
 Annualized Salary **Pay Frequency** Future Raise Amount Workers Comp Wage Limit
 Average Hours Calculated Annual Salary Future Raise %

Rate Nu...	Rate Amount
1	9.22
2	13.41
3	15.00

Division Team Pay Grade
 Branch Jobs Number
 Department W/C Code Workers Comp State

Primary Rate Rate Number
☒ Yes ☐ No 1
 Rate Amount 9.22

View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd:759.44K 11.8M/sec Sent:11.73K

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:	<i>Informational Only.</i> 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 multiplies the Salary Amount by the Pay Frequency. If the employee is hourly, it multiplies the Rate Amount by the Pay Frequency and by Standard Hours.
Future Raise Date:	<i>Informational only.</i> The date the future raise will take effect.
Future Raise Amount:	<i>Informational only.</i> 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 %:	<i>Informational only.</i> 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 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 : Displays the Update Rate Amount dialog, which allows you to update pay rates for multiple employees.

Update Rates or Salaries Dialog:

Update Rates or Salaries

Update

☐ Salaries

☒ Rates

☐ For Hourly Employees Only

Wage Range to Be Modified

from \$ to \$

Mode

☒ Change by a Fixed Amount (e.g. add .50) \$

☐ Change by a Percent (e.g. 10) %

☐ Change to an Amount (e.g. change to 6.15) \$

✓ Select Employees ✗ Cancel

Update:

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

Rates: When selected, rates will be updated.

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.

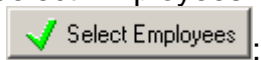
Change by a Percent:

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

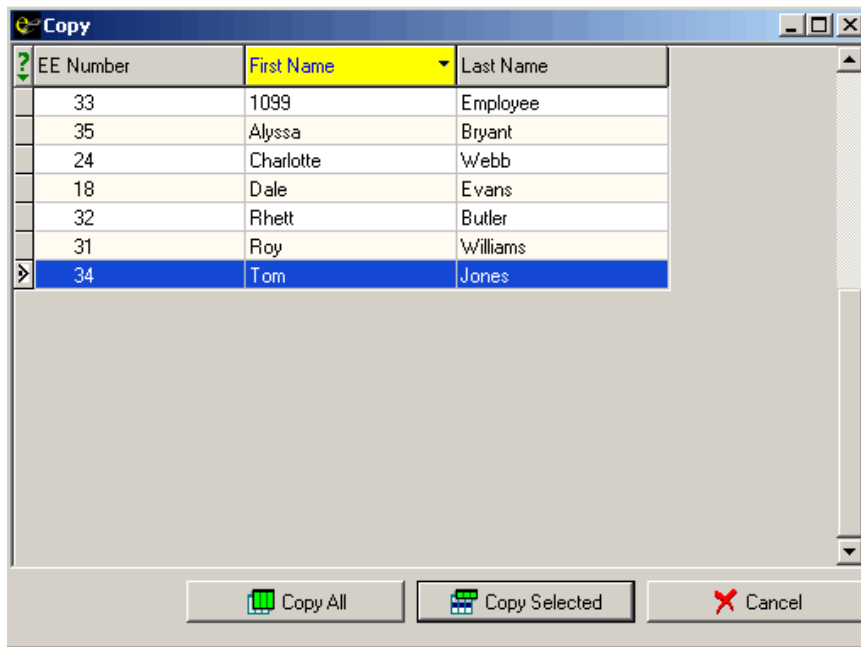
Change to an Amount:

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

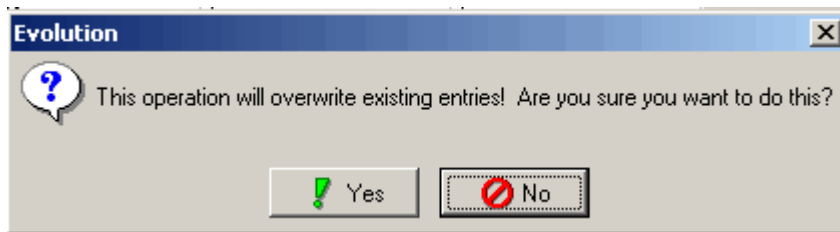


Once you have populated your specific updates in the Update Rates or Salaries dialog, the Select Employees button becomes active. To update employee rates and/or salaries, click this button. A list of active employees will appear.




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  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.

Evolution 7.5.33.1 [odin1] - Employee - States

Admin Client Company Employee Payroll Reports Misc

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

118 Evans Dale < Prior Next >

Browse Details Tax Overrides

Home State

NY

St...	Marital Status	Withholding Allowances
NY	S	0

State County Reciprocal Amount/Percentage Marital Status

NY SDI Tax Code Reciprocal Method

NY SUI Withholding Allowances Reciprocal State

NY 0 Take None

Import Marital Status

Single

Married

View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd:767.38K 9.6M/sec Sent:14.55K

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 Reciprocity 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 reciprocity used for the Reciprocal Method.

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

- 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.

The screenshot shows the 'Evolution 7.5.33.1 [odin1] - Employee - States' window. The left sidebar contains a tree view with 'Admin' selected. The main area displays employee information for 'Evans, Dale' (SSN: 089-50-7691, EE#: 18) from 'Thomas English-Do Not Touch' (Company Number: Z9999). The 'Tax Overrides' tab is active, showing options to 'Override State Tax Type' (set to 'None') and 'Override State Tax Value'. Below this, the 'Use Effective Dates to Change Tax Statuses' section includes checkboxes for 'State Exempt or Block' (set to 'Include') and '1099 Calculate SUI Taxable Wages' (set to 'No'). Further down, there are sections for 'EE SDI', 'EE SUI', 'ER SDI', and 'ER SUI', each with 'Exempt', 'Block', and 'Include' radio buttons. The 'Include' option is selected for all four. The bottom status bar shows 'Task Queue: 0 Total; 0 Finished', 'UserID: remotetrain', and performance metrics.

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:

Evolution 7.5.33.1 [odin1] - Employee - Locals

Admin Client Company Employee Payroll Reports Misc

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

18 Evans Dale < Prior Next Hide this Local

Browse Details

Local	Type	Value	Exempt Exclude	Misc Amount	Filler	Enabled
New York City Non-Res.	N		I			Y

Local

New York City Non-Res.

County

Tax Code

Override Tax Type: None

Standard Tax Rate: 0.0025

Override Tax Value

Misc Amount

% Of Taxable Wages

Local Enabled

☒ Yes ☐ No

Deduct

☒ Always ☐ Never

☐ No Overrides

Use Effective Dates to Change Tax Statuses

Exempt or Block

☐ Exempt ☐ Block ☒ Include

Include pretax deductions in tax wages

☐ Yes ☒ No

View Task Queue: 1 Total; 1 Finished UserID: remotetrain Recd:768.13K 9.6M/sec Sent:15.52K

Local:	<i>Required.</i> Select the local tax. These locals are set up and stored at Company – Taxes-Local Tax .
County:	<i>Read-Only.</i> 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:	<p><i>Defaults to Include. After the initial set up, if you need to change this option, you must use an effective date.</i></p> <p>Exempt: Employee is not subject to this tax.</p> <p>Block: Employee is subject to this tax, but the taxes are not withheld.</p> <p>Include: Employee is subject to this tax, and it is withheld.</p>
Override Tax Type:	<p><i>Defaults to None.</i></p> <p>None: No tax override.</p> <p>Regular Amount: The employee is taxed the amount in the Override Tax Value box.</p>

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.

Browsing Scheduled E/Ds

To view the Scheduled E/Ds created 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. Click on the Browse Scheduled E/Ds tab for the employee whose scheduled earnings and deduction you wish to view.

Evolution 9.0.2.9 [st3] - Employee - Scheduled E/Ds

Admin Client Company Employee Payroll Reports Misc

Last: **Evans** SSN: **089-50-7691** E/D Code: **D02** Type: **D1** Company: **Thomas English**
 First: **Dale** EE#: **18** Desc: **Checking Account** Number: **9999**

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	
DZ	NY SDI	Y			D	11/15/2006	

Help Exit

View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd:827.05K 7.4M/sec Sent:17.83K

Users may view the following information on the Earnings and Deductions grid for the E/Ds created for the selected employee.

E/D Code: The code identifying the earning or deduction.
Generally, the first letter of E/D codes are created using the following convention:

E	Earning
D	Deduction
M	Memo

Description: The descriptive name of the E/D code.

Calculation Type: The method used to calculate the E/D. Options are:

- Fixed abbreviated as F
- % of Gross abbreviated as G
- % of Net abbreviated as N
- % of Disposable Earnings abbreviated as D
- Garnishment abbreviated as R
- Garnishment % Gross abbreviated as O
- % of E/D Group Amount abbreviated as P
- % of E/D Group Hours abbreviated as B
- % of E/D Group Amt and Hours

abbreviated as C

- Levy abbreviated as L
- Pension Match abbreviated as S
- Rate * Hours abbreviated as H
- Rate * Amount abbreviated as A
- State SDI abbreviated as Y
- Washington L&I abbreviated as W
- None abbreviated as Z

Amount: The amount specified for the scheduled E/D.

Percentage: The percentage specified for the scheduled E/D.

Frequency: The frequency in which the scheduled e/d should be applied to the employee. Options are:

- Every Pay abbreviated as D
- Every Scheduled Pay abbreviated as P
- Every Other Scheduled Pay abbreviated as O
- First Scheduled of Month abbreviated as F
- Last Scheduled of Month abbreviated as L
- Closest Scheduled to the 15th of Month

abbreviated as M


- Quarterly abbreviated as R
- Semi-Annual abbreviated as S
- Annual abbreviated as A
- User Entered abbreviated as U

Effective Start Date: The date the scheduled E/D begins. When creating a new scheduled E/D for an employee this date defaults to the current date. The Effective Start Date uses the employee's check date as a reference.

Effective End Date: The date the scheduled E/D ends. If this field has been left blank the scheduled item will continue indefinitely. If the check date of the payroll is greater or equal to this date, the scheduled E/D will take effect.

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

Evolution 9.0.3.2 [odin] - Employee - Scheduled E/Ds

Admin Client Company Employee Payroll Reports Misc

Last: Direct Deposit First: Employee SSN: 123-25-6855 EE#: 10 E/D Code: D01 Desc: Checking Type: D1 Company: Sample Client Number: Alpha

10 Direct Deposit Employee < Prior Next >

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

E/D Code
D01 Checking

Calculation Method
None
Amount %
Frequency
Every Pay

Month # Which Payrolls
None All

E/D Group

Agency

Effective Start Date 9/4/2001 **Effective End Date**

Priority Multiple Scheduled E/D Group

Child Support Case

Garnishment ID

Benefit Reference

Benefit Amount Type

EE Direct Deposit
135482

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

Deductions to zero
Yes No

Employee

View Task Queue: 1 New Finished; 1 Total; 1 Finished UserID: remotetrain Recd:960.70K 11.7M/sec Sent:15.16K

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. This is a *required* field.
- Fixed: Uses a fixed amount to calculate the E/D. There must be a value in the **Amount** field, 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 **Amount** 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 than a specified amount; you must enter an

amount in the **Take Home Pay** field for this to work correctly.

- 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.

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 not 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 based on the setting selected on the Client-E/Ds window. Contact your Service Bureau for more information.

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,

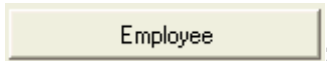
even if the employee has no other earnings. It also applies scheduled deductions if there are no other earnings to be paid. If there are no earnings to deduct from, these deductions will not be taken and never will be taken or made up.

Deductions to Zero:

*Defaults to the Value set on the **Scheduled Defaults** tab of the **Client-E/Ds** window. Contact your Service Bureau for more information.* 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.

A rectangular text box with a light beige background and a thin black border. The word "Employee" is centered within the box in a black, sans-serif font.

Advance you to the **Browse** tab of the **Employee–Employee** window.

Details 2 tab

Evolution 7.5.33.1 [odin1] - Employee - Scheduled E/Ds

Last: **Webb** SSN: **288-45-6297** E/D Code: **D01** Type: **DN** Company: **Thomas English-Do Not Touch**
First: **Charlotte** EE#: **24** Desc: **Misc.** Number: **Z9999**

24 Webb Charlotte R < Prior Next >

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

Target Action None	Minimum Wage Multiplier 	Annual Maximum Amount
Number of Targets Remaining 	Maximum Garnish % 	Client Annual Maximum Amount
Target Amount 	Minimum E/D Group 	Maximum E/D Group
Balance Taken 	Minimum Pay Period % 	Maximum Pay Period %
Maximum Average Amount E/D Group 	Minimum Pay Period Amount 	Maximum Pay Period Amount
Maximum Average Hours E/D Group 		Threshold E/D Group
Maximum Average Hourly Wage Rate 		Threshold Amount

Help
Exit

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

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 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.

Evolution 7.5.33.1 [odin1] - Employee - Scheduled E/Ds

Admin Client Company Employee Payroll Reports Misc

Last: **Webb** SSN: **288-45-6297** E/D Code: **D01** Type: **DN** Company: **Thomas English-Do Not Touch**
First: **Charlotte** EE#: **24** Desc: **Misc.** Number: **Z9999**

24 Webb Charlotte R < Prior Next >

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


EE Bank Account Nu...	ABA Number
5551212	011600062

ABA Number Bank Account Number Account Type In Prenote
011600062 5551212 Checking Yes No

Addenda
Branch Identifier
☐ Allow Hyphens

Help Exit

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


4. Create a new bank account record 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 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). The system also recognizes that the ABA (Routing) number must be nine digits in length. A warning message will display notifying the user if these criteria have not been met.
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. This field will accept up to fifteen (15) characters.
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  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.

Evolution 7.5.33.1 [odin1] - Employee - Scheduled E/Ds

Admin Client Company Employee Payroll Reports Misc

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

Custom case nu...	Priority number
02651	1

Priority Number Case Number Origination State
 1 02651 VT


Agency
 Intl Equity

Arrears
☐ Yes ☒ No

St Medical Ins Eligible
☐ Yes
☐ No
☒ Not Applicable

FIPS Code

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

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.

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

Evolution 7.5.33.1 [odin1] - Employee - Scheduled E/Ds

Admin Client Company Employee Payroll Reports MISC

Last: **Evans** SSN: **089-50-7691** E/D Code: **M06** Type: **M3** Company: **Thomas English-Do Not Touch**
First: **Dale** EE#: **18** Desc: **Pension Match** Number: **Z9999**

18 Evans Dale < Prior Next

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

E/D Code
M06 Pension Match
Calculation Method
Pension Match
Amount %
Frequency
Every Pay
Month # Which Payrolls
None All
E/D Group
EE 401K Deduction
Agency
Effective Start Date Effective End Date
1/31/2006
Priority Multiple Scheduled E/D Group
3

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
Deductions to zero
Yes No

Employee

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

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

Evolution 7.5.33.1 [odin1] - Employee - Scheduled E/Ds

Admin Client Company Employee Payroll Reports Misc

Last: **Evans** SSN: **089-50-7691** E/D Code: **M06** Type: **M3** Company: **Thomas English-Do Not Touch**
First: **Dale** EE#: **18** Desc: **Pension Match** Number: **Z9999**

18 Evans Dale < Prior Next >

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

Target Action None	Minimum Wage Multiplier	Annual Maximum Amount
Number of Targets Remaining	Maximum Garnish %	Client Annual Maximum Amount
Target Amount	Minimum E/D Group	Maximum E/D Group EE 401K Deduction
Balance Taken	Minimum Pay Period %	Maximum Pay Period % 50.00
Maximum Average Amount E/D Group	Minimum Pay Period Amount	Maximum Pay Period Amount
Maximum Average Hours E/D Group		Threshold E/D Group
Maximum Average Hourly Wage Rate		Threshold Amount

Help Exit

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

Globally Updating Scheduled E/Ds

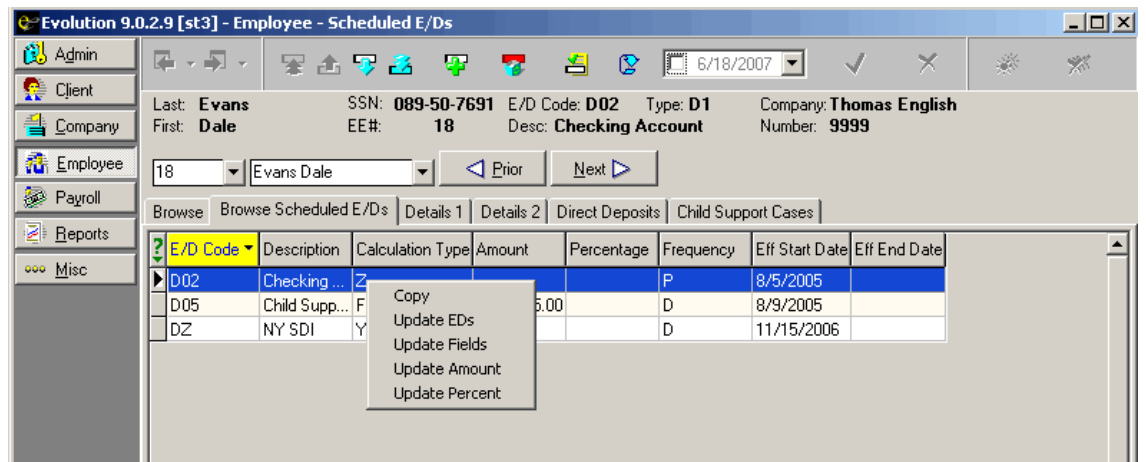
Users may globally update scheduled E/Ds for some or all employees who use a particular scheduled E/D in the following manners:

Copy:	Copies the entire scheduled E/D to one or more employees.
Update E/Ds:	Updates the E/D Code of the scheduled E/D for each employee that uses it.
Update Fields:	Updates selected fields of the scheduled E/D for each employee.
Update Amount:	Updates the Amount field of the scheduled E/D for each employee.
Update Percent:	Updates the percentage field of the scheduled E/D for each employee.

The automated copy features, including the Copy, Update E/Ds, Update Fields, Updates Amounts and Update Percent functions, will only update current E/Ds. They will not update Scheduled E/Ds with an Effective End Date.

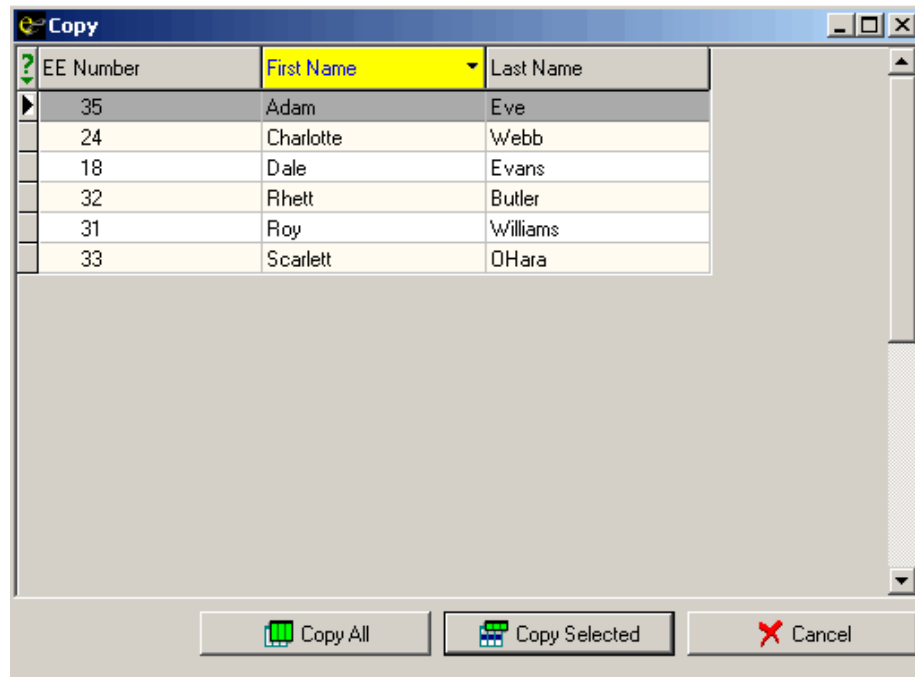
To copy all parameters associated with a scheduled E/D from one employee to another (or to a group of employees), do the following:

1. Click Employee and then click Scheduled E/Ds.
2. Evolution displays the Browse tab of the Employee-Scheduled E/Ds window.
3. Click on the Browse Scheduled E/Ds tab.
4. On the Browse Scheduled E/Ds tab, right-click the scheduled E/D you would like to copy.



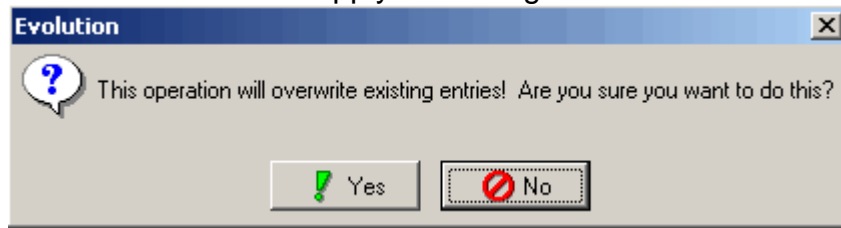
5. Click Copy.

6. Evolution displays the Copy dialog.



7. Select the employees for whom you want to apply the changes and click either the Copy All or Copy Selected button.

8. Evolution warns you that the change will overwrite existing data. Click Yes to apply the changes.

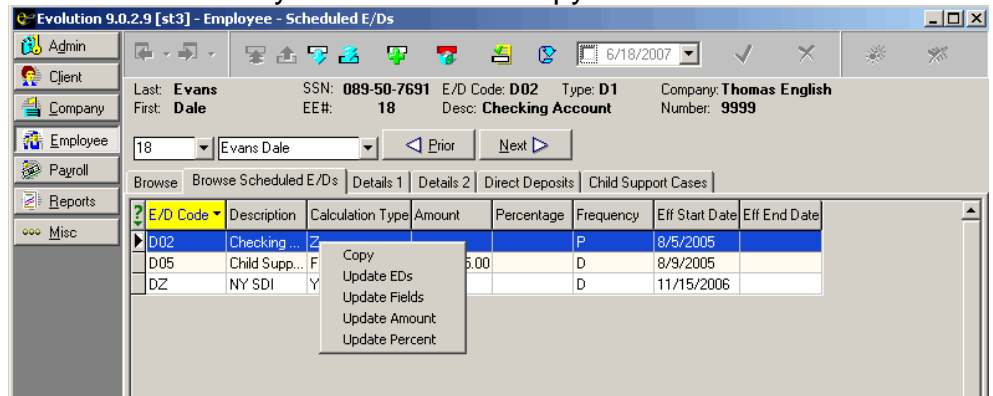


9. Evolution adds the scheduled E/D to each selected employee. The values associated with the newly created scheduled E/D will match the values of the originally selected scheduled E/D.

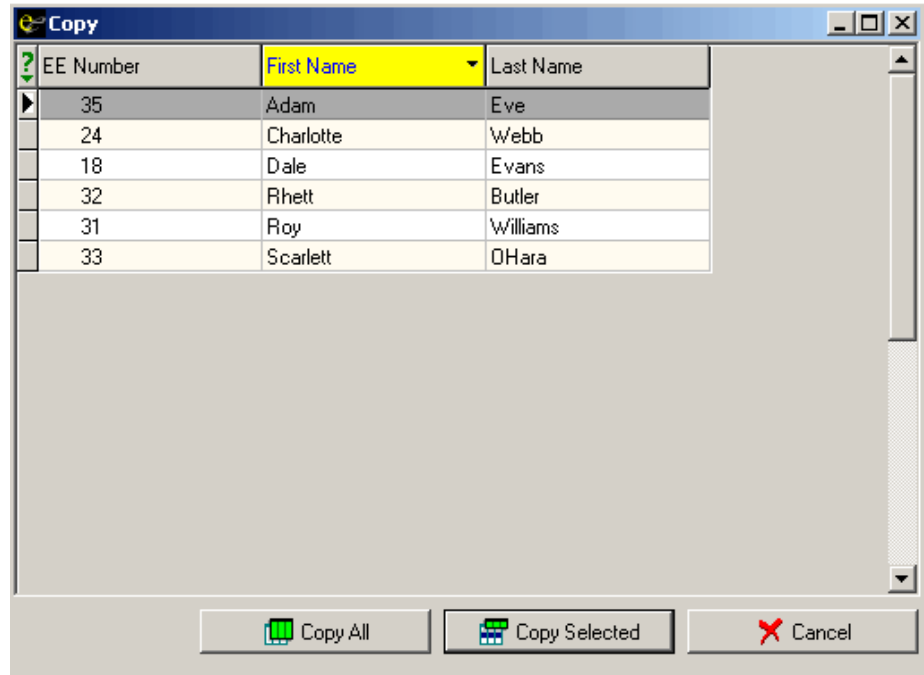
To globally update the parameters associated with a scheduled E/D, do the following:

1. Click Employee and then click Scheduled E/Ds.
2. Evolution displays the Browse Tab of the Employee-Scheduled E/Ds window.
3. Click on the Browse Scheduled E/Ds tab.

- On the Browse Scheduled E/Ds tab, right-click the scheduled E/D you would like to copy.

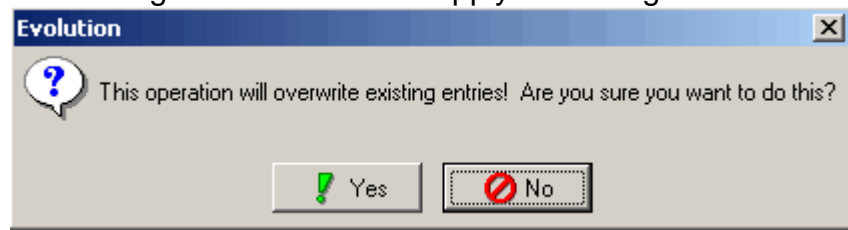


- Click Update E/Ds.
- Evolution displays the Copy dialog.



7. Select the employees for whom you want to apply the changes and click either the Copy All or Copy Selected button.

8. Evolution warns you that the change will overwrite existing data. Click Yes to apply the changes.

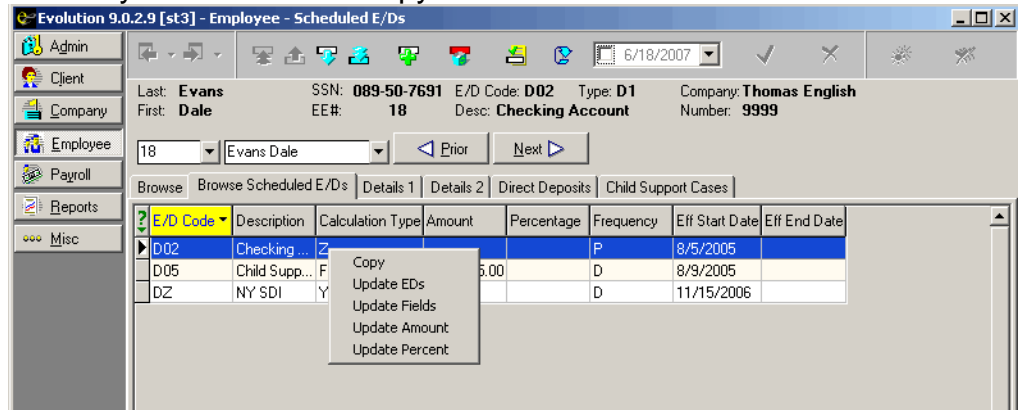


9. Evolution updates the scheduled E/D for each selected employee whose has the scheduled item in place to match all fields of the originally selected scheduled E/D.

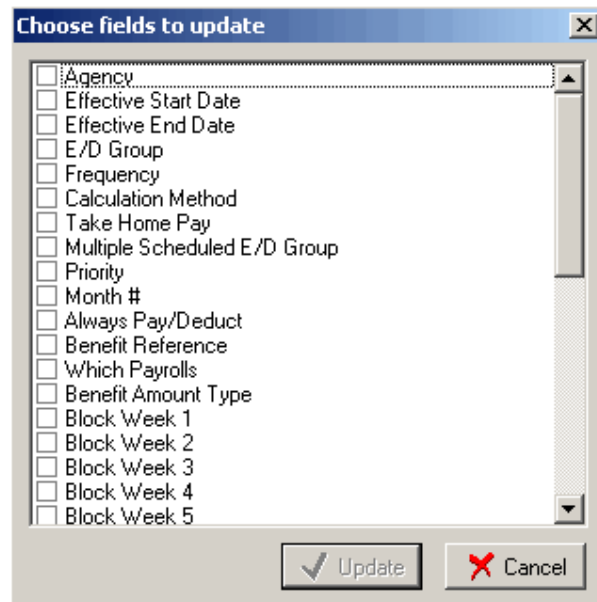
To globally update the various fields associated with a scheduled E/D, do the following:

1. Click Employee and then click Scheduled E/Ds.
2. Evolution displays the Browse Tab of the Employee-Scheduled E/Ds window.
3. Click on the Browse Scheduled E/Ds tab.

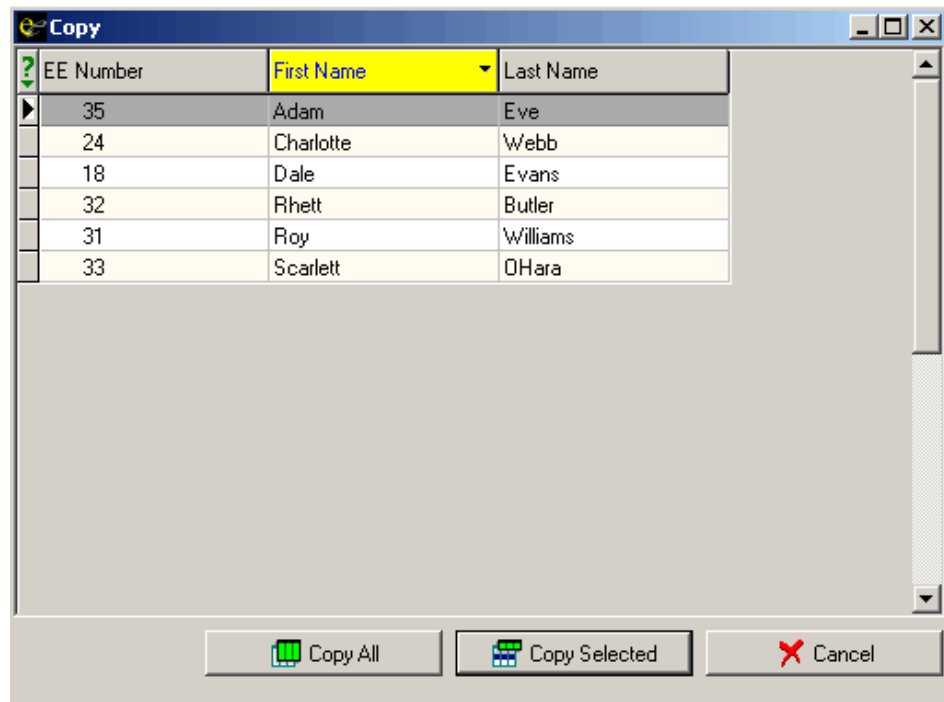
- On the Browse Scheduled E/Ds tab, right-click the scheduled E/D you would like to copy.



- Click Update Fields.
- Evolution displays the Choose Fields to Update dialog.

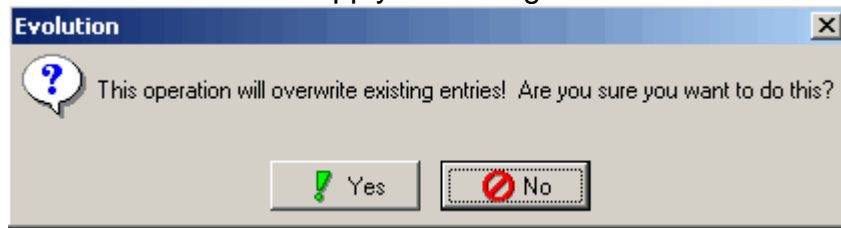


7. Evolution displays the Copy Dialog.



8. Select the employees for whom you want to apply the changes and click the Copy All or Copy Selected button.

9. Evolution warns you that the change will overwrite existing data. Click Yes to apply the changes.

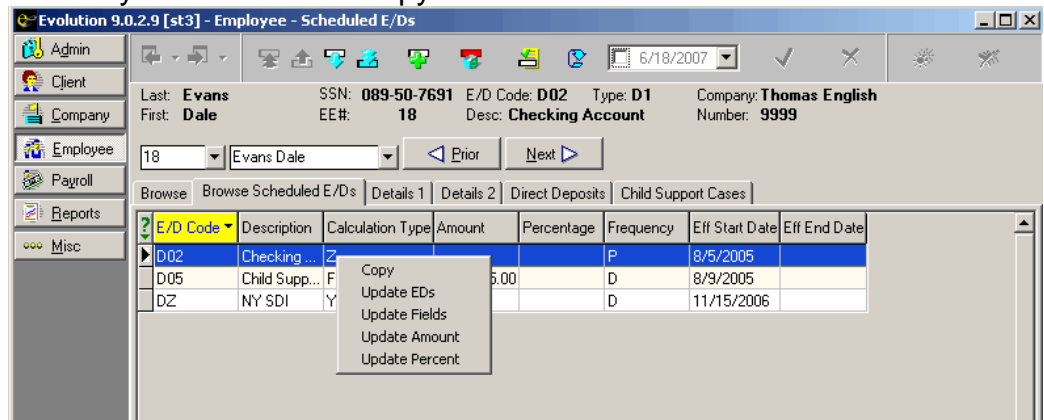


10. Evolution updates the selected fields for the selected scheduled E/D for each selected employee to whom it is attached.

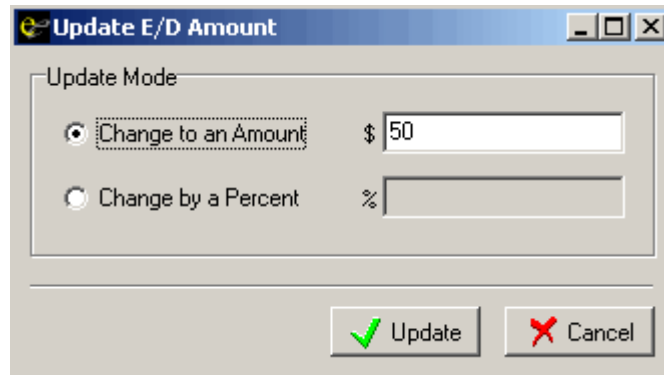
To globally update the Amount field for a selected scheduled E/D, do the following:

1. Click Employee and then click Scheduled E/Ds.
2. Evolution displays the Browse Tab of the Employee-Scheduled E/Ds window.
3. Click on the Browse Scheduled E/Ds tab.

- On the Browse Scheduled E/Ds tab, right-click the scheduled E/D you would like to copy.






- Click Update Amounts
- Evolution displays the Update E/D Amount dialog. Enter the new amount or the percentage by which the amount should change.



7. Evolution displays the Copy dialog.

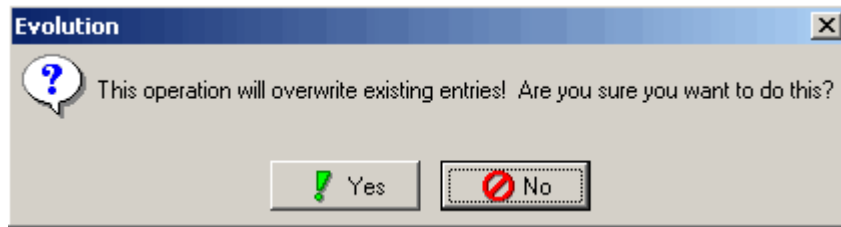
Copy

EE Number	First Name	Last Name
35	Adam	Eve
24	Charlotte	Webb
18	Dale	Evans
32	Rhett	Butler
31	Roy	Williams
33	Scarlett	O'Hara

 Copy All  Copy Selected  Cancel

8. Select the employees for whom you want to apply the changes and click the Copy All or Copy Selected button.

9. Evolution warns you that the change will overwrite existing data. Click Yes to apply the changes.

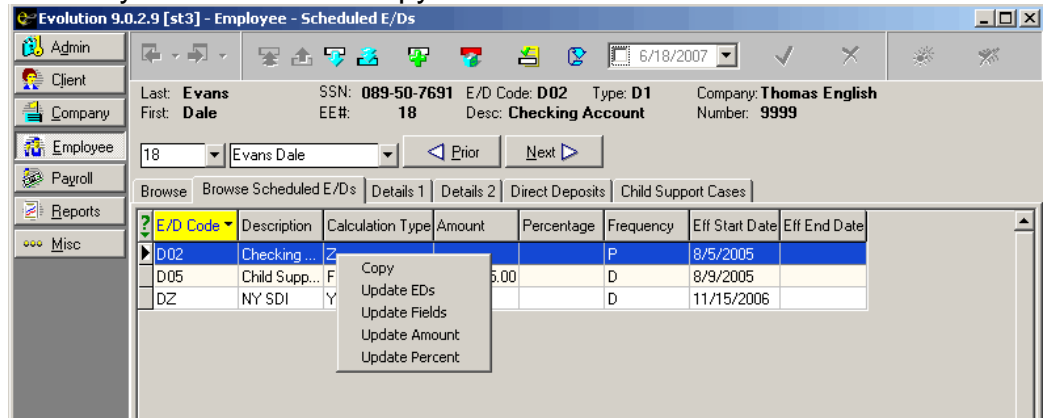


10. Evolution updates amount of the selected scheduled E/D for the selected employee(s) to whom it is attached.

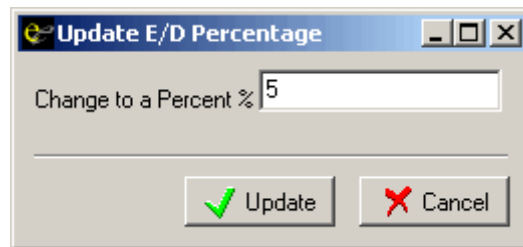
To globally update the value entered in the Percent field of scheduled E/D, do the following:

1. Click Employee and then click Scheduled E/Ds.
2. Evolution displays the Browse Tab of the Employee-Scheduled E/Ds window.
3. Click on the Browse Scheduled E/Ds tab.

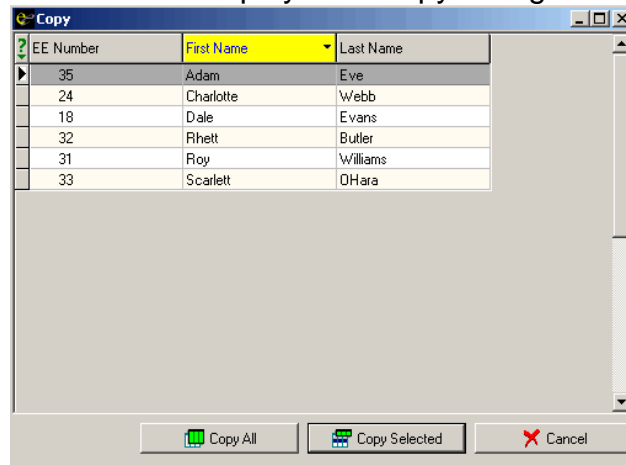
- On the Browse Scheduled E/Ds tab, right-click the scheduled E/D you would like to copy.



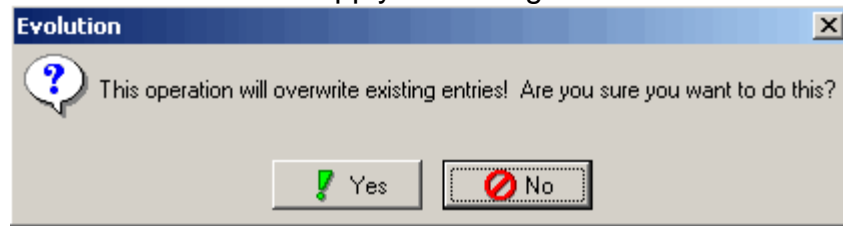
- Click Update Percent.
- Evolution displays the Update E/D Percentage dialog.



7. Evolution displays the Copy dialog.



8. Select the employees for whom you want to apply the changes and click the Copy All or Copy Selected button.
9. Evolution warns you that the change will overwrite existing data. Click Yes to apply the changes.



10. Evolution updates the Percent Field of the selected scheduled E/D for each selected employee to whom it is attached.

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.
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 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/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.

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.

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:

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.

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

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

[Browse](#) | [Browse Scheduled E/Ds](#) | [Details 1](#) | [Details 2](#) | [Direct Deposits](#) | [Child Support Cases](#)

E/D Code <input type="text" value="M10"/> EE Fund A Calculation Method <input type="text" value="% of E/D Group Amt"/> Amount % <input type="text" value=""/> <input type="text" value="100.00"/> Frequency <input type="text" value="Every Pay"/> Month # Which Payroll <input type="text" value="None"/> <input type="text" value="All"/> E/D Group <input type="text" value="EE Fund Split"/> Agency <input type="text" value=""/> Effective Start Date Effective End Date <input type="text" value="3/27/2006"/> <input type="text" value=""/> Priety Multiple Scheduled E/D Group <input type="text" value=""/> <input type="text" value=""/>	Child Support Case <input type="text" value=""/> Garnishment ID <input type="text" value=""/> Benefit Reference <input type="text" value=""/> Benefit Amount Type <input type="text" value=""/> EE Direct Deposit <input type="text" value=""/> Deduct Whole Check <input type="radio"/> Yes <input checked="" type="radio"/> No Take Home Pay <input type="text" value=""/>	Block Week 1 <input type="radio"/> Yes <input checked="" type="radio"/> No Block Week 2 <input type="radio"/> Yes <input checked="" type="radio"/> No Block Week 3 <input type="radio"/> Yes <input checked="" type="radio"/> No Block Week 4 <input type="radio"/> Yes <input checked="" type="radio"/> No Block Week 5 <input type="radio"/> Yes <input checked="" type="radio"/> No Always Pay/Deduct <input type="text" value="No"/> <input type="button" value="Employee"/>
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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 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.

Evolution 7.0.18.11 [st3] - Employee - Pension Fund Splits

Systems SB Admin Admin Finance S/B Report Bureau Client Company Employee Aux Payroll Payroll Reports Operations Tax prints Tax reports Misc

Last: **Fund Split** SSN: 118-11-8118 Company: **Sample Client**
First: **Pension** EE#: 330 Number: **Alpha**

330 Fund Split Pension < Prior Next >

Browse Details

Funds	E/D Code	Percentage	Employee or Employer
Fund A	M10	50.00	E
Fund A	M13	50.00	R
Fund B	M11	25.00	E
Fund B	M14	25.00	R
Fund C	M12	25.00	E
Fund C	M15	25.00	R

Fund Fund A E/D Code M10 % 50.00 EE or ER
☐ Employer
☒ Employee

View Task Queue: 5 Total; 5 Finished UserID: hhogan Recd: 2.27M 8.5M/sec Sent:39.24K

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

Sample Bank One
Bank Address: PO Box 17, Appleton, VT
State: VT, City: VT
Check Number 893

Pay Two Hundred Ninety-Five Dollars and Twenty-Six Cents

*****295.26

To the Order of:

Pension Fund Split
3 Fund Split Way
Pension, VT 12345

330 893
Void After 60 Days



Authorized Signature

⑈000893⑈ ⑆01600062⑆ 123456⑈

Pension Fund Split

Dept One

Company: Alpha
Number: 330
Social Security #: 1/1/2006
Hire Date: 1/1/2006
Period Begin: 4/15/2006
Period End: 4/18/2006
Check Date: 4/18/2006
Check Number: 893
Division: Branch
Department: 1
Team:

Sick 1 = 0.75

Earnings				Deductions			
Code	Location	Rate	Hours	Amount	Code	Amount	Amount
Regular Earnings		10.00	40.00	400.00	Fed (S.O) (1140.00)	42.29	126.87
MEMOS					OASDI (1200.00)	24.80	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.O) (1140.00)	11.85	35.55
EE Fund B		0.00	5.00	15.00	401k EE Deduction	20.00	60.00
EE Fund C		0.00	5.00	15.00			
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	Total Deductions	104.74	314.22
NET PAY			295.26	Total Direct Deposits	0.00	Check Amount	295.26

#Alpha Sample Client

Payroll Register (S109)	
Check Date :	04/18/2006-1
Period Range :	04/09/2006 TO 04/15/2006
Week Number :	Week #16

Employee Name		Social Security Number				Salary		Frequency		Check Number	Check Date	Check Type
Earnings Description	Rate of Pay	Current Hours	Current Amount	YTD Hours	YTD Amount	Deductions Description	Current Amount	YTD Amount		Taxes Description	Current Amount	YTD Amount
Department: 1 - Dept One												
330 - Fund Split, Pension - 118-11-8118 VT VT 0.00 Weekly 893 04/18/2006 Regular												
01 Regular Earnings	10.00	40.00	400.00	120.00	1,200.00	05 401k EE Deduction	20.00	60.00		Federal (S/D)	42.29	126.87
10 EE Fund A-M	0.00	0.00	10.00	0.00	30.00	06 401K ER Pension	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/D)	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

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.

Evolution 7.5.40.1 [odin1] - Employee - Time Off Accrual

Admin Client Company Employee Payroll Reports Misc

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

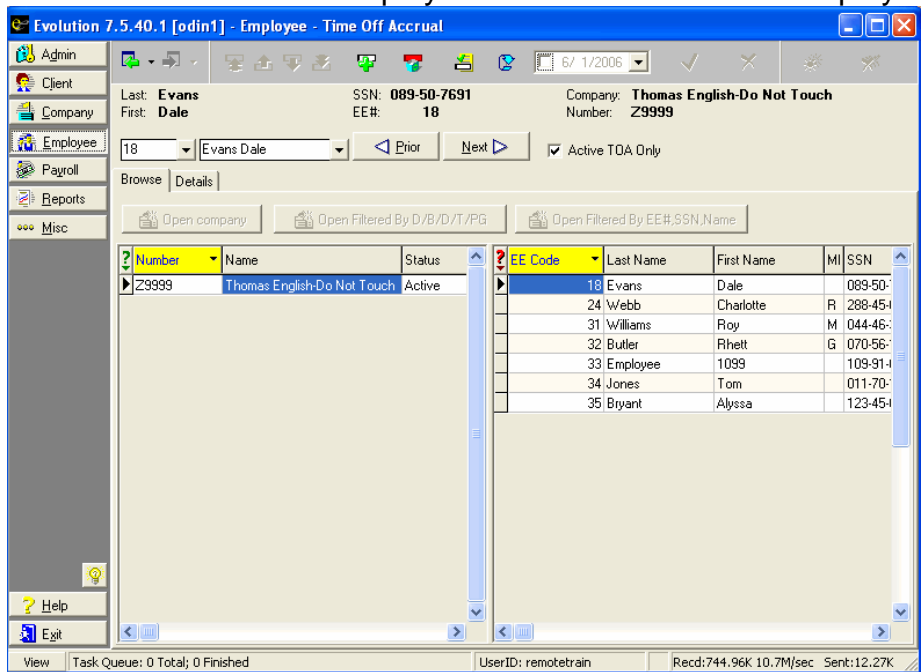
Browse Details


Open company Open Filtered By D/B/D/T/PG Open Filtered By EE#,SSN,Name

Number	Name	Status	EE Code	Last Name	First Name	MI	SSN
Z9999	Thomas English-Do Not Touch	Active	18	Evans	Dale		089-50-7691
			24	Webb	Charlotte	R	288-45-1234
			31	Williams	Roy	M	044-46-5678
			32	Butler	Rhett	G	070-56-7890
			33	Employee	1099		109-91-1234
			34	Jones	Tom		011-70-1234
			35	Bryant	Alyssa		123-45-6789

View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd:744.96K 10.7M/sec Sent:12.27K

- 3. Click the **Details** tab.
- 4. Evolution displays the **Details** tab for that employee.



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. 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

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

18 Evans Date < Prior Next > ☒ Active TOA Only

Type	Balance	Accrued	Used	Override Eff Date	Override Accrual Maximum	Override Rate	Override Rollover Type	Override Eff Date	Override Rollover Date
Vacation	160.00	300.00	140.00						

Type
Vacation

Current Accrued 300.00 **Current balance** 160.00

Current Used 140.00

Active
☒ Yes ☐ No

Reason
test adjustment

Override Accrual Maximum
Override Rate
Override Rollover Type
Override Eff Date
Override Rollover Date

Show TOA History

View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd:866.06K 11.3M/sec Sent:15.56K

Viewing Time Off Accrual History

Evolution 7.5.41.1 [odin1] - Employee - Time Off Accrual

Admin Client Company Employee Payroll Reports Misc

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

18 Evans Dale < Prior Next < Active TDA Only

Browse Details History

Show transactions in period from: 4/ 1/2006 to: 6/ 8/2006 Refresh **Vacation**

Transactions


Accrual ...	Accrued	Accrued Capped	Used	Note	Created	Changed by	Check I
5/1/2006	0.00		40.00	Manual Adj; adjust balance per HR Direct	6/1/2006 9:52:06 AM	Remotetrain	

Adjustments: Double click on transactions to open this information

Connected Transaction: Double click on transactions to open this information

Help Exit

View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd:174.46K 13.1M/sec Sent:12.73K

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 . 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.

Evolution 7.5.41.1 [odin1] - Employee - Shifts

Admin Client Company Employee Payroll Reports Misc

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

18 Evans Dale < Prior Next >



Browse Details

Auto-Shift
Second Shift

Shift Name	Shift Rate	Shift %
Second Shift	25.00	10.00

Shift Rate %
Second Shift 25.00 10.00

View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd:169.03K 13.5M/sec Sent: 9.85K

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 .

- 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.

Evolution 7.5.41.1 [odin1] - Employee - Auto Labor Distribution

Admin Client Company Employee Payroll Reports Misc

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

18 Evans Dale < Prior Next >



Browse Details

E/D Group
Auto Labor Distribution Clear Dist.

Division Code	Branch Code	Department Code	Team Code	Job	Workers C
1	1	100			
1	1	200			
1	1	300			

Division Code 1 Division Hide Job
Branch Code 1 Branch Hide Workers Comp Code
Department Code 300 Department Delivery % 25.00
Team Code Team

View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd:169.68K 13.3M/sec Sent:11.27K

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

10. Click the **Employee** and then click **Piecework**. Evolution displays the **Browse** tab.
11. Select an **EE Number (EE Code)** and click the **Create Record** button .
12. 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.

Evolution 7.5.41.1 [odin1] - Employee - Piece Work

Admin Client Company Employee Payroll Reports Misc

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

6/ 1/2006

Evans Dale < Prior Next >

Browse Details

Name	Rate	Quantity	Rate Amount
Muffins	12.00	0.50	

Piece

Muffins	Rate Amount	Rate Quantity
	0.50	12.00

Help Exit

View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd:190.74K 13.4M/sec Sent:12.09K

- 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**.

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

14. 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.

Evolution 8.0.0.86 [zeus] - Employee - Additional info

Admin Client Company Employee Payroll Reports Misc

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

18 Evans Dale < Prior Next >

Browse Values

Name	String	Date	Amount	Value
Certification	CPR			
Eye Color				Blue

Field

Eye Color

String

Date

Amount

Value

Blue

Help Exit

View Task Queue: 2 Total; 2 Finished UserID: remotetrain Recd:255.59K 11.9M/sec Sent:11.27K

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:

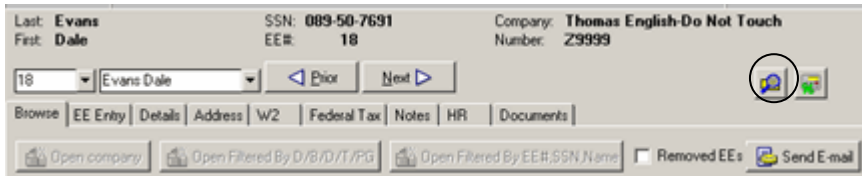
1. Click **Employee** and then click **Employee**.
2. Evolution displays the **Browse tab**. If the company is not open, select the company and click the **Open company** button.
3. Evolution opens the company. Select the employee, then click the **EE Entry** tab.
4. On the **EE Entry tab**, enter the 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.



The screenshot shows the Evolution software interface. At the top, it displays employee information: Last: Evans, First: Dale, SSN: 089-50-7691, EE#: 18, Company: Thomas English-Do Not Touch, and Number: Z9999. Below this, there are dropdown menus for '18' and 'Evans Dale', and buttons for '< Prior' and 'Next >'. A toolbar contains buttons for 'Browse', 'EE Entry', 'Details', 'Address', 'W2', 'Federal Tax', 'Notes', 'HR', and 'Documents'. At the bottom, there are buttons for 'Open company', 'Open Filtered By D/B/D/T/PG', 'Open Filtered By EE#,SSN,Name', a checkbox for 'Removed EEs', and a 'Send E-mail' button. A small icon of a magnifying glass over a document is circled in the top right corner of the window.

To locate a check or checks, do the following:

1. Click the **Check Finder**  button.
2. Evolution displays the **Check Finder** window.

Check Finder

Begin Check Date: 1/31/2006 End Check Date: 1/31/2006 Run #: Check Serial #: EE Code: 18

Filter Show OK Cancel

?							
---	--	--	--	--	--	--	--

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.


Check preview	
EARNINGS:	DEDUCTIONS:
E02 Regular (80) = \$737.60	D02 Checking Account = \$582.67
Earnings SubTotal = \$737.60	D05 Child Support = \$125.00
	Deductions SubTotal = \$707.67
MEMOS:	FEDERAL TAXES:
	Federal Tax = \$10.00 (\$737.60)
	STATE TAXES:
	NY State Tax = \$19.93 (\$737.60)
	Taxes SubTotal = \$29.93
	Net Amount = \$0.00
<div> <div>Print Check</div> <div>Preview Check</div> <div>Close</div> </div>	

- To preview the check, click the **Preview Check** button. When done, click the **Close** button.

Dale Evans
123 Main Street
State Island, NY 10301

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. A created check may be copied into a new payroll or into an existing payroll and/or batch. You may also Disable Shortfalls and YTDs. The Plug Taxes flag is selected by default. This option will enter the calculated tax amount for the resulting check in Payroll that produced by the Tax and Check Line Calculator. If this option is not selected when the check is created, the user will have to manually enter the tax amounts on the **Manual Tax** tab of the **Payroll-Check** window for the newly created check.

Tax and Check Line Calculator

Tax | Check Preview | Payrolls

Employee: 18 Evans Dale Refresh Scheduled E/Ds (F3)

Tax Frequency: Bi-Weekly

States: With Allow, State Tax Wages, State Tax, SDI Tax Wages, SDI

Override Fed Type: None

Override Fed Value:

Override QASDI:

Override Medicare:

Override EIC:

Backup Withholding:

Locals: Local Name, Local Tax Wages, Local Tax, OR An

Block Federal, Block Additional Federal, Tax at Supplemental Rate, Block EE QASDI, Block EE Medicare, Block EIC, Net To Gross

Federal Marital Status: Single, Married

Fed Number of Dependents: 2

Federal Tax Wages, Federal Tax, QASDI Taxable Wages, QASDI Tax, QASDI Taxable Tips, Medicare Taxable Wages, Medicare Tax, EIC Tax

Gross, Net

Disable YTDs, Disable Shortfalls, Check Preview, Plug Taxes, Check Type: Manual, Regular

Calculate check (F5), Copy to payroll (F8), Close (F2)

E/D Code	Amount	State	SUI State	Ho
D02				
D05	125.00			
DZ	0.00			

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

Tax and Check Line Calculator	
Tax Check Preview Payrolls	
18 Evans Dale	
EARNINGS:	DEDUCTIONS:
E01 Salary = \$1,000.00	D05 Child Support = \$125.00
Earnings SubTotal = \$1,000.00	D06 401k = \$25.00
	Deductions SubTotal = \$150.00
MEMOS:	FEDERAL TAXES:
M06 Pension Match = \$3.13	Federal Tax = \$10.00 (\$975.00)
Memos SubTotal = \$3.13	STATE TAXES:
	NY State Tax = \$33.74 (\$975.00)
	LOCAL TAXES:
	New York City Non-Res. = \$2.40 (\$1,000.00)
	Taxes SubTotal = \$46.14
	Net Amount = \$803.86

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

Tax and Check Line Calculator

Tax | Check Preview | Payrolls

Check D...	Run Nu...	Scheduled	Type	Status
7/24/2006	1	N	R	W
11/10/2006	1	Y	E	W

Period Begin...	Period End Date	Frequency
7/6/2006	7/20/2006	B

Attach to New Payroll | Attach to New Batch | Attach to Selected Batch

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:

Last: Employee		SSN: 109-91-0991	Company: Thomas English-Do Not Touch
First: Ten Ninety-nine		EE#: 33	Number: Z9999

33 | Employee Ten Ninety-nine | < Prior | Next >

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

Social Security Number <input type="text" value="109-91-0991"/>	Annual Form Type <input type="text" value="1099"/>	Residential State <input type="text" value="NY"/>
Treat as EIN or SSN <input type="radio"/> EIN <input checked="" type="radio"/> SSN	Deceased <input type="radio"/> Yes <input checked="" type="radio"/> No	I-9 on File <input checked="" type="radio"/> Yes <input type="radio"/> No
1099 or Employee <input checked="" type="radio"/> 1099 <input type="radio"/> W-2	Statutory Employee <input type="radio"/> Yes <input checked="" type="radio"/> No	1099R <input type="text" value=""/> Distribution Code
First Name <input type="text"/>	Legal Rep <input type="radio"/> Yes <input checked="" type="radio"/> No	Tax Amount Determined <input type="radio"/> Yes <input checked="" type="radio"/> No
Middle Name <input type="text"/>	Deferred Compensation <input type="radio"/> Yes <input checked="" type="radio"/> No	Total Distribution <input type="radio"/> Yes <input checked="" type="radio"/> No
Last Name <input type="text"/>	Pension <input type="radio"/> Yes <input checked="" type="radio"/> No	Pension Plan <input type="text" value="None"/>
Name Suffix <input type="text"/>		

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.

Browse	Address/Calendar Setup	Tax Reporting	Tax Defaults	Checks	General Business
EIN Number 030269833					
Federal Reporting Agency Internal Revenue Service - Andover		FUI Reporting Agency Internal Revenue Service - Andover			
Federal Tax Deposit Frequency Monthly		Federal Tax Payment Agency Bank Of America		FUI Tax Agency Bank Of America	
945 Tax Deposit Frequency Semi-Weekly		Use Effective Dates to Change Tax Statuses			
Federal Tax Payment Method EFT Debit		Exempt Federal <input type="radio"/> Yes <input checked="" type="radio"/> No		Exempt ER Medicare <input type="radio"/> Yes <input checked="" type="radio"/> No	
FUI Tax Deposit Frequency Quarterly		Exempt EE OASDI <input type="radio"/> Yes <input checked="" type="radio"/> No		Exempt FUI <input type="radio"/> Yes <input checked="" type="radio"/> No	
		Exempt EE Medicare <input type="radio"/> Yes <input checked="" type="radio"/> No		Apply Misc Limit to 1099 <input checked="" type="radio"/> Yes <input type="radio"/> No	

- 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, choose 1099. Evolution will default the **Annual Form Type** to 1099.

The screenshot shows the 'W2' tab of the 'Employee-Employee' window. At the top, there is a header bar with a dropdown menu showing '1' and 'Patrick James M', and buttons for 'Prior' and 'Next'. Below this is a navigation bar with tabs: 'Browse', 'EE Entry', 'Details', 'Address', 'W2', 'Federal Tax', 'Notes', 'HR', 'Documents', and 'Mail Room'. The main content area is divided into several sections:



- Social Security Number:** A text field containing '009-55-1235'.
- Annual Form Type:** A dropdown menu with '1099' selected.
- Residential State:** A dropdown menu with 'VT' selected.
- Treat as EIN or SSN:** Two radio buttons, 'EIN' and 'SSN', with 'SSN' selected.
- Deceased:** Two radio buttons, 'Yes' and 'No', with 'No' selected.
- I-9 on File:** Two radio buttons, 'Yes' and 'No', with 'Yes' selected.
- 1099 or Employee:** Two radio buttons, '1099' and 'W-2', with '1099' selected.
- Statutory Employee:** Two radio buttons, 'Yes' and 'No', with 'No' selected.
- 1099R:** A section with a label 'Distribution Code' and an empty text field.

If Treat as EIN is selected, the Social Security number field is formatted as shown below.

Social Security Number

Treat as EIN or SSN
☒ EIN ☐ SSN

The worker is then paid using the 1099 Earnings code.

13	Pippen Scotty	Regular	-99998770	1P 0.00	\$0.00	Batch 12/10/2005-12/18/2005 Check 1 of 1
Check Lines Manual Tax General Tax Overrides Preview Employee Notes						
	E/D Code	E/D Description	Hours/Pieces	Rate of Pay	RATE NBR	Amount
	E62	1099 Earnings				10,000.00

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.

The screenshot shows the Evolution HR system interface for employee Patrick James M. The 'W2' tab is selected, displaying the following fields and options:

- Social Security Number:** 009-55-1235
- Annual Form Type:** W-2 & 1099
- Residential State:** VT
- Treat as EIN or SSN:** ☒ EIN ☐ SSN
- Deceased:** ☐ Yes ☒ No
- I-9 on File:** ☒ Yes ☐ No
- 1099 or Employee:** ☐ 1099 ☒ W-2
- Statutory Employee:** ☐ Yes ☒ No
- 1099R:** Distribution Code

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.

- 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).

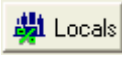
However, most employees can be set up from the **EE Entry** tab of **Employee – Employee** window.

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 .

Locals

Company Local Tax

Local	State	Tax Rate	Next Tax Rate	Tax Amount	Next Tax Amount	Misc Amount	Next Misc. Amount	Next Misc
New York City Non-Res.	NY							

Employee Locals

☐ Sort by County/Local

County	Local	Exempt Exclude	Always Deduct	Misc Amount	Filler
New York City Non-Res.					

County: % Of Taxable Wages:

Always Deduct

☒ Always ☐ Never

☐ No Overrides

☒ OK

5. Specify the following data for the local:

County:	<i>Read-Only.</i> 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:	<p>Always: The local tax is always deducted, unless you manually block it on the check or check line. Cannot be overridden, only blocked.</p> <p>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.</p> <p>Never: The local tax is not always</p>

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 :

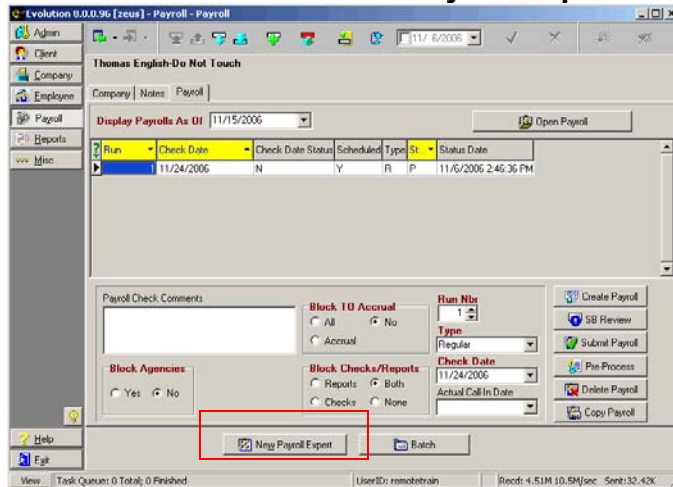
Select a local in the Employee Locals pane, and click on the Remove button, and it will remove that local from the employee.

Payroll

Using the Payroll Expert to Create a Payroll

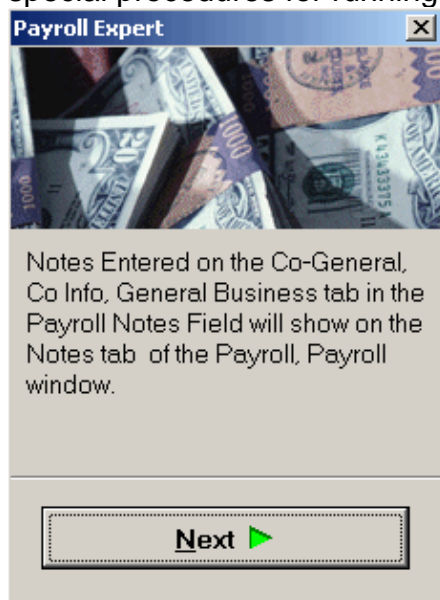
Evolution provides a wizard called the **Payroll Expert** to help you create a payroll. To use this wizard to create a payroll, do the following:

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.



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 [X]




Please, enter payroll check comments below.

Next ►

For the type of payroll, select **Regular**.

Payroll Expert [X]

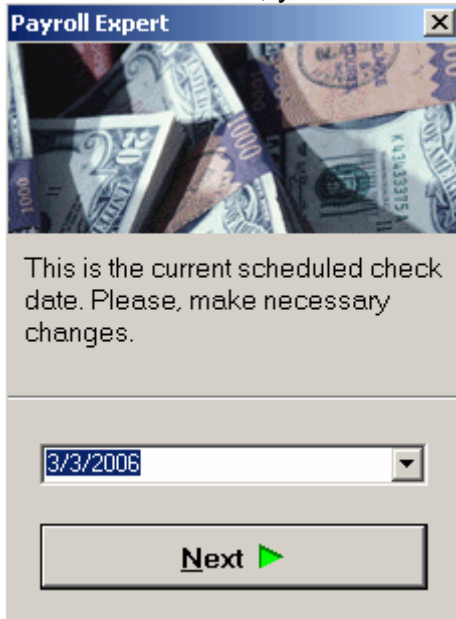


Please, choose payroll type.

Regular [v]

Next ►

The Wizard then confirms the Scheduled Payroll Date. This date is generated 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.

A screenshot of a software dialog box titled "Payroll Expert". The title bar is blue with a close button (X) on the right. Below the title bar is a graphic showing several US dollar bills (100, 20, and 10) fanned out. Below the graphic, the text reads: "This is the current scheduled check date. Please, make necessary changes." Below this text is a date input field containing "3/3/2006" with a small downward arrow on the right. At the bottom is a large button labeled "Next" followed by a green right-pointing triangle.

Select whether or not to block agencies. If **Yes** is selected, no agency checks will be created. If **No** is selected, all agency checks will print.

Payroll Expert [X]

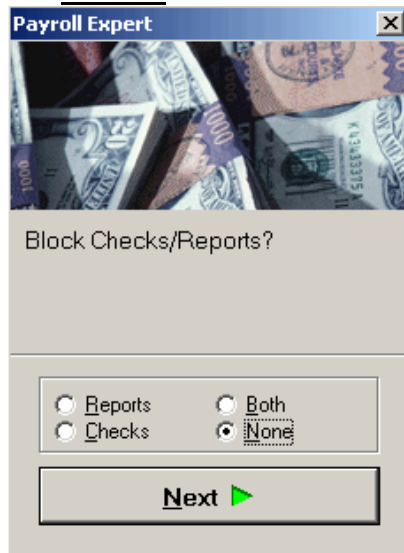


Block all agencies?

☐ 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.



Payroll Expert

Block Checks/Reports?

☐ Reports ☐ Both
☐ Checks ☒ None

Next ►

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.



Payroll Expert

Block Time Off Accrual?

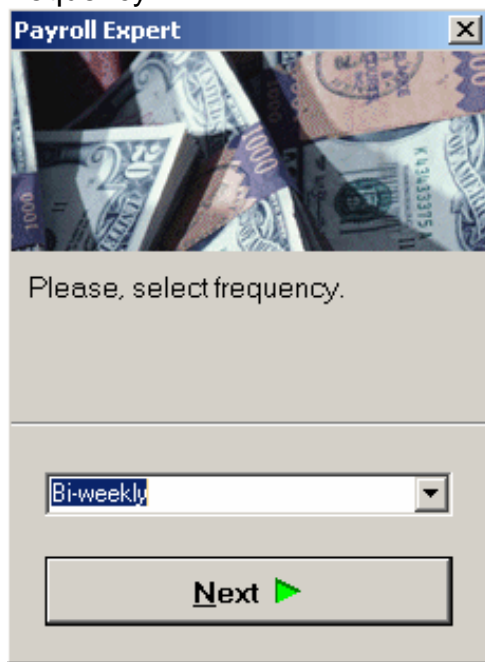
☐ All ☒ None

☐ Accrual

Next ►

Evolution now begins to create the batch.

Select the pay frequency of the batch, if your company uses more than one pay frequency.



The screenshot shows a window titled "Payroll Expert" with a close button (X) in the top right corner. Below the title bar is a decorative image of various US dollar bills. The main area of the window contains the text "Please, select frequency." followed by a dropdown menu. The dropdown menu is currently set to "Bi-weekly". At the bottom of the window is a button labeled "Next" with a green right-pointing triangle icon.

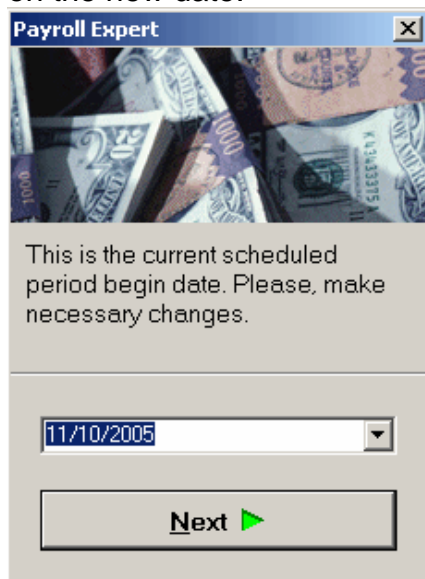
Payroll Expert

Please, select frequency.

Bi-weekly

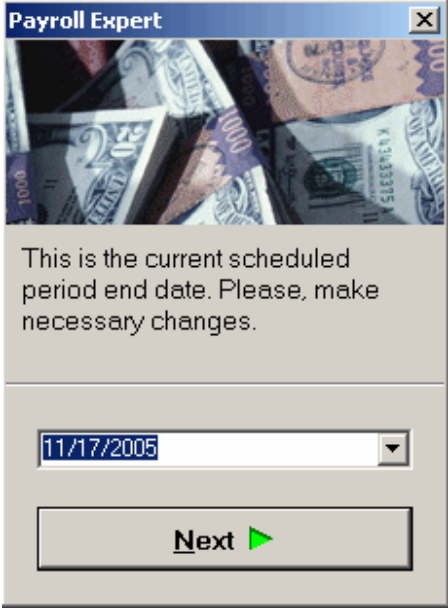
Next ►

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.



The screenshot shows a dialog box titled "Payroll Expert" with a close button (X) in the top right corner. The background of the dialog box features a collage of US dollar bills. Below the image, there is a text prompt: "This is the current scheduled period begin date. Please, make necessary changes." Underneath the text is a date selection field displaying "11/10/2005" with a dropdown arrow on the right. At the bottom of the dialog box is a button labeled "Next" followed by a green right-pointing triangle.

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.



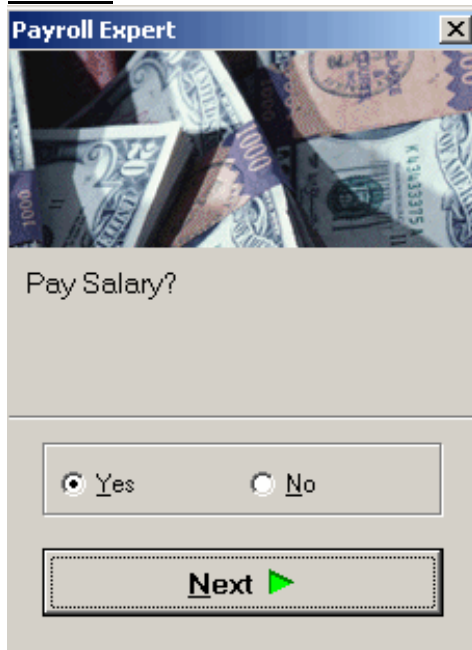
Payroll Expert

This is the current scheduled period end date. Please, make necessary changes.

11/17/2005

Next ►

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**.



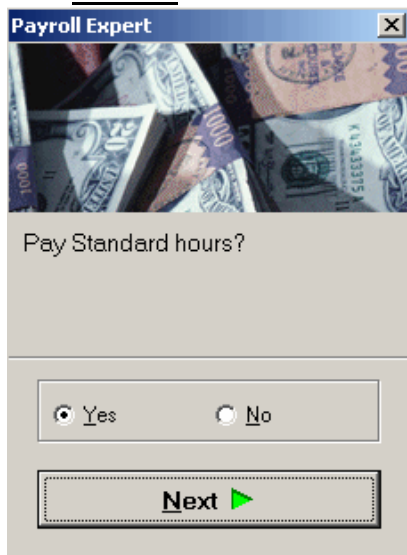
Payroll Expert

Pay Salary?

☒ Yes ☐ No

Next ►

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**.



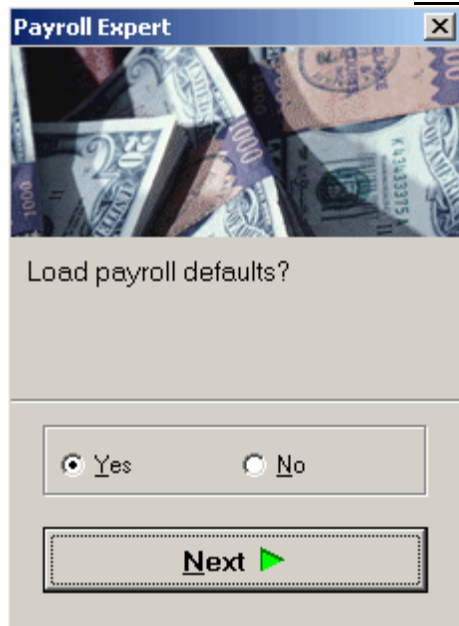
Payroll Expert

Pay Standard hours?

☒ Yes ☐ No

Next ►

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**.



Payroll Expert


Load payroll defaults?

☒ Yes ☐ No

Next ►

If desired, select a default check template for the batch (i.e. Bonus Check).

Payroll Expert [X]




Please, select a default check template for this batch or leave it blank.

Next ►

If desired, select a payroll filter.

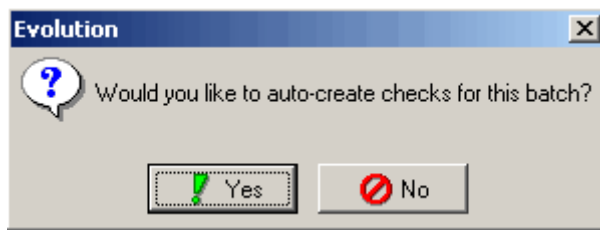
Payroll Expert [X]



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.

Admin

Client

Company

Employee

Payroll

Reports

Misc

6/ 2/2006

✓

✕

☼

☼

Thomas English-Do Not Touch

#1 7/7/2006

Batch

Quick Entry

Quick Entry W/Overrides

Earnings and Deductions

Taxes

Import

Batch	Period Begin Date	Period End Date	Frequency
12	3/16/2006	3/23/2006	B

Payroll Filter

Payroll Check Template

Frequency

Bi-Weekly

Period Begin Date

Period End Date

3/16/2006

3/23/2006

Batch Creation Options

Checks per EE

1

Calculate Scheduled EDs

Select EE's from List

Create 945 Checks

Pay

All

Salary

Hourly

Create Checks

Regular

Manual

3rd Party

Pay Salary

Yes

No

Pay Standard Hours

Yes

No

Load Payroll Defaults

Yes

No

Create Batch

Refresh ED

Refresh ED No Man

Delete Batch

Payroll

New Batch Expert

Check

Quick Entry

View

Task Queue: 2 Total; 2 Finished

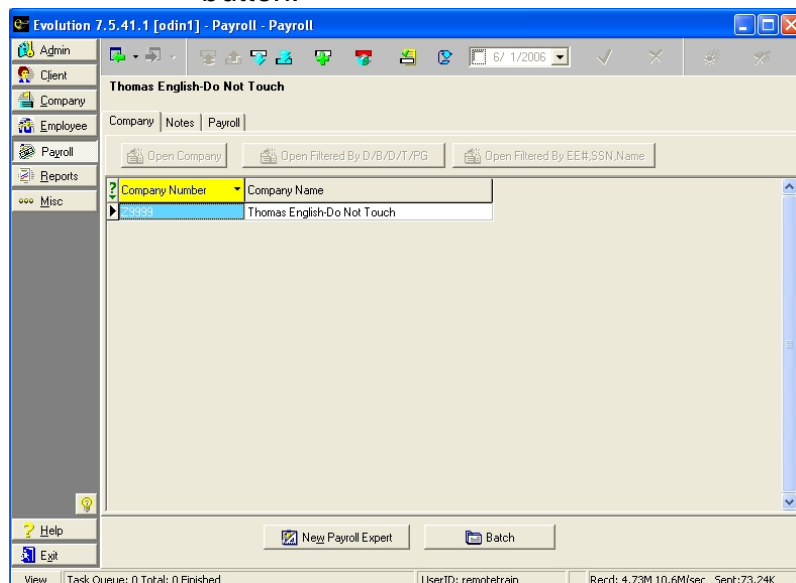
UserID: remotetrain

Recd: 2.53M 9.0M/sec Sent:27.31K

367

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.

Evolution 8.0.0.96 [zeus] - Payroll - Payroll

Thomas English-Do Not Touch

Company Notes Payroll

Display Payrolls As Of 11/15/2006 Open Payroll

Run	Check Date	Check Date Status	Scheduled	Type	St...	Status Date
1	11/24/2006	N	Y	R	P	11/6/2006 2:46:36 PM

Payroll Check Comments

Block TO Accrual

☐ All ☒ No ☐ Accrual

Block Agencies

☐ Yes ☒ No

Block Checks/Reports

☐ Reports ☒ Both ☐ Checks ☐ None

Run Nbr 1

Type Regular

Check Date 11/24/2006

Actual Call-In Date

Create Payroll

SB Review

Submit Payroll

Pre-Process


Delete Payroll

Copy Payroll

New Payroll Expert

Batch

View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd: 4.51M 10.5M/sec Sent: 32.42K

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.

Evolution 9.0.2.9 [st3] - Payroll - Batch

Thomas English #1 9/28/2007

Batch Quick Entry Quick Entry W/O verides Earnings and Deductions Taxes Import Auto Reduction

Batch	Period Begin Date	Period End Date	Frequency
178	9/9/2007	9/22/2007	B

Payroll Filter

Payroll Check Template

Frequency: Bi-Weekly

Period Begin Date: 9/9/2007 Period End Date: 9/22/2007

Pay Salary: ☒ Yes ☐ No

Pay Standard Hours: ☒ Yes ☐ No

Load Payroll Defaults: ☒ Yes ☐ No

Batch Creation Options

Checks per EE: 1

Calculate Scheduled EDs: ☐ Select EEs from List: ☐ Create 945 Checks: ☐

Pay: ☒ All ☐ Salary ☐ Hourly

Create Checks: ☒ Regular ☐ Manual ☐ 3rd Party

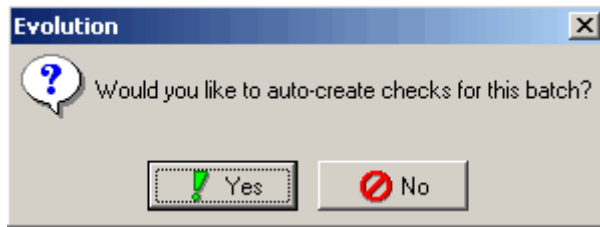
Create Batch Refresh ED Refresh ED No Man Delete Batch

Help Exit

Payroll New Batch Expert Check Quick Entry

View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd: 1.33M 7.8M/sec Sent: 17.92K

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

Evolution 9.0.2.9 [st3] - Payroll - Batch

Thomas English #1 9/28/2007 Checks: 6

Batch Quick Entry Quick Entry W/Overrides Earnings and Deductions Taxes Import Auto Reduction

32 Butler Rhett G

Type	Notes	EE Code	Name	Amt E02 Regular	Amt D06 401k	Amt E01 Salary
R	N	32	Butler Rhett G			2,000.00
R	N	18	Evans Dale			
R	N	35	Eve Adam			
R	N	33	O'Hara Scarlett			2,000.00
R	Y	24	Webb Charlotte R			
R	N	31	Williams Roy M			

0.00 0.00 4,000.00

Payroll New Batch Expert Check Batch Totals

View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd: 1.33M 7.6M/sec Sent: 17.92K

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.

Evolution 9.0.2.9 [st3] - Payroll - Check

Admin Client Company Employee Payroll Reports Misc

Thomas English #1 9/28/2007 9/9/2007 - 9/22/2007
 200
 18 Evans Dale Regular -99998732 1P 9.25 \$0.00 Batch 9/9/2007-9/22/2007
 Check 1 of 1

Check Lines Manual Tax General Tax Overrides Preview Employee Notes

E/D Code	E/D Description	Hours/Pieces	Rate of Pay	Amount
D05	Child Support			
DZ	NY SDI			
D02	Checking Account			
E02	Regular	80.00		

80 0.00

All Fields Check Line Local Overrides

Division Branch Department Team
 State SUI Workers Comp Job
 Agency Shift Piece
 Rate Nbr Rate of Pay Hours (Pieces) Line Item Date Line Item End Date
 80.00

YTD (F3)
 Locals (F7)
 Preview ALD (F6)

Batch Recalculate Check Quick Entry

View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd: 1.33M 7.8M/sec Sent:18.85K

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.

Evolution 9.0.2.9 [st3] - Payroll - Batch

Admin Client Company Employee Payroll Reports Misc

Thomas English #1 9/28/2007 Checks: 6

Batch Quick Entry Quick Entry W/Overrides Earnings and Deductions Taxes Import Auto Reduction

☐ Display User Entries Separately ☐ Display Totals By Check Type

E/D Code	Description	Hours/Pie...	Amount
D01	Misc.		
D02	Checking Account		
D05	Child Support		
D06	401k		
D07	Pension Match		
DZ	NY SDI		
E01	Salary		4,000.00
E02	Regular	400.00	
E03	Overtime		

EE Code	Employee Name	Hours/Pie...	Amount
31	Williams Roy M		

Help Exit

Payroll New Batch Expert Check Complete Payroll

View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd: 1.33M 7.8M/sec Sent:18.87K

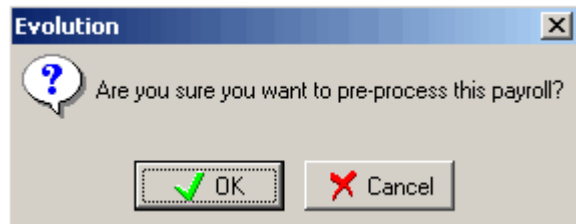
If the totals or the number of checks are incorrect, do the following:

- a. Select the E/D code with the incorrect amount from the left pane.
- b. Select the employee in the right pane.
- c. Press CTRL+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.

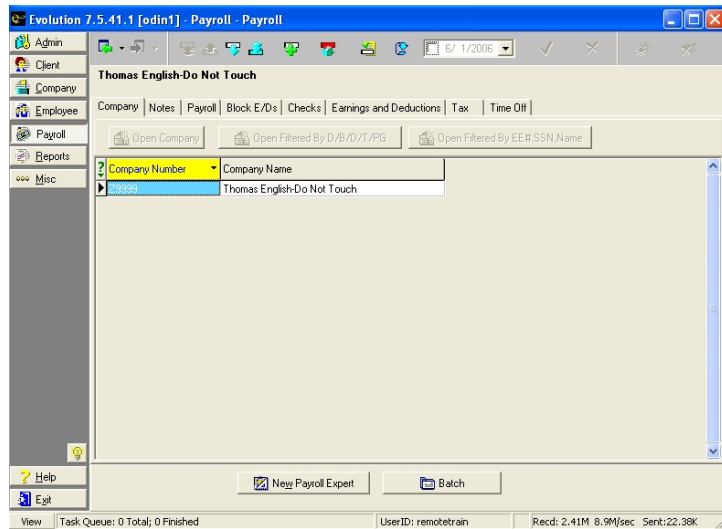
- If you do not need your Payroll Specialist to review the payroll, click the **Submit Payroll** button on the **Payroll** tab of the **Payroll-Payroll** window. The Payroll Specialist then processes the payroll normally.
- If you need your Payroll Specialist to review the payroll, click the **SB Review** 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.

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.

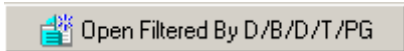


Company Tab

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:



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.



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.

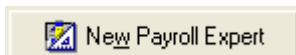


Clicking this button allows you to filter the selected company data by employee number (employee code), social security number,

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.

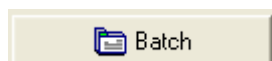
The Company Grid allows you to view all of the companies for which you have access. The grid lists each company by Company Number and Company Name.

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

The screenshot shows a software window titled "Notes Tab". On the left is a vertical sidebar with icons and labels: "Admin", "Client", "Company", "Employee", "Payroll", "Reports", "Misc", "Help", and "Exit". The main area has a title bar "Thomas English-Do Not Touch" and a tabbed interface with "Company", "Notes", and "Payroll" tabs. The "Notes" tab is active, displaying the text: "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." Below this text is a large empty rectangular field. At the bottom of the main area are two buttons: "New Payroll Expert" and "Batch". The bottom status bar contains the text: "View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd:842.24K 6.9M/sec Sent: 9.22K".

Admin

Client

Company

Employee

Payroll

Reports

Misc

Help

Exit

Thomas English-Do Not Touch

Company Notes Payroll

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.

New Payroll Expert Batch

View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd:842.24K 6.9M/sec Sent: 9.22K

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

Evolution 8.0.0.96 [zeus] - Payroll - Payroll

Admin Client Company Employee Payroll Reports Misc

Thomas English-Do Not Touch

Company Notes Payroll

Display Payrolls As Of 11/15/2006 Open Payroll

Run	Check Date	Check Date Status	Scheduled	Type	St...	Status Date
1	11/24/2006	N	Y	R	P	11/6/2006 2:46:36 PM

Payroll Check Comments

Block TO Accrual

☐ All ☒ No

☐ Accrual

Block Agencies

☐ Yes ☒ No

Block Checks/Reports

☐ Reports ☒ Both

☐ Checks ☐ None

Run Nbr 1

Type Regular

Check Date 11/24/2006

Actual Call-In Date

Create Payroll

SB Review

Submit Payroll

Pre-Process

Delete Payroll

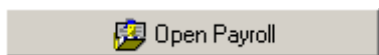
Copy Payroll

New Payroll Expert Batch

View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd: 4.51M 10.5M/sec Sent:32.42K

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

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.

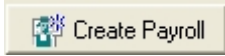
To select a check date for payroll, right –click somewhere in the grid or the check date field and a list of scheduled check dates will appear for you to make your selection.

Actual Call In Date:

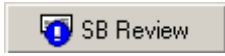
Informational Only.

Does not affect calculations. Enter the date the payroll was actually called in.

Function Buttons



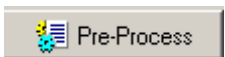
Click this button to create a new payroll.



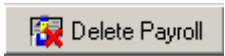
Click this button to put selected payroll on hold until reviewed by the Payroll Specialist.



Click this button to submit the selected payroll to the Payroll Specialist for processing.

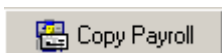


Click this button to pre-process the selected payroll. Once a payroll is pre-processed, you can run any report that does not use liabilities processing to confirm the validity of the payroll data.



Click this button to delete the selected payroll. Only non-

processed payrolls can be deleted. Once deleted, this payroll cannot be recovered.



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

Evolution 7.5.41.1 [odin1] - Payroll - Payroll

Admin

Client

Company

Employee

Payroll

Reports

Misc

Thomas English-Do Not Touch

Company | Notes | Payroll | Block E/Ds | Checks | Earnings and Deductions | Tax | Time Off

EE Scheduled E/D Code

Block

D10

Y

EE Scheduled E/D Code

D10

Block

Yes

No

Payroll

New Payroll Expert

Batch

View

Task Queue: 0 Total; 0 Finished

UserID: remotetrain


Recd: 1.36M 11.6M/sec Sent:11.41K


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

Evolution 7.5.41.1 [odin1] - Payroll - Payroll

Admin Client Company Employee Payroll Reports Misc

Thomas English-Do Not Touch Checks:

Company Notes Payroll Block E/Ds Checks Earnings and Deductions Tax Time Off

Batch	EE Code	Employee Name	Gross Wag...	Net Wages	Check Type	Serial Nbr	Check Status
123	31	Williams Roy M			Regular	-99999305	Outstanding
123	32	Butler Rhett G			Regular	-99999304	Outstanding
123	33	Employee 1099			Regular	-99999303	Outstanding
123	34	Jones Tom			Regular	-99999302	Outstanding
123	24	Webb Charlotte R			Regular	-99999306	Outstanding
123	18	Evans Dale			Regular	-99999307	Outstanding

Help Exit

Payroll New Payroll Expert Batch

View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd: 1.36M 11.6M/sec Sent:12.45K

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

Evolution 7.5.41.1 [odin1] - Payroll - Payroll

Thomas English-Do Not Touch Checks: 6

Company | Notes | Payroll | Block E/Ds | Checks | Earnings and Deductions | Tax | Time Off

☐ Display User Entries Separately ☐ Display Totals By Check Type

E/D Code	Description	Hours/Pie...	Amount
D01	Misc.		
D02	Checking Account		
D03	Advance		
D05	Child Support		
D06	401k		
D10	Union Dues	1.04	
E01	Salary		5.0
E02	Regular	395.00	3.0
E03	Average Overtime		
M06	Pension Match		

EE Code	Employee Name	Hours/Pie...	Amount
18	Evans Dale	80.00	737.8
24	Webb Charlotte R	80.00	800.0
31	Williams Roy M	80.00	1,440.0
32	Butler Rhett G	75.00	768.0
33	Employee 1099		
34	Jones Tom	80.00	0.0

Payroll New Payroll Expert Batch

View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd: 1.36M 11.6M/sec Sent: 12.45K

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

Evolution 7.5.74.1 [odin1] - Payroll - Batch

Admin Client Company Employee Payroll Reports Misc

Thomas English-Do Not Touch #1 6/9/2006 Checks: 6

Batch Quick Entry Quick Entry W/O overrides Earnings and Deductions Taxes Import

☐ Display User Entries Separately

Description	Amount	EE Code	Employee Name	Amount
FEDERAL EE OASDI TIPS	0.00	32	Butler Rhett G	0.00
FEDERAL EE OASDI WAGES	1,568.75	24	Webb Charlotte R	0.00
FEDERAL EE MEDICARE TAX	22.75			
FEDERAL EE MEDICARE TAXAB...	1,568.75			
FEDERAL OASDI TAX	97.26			
FEDERAL TAX	167.43			
FEDERAL TAXABLE WAGES	2,281.35			
LOCAL (New York City Non-Res.)	1,537.60			
LOCAL (New York City Non-Res.)	3.55			
STATE (NY) TAX	81.57			
STATE (NY) WAGE	2,281.35			

Help Exit

Payroll New Batch Expert Check

View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd: 8.66M 11.3M/sec Sent:33.49K

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

Evolution 7.5.41.1 [odin1] - Payroll - Payroll

Admin Client Company Employee Payroll Reports Misc

Thomas English-Do Not Touch

Company Notes Payroll Block E/Ds Checks Earnings and Deductions Tax Time Off


Run Balance Check

Help Exit

Payroll New Payroll Expert Batch

View Task Queue: 2 Total; 2 Finished UserID: remotetrain Recd: 5.19M 9.0M/sec Sent:82.62K

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  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.

Evolution 9.0.2.9 [st3] - Payroll - Batch

Admin Client Company Employee Payroll Reports Misc

Thomas English #1 9/28/2007

Batch Quick Entry Quick Entry W/Overrides Earnings and Deductions Taxes Import Auto Reduction

Bat.	Period Begin Date	Period End Date	Frequency
178	9/9/2007	9/22/2007	B

Payroll Filter

Payroll Check Template

Frequency: Bi-Weekly

Period Begin Date: 9/9/2007 Period End Date: 9/22/2007

Batch Creation Options

Calculate Scheduled EDs Select EEs from List Create 945 Checks

Checks per EE: 1

Pay: All Salary Hourly

Create Checks: Regular Manual 3rd Party

Pay Salary: Yes No

Pay Standard Hours: Yes No

Load Payroll Defaults: Yes No

Create Batch Refresh ED Refresh ED No Man Delete Batch

Help Exit

Payroll New Batch Expert Check Quick Entry

View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd: 1.33M 7.8M/sec Sent: 17.92K

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: <ul style="list-style-type: none"> • Daily • Weekly • Bi-Weekly • Semi-Monthly

- 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.

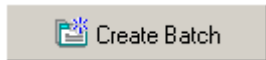
- Filters give you the ability to have salary checks and hourly checks in separate batches or to create different batches for different division, branch, department, or teams. These are created at the Company level. Contact your Payroll Specialist if needed.

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.



Creates a new batch for the selected payroll.



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.



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.



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:

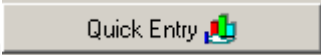
When selected, the user may select the employees to create checks for in this batch. The user may select from a list including active and terminated employees.

Create 945 Checks:	When selected, 945 checks will be created.
Pay:	<p>When selected, each flag performs the following function:</p> <ul style="list-style-type: none"> • 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:	<p>The type of checks to be auto created in the batch.</p> <ul style="list-style-type: none"> • 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 . 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

Evolution 9.0.2.9 [st3] - Payroll - Batch

Thomas English #1 9/28/2007 Checks: 6

Batch Quick Entry Quick Entry W/Overrides Earnings and Deductions Taxes Import Auto Reduction

32 Butler Rhett G

Type	Notes	EE Code	Name	Amt E02 Regular	Amt D06 401k	Amt E01 Salary
R	N	32	Butler Rhett G			2,000.00
R	N	18	Evans Dale			
R	N	35	Eve Adam			
R	N	33	O'Hara Scarlett			2,000.00
R	Y	24	Webb Charlotte R			
R	N	31	Williams Roy M			

0.00 0.00 4,000.00

Payroll New Batch Expert Check Batch Totals

View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd: 1.33M 7.8M/sec Sent: 17.92K

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

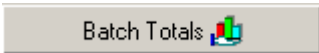
- Checks highlighted in Yellow have employee notes associated. Employee notes are loaded at the Employee level.

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 9.0.2.9 [st3] - Payroll - Batch

Thomas English #1 9/28/2007 Checks: 6

Batch Quick Entry Quick Entry W/Overrides Earnings and Deductions Taxes Import Auto Reduction

31 Williams Roy M

Type	Notes	EE Code	Name	Check #	Amt E01 Salary	Hrs E02 Regular	Amt E04 Bonus	Hrs E03 Overtime
R	N	32	Butler Rhett G	1		80.00		
R	N	32	Butler Rhett G	1	2,000.00			
R	N	18	Evans Dale	1		80.00		
R	N	35	Eve Adam	1				
R	N	33	OHara Scarlett	1		80.00		
R	N	33	OHara Scarlett	1	2,000.00			
R	Y	24	Webb Charlotte R	1		80.00		
R	N	31	Williams Roy M	1		80.00		

4,000.00 400.00 0.00 0.00

Help Exit

Payroll New Batch Expert Check Complete Payroll

View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd: 1.34M 7.9M/sec Sent:19.18K

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.

Evolution 7.5.41.1 [odin1] - Payroll - Check

Admin Client Company Employee Payroll Reports Misc

Thomas English-Do Not Touch #1 6/9/2006 2/16/2006 - 2/23/2006

100 32 Butler Rhett G Regular -99999275 1P 10.25 \$0.00 Batch 2/16/2006-2/23/2006 Check 1 of 1

Check Lines Manual Tax General Tax Overrides Preview Employee Notes

E/D Code	E/D Description	Hours/Pieces	Rate of Pay	Amount
D02	Checking Account			623.55
E02	Regular	75.00	10.25	768.75
E03	Average Overtime			
		75		145.20

All Fields Check Line Local Overrides

Division Branch Department Team

State SUI Workers Comp Job

Agency Shift Piece

Rate Nbr Rate of Pay Hours (Pieces) Line Item Date Line Item End Date

-1 10.25 75.00

YTD (F3) Locals (F7) Preview ALD (F6)

Batch Recalculate Check

View Task Queue: 2 Total; 2 Finished UserID: remotetrain Recd: 5.19M 9.0M/sec Sent:82.66K

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.

The screenshot shows the 'Evolution 9.0.2.9 [st3] - Payroll - Batch' window. The 'Taxes' tab is selected. The window title bar includes a date dropdown set to 6/19/2007. The main header area displays 'Thomas English' and '#1 9/28/2007' with 'Checks: 6' on the right. Below the header is a tabbed interface with 'Batch', 'Quick Entry', 'Quick Entry W/Overrides', 'Earnings and Deductions', 'Taxes' (selected), 'Import', and 'Auto Reduction'. A checkbox 'Display User Entries Separately' is present. The main area contains two tables. The left table lists tax descriptions and amounts, and the right table lists employee codes, names, and amounts.

Description	Amount
FEDERAL TAX	10.00
FEDERAL TAXABLE WAGES	960.00
STATE (NY) TAX	32.85
STATE (NY) WAGE	960.00

EE Code	Employee Name	Amount
18	Evans Dale	10.00

Import Tab

Evolution 9.0.2.9 [st3] - Payroll - Batch

Thomas English #1 9/28/2007 Checks: 6

Batch | Quick Entry | Quick Entry W/Overrides | Earnings and Deductions | Taxes | Import | Auto Reduction

Timeclock import

Source file name: C:\Documents and Settings\abryant\Desktop\Evolution Import.txt Import to the payroll

Exception report file name: C:\Documents and Settings\abryant\Desktop\E-Sheets\Impc View the report file

Look EE up by: ☒ Custom # ☐ Name ☐ SSN

DBDT match: ☐ Full (faster) ☒ Partial (slower)

File format: ☐ Fixed positions ☒ Comma delimited

☐ Use four digits for year ☐ Auto import job codes ☐ Use employee pay rates ☐ Auto Refresh ED

Help Exit

Payroll New Batch Expert Check Batch Totals

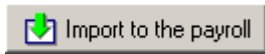
View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd: 4.16M 8.6M/sec Sent:25.42K

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.

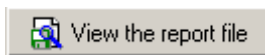


Click this button to import the data to the payroll.

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.



Click button to display the exception report file.

Look EE up by:	<p>Select the unique identifier used to match the import data with Evolution's data.</p> <ul style="list-style-type: none"> • Custom # • Name • SSN
DBDT match:	<p>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.</p> <p>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.</p>
File format:	<p>Select format for the import file.</p> <ul style="list-style-type: none"> • 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 than just pulling 8810, you can now select 8810VT and Vermont's 8810 code will be attached.

Auto Reduction tab

Evolution 9.0.2.9 [st3] - Payroll - Batch

Thomas English #1 9/28/2007 Checks: 6

Batch Quick Entry Quick Entry W/Overrides Earnings and Deductions Taxes Import Auto Reduction

Auto Reduction E/D Group Default: Paid Time Off Employees to Reduce Default: ☐ Hourly ☐ Salaried ☒ Both Reduce Hours View Exceptions

Reduction Exceptions

EE Code	EE Name	Check Number	ED Code	ED Description	Hours

Double-click on record to go to Payroll - Check screen

Payroll New Batch Expert Check

View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd: 4.92M 8.6M/sec Sent:41.60K

On the tab, users can access a feature that allows you to reduce regular hours by the number of hours belonging to an **Auto Reduction E/D Group**. The E/D Group to be used perform the reduction will be created by your Payroll Specialist.

The reduction function is only available on waiting payrolls. It will not take partial reductions and will only reduce E/D code type EB, Regular Hours, which are the same pay rate and D/B/D/T of the reducing line.

To perform the reduction, do the following:

1. On the **Auto Reduction** tab of the waiting payroll you wish to adjust, select the appropriate E/D Group from the **Auto Reduction E/D Group Default field**. This field default based on a setting on the Company level.
2. Select the type of employees who should be reduced from the **Employee to Reduce Default** field. Options are: Hourly, Salaried, or Both.
3. Click the **Reduce Hours** button.

Any adjustments made to employee will show on the **Check Lines tab** of the **Payroll-Check** window.

The screenshot shows the 'Evolution 9.0.2.9 [st3] - Payroll - Check' window. The left sidebar contains navigation buttons: Admin, Client, Company, Employee, Payroll, Reports, and Misc. The main area displays employee information for Thomas English, #1 9/28/2007, with a date range of 9/9/2007 - 9/22/2007. The 'Check Lines' tab is active, showing a table with columns: E/D Code, E/D Description, Hours/Pieces, Rate of Pay, and Amount. The table lists several lines: E01 (Salary, 2,000.00), D02 (Checking Account), D06 (401k), D07 (Pension Match), E02 (Regular, 40.00 hours, 0.00 rate), and E05 (Vacation, 40.00 hours, 0.00 rate). The total hours shown at the bottom are 80, and the total amount is 2,000.00.

E/D Code	E/D Description	Hours/Pieces	Rate of Pay	Amount
E01	Salary			2,000.00
D02	Checking Account			
D06	401k			
D07	Pension Match			
E02	Regular	40.00	0.00	0.00
E05	Vacation	40.00	0.00	0.00
		80		2,000.00

In the example above, Employee # 32, originally had 80 entered for Regular Hours and 40 entered for Vacation. After running the utility, the Regular Hours amount has been reduced to 40 Hours.

The system will not create a negative amount of regular hours where the reducing line is greater than the available regular hours. If the E/D was

not able to reduce regular hours, the E/D will be stamped as failed. The user can look at a list of failed reduction by clicking the **View Exceptions** button after the reduction process completes.

Reduction Exceptions						
?	EE Code	EE Name	Check Number	ED Code	ED Description	Hours
▶	33	Scarlett OHara	-99998728	E05	Vacation	90.00
Double-click on record to go to Payroll - Check screen						

In the example above, Employee # 33, originally had 80 entered for Regular Hours and 90 entered for Vacation. After running the utility, the Regular Hours amount could not be reduced because the reduction amount was greater than the available hours.

When a check line reduces another, the E/D group that was specified when the utility was run will be recorded on the reducing check line. This will provide an audit for troubleshooting purposes. This will also avoid a problem if the utility is run more than once.

No partial reduction of hours will be done. A single check line must have enough hours to reduce or the reduction will not occur. If two regular check lines combined have enough hours available, the system will not split the reduction between the two check lines.

Users will not be able to run this feature after the payroll has been preprocessed if the company is set up to do Auto Labor Distribution. For more information, please contact your Payroll Specialist.

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

Evolution 7.5.41.1 [odin1] - Payroll - Check

Admin Client Company Employee Payroll Reports Misc

Thomas English-Do Not Touch #1 6/9/2006 2/16/2006 - 2/23/2006

32 Butler Rhett G Regular -99999275 1P 10.25 \$0.00 Batch 2/16/2006-2/23/2006 Check 1 of 1

Check Lines Manual Tax General Tax Overrides Preview Employee Notes

E/D Code	E/D Description	Hours/Pieces	Rate of Pay	Amount
D02	Checking Account			623.55
E02	Regular	75.00	10.25	768.75
E03	Average Overtime			
		75		145.20

All Fields Check Line Local Overrides

Division Branch Department Team

State SUI Workers Comp Job

Agency Shift Piece YTD (F3)

Rate Nbr Rate of Pay Hours (Pieces) Line Item Date Line Item End Date Locals (F7)





Preview ALD (F6)

Batch Recalculate Check

View Task Queue: 2 Total; 2 Finished UserID: remotetrain Recd: 6.23M 8.9M/sec Sent:83.79K

Toolbar

The following toolbar will appear above each tab of this window.


Thomas English-Do Not Touch		#1 3/3/2006		11/10/2005 - 11/17/2005		   	
100							
24	Webb, Charlotte R	Regular	-99999489	1P 10.00	\$0.00	Batch 11/10/2005-11/17/2005 Check 3 of 3	

The toolbar is composed of the following parts (the corresponding examples from the toolbar above will appear in italics):

Company Name	<i>Thomas English- Do Not Touch</i>
Run Number	<i>#1</i>
Check Date	<i>3/3/2006</i>
Begin/End Dates of Payroll	<i>11/10/2005-11/17/2005</i>
EE Code	<i>24</i>
Employee Name	<i>Webb, Charlotte R</i>
Check Type	<i>Regular</i>
Check Number	<i>-99999489</i>
Rate Number & Rate Amount	<i>1P 10.00</i>
Salary Amount	<i>\$0.00</i>
Begin/End Dates of Batch	<i>Batch 11/10/2005-11/17/2005</i>
Check Count for the employee	<i>Check 3 of 3</i>

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.

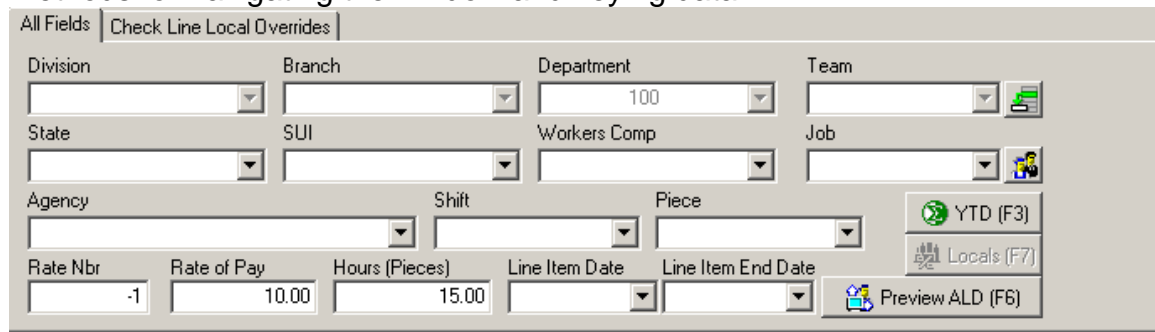
Hours/ Pieces: The corresponding hours/ pieces pertaining to the E/D code.

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).

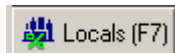
Amount: Type the amount for the check line.

- 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.



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

This tab allows you to block or exempt local taxes for each check line.

Local Name:	The name of the local tax.
Exclude:	<p>How the local should be treated for the corresponding check line</p> <ul style="list-style-type: none"> • 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

Evolution 7.5.41.1 [odin1] - Payroll - Check

Admin Client Company Employee Payroll Reports Misc

Thomas English-Do Not Touch #1 6/9/2006 2/16/2006 - 2/23/2006

100 32 Butler Rhett G Regular -99999275 1P 10.25 \$0.00 Batch 2/16/2006-2/23/2006 Check 1 of 1

Check Lines Manual Tax General Tax Overrides Preview Employee Notes

Row	Description	Amount
1	Federal	
2	OASDI	
3	Medicare	
4	EIC	
5	Back-up Withholding	
6	STATE - NY	
7	SDI - NY	
8	SUI - NY-SUI	
9	SUI - NY-Re-Employment	

Calculate Override Taxes
☒ Yes ☐ No

Reciprocate SUI
☒ Yes ☐ No

Prorate FICA

Add States Add Locals

Batch Recalculate Check

View Task Queue: 2 Total; 2 Finished UserID: remotetrain Recd: 6.23M 8.9M/sec Sent:83.79K

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.

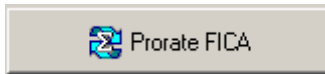
Calculate Override Taxes: *Default* Yes: calculates the tax amount. This may be different than what the user entered, depending on limits and/or shortfalls.

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:

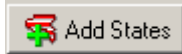
Yes: The employee is setup to reciprocate SUI with another state.

No: The employee does not reciprocate SUI.



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



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.



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.

General tab

Evolution 7.5.51.1 [odin1] - Payroll - Check

Admin Client Company Employee Payroll Reports Misc

Thomas English-Do Not Touch #2 6/30/2006 6/17/2006 - 6/25/2006

100 18 Evans Dale Regular -99999196 1P 9.22 \$0.00 Batch 6/17/2006-6/25/2006 Check 2 of 2

Check Lines Manual Tax General Tax Overrides Preview Employee Notes

Block DD
☐ Yes ☒ No

Block DD Except Net
☐ Yes ☒ No

Block Time Off Accrual
☐ All ☒ No

Block Auto Distribution
☐ Yes ☒ No

Block Sched E/Ds Except DD
☐ Yes ☒ No

Block Sched E/Ds Except Pension
☐ Yes ☒ No

Block Scheduled E/Ds From Agency
☐ Yes ☒ No

945 Check
None

Create New Check
Apply Check Template
Refresh scheduled E/Ds
Create Next Check
Void Next Check
Create Manual Check

Current Check Comments

Batch Recalculate Check

View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd: 1.35M 11.4M/sec Sent: 11.66K

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.

Block Time Off Accrual:	<p><i>Defaults to No.</i></p> <p>All: Blocks accruals on all hourly based time off accrual and blocks usage on all accruals.</p> <p>Accrual: Blocks hourly based time off from accruing, but still records time taken.</p> <p>No: Allows all time off to accrue and show taken amounts.</p>
Block Auto Distribution:	<p><i>Defaults to No</i></p> <p>Yes: Blocks the automatic distribution of labor.</p> <p>No: Performs the automatic distribution of labor normally.</p>
Block Sched E/Ds except DD:	<p><i>Defaults to No</i></p> <p>Yes: Blocks all scheduled E/Ds, except for scheduled E/Ds based on the E/D code type of D1.</p> <p>No: Applies scheduled E/Ds to the check normally.</p>

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

453

Functions

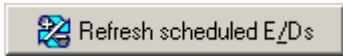


the check stub. These comments add to the comments entered in the **Payroll Check Comments** box on the **Payroll** tab of the **Payroll-Payroll** window.

Clicking this button will launch the Payroll Expert to help you create a check for any employee.

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.



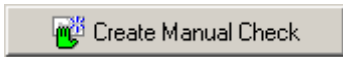
Reloads the default scheduled E/Ds for this check.



Creates another regular check for this employee.



Brings up the **Void Check** dialog box for this employee.



Creates a manual check for this employee.

Tax Overrides tab

Evolution 7.5.41.1 [odin1] - Payroll - Check

Thomas English-Do Not Touch #1 6/9/2006 2/16/2006 - 2/23/2006

100 32 Butler Rhett G Regular -99999275 1P 10.25 \$0.00 Batch 2/16/2006-2/23/2006 Check 1 of 1

Check Lines Manual Tax General Tax Overrides Preview Employee Notes

Tax Frequency BiWeekly **Federal Type** None **Block**

Tax Supplmt Rate ☐ Yes ☒ No Federal Value

Block

Federal ☐ Yes ☒ No EE QASDI ☐ Yes ☒ No EE Medicare ☐ Yes ☒ No EE EIC ☐ Yes ☒ No

Additional Fed. ☐ Yes ☒ No ER QASDI ☐ Yes ☒ No ER Medicare ☐ Yes ☒ No ER FUI ☐ Yes ☒ No

State overrides

S...	Excl Addtl	Supplmt Rate	Excl SDI	Excl State	Excl SUI	Type	Value	EE SD
NY	No	No	No	No	No	None		

Local overrides

Local Name	Exclude	Amount

Batch Recalculate Check

View Task Queue: 2 Total; 2 Finished UserID: remotetrain Recd: 6.23M 8.9M/sec Sent:83.79K

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

Evolution 7.5.41.1 [odin1] - Payroll - Check

Admin Client Company Employee Payroll Reports Misc

Thomas English-Do Not Touch #1 6/9/2006 2/16/2006 - 2/23/2006

100 32 Butler Rhett G Regular -99999275 1P 10.25 \$0.00 Batch 2/16/2006-2/23/2006 Check 1 of 1

Check Lines Manual Tax General Tax Overrides Preview Employee Notes


EARNINGS:	DEDUCTIONS:
E02 Regular (75) = \$768.75	D02 Checking Account = \$623.55
Earnings SubTotal = \$768.75	Deductions SubTotal = \$623.55
MEMOS:	FEDERAL TAXES:
	QASDI Tax = \$47.66 (\$768.75/\$0.00)
	Medicare Tax = \$11.15 (\$768.75)
	Federal Tax = \$66.85 (\$768.75)
	STATE TAXES:
	NY State Tax = \$19.54 (\$768.75)
	Taxes SubTotal = \$145.20
	Net Amount = \$0.00

Plug taxes

Batch Recalculate Check

View Task Queue: 2 Total; 2 Finished UserID: remotetrain Recd: 6.23M 8.9M/sec Sent:83.79K

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

 Admin Client Company Employee Payroll Reports Misc Help Exit	6/ 2/2006									
	Thomas English-Do Not Touch #1 6/9/2006 2/16/2006 - 2/23/2006									
	100									
	<input type="text" value="24"/>	<input type="text" value="Webb Charlotte R"/>	<input type="text" value="Regular"/>	<input type="text" value="-99999277"/>	<input type="text" value="1P"/>	<input type="text" value="10.00"/>	<input type="text" value="\$0.00"/>	Batch 2/16/2006-2/23/2006		
								Check 1 of 1		
	Check Lines Manual Tax General Tax Overrides Preview Employee Notes									
	Notes regarding this Employee that a data processor may need to be aware of while keying payroll									
Batch Recalculate Check										
View Task Queue: 2 Total; 2 Finished UserID: remotetrain Recd: 1.96M 11.4M/sec Sent:18.28K										


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**

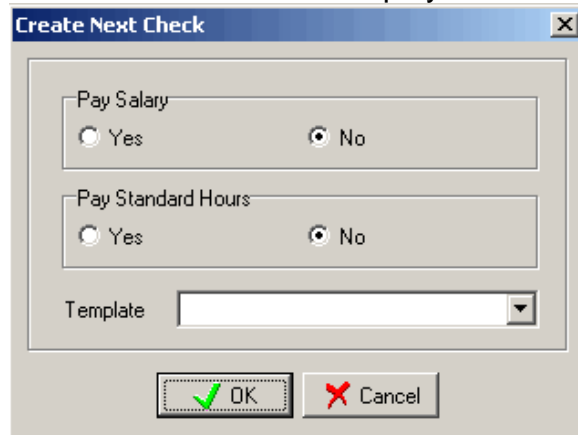
button  or ALT+Insert and by clicking the **Create New Check** button on the **General** tab of the **Payroll-Check** window. If you create a new check using the **Payroll Expert**, you may create a check for any active employee associated with the company. If you create a new check using the **Create 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.

<div>Admin</div> <div>Client</div> <div>Company</div> <div>Employee</div> <div>Payroll</div> <div>Reports</div> <div>Misc</div> <div>Help</div> <div>Exit</div>	<div> <div>6/ 2/2006</div> <div>✓</div> <div>✗</div> </div>									
	<div> <div>Thomas English-Do Not Touch</div> <div>#1 7/7/2006</div> <div>3/16/2006 - 3/23/2006</div> </div>									
	<div> <div>100</div> <div>32</div> <div>Butler Rhett G</div> <div>Regular</div> <div>-99999263</div> <div>1P</div> <div>10.25</div> <div>\$0.00</div> <div>Batch 3/16/2006-3/23/2006</div> <div>Check 1 of 1</div> </div>									
	<div> <div>Check Lines</div> <div>Manual Tax</div> <div>General</div> <div>Tax Overrides</div> <div>Preview</div> <div>Employee Notes</div> </div>									
	<div> <div>Block DD</div> <div><input type="radio"/> Yes <input checked="" type="radio"/> No</div> </div>									
	<div> <div>Block Sched E/Ds Except DD</div> <div><input type="radio"/> Yes <input checked="" type="radio"/> No</div> </div>									
	<div> <div>Block DD Except Net</div> <div><input type="radio"/> Yes <input checked="" type="radio"/> No</div> </div>									
	<div> <div>Block Sched E/Ds Except Pension</div> <div><input type="radio"/> Yes <input checked="" type="radio"/> No</div> </div>									
	<div> <div>Block Time Off Accrual</div> <div><input type="radio"/> All <input checked="" type="radio"/> No</div> </div>									
	<div> <div>Block Scheduled E/Ds From Agency</div> <div><input type="radio"/> Yes <input checked="" type="radio"/> No</div> </div>									
<div> <div>Block Auto Distribution</div> <div><input type="radio"/> Yes <input checked="" type="radio"/> No</div> </div>										
<div> <div>945 Check</div> <div>None</div> </div>										
<div>Current Check Comments</div> <div></div>										
<div> <div>Batch</div> <div>Recalculate Check</div> <div>Quick Entry</div> </div>										
<div>View Task Queue: 2 Total; 2 Finished UserID: remotetrain Recd: 2.53M 9.0M/sec Sent:27.33K</div>										

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.

Evolution 7.5.41.1 [odin1] - Payroll - Check

Admin Client Company Employee Payroll Reports Misc

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 ☒ Accrual

Block Scheduled E/Ds From Agency
☐ Yes ☒ No

Block Auto Distribution
☐ Yes ☒ No

945 Check
 None

Create New Check
 Apply Check Template
 Refresh scheduled E/Ds
 Create Next Check
 Void Next Check
 Create Manual Check

Current Check Comments

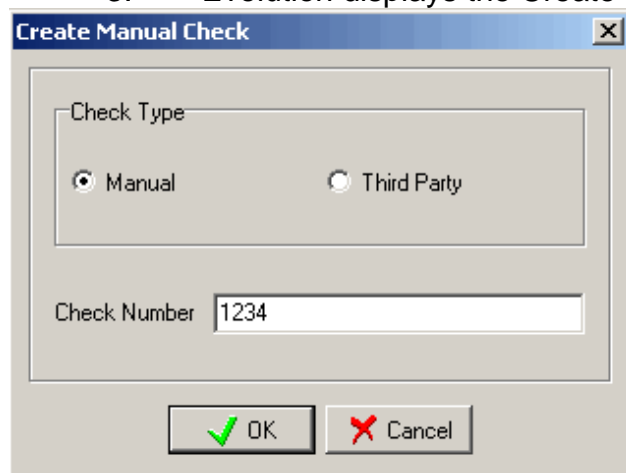
Batch Recalculate Check Quick Entry

View Task Queue: 2 Total; 2 Finished UserID: remotetrain Recd: 1.44M 11.7M/sec Sent:23.97K

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.



The image shows a 'Create Manual Check' dialog box. It has a title bar with the text 'Create Manual Check' and a close button (X). Inside the dialog, there is a section labeled 'Check Type' containing two radio buttons: 'Manual' (which is selected) and 'Third Party'. Below this, there is a text field labeled 'Check Number' containing the value '1234'. At the bottom of the dialog, there are two buttons: 'OK' with a green checkmark icon and 'Cancel' with a red X icon.

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.

Evolution 7.5.41.1 [odin1] - Payroll - Batch

Admin Client Company Employee Payroll Reports Misc

Thomas English-Do Not Touch #1 7/21/2006

Batch Quick Entry Quick Entry W/O overrides Earnings and Deductions Taxes Import

Bat...	Period Begin Date	Period End Date	Frequency
123	3/30/2006	4/6/2006	B

Payroll Filter

Payroll Check Template

Frequency: Bi-Weekly

Period Begin Date: 3/30/2006 Period End Date: 4/6/2006

Batch Creation Options

☒ Calculate Scheduled ED's ☐ Select EE's from List ☐ Create 945 Checks

Pay: ☒ All ☐ Salary ☐ Hourly

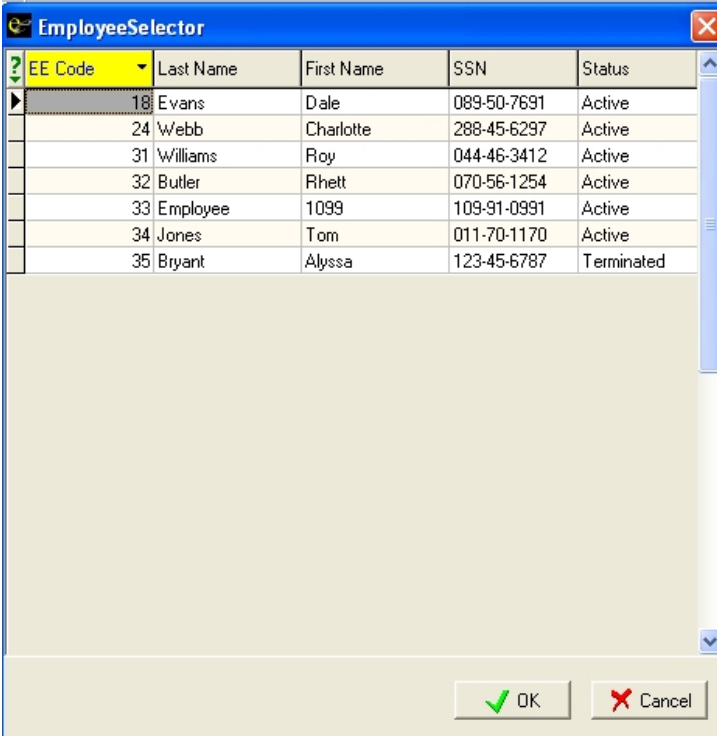
Check Type: ☒ Regular ☐ Manual ☐ 3rd Party

Buttons: Create Batch, Refresh ED, Refresh ED No Man, Delete Batch

Buttons: Payroll, New Batch Expert, Check, Quick Entry

View Task Queue: 2 Total; 2 Finished UserID: remotetrain Recd: 1.44M 11.7M/sec Sent: 23.99K

A dialog box will display with a list of EE's. Select the EE(s) you are creating manual checks for. Click OK.



The dialog box titled "EmployeeSelector" contains a table with the following data:

EE Code	Last Name	First Name	SSN	Status
18	Evans	Dale	089-50-7691	Active
24	Webb	Charlotte	288-45-6297	Active
31	Williams	Roy	044-46-3412	Active
32	Butler	Rhett	070-56-1254	Active
33	Employee	1099	109-91-0991	Active
34	Jones	Tom	011-70-1170	Active
35	Bryant	Alyssa	123-45-6787	Terminated

At the bottom of the dialog box are two buttons: "OK" (with a green checkmark icon) and "Cancel" (with a red X icon).

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.

Evolution 7.5.52.6 [odin1] - Payroll - Check

Thomas English-Do Not Touch #2 6/30/2006 6/17/2006 - 6/25/2006

18 Evans Date Regular -99999195 1P 9.22 \$0.00 Batch 6/17/2006-6/25/2006 Check 3 of 3

Check Lines Manual Tax General Tax Overrides Preview Employee Notes

E/D Code	E/D Description	Hours/Pieces	Rate of Pay	Amount
D02	Checking Account			
D05	Child Support			125.00
D06	401k			25.00
M06	Pension Match			3.13
I 002	Regular			

0 -146.87

All Fields Check Line Local Overrides

Division Branch Department Team

State SUI Workers Comp Job

Agency Shift Piece

Rate Nbr Rate of Pay Hours (Pieces) Line Item Date Line Item End Date

YTD (F3) Locals (F7) Preview ALD (F6)

Batch Recalculate Check

View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd: 1.36M 11.6M/sec Sent: 11.83K

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

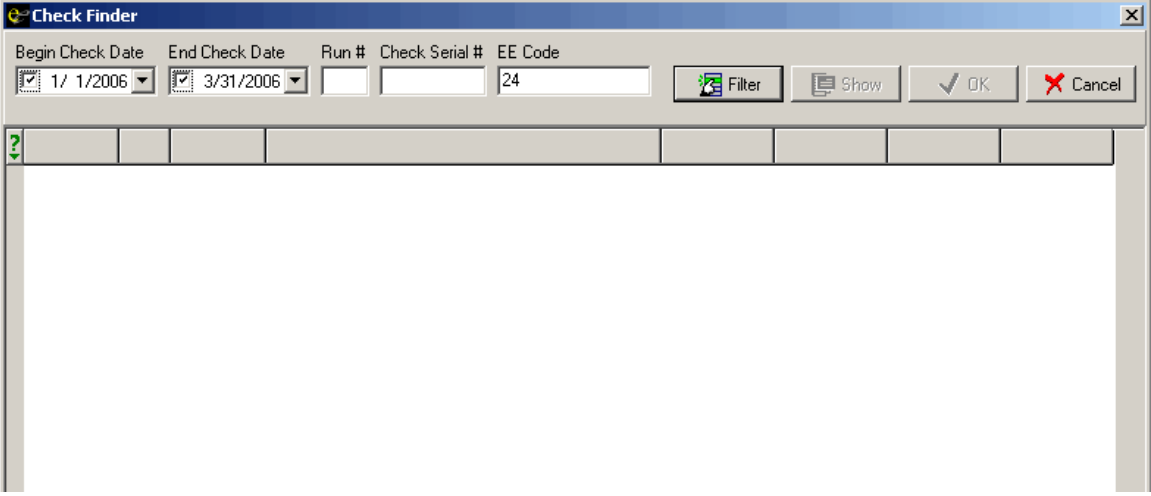
The two methods are similar, but using the **Payroll Expert** generally requires a few more steps. The **Void Next Check** button is located on the **General** tab of the **Payroll Check** window.

The screenshot shows the 'Evolution 7.5.42.1 [odin1] - Payroll - Check' window. The 'General' tab is active, displaying several sections for configuring a payroll check. The 'Block DD' section has 'No' selected. The 'Block DD Except Net' section has 'No' selected. The 'Block Time Off Accrual' section has 'No' selected. The 'Block Auto Distribution' section has 'No' selected. The 'Block Sched E/Ds Except DD' section has 'No' selected. The 'Block Sched E/Ds Except Pension' section has 'No' selected. The 'Block Scheduled E/Ds From Agency' section has 'No' selected. The '945 Check' dropdown is set to 'None'. The 'Void Next Check' button is highlighted with a red rectangle. Other buttons include 'Create New Check', 'Apply Check Template', 'Refresh scheduled E/Ds', 'Create Next Check', and 'Create Manual Check'. The bottom status bar shows 'Task Queue: 2 Total; 2 Finished', 'UserID: remotetrain', and 'Recd: 1.37M 10.0M/sec Sent:24.92K'.

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**.



The screenshot shows the "Check Finder" dialog box. It has a title bar with a close button. Below the title bar, there are five input fields: "Begin Check Date" (with a calendar icon and a dropdown arrow, showing "1/ 1/2006"), "End Check Date" (with a calendar icon and a dropdown arrow, showing "3/31/2006"), "Run #" (empty), "Check Serial #" (empty), and "EE Code" (containing "24"). To the right of these fields are four buttons: "Filter" (with a magnifying glass icon), "Show" (with a list icon), "OK" (with a checkmark icon), and "Cancel" (with a red X icon). Below the input fields is a table with a header row and one data row. The header row has five columns with labels: "?", "Run #", "Check Serial #", "EE Code", and "Status". The data row is empty. The table is followed by a large empty rectangular area.

?	Run #	Check Serial #	EE Code	Status


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.

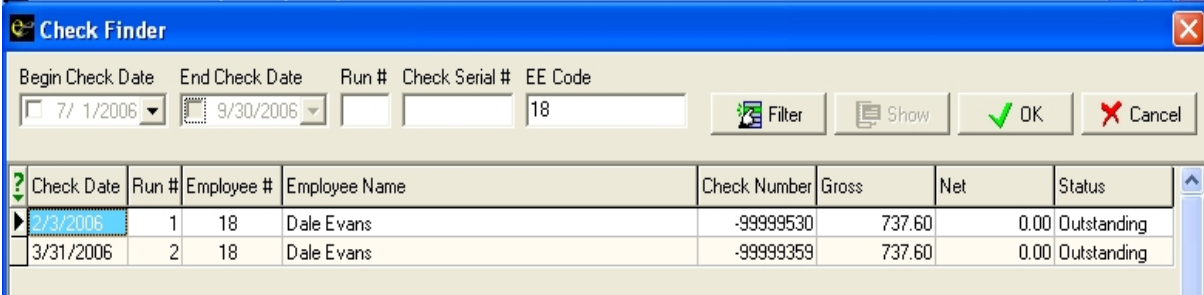
Check Finder

Begin Check Date: 3/ 1/2006 End Check Date: 3/ 1/2006 Run #: Check Serial #: EE Code: 24

Filter Show OK Cancel

|--|--|--|--|--|--|--|--|--|

3. Evolution displays a list of checks that match the criteria. Select the check you want to void and click OK.



The screenshot shows the 'Check Finder' window with the following search criteria: Begin Check Date 7/1/2006, End Check Date 9/30/2006, Run #, Check Serial #, and EE Code 18. The window displays a table of checks with columns: Check Date, Run #, Employee #, Employee Name, Check Number, Gross, Net, and Status. Two checks are listed, both for Dale Evans, with a Gross of 737.60 and a Net of 0.00, both with a status of 'Outstanding'.

Check Date	Run #	Employee #	Employee Name	Check Number	Gross	Net	Status
7/1/2006	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.



- 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.

The screenshot shows the 'Evolution 7.5.42.1 [odin1] - Payroll - Check' window. The left sidebar contains navigation links: Admin, Client, Company, Employee, Payroll, Reports, and Misc. The main area displays check details for 'Thomas English-Do Not Touch' with check number '100' and date '6/30/2006'. The status is 'Void'. The 'Check Lines' tab is active, showing a table with the following data:

E/D Code	E/D Description	Hours/Pieces	Rate of Pay	Amount
D02	Checking Account			-557.33
M06	Pension Match			-3.13
D05	Child Support			-125.00
D06	401k			-25.00
E02	Regular	80.00	9.22	-737.60
		-80		-33.40

- 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  button to save the changes to local memory.
7. If Evolution hasn't committed the changes to the database, click the Commit Changes  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

Admin Client Company Employee Payroll Reports Misc

Client Z9999 Thomas English-Do Not Touch!

Company Z9999 Thomas English-Do Not Touch

Browse Report Parameters

Open company Set Up Reports

Number	Name	Status	Report Name
Z9999	Thomas English-Do Not Touch	Active	<input type="checkbox"/> Ad Hoc - Company Contacts (S1153) <input type="checkbox"/> Ad Hoc - Company Test (S1153) <input type="checkbox"/> Ad Hoc - Company Test 2 (S1153) <input type="checkbox"/> Ad Hoc - Payroll 1 (S1132) <input type="checkbox"/> Ad Hoc - Payroll1 (S1132) <input type="checkbox"/> Check Reconciliation (S214) <input type="checkbox"/> Cover Letter (S193) <input type="checkbox"/> Deduction Code Report (S181) <input type="checkbox"/> Delivery Instructions (S187) <input type="checkbox"/> Delivery Label (S184) <input type="checkbox"/> Earning And Deductions (RW) (S181) <input type="checkbox"/> EE Shortfalls Report (S228) <input type="checkbox"/> Employee Profiles (S263) <input type="checkbox"/> General Ledger (RW) (S183) <input type="checkbox"/> General Ledger - Rapid Export Format (S348) <input type="checkbox"/> Input Worksheet (S351) <input type="checkbox"/> Input Worksheet Fax Cover (S360) <input type="checkbox"/> Job Costing (RW) (S229) <input type="checkbox"/> Payroll Register (S109) <input type="checkbox"/> Quarterly Tax Summary (S1080) <input type="checkbox"/> Tax Report (S247)

View Task Queue: 2 Total; 2 Finished UserID: remotetrain Recd:132.85K 12.2M/sec Sent: 7.26K

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

Admin Client Company Employee Payroll Reports Misc

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

Browse Report Parameters

Override default parameters as
Payroll Register (S109) Restore Defaults

Print
☒ Run through the Queue Run Report(s)

Payrolls Misc Employee Filter DBDT Filter

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

Check Date	Run #	Processed	Status	Type
6/30/2006	2		W	R
6/30/2006	1	6/5/2006 12:13:05 PM	P	R
6/23/2006	1	5/25/2006 4:00:53 PM	P	R
5/8/2006	1	5/8/2006 1:15:03 PM	P	D
4/18/2006	1	4/18/2006 2:06:42 PM	P	D
3/31/2006	2	4/13/2006 5:01:03 PM	P	R
3/31/2006	1	2/17/2006 8:42:30 AM	P	T
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

Help Exit

View Task Queue: 2 Total; 2 Finished UserID: remotetrain Recd:171.69K 11.8M/sec Sent: 7.52K

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

Payrolls | Misc | Employee Filter | DBDT Filter



Check Date Period

Year ☒ 1st Quarter ☒ 3rd Quarter
☒ 2nd Quarter ☒ 4th Quarter

From To

Select Payrolls for
☐ 1st Quarter ☐ 3rd Quarter
☐ 2nd Quarter ☐ 4th Quarter
☐ Year

☐ Show Processed Only ☐ Consolidation

 	Check Date	Run #	Processed	Status	Type
<input type="checkbox"/>	3/31/2006	1	2/17/2006 8:42:30 AM	P	T
<input type="checkbox"/>	3/17/2006	1		W	R
<input type="checkbox"/>	3/3/2006	1		W	R
<input type="checkbox"/>	2/17/2006	2	2/17/2006 8:47:29 AM	P	A
<input type="checkbox"/>	2/17/2006	1	2/2/2006 10:44:13 AM	P	R
<input type="checkbox"/>	2/15/2006	1	2/15/2006 6:01:14 PM	P	D
<input type="checkbox"/>	2/3/2006	1	2/2/2006 10:44:48 AM	P	R
<input type="checkbox"/>	2/2/2006	1	2/2/2006 3:40:54 PM	P	D
<input type="checkbox"/>	1/25/2006	1	1/25/2006 7:00:07 PM	P	D

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: <ul style="list-style-type: none">• Select All• Unselect All• Reverse Selection
Check Date:	The check date of the payroll.
Run #:	The run number of the payroll.
<p>➤ When the Consolidation check box is selected, Evolution modifies the run numbers to distinguish amongst the payrolls of the consolidated companies.</p>	
Processed:	The date and time the payroll was processed.
Status:	The status the payroll is in.

Misc Tab

Payrolls	Misc	Employee Filter	DBDT Filter
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Grouping and Sorting

Group Level Company

Group Type Detail

Group Sort Group Code

Detail Sort Employee Last Name

☐ Page Break after each group

☒ Show Terminated Employees

☐ Mask Sensitive Information

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

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:	<p>Selected: Insert a page break after each group.</p> <p>Cleared: Does not include a page break after each group.</p>
Show Terminated Employees:	<p>Selected: Includes data from terminated employees in the report.</p> <p>Cleared: Excludes data from terminated employees from the report. Only data from active employees will be shown.</p>
Mask Sensitive Information:	<p>Selected: Blocks the Social Security number from being displayed on the report by printing xxx-xx-xxxx in the place of the SSN.</p> <p>Cleared: <i>Defaults</i>. Prints the Social Security Number (SSN) on the report.</p>

Employee Filter tab

Admin Client Company Employee Payroll Reports Misc

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

Browse Report Parameters

Override default parameters as
Payroll Register (\$109) Restore Defaults Print
☒ Run through the Queue Run Report(s)

Payrolls Misc Employee Filter DBDT Filter

EE Code	SSN	First Name	Last Name
<input type="checkbox"/> 1	056-56-5620	Sara	Lee
<input type="checkbox"/> 2	111-22-3333	Thomas	Jemina
<input type="checkbox"/> 3	088-99-6547	Angel	Butterworth
<input type="checkbox"/> 4	007-14-7410	April	Pearson
<input type="checkbox"/> 5	125-42-5142	June	Kelley
<input type="checkbox"/> 6	110-32-0320	May	West
<input type="checkbox"/> 7	001-21-2453	July	South
<input type="checkbox"/> 8	145-21-3620	March	East
<input type="checkbox"/> 9	002-44-4444	Marjorie	Adams
<input type="checkbox"/> 10	102-10-2101	Ernie	Bert
<input type="checkbox"/> 11	104-41-4141	Earl E.	Riser
<input type="checkbox"/> 12	125-12-5125	Mister	Goodbar
<input type="checkbox"/> 13	111-44-5245	Sarah	Therrien
<input type="checkbox"/> 14	102-45-9696	Apple	McIntosh
<input type="checkbox"/> 15	066-15-1456	Francis Scott	King
<input type="checkbox"/> 16	102-42-4210	Mary	Campbell
<input type="checkbox"/> 17	131-32-1321	Gary	North
<input type="checkbox"/> 18	089-50-7691	Dale	Evans

Help Exit

View Task Queue: 2 Total; 2 Finished UserID: remotetrain Recd: 2.94M 11.8M/sec Sent:135.02K

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

Payrolls Misc Employee Filter DBDT Filter

DBDT Level Department

 	Division	Division #	Branch	Branch #	Department	Department #
 <input type="checkbox"/>	Hide	1	Hide	1	Baker	100
<input type="checkbox"/>	Hide	1	Hide	1	Decorator	200
<input type="checkbox"/>	Hide	1	Hide	1	Delivery	300

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

Evolution 8.0.0.96 [zeus] - Reports - Set up Reports

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

Browse Details

Open company

Num	Name	Report print Name	Report Description	Report Print Priority
Z9999	Thomas English	Certified Payroll Report (S518)		5
		Check Reconciliation (S214)		5
		Cover Letter (S193)		3
		Deduction Code Report (S181)		5
		Delivery Instructions (S187)		2
		Delivery Label (S184)		1
		Earning And Deductions (RW) (S181)		9
		EE Shortfalls Report (S228)		6
		Employee Profiles (S263)		8
		General Ledger (RW) (S183)		5
		General Ledger - Rapid Export Format (S348)		7
		Input Worksheet (S351)		9
		Input Worksheet Fax Cover (S360)		9
		Job Costing (RW) (S229)		5
		Payroll Register (S109)		7
		Quarterly Tax Summary (S1080)		5
		Tax Report (S247)		4
		Taxable wage report for payroll (S236)		7
		YTD Compensation Report (S109)		9

View Task Queue: 0 Total; 0 Finished UserID: remotetrain Recd:555.22K 11.7M/sec Sent: 8.77K

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: Remote users cannot change the Number of Copies field. It will default to 0 when a remote user adds a report. To change the number of copies, contact your Service Bureau. If a Service Bureau internal user added the report to the system, the actual number of copies to print will display.
- 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

Report Parameters

Misc | Employee Filter | DBDT Filter

Grouping and Sorting

Group Level: Company

Group Type: Detail

Group Sort: Group Code

Detail Sort: Employee Last Name

Do according to Company Setup

☐ Page Break after each Group

☒ Show Terminated Employees

☐ Mask Sensitive Information

☐ Show only Summary for Multiple check dates

☐ Show Home DBDT for each Employee

☒ Include Memos in Totals

☒ Include Taxable Memos in Totals

☒ Include Pieces from Piecework in Totals

☒ Break Employee between Pages

OK Cancel

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:	<p>Selected: Includes data from terminated employees in the report.</p> <p>Cleared: Excludes data from terminated employees from the report.</p>
Mask Sensitive Information:	<p>Selected: Blocks the Social Security number from being displayed on the report by printing xxx-xx-xxxx in the place of the SSN.</p> <p>Cleared: <i>Defaults</i>. Prints the Social Security Number (SSN) on the report.</p>
Show only Summary for Multiple check dates:	<p>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.</p>
Show Home DBDT for Each employee:	<p>Displays the home D/B/D/T for the employee.</p>
Include Memos in Totals:	<p>Displays the amounts on the report and</p>

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

Payrolls | Misc | Employee Filter | DBDT Filter

  EE Code	SSN	First Name	Last Name
<input type="checkbox"/> 1	056-56-5620	Sara	Lee
<input type="checkbox"/> 2	111-22-3333	Thomas	Jemima
<input type="checkbox"/> 3	088-99-6547	Angel	Butterworth
<input type="checkbox"/> 4	007-14-7410	April	Pearson
<input type="checkbox"/> 5	125-42-5142	June	Kelley
<input type="checkbox"/> 6	110-32-0320	May	West
<input type="checkbox"/> 7	001-21-2453	July	South
<input type="checkbox"/> 8	145-21-3620	March	East
<input type="checkbox"/> 9	002-44-4444	Marjorie	Adams
<input type="checkbox"/> 10	102-10-2101	Ernie	Bert
<input type="checkbox"/> 11	104-41-4141	Earl E.	Riser
<input type="checkbox"/> 12	125-12-5125	Mister	Goodbar
<input type="checkbox"/> 13	111-44-5245	Sarah	Therrien
<input type="checkbox"/> 14	102-45-9696	Apple	McIntosh
<input type="checkbox"/> 15	066-15-1456	Francis Scott	King
<input type="checkbox"/> 16	102-42-4210	Mary	Campbell
<input type="checkbox"/> 17	131-32-1321	Gary	North
<input type="checkbox"/> 18	089-50-7691	Dale	Evans

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

Misc | Employee Filter | DBDT Filter

DBDT Level Department

?	Division	Division #	Branch	Branch #	Department	Department #
▶	<input type="checkbox"/> Hide	1	Hide	1	Baker	100
	<input type="checkbox"/> Hide	1	Hide	1	Decorator	200
	<input type="checkbox"/> Hide	1	Hide	1	Delivery	300

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.

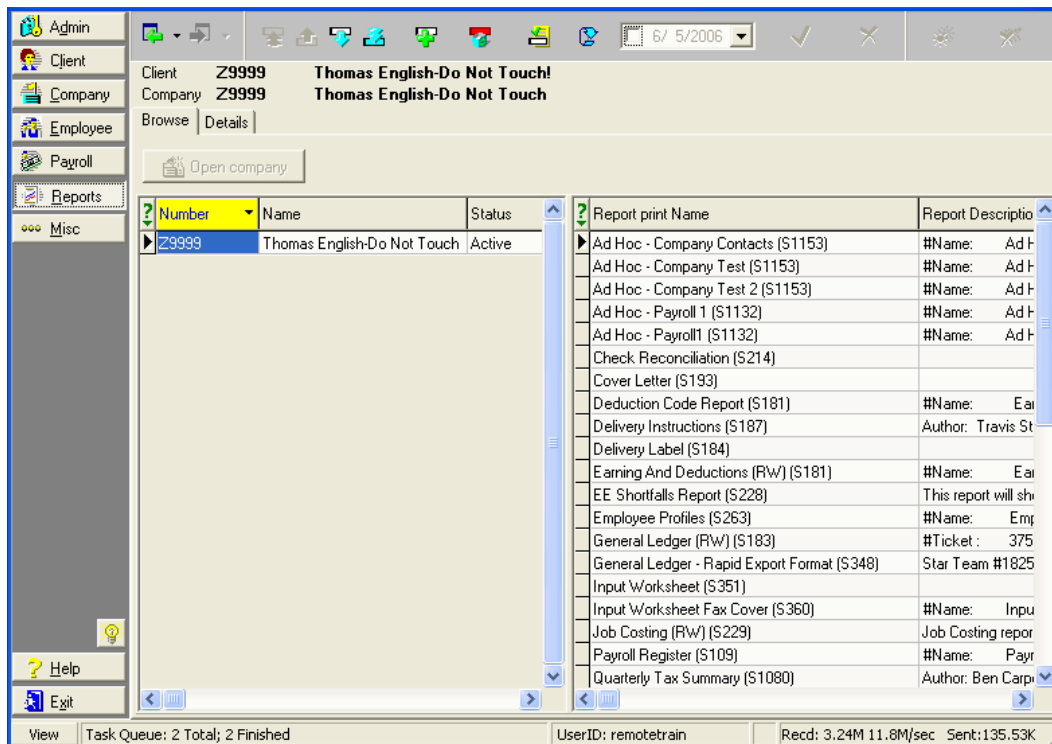
13. Evolution processes the report.

- 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.

The screenshot shows a software window titled 'Thomas English-Do Not Touch!'. The left sidebar contains a tree view with 'Reports' selected. The main area is divided into several sections:

- Client/Company:** Z9999
- Report:** Check Reconciliation (RW) (S214)
- Report Print Name:** Check Reconciliation
- Author:** Dmitry Shapovalov
- #Ticket:** 33093
- #Author:** Dmitry Shapovalov
- #Date:** 12/15/2005
- Payroll Processing Print Settings:**
 - Print Frequency:** Every Pay
 - Priority to Print:** 5
 - Week Number:** (empty)
 - Month:** (empty)
 - Number of Copies:** 1
 - ☐ Summarize
 - ☐ Duplexing
- Output ASCII file name:** A:\
- ☐ Add to existing file



At the bottom, there are two buttons: 'Report Parameters' and 'Go to Run Reports'. The status bar at the very bottom shows 'Task Queue: 2 Total; 2 Finished', 'UserID: remotetrain', and 'Recd: 3.59M 11.8M/sec Sent:136.91K'.

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**.
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-**

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**.

Browse | Report Parameters

Open company | Set Up Reports

Number	Name	Status
9999	Thomas English	Active


Report Name


- ☐ 401K Report (S215)
- ☒ Certified Payroll Report (S518)
- ☐ Check Reconciliation (S214)
- ☐ Cover Letter (S193)
- ☐ Delivery Instructions (S187)
- ☐ Delivery Label (S184)
- ☐ Direct Deposit (S211)
- ☐ Earnings And Deductions (S181)
- ☐ Employee Profiles (S263)
- ☐ General Ledger (S183)
- ☐ Individual Earnings Report (S431)
- ☐ Input Wksht Cover Letter (S360)

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, see *the Running Company Reports and Reports-Run Reports window sections*.

Browse Report Parameters

Override default parameters as

Certified Payroll Report (S518)  Restore Defaults

Print ☒ Run through the Queue  Run Report(s)

Payrolls Misc

Check Date Period



Year ☒ 1st Quarter ☒ 3rd Quarter
☒ 2nd Quarter ☒ 4th Quarter

From To

Select Payrolls for


☐ 1st Quarter ☐ 3rd Quarter
☐ 2nd Quarter ☐ 4th Quarter
☐ Year


☐ Show Processed Only ☐ Consolidation

 	Check Date	Run #	Processed	Status	Type
<input checked="" type="checkbox"/>	5/30/2006	1	4/26/2006 9:39:17 AM	P	R
<input type="checkbox"/>	5/23/2006	1	4/21/2006 11:02:52 ...	P	R
<input type="checkbox"/>	5/16/2006	1	4/21/2006 10:56:45 ...	P	R
<input type="checkbox"/>	5/9/2006	1	4/21/2006 10:38:32 ...	P	R
<input type="checkbox"/>	5/2/2006	1	4/21/2006 10:26:23 ...	P	R
<input type="checkbox"/>	4/25/2006	1	4/21/2006 10:22:12 ...	P	R
<input type="checkbox"/>	3/21/2006	1	2/21/2006 2:23:42 PM	P	R
<input type="checkbox"/>	3/7/2006	1	3/1/2006 12:51:48 PM	P	R
<input type="checkbox"/>	2/28/2006	1	2/16/2006 7:46:08 AM	P	R
<input type="checkbox"/>	2/21/2006	2	2/15/2006 4:06:43 PM	P	R
<input type="checkbox"/>	2/21/2006	1	2/15/2006 2:40:42 PM	P	R

6. Click the **Misc** tab.

Browse Report Parameters

Override default parameters as
Certified Payroll Report (\$518)  Restore Defaults

Print  Run Report(s)
☒ Run through the Queue

Payrolls Misc

E/D Group All Earnings

E/D Group Deductions #1 All Deductions

E/D Group Deductions #2

☐ Do not print Employees' names and addresses

Group by first 40 symbols of job description

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.




Click this button to display the Find dialog box, which will allow the user to search the report preview for specific text.

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	
<i>Totals for D06</i>		25.00
D10	Union Dues	
<i>Totals for D10</i>		65.00
E01	Salary	
<i>Totals for E01</i>		5000.00
E02	Regular	
<i>Totals for E02</i>		3746.35
M06	Pension Match	
<i>Totals for M06</i>		3.13
<i>Company Totals</i>		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.frb services.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