Birchwood Payroll Inc

Leave Payday To The Pros

Evolution Payroll®
User Guide v 3.4

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Evolution Payroll Getting Started

Evolution Payroll is a dynamic Payroll, HR, and Tax Management system developed by payroll and HR service bureau veterans for the Human Capital Management (HCM) industry.

It is a Web-based application that facilitates remote client tasks such as adding new employees, existing employee maintenance, managing and processing payrolls, running reports and more, via the Internet using a Web browser.

System Requirements

For non-SaaS (Software as a Service) customers, in order to be able to use the new features included in Evolution Payroll Release 3.0, you must have Evolution Classic Version 16.36 or higher installed. If you are a SaaS customer, these upgrades will be done for you.

Screen Resolution

The Optimum Resolution for Evolution Payroll use is 1920 x 1080. Evolution Payroll is designed to fit most screens and screen resolutions by using a Responsive Web Design (RWD), which allows the components within the application to be moved and resized based on screen size and resolution. The minimum supported resolution is 1360 x 768.

Internet Browser

Evolution Payroll is designed to leverage the features of the most current browser versions. For the best possible experience, we recommend using one of the browsers listed below.

Browser	Supported Version
Internet Explorer	10.0+
Firefox	28.0+
Chrome	33.0+
Safari	7.0+

Note: You must be using Evolution Classic version 16.47 or higher to use the Ad Hoc Reporting features. If you are a SaaS customer, these upgrades will be done for you.

Security Settings

Access to Evolution Payroll is granted in Evolution. Users may be granted access to as many or as few menus and functions in Evolution Payroll as the service bureau determines appropriate.

User or Group Security Rights

Additional settings specify whether individual users have full access, read-only access, or no access.

1. Go to the Admin - Security – Users (or Groups) screen, and select the user.
2. Click the **Details** tab - **User Rights** button.
   - Modify settings by right-clicking the **green plus sign / red minus sign**, and selecting **Enabled** or **Disabled**.
   - Click the small **plus signs** (far left) to open a menu "tree". Everything can be selected individually to give or remove permissions to users.
3. Click the black **plus sign** next to Employee to open related topics
4. Right-click the item to be changed from standard group rights

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Note: each item must be selected individually.

Enabled - the selected item is visible in the Edit Employee section of the Employees screens in Evolution Payroll. The user can Add/Edit and Delete Information.

Read-Only - the selected item is visible in Employees screens in Evolution Payroll. The Add button is disabled, and Edit and Delete are not functional for that item.

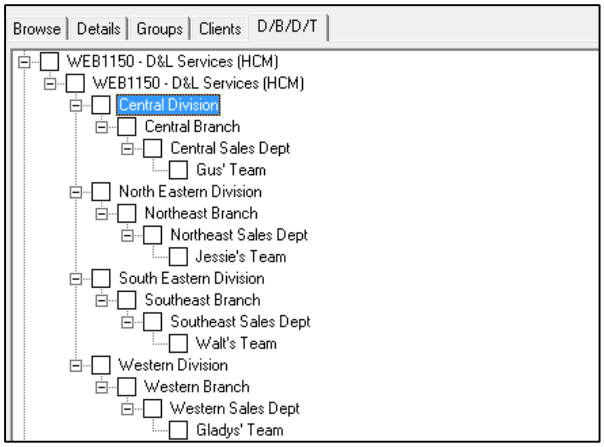
Disabled - the selected item is not visible in the Employees screens in Evolution Payroll.

D/B/D/T Level Security Restrictions

The Organization (D/B/D/T) Level Security in Evolution Payroll is controlled by the D/B/D/T level restrictions set in Evolution Classic, on the **Admin – Security – Users – DBDT tab** for the user's profile. Those settings affect three areas in Evolution Payroll:

1. Employees will not be visible to a user if s/he is part of a D/B/D/T level to which the user does not have permission to view.
2. The D/B/D/T level will not be available for selection throughout the application if the user does not have permission to view it.
3. Checks will not be visible to a user if they belong to an employee who belongs to a D/B/D/T level that is blocked from the user.

Note: Pay Rates will also be hidden as part of the employee belonging to a D/B/D/T level that is blocked.



Logging into Evolution Payroll

Evolution Payroll uses the Enhanced Security Level setting from the SB Admin – Service Bureau - Flags & Settings tab in Evolution. Currently there are three levels of enhanced security to choose from. The table below highlights the levels and their requirements.

Low

- Requires only a password to login
- Users must set up three questions / answers
- Forgot password functionality is available
- 3 invalid login attempts will lock the account (forcing the user to answer the security questions)
- 3 invalid answers to the general security questions will block the account

Medium

- Requires a password to login
- Users must set up three questions / answers
- The user is asked to define two Extra Security Questions / Answers in extended login
- Forgot password functionality is available
- 3 invalid login attempts will lock the account (forcing the user to answer security questions)
- 3 invalid answers to security questions will block the account

High

- Requires a password to login
- Users must set up three questions / answers
- The user is asked to define two Extra Security Questions / Answers in extended login
- Forgot password functionality is ***not*** available
- 3 invalid login attempts will block the account

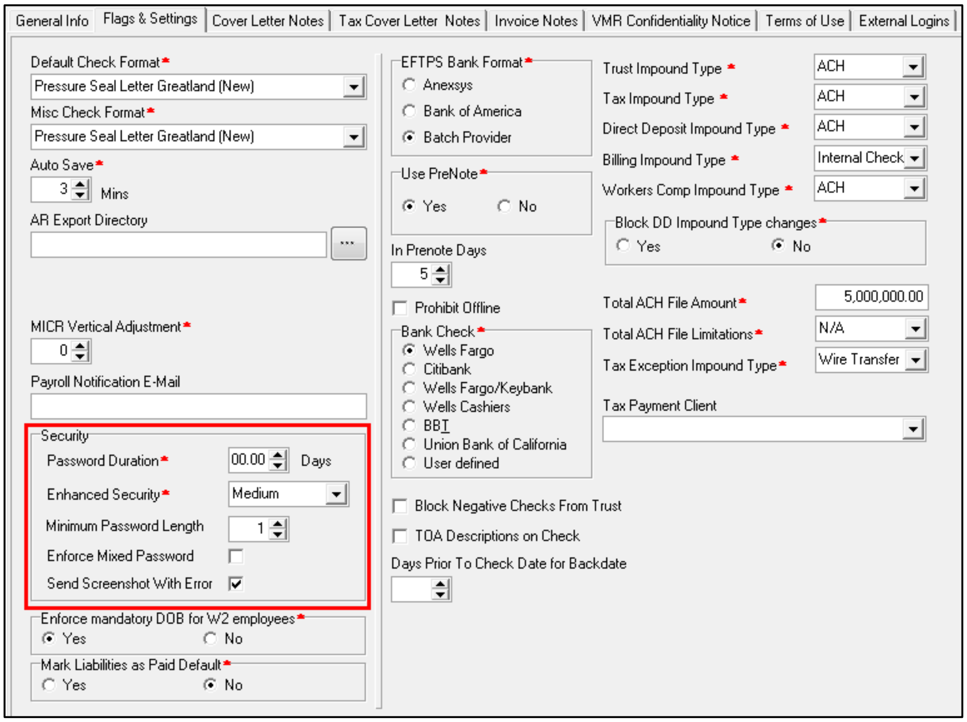
In addition to establishing the level of enhanced security, other security considerations must be set on this screen.

Password Duration - how often passwords are required to be changed

Minimum Password Length - minimum number of characters the password must contain

Enforce Mixed Password - new passwords must contain at least one alpha, one numeric, and one special character

Send Screenshot with Error – the system automatically sends a screen print when an error message is received.



Once security requirements have been established in Evolution,

1. Open a Web browser and enter the URL provided by iSystems.

The first time a use logs in, enter the Username and Password assigned to them by the service bureau.

2. Click **Sign In**.

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

3. Click **OK**.
4. Select Questions 1, 2, and 3 from the dropdown lists and provide answers to the questions.

5. Click **Submit**.

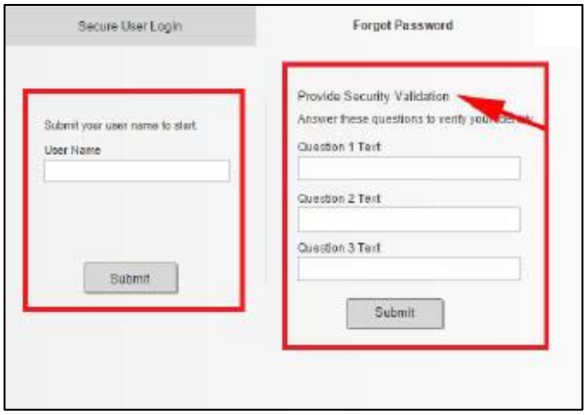
6. If the Enhanced Security field in Evolution has either a **medium** or **high** value, the user will be prompted to create and answer two additional security questions, which will be asked each time the user logs in.
   Result: the Dashboard opens.

Forgotten Password

If the user forgets their password, click **I forgot my password** on the login screen.

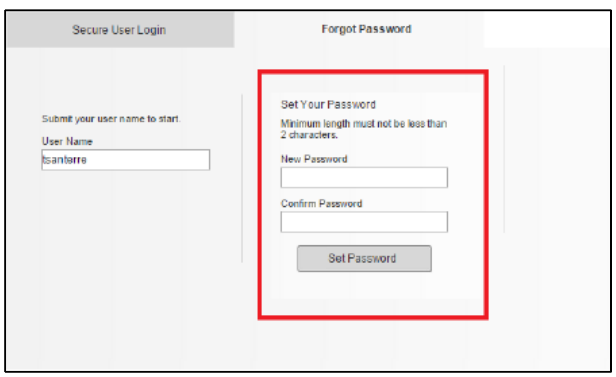
- A new screen opens requiring the user to enter their username and click **Submit**.

Once submitted, three security questions displayed on the screen must be answered to continue.



Note: If a user answers any of the security questions incorrectly three times, s/he will get a message that the account is blocked, and instruct them to contact their service bureau.

- After answering all three security questions, the user clicks the **Submit** button.
- A new screen opens, on which the user is to set up a new password.



- The user enters and confirms the new password, and clicks the **Set Password** button.
- The main Login screen opens, where the username and new password are entered.
  Result: The Evolution Payroll Dashboard opens.

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

Terms of Use

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

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

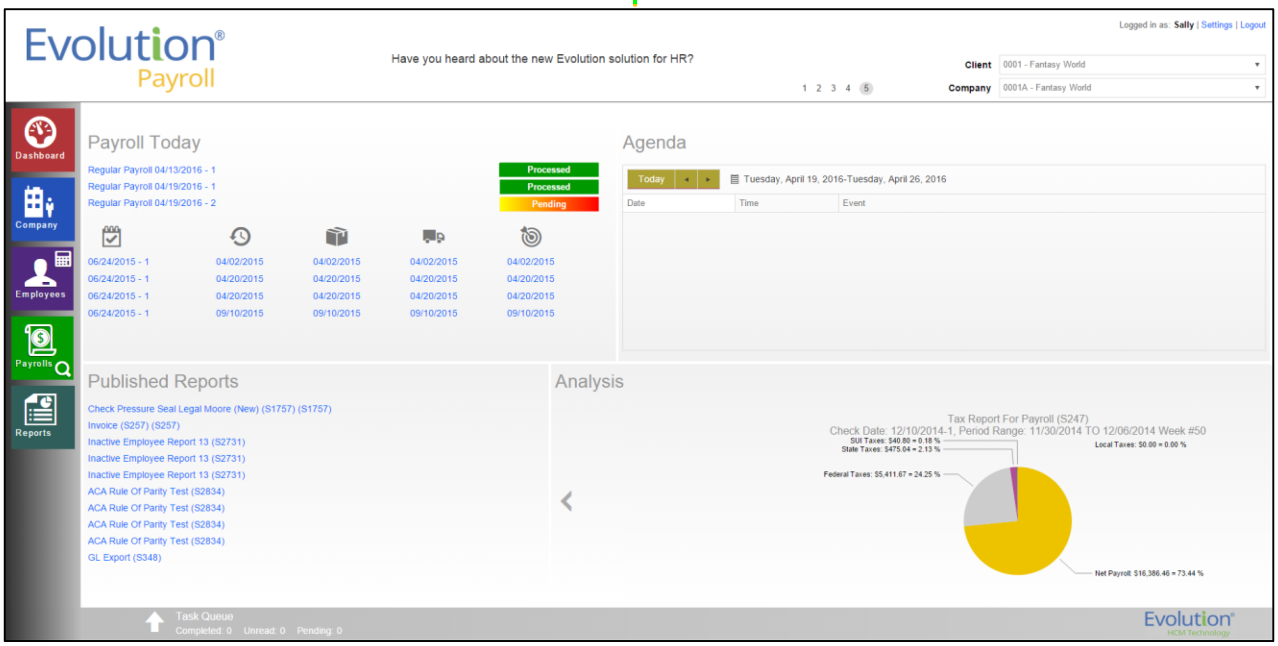
- New users are presented with the Terms of Use after the user has selected three security questions and answers.
- Existing users will see the Terms of Use upon initial login or if the Terms of Use have changed.

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

When the user accepts, the Dashboard screen opens.

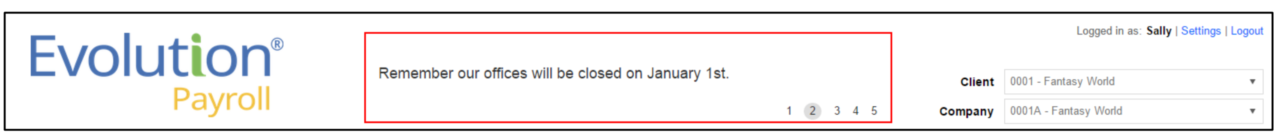
The Dashboard

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



Header

In the Header at the top of the screen, far left, is the company's logo. The center section displays up to five Announcements/Messages selected by the company. Click the numbers to view one of the five messages.



The clients and companies are selected from the dropdown lists in the upper right corner of the screen. When the Dashboard first opens, the default client shown is the one with the lowest Internal Client Number. The client and company fields are accessible in every screen within Evolution Payroll (see screen print below.)

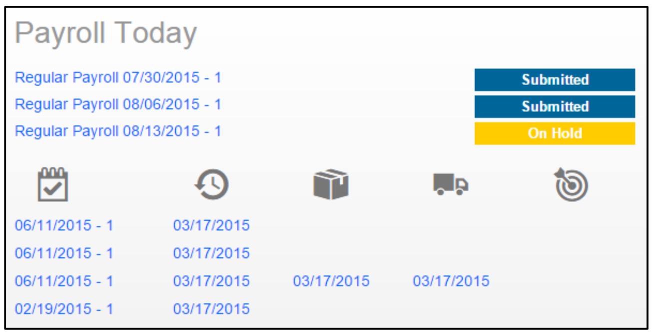
Note: When a different Client/Company is selected, regardless of the menu in which the user is working, the user is automatically returned to the Dashboard screen.

Menu Bar

Use the Menu Bar on the left-hand side of the screen to navigate within Evolution Payroll, similarly to the Menu Bar in Evolution. Menu Items are selected from the main screens of each menu. Each menu is covered in more detail later in this Guide.

Payroll Today

The Payroll Today tile offers a snapshot of payrolls scheduled around the time of the viewing. The payrolls listed are links that, when clicked, take you to the Batch Settings screen for the payroll selected. Normally the first payroll is the most recently run prior to current day. The next are payrolls scheduled to go out on the current day or in the very near future. The status for each payroll is shown to the right of the payrolls.

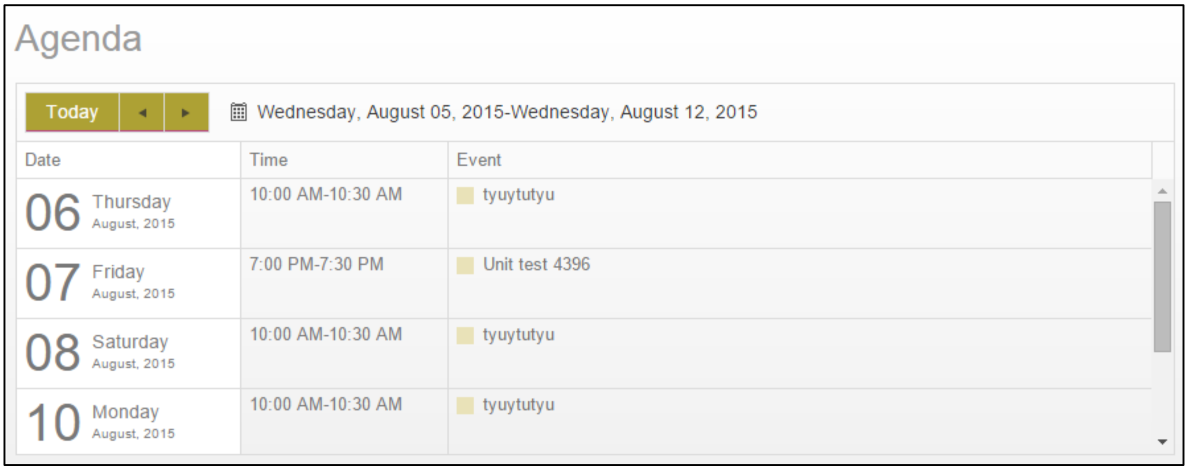


The symbols across the center of the tile are described in the table below and indicate delivery status, currently a feature of VMR, of those payrolls listed below. To view this section, the company must be set up with VMR.

Symbol	Description
	Check date of the payrolls listed below
	Processed date of the payrolls listed below
	Packaged date of the payrolls listed below
	In Transit date of the payrolls listed below
	Date Delivered of the payrolls listed below

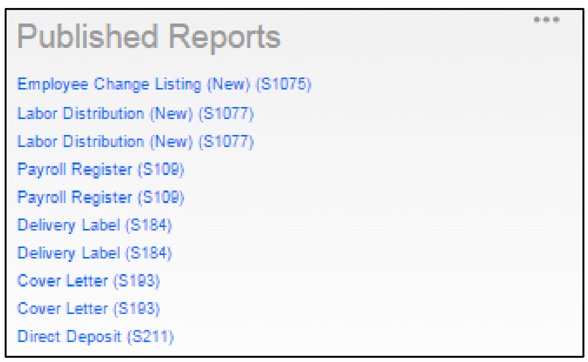
Agenda

The agenda functions similarly to the User Scheduler, and is available to the user only. It keeps a calendar of all scheduled tasks. Agenda users must have User Scheduler security rights established in Evolution to access the Agenda in Evolution Payroll.



Published Reports

The Published Reports tile lists the 10 most recently run reports published to the company through VMR in Evolution. Each report link when clicked, brings the user to the "Published Reports" screen in the application, showing a preview of the report results.

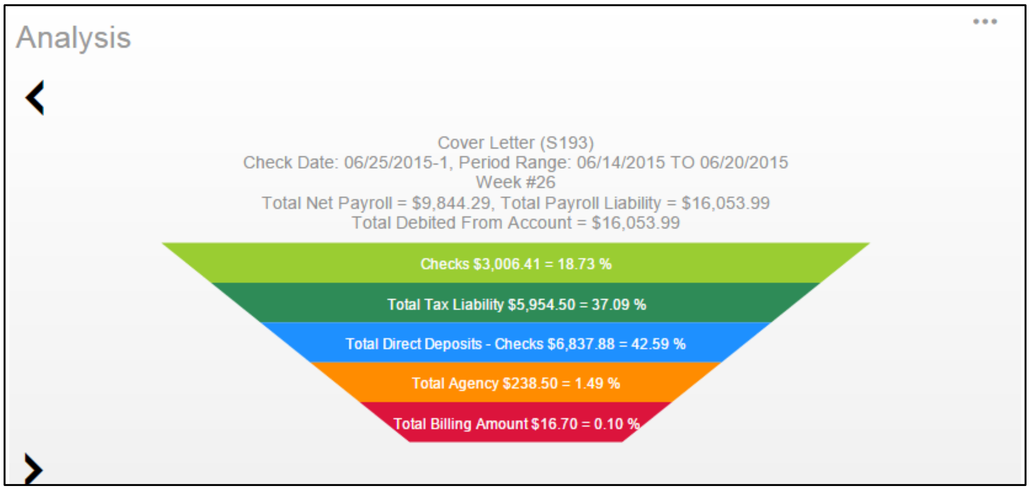


Analysis

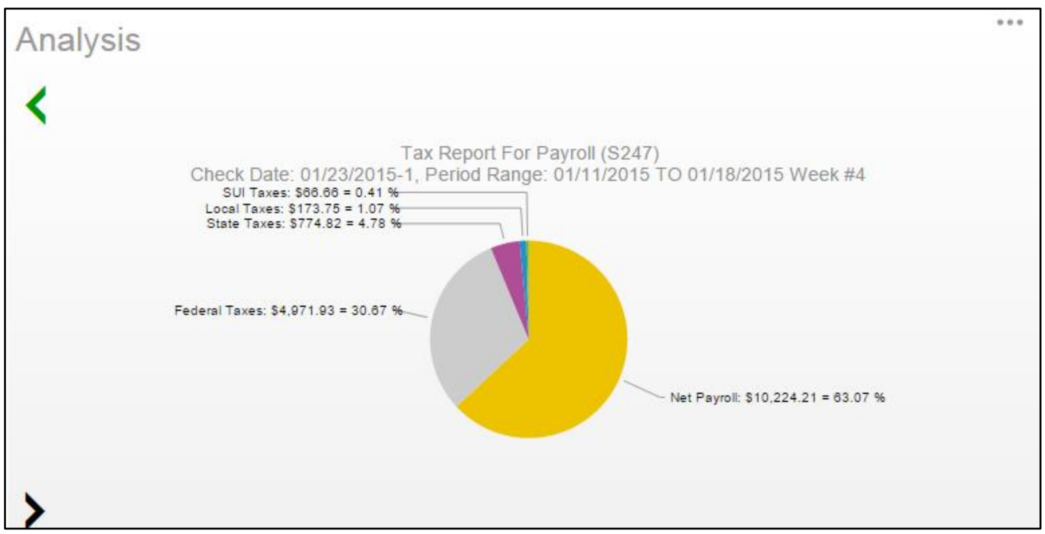
The tile on the bottom right of the Dashboard screen displays a graphical representation of the *Cover Letter Report (S193)* and *Tax Report for Payroll (S247)* reports. Users can click the left or right arrow to scroll to the next view.

The Analysis tile always shows data for the last processed payroll and is updated when next payroll is processed. For the graphs to be displayed, the reports must be properly configured to display on the dashboard.

The *Cover Letter (RW) (S193)* displays as an inverted pyramid showing the actual dollar amounts in the payroll. At the top of the chart is a breakdown of the payroll that the chart represents.

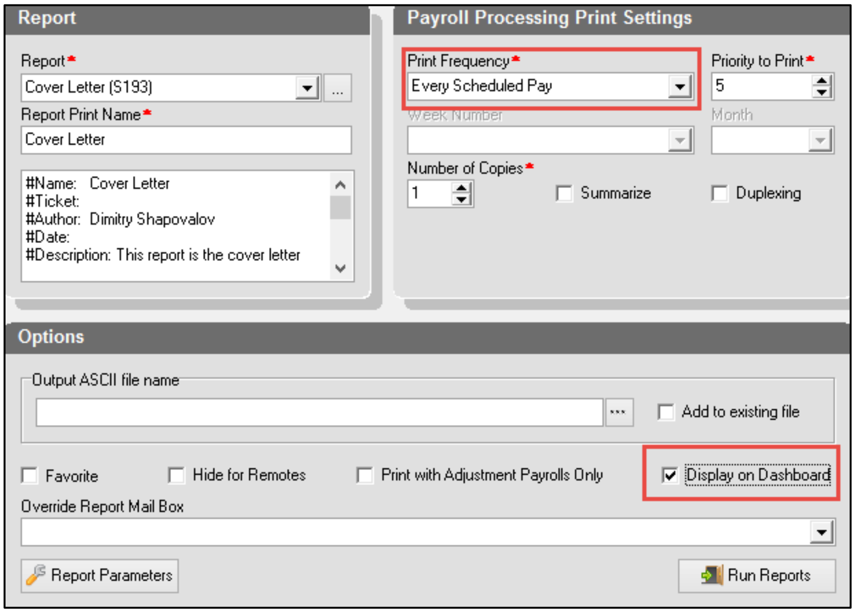


The *Tax Report for Payroll (S247)* displays as a Pie Chart showing the amounts of the taxes as well as the Net Payroll amount for the payroll for which the report was generated.



Setting company reports to show on the Dashboard

1. In Evolution, go to Reports – Setup Reports.
2. Select the company from the list on the left-hand side of the screen and click the **Details** tab.
3. Click the **Plus** sign to add a new record.
4. Select the report to be added.
5. Update the **Print Frequency**, **Priority to Print**, and **Number of Copies** as needed
6. Select the option to **Display on Dashboard**.



Note: Print Frequency must be set to Every Pay to be updated on the Dashboard each time a payroll is processed. Number of copies must be set to 1 or more.

Navigating Evolution Payroll

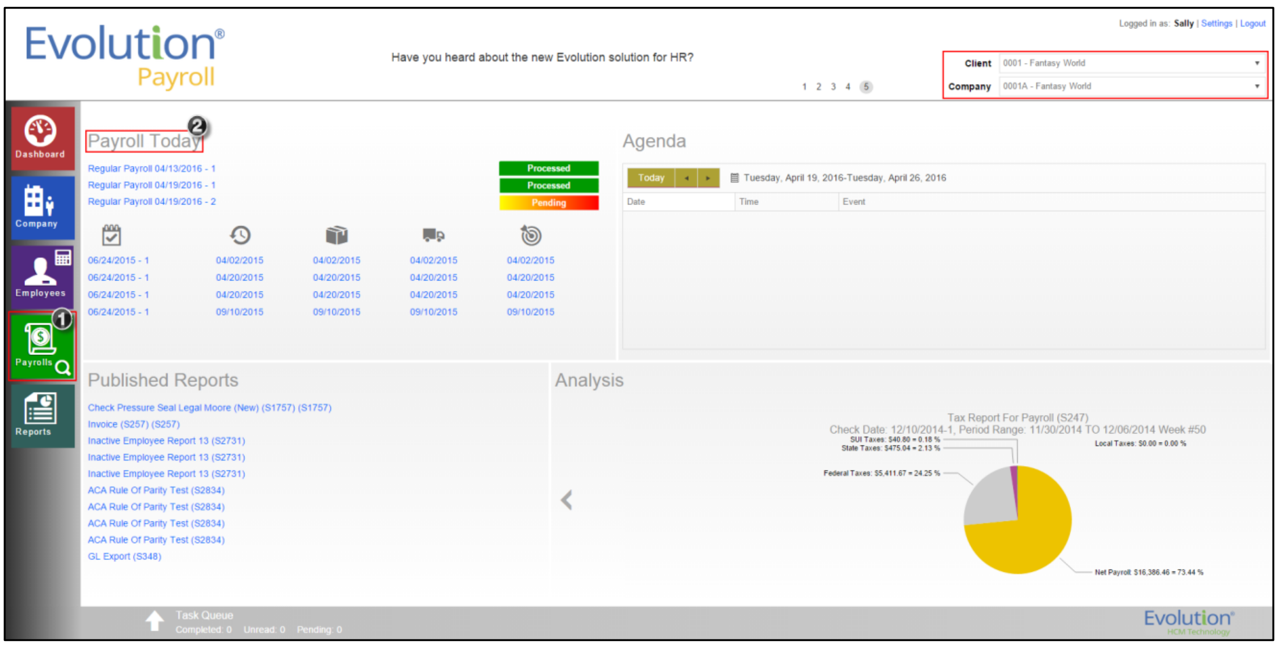
Navigate within Evolution Payroll using buttons, symbols, or by clicking within the fields themselves. When adding information, press the **TAB** key to advance to each of the applicable fields in the order in which they should be completed. When tabbing, the next screen will open when the **TAB** key is pressed in the last field on the screen.

Client and Company Selector

Select the client and company from the dropdown menus in the upper right corner of the screen to view company-specific information.

To navigate to the topic and screens desired from the Dashboard, users can

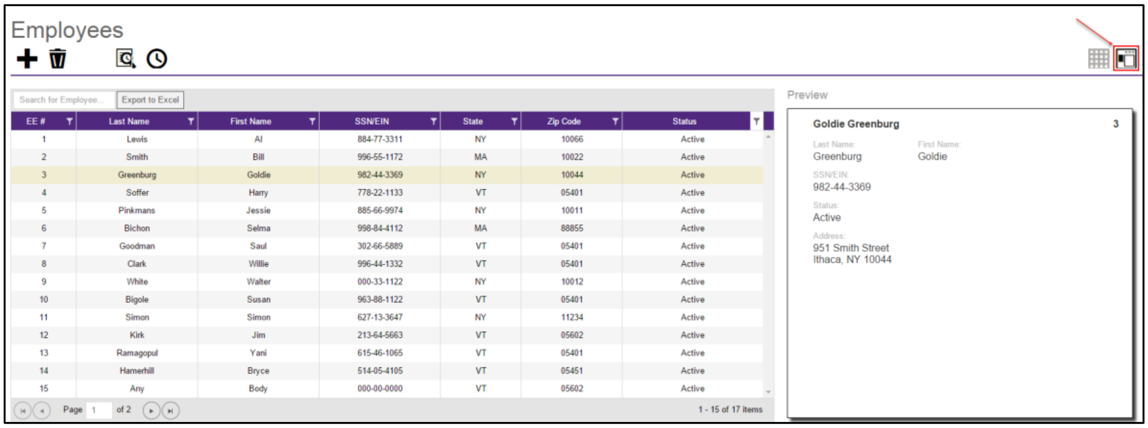
1. Click the **Menu**s, or
2. Click the **Tile** titles

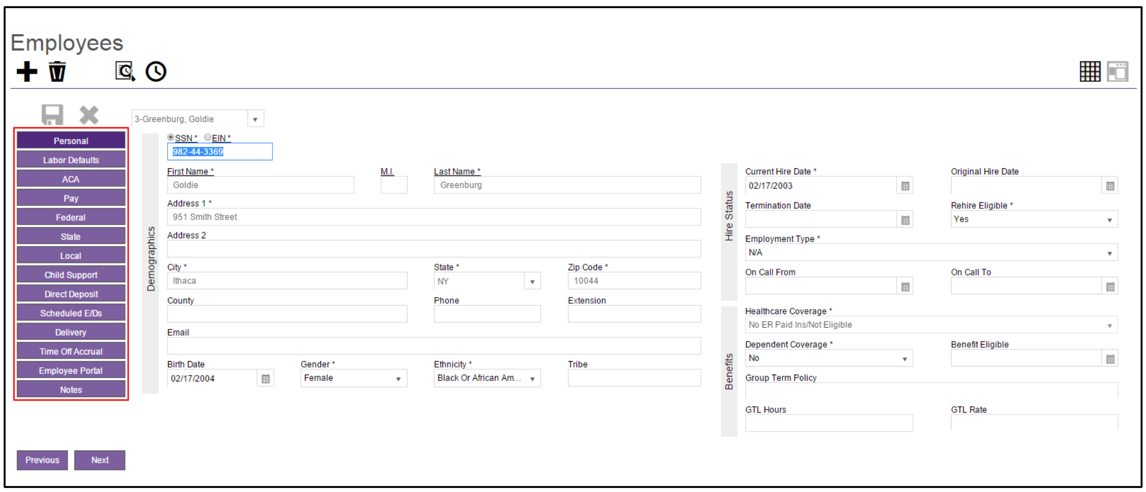


The Employee Menu

After clicking the Employee menu, click the active button (the button that is not grayed-out) in the Header to access the additional menu items within the Employee menu.

Example: the following screen opens when the user clicks the Employees menu. This is the Table View. Click the active button to access the Form View, which lists the menu items within the Employee menu.

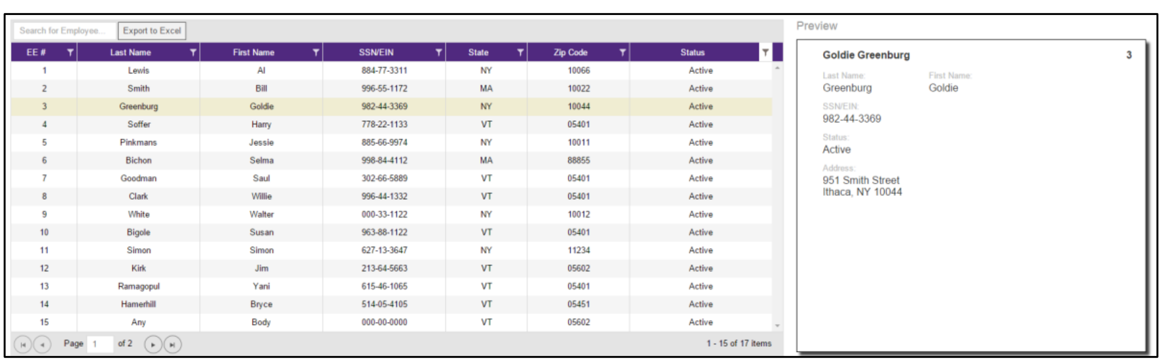




Tables

Several screens in Evolution Payroll are formatted as tables, which come with their own unique navigating functionality.

The first screen to open in the Employees menu is displayed in table format:



There are several additional tools that can be used when navigating with tables.

Filtering – if a column header has a filter symbol next to the name click to open a filter box. Enter criteria to filter the results displayed on the screen when searching for specific data.

Search for Employee... | Export to Excel

EE #	Last Name	First Name	SSN/EIN	State	Zip Code	Status
4	Soffer	Harry	778-22-1133	VT		Active
7	Goodman	Saul	302-66-5889	VT		Active
8	Clark	Willie	996-44-1332	VT		Active
10	Bigole	Susan	963-88-1122	VT		Active
12	Kirk	Jim	213-64-5663	VT		Active
13	Ramagopul	Yani	615-46-1065	VT		Active
14	Hamerhill	Bryce	514-05-4105	VT		Active
15	Any	Body	000-00-0000	VT		Active
16	Golden	Larz	651-96-5106	VT	05401	Active
17	Scott	Bloomenfield	635-21-0651	VT	05401	Active

Show items with value that:
Is equal to
VT
And
Is equal to
Filter | Clear

The filter symbol remains white to let the viewer see that the filter is being used.

Column Re-ordering – click and drag the column heading to re-order the data – for example, click and drag the Zip Code column to view in a different order:

EE #	Last Name	First Name	State	Zip Code	Status
1	Lewis	Al	NY	10066	Active
2	Smith	Bill	MA	10022	Active
3	eenburg	Goldie	NY	10044	Active
4	[illegible]	Harry	VT	05401	Active
5	Pinkman	Jessie	NY	10011	Active
6	Bichon	Selma	MA	88855	Active
7	Goodman	Saul	VT	05401	Active
8	Clark	Willie	VT	05401	Active
9	White	Walter	NY	10012	Active
10	Bigole	Susan	VT	05401	Active
11	Simon	Simon	NY	11234	Active
12	Miller	Mary	VT	05401	Active

Sorting – similar to Excel, data can be sorted from high-to-low or low-to-high by clicking the column header. This can be done with alpha as well as numerical data.

EE #	Zip Code	First Name	Last Name	State	Status
1	10066	Al	Lewis	NY	Active
2	10022	Bill	Smith	MA	Active
3	10044	Goldie	Greenburg	NY	Active
4	05401	Harry	Soffer	VT	Active
5	10011	Jessie	Pinkman	NY	Active
6	88855	Selma	Bichon	MA	Active
7	05401	Saul	Goodman	VT	Active
8	05401	Willie	Clark	VT	Active
9	10012	Walter	White	NY	Active
10	05401	Susan	Bigole	VT	Active
11	11234	Simon	Simon	NY	Active
12	05401	Mary	Miller	VT	Active

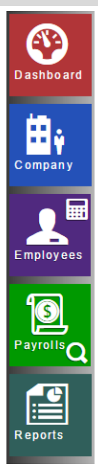
Hot Keys

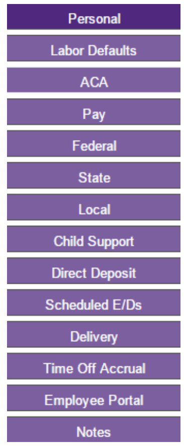
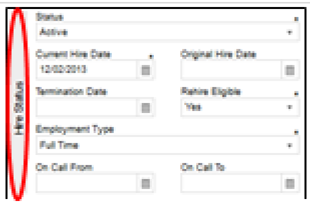
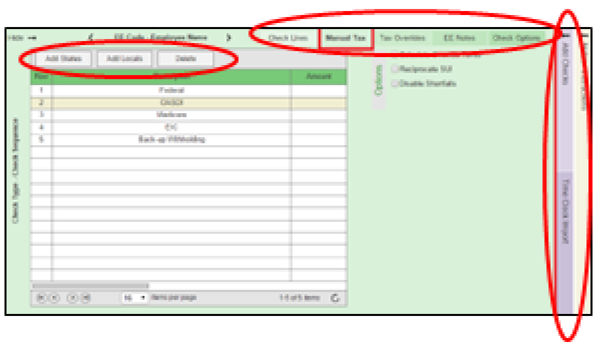
A series of **Hot Keys** have been developed to enable quicker navigation. There are several key combinations that perform the same function with different results, depending upon the menu the user is in. The table below identifies the Keyboard Hot Keys currently available.

Keyboard Key/s	Description
Press the ALT key + N	Add new employee / Add new payroll
Press the CTRL key + S	Save employee / Save payroll
Press the CTRL key + E	Export grid to Excel (this only works in Grid view)
Press ALT + Insert	Insert / add a record (row) into a table (instead of clicking the Add button.)
Press ALT + Delete	Delete record (row) from a table (instead of clicking the Delete button.)
Press the ALT key + the Right Arrow key	Scroll right to next employee record or check line
Press the ALT key + the Left Arrow key	Scroll left to previous employee record or check line

New Terminology

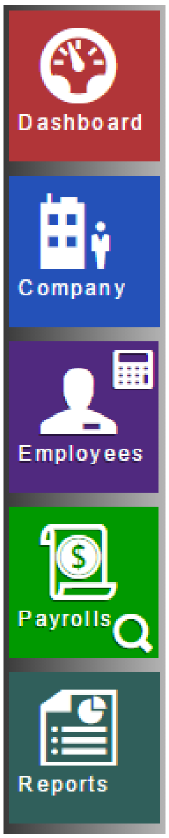
There is new terminology used throughout Evolution Payroll that warrants introduction. The table below explains the new terminology that you will see in this document as well as in the application.

Name	Example	Description
Menu Bar		Colored blocks on the left-hand side of the screens that correspond to a menu. Click the menus to be brought to the main screen of the menu selected.

Menu Items		Within some of the menus (Company and Employee) there is a sub-menu on the left side of the screen with menu items that pertain to the topics of those menu items. Our example is from the Employees menu.
Sections		Many of the screens in the application are divided into sections. These sections have headings that separate the information pertaining to the sections.
Flyout tabs		There are two types of tabs you will see in the application: Those at the far right-hand side of the screen, and those along the top of the screen. The instructions within this guide will be explicit to direct you to the right tab.

The Menu Bar

The Menu Bar contains many of the same menus as are in Evolution, based on security rights the user has been given. Note that the list of Menu Items within each menu are color-coded to match the menu selected, indicating in which menu the user is currently working.



Information on the Evolution Payroll Dashboard is laid out in sections, or tiles, from which users can navigate to the information selected.

Company information, including settings and rules established by the company can be viewed in the Company menu. The fields' values are taken from corresponding fields in Evolution. The data in the Company menu is currently read-only however it can be edited in Evolution.

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

Payrolls are processed quickly and easily through Evolution Payroll. The first screen in the Payrolls Menu is the Payroll Timeline, displaying coupon or card-like views of scheduled payrolls.

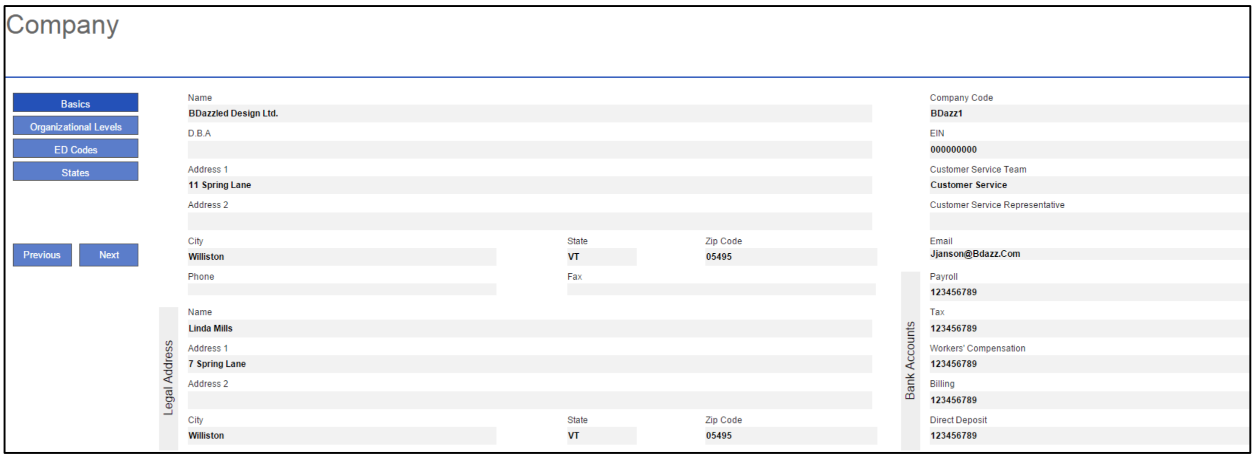
The Reports menu lets the user see reports that have been published to Evolution Payroll from VMR, as well as process additional reports as needed.

The Company Menu

Company information, including settings and rules established by the company can be viewed in the Company menu. The fields' values are taken from corresponding fields in Evolution. The data in the Company menu is currently read-only however it can be edited in Evolution.

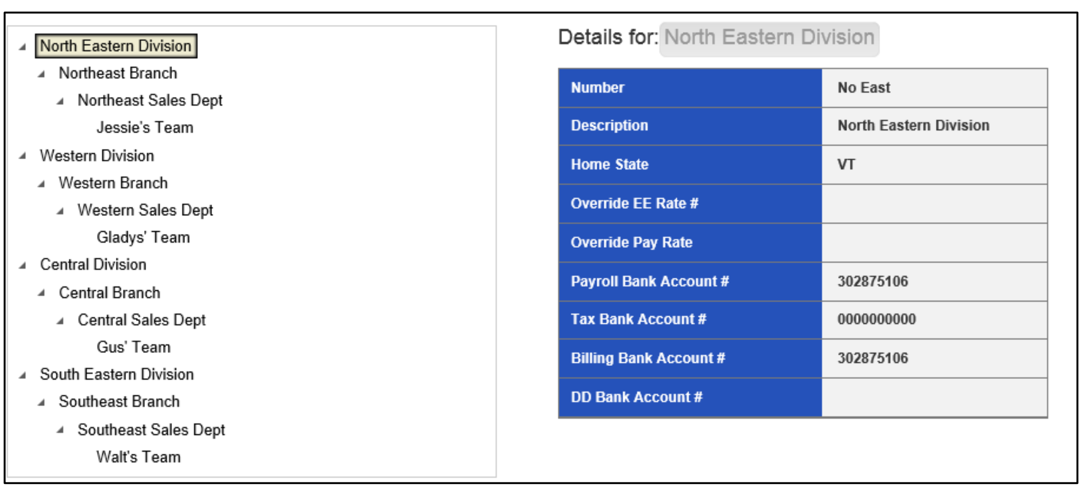
Company - Basics screen

The first screen that opens when the Company menu is accessed is the Company – Basics screen. Note the additional Company menu items on the left-hand side of the screen.



Company - Organization Levels screen

The Company - Organization Levels screen displays the Division, Branch, Department, and Team organization level-specific information, if applicable, for this company. Each company level (previously known as D/B/D/T in Evolution) may have their own payroll bank accounts. When a level is selected on the left, a Payroll Bank Account number, Tax Bank Account number, Billing Bank Account number, and Direct Deposit Account number display on the right, if applicable.



The section on the left-hand side of the screen displays the organization level setup (Division, Branch, Department, and Team).

- Click a level to view information specific to that organization level in the panel on the right.

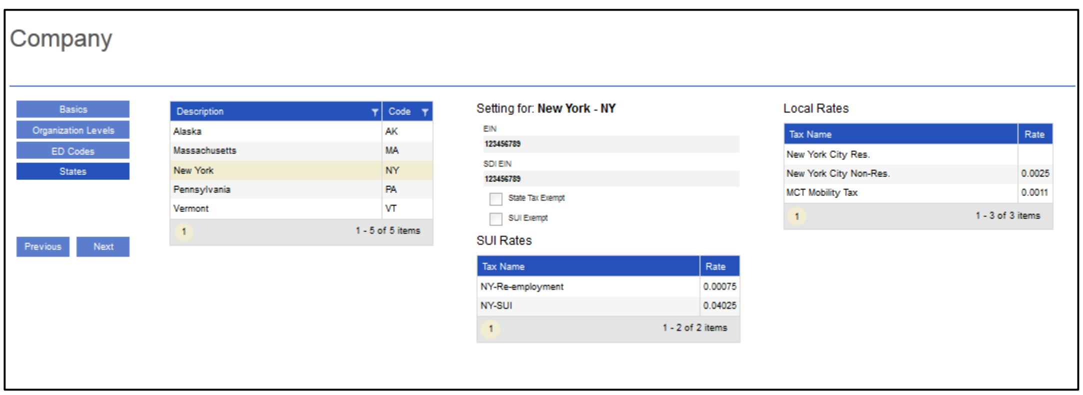
Company - E/D Codes Screen

The Company - E/D Codes screen displays a list of the E/D Codes created and used by the company.

					Default	
Code	Description	Rate	Rate #	OT Rate	Start D...	Amount
M1	ACA Hours					
E4	Sick					10.00
E3	Vacation					11.00
E02	Regular					
E01	Salary					
D7	Child Support - 2					
D6	Health Insurance					
D5	Garnishment					
D4	Child Support					
D3	Direct Deposit - Net					
D2	Direct Deposit - Partial 2					
D1	Direct Deposit - Partial 1					

Company - States Screen

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



Appendix - Company Menu

Company Basics screen

Field / Button	Description
Name	The company name.
DBA	Company name if the company is doing business as a name other than the name above.
Address 1	First address line of company address.
Address 2	Second address line of company address.
City	City name of company address.
State	Company state.
Zip Code	Company zip code.
Phone	Main phone number for company.
Fax	Main fax number for company.
Legal Address section	If the company has a legal name and address different from the address listed above, enter it in this section.
Name	Legal company name, if different.
Address 1	Legal address first line, if different.
Address 2	Legal address second line, if different.
City	Legal address city, if different
State	Legal state address, if different.
Zip Code	Legal zip code, if different.
Company Code	This must be alpha or numeric, up to 9 characters, and must be unique to this company.
EIN	The Employer Identification Number (EIN) for the company.
Customer Service Team	Name of the Customer Service Team.
Customer Service Representative	Name of the Customer Service Representative.
Email	Email address of the Customer Service Representative.
Bank Accounts section	
Payroll	The payroll bank account number.
Tax	The tax bank account number.
Workers' Compensation	The Workers' Compensation bank account number.

Field / Button	Description
Billing	The billing bank account number.
Direct Deposit	The direct deposit bank account number.

Company - Organization Levels screen Company - States Screen

Field / Button	Description
Number	The number of the organization level displayed.
Description	The description of the organization level displayed.
Home State	The home state of the organization level displayed.
Override EE Rate #	The employee rate number override, if applicable.
Override Pay Rate	The pay rate amount if applicable.
Payroll Bank Account #	Payroll bank account number for the organization level displayed.
Tax Rate Account #	Tax rate account number for the organization level displayed.
Billing Bank Account #	Billing bank account number for the organization level displayed.
DD Bank Account #	Direct deposit account number for the organization level displayed.
Code	Assigned at the System level, these are the E/D Codes the company has selected to use.
Description	Description of the E/D Code
Rate	Rate at which the earning or deduction is added or subtracted
Rate #	Rate Number for the rate that translates to the employees' rate number
OT Rate	Rate at which overtime is applied
Default section	
Start Date	Default Start Date for all company employees with this set up as a Scheduled E/D. Can be changed at the Employee level.
Amount	Default Amount for all company employees with this set up as a Scheduled E/D. Can be changed at the Employee level.
Rate	Default Rate for all company employees with this set up as a Scheduled E/D. Can be changed at the Employee level.

Company - States Screen

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

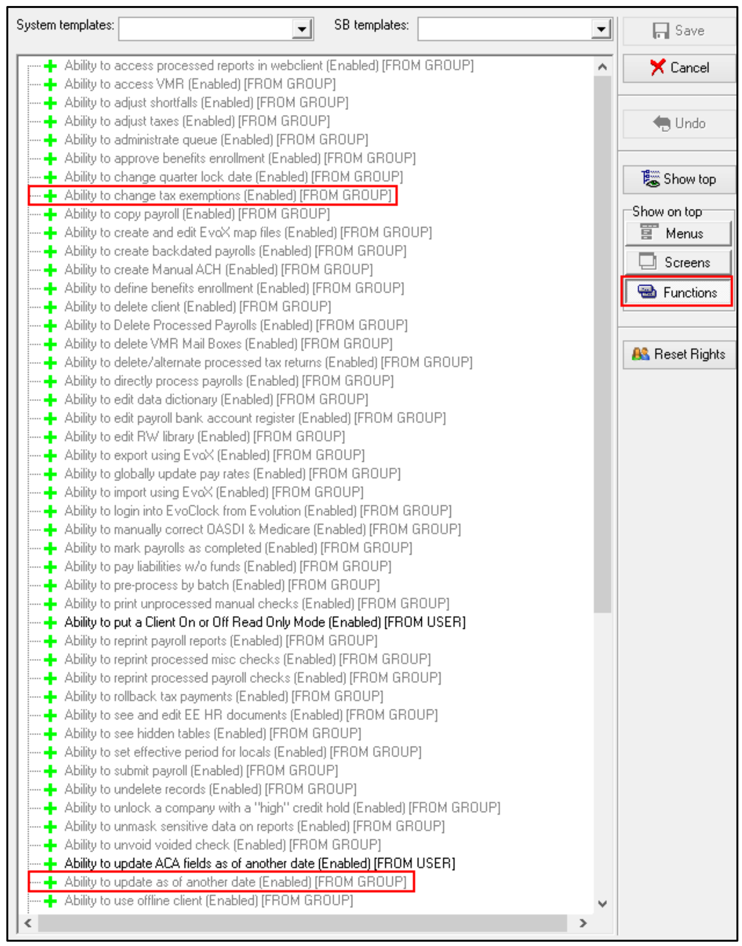
The Employees Menu

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

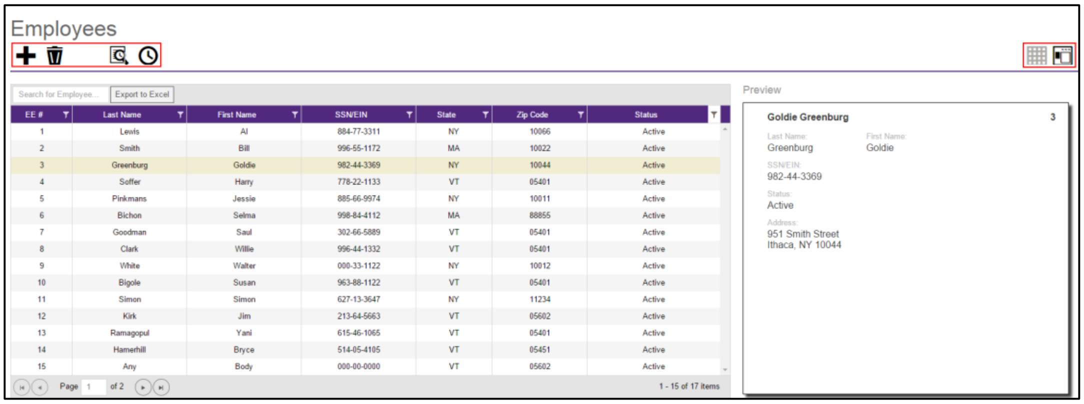
Security Settings

Security settings must be set to enable Dynamic field editing.

1. Go to the Admin – Security – Users.
2. Select the user from the list.
3. Click the **Details** tab.
4. Click the **User Rights** button.
5. Click the Functions button.
6. Enable the following rights:
    - Ability to update as of another date
    - Ability to change tax exemptions
7. Click **Save.**



The following is the first screen that opens when the Employees menu is accessed. The default for this screen is to show only employees with a status of Active.

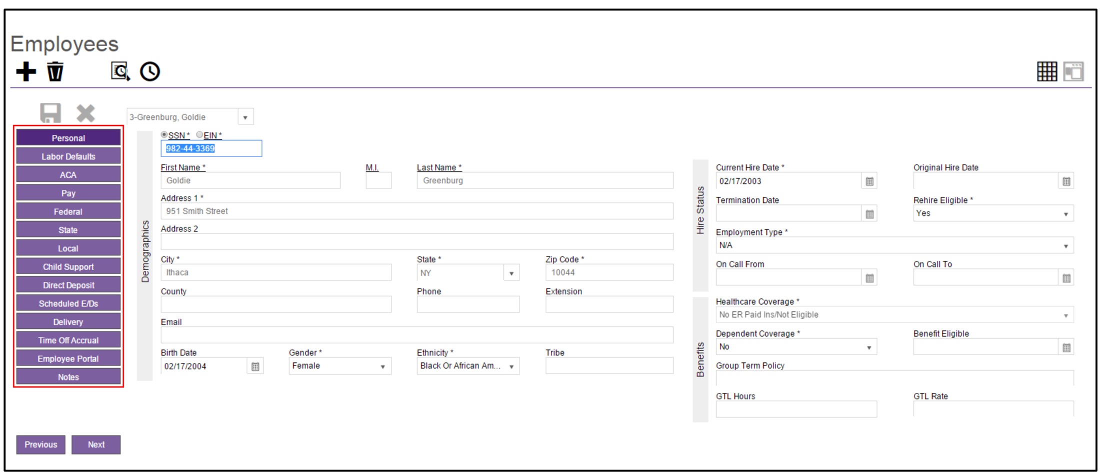


EE #	Last Name	First Name	SSN/EIN	State	Zip Code	Status
1	Lewis	Al	884-77-3311	NY	10066	Active
2	Smith	Bill	996-55-1172	MA	10022	Active
3	Greenburg	Goldie	982-44-3369	NY	10044	Active
4	Soffer	Harry	778-22-1133	VT	05401	Active
5	Pinkmans	Jessie	885-66-9974	NY	10011	Active
6	Bichon	Selma	998-84-4112	MA	88855	Active
7	Goodman	Saul	302-66-5889	VT	05401	Active
8	Clark	Willie	996-44-1332	VT	05401	Active
9	White	Walter	000-33-1122	NY	10012	Active
10	Bigole	Susan	963-88-1122	VT	05401	Active
11	Simon	Simon	627-13-3647	NY	11234	Active
12	Kirk	Jim	213-64-5663	VT	05602	Active
13	Ramagopul	Yani	615-46-1065	VT	05401	Active
14	Hamerhill	Bryce	514-05-4105	VT	05451	Active
15	Any	Body	000-00-0000	VT	05602	Active

The buttons in the header, far right are used to toggle between the **Table view** (above) and the **Employee view** (below) in which information shows for one employee.

The buttons in the header, far left, are used to add a new employee, show audit history, and sign in to SwipeClock directly.

Note: The SwipeClock sign on button will be available on all of the screens in the Employees menu, as well as the screens in the Payroll menu.



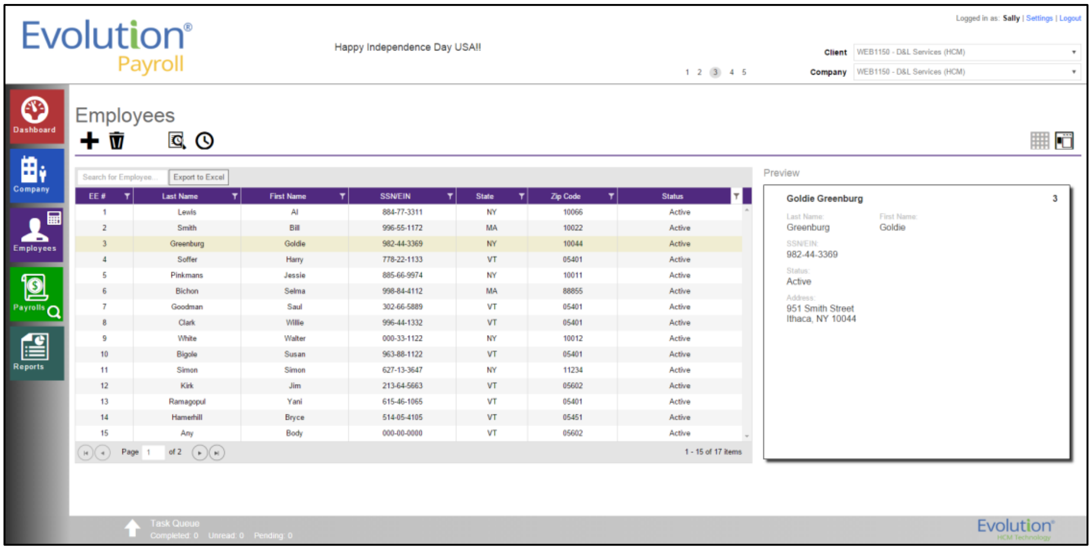
Note: If the company has any payrolls with a status of C, H, I, Y, or B, an error message will be displayed, and the user will not be able to add new employees, or make edits to any employees of that company.

Adding New Employees

To add a new employee in Evolution Payroll,

1. Select and open the client and company from the dropdown list above the heading on the right-hand side of the screen.
2. Click the **Employees** Menu to open.

If there are employees already set up with this company, they appear in the list on the left-hand side of the screen.

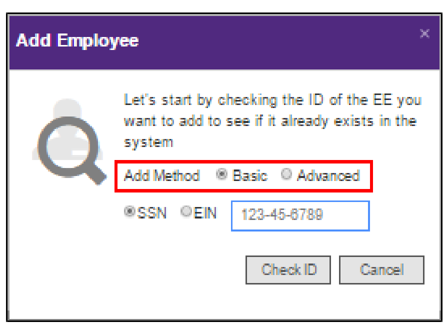


3. Click the large **plus** ✚ **sign** in the heading to create a new record

   Result: The Add Employee box opens.

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

Note: The option of selecting **Basic** or **Advanced** is available only if the security function “Apply EE Quick Entry in WebClient” is disabled.



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

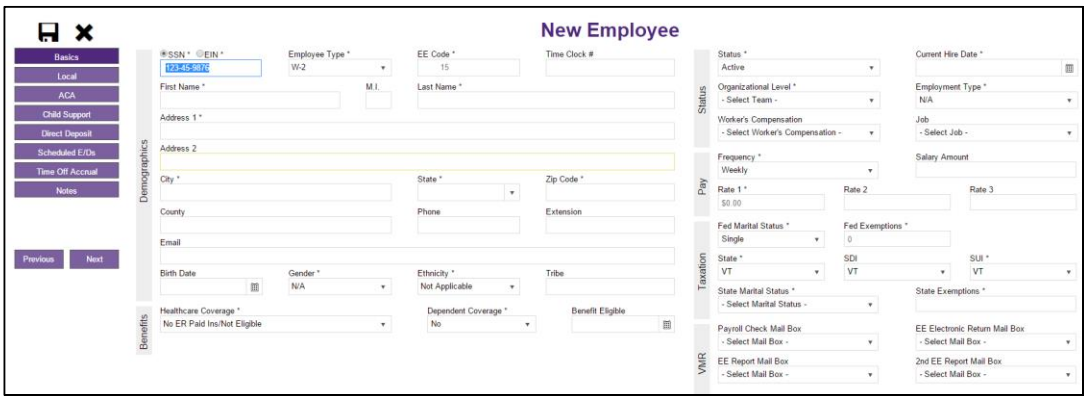
   If the Social Security Number or EIN is already in the system, the Employees – Basics screen opens with the existing demographic information already copied into the new employee fields.

Note: if the **Advanced** Add Method was selected, the Employees – Personal screen opens.

Employees - Basics screen

The Employees – Basics screen is displayed only when creating a new employee, when the Basic method is selected. The Basics screen contains the most common fields used when entering an employee, including multiple pay rates and organizational levels. When using the Basic method, only the information on the Basics screen is required to save the employee. Additional Employees Menu items are available on the left-hand side of the screen if needed. If the sections on the Basics screen do not provide enough detail about the employee, users may select the **Advanced** method in the Add Employee dialog box.

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



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

---

1. Complete the required and applicable fields on the Employee – Basics screen. For detailed information about the fields on this screen, refer to the Employees - Basics Screen section in the Appendix at the end of this chapter.
2. Press the **TAB** key or click the **Next** button when you complete entering information on this screen.
   Result: From this screen, the Employees – Local screen opens.

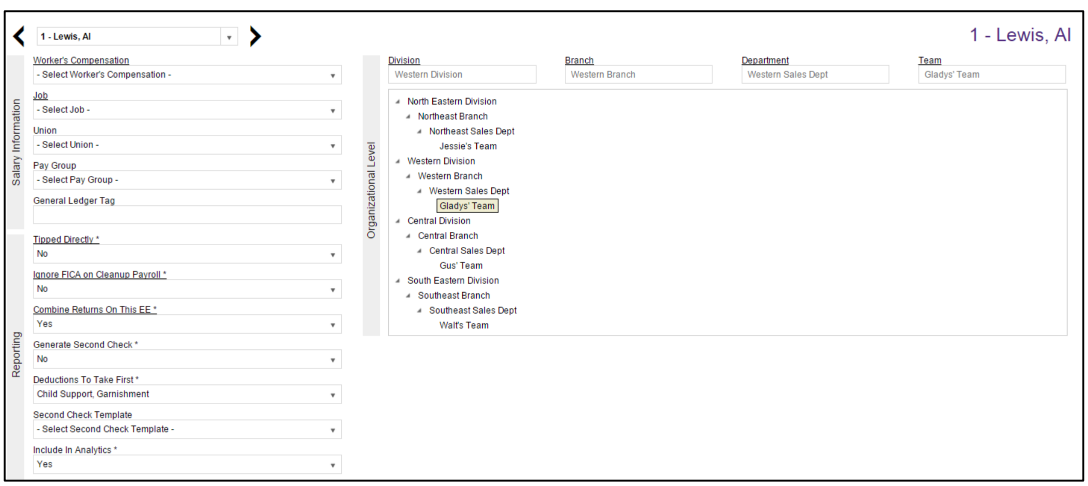
Employees - Personal screen

If more detailed information is needed than the Basics screen provides, select the **Advanced** method on the Add Employee dialog box. Note the additional Employee Menu items on the left-hand side of the screen.

Important! When creating a new employee using the Advanced screens, you must progress to the **Local** Menu Item (if applicable; if there are no locals for the new employee, you must progress to the **State** Menu Item) before the new employee can be saved. If you exit before that, the new employee information that was entered is lost.

3. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the Employees – Personal screen in the Appendix at the end of this chapter.
4. Press the **TAB** key or click the **Next** button when you complete entering information on this screen.
   Result: The Employees – Labor Defaults screen opens

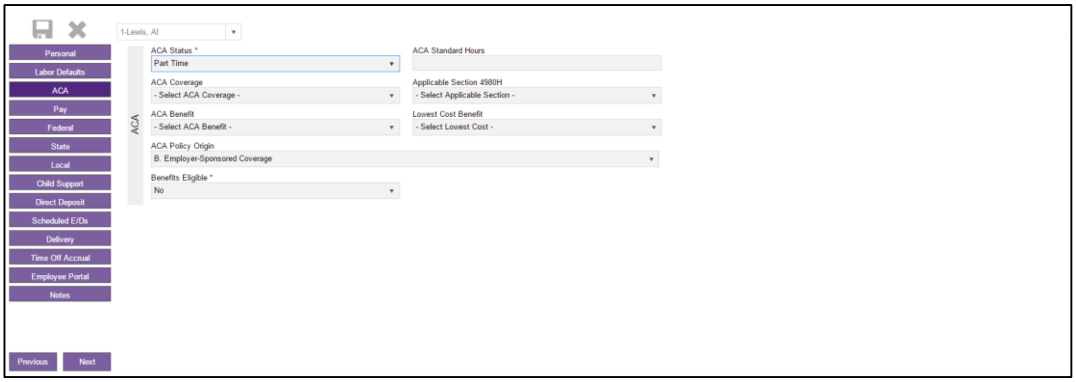
Employees - Labor Defaults screen



1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the Employees – Labor Defaults screen section in the Appendix at the end of this chapter.
2. Press the **TAB** key or click the **Next** button when you complete entering information on this screen.
   Result: The Employees – Pay screen opens.

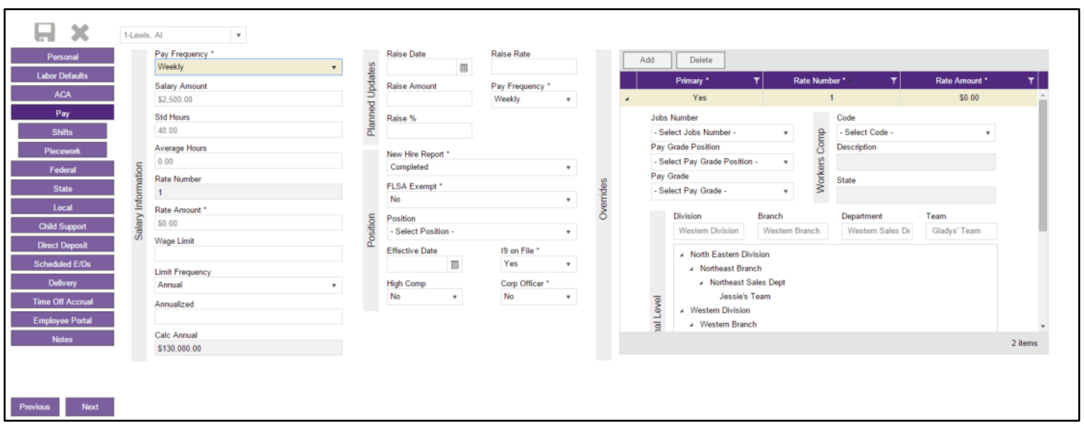
Employees - ACA screen

The ACA screen in Evolution Payroll contains the same fields as the ACA tab in Evolution Classic, located on the Employee – Employee – screen.



Employees - Pay screen

The Employees – Pay screen contains salary information, rate amounts for hourly employees, pay frequency, etc. There are also three sub-menus that are part of the Pay menu item. The information on these screens is read-only for employees.

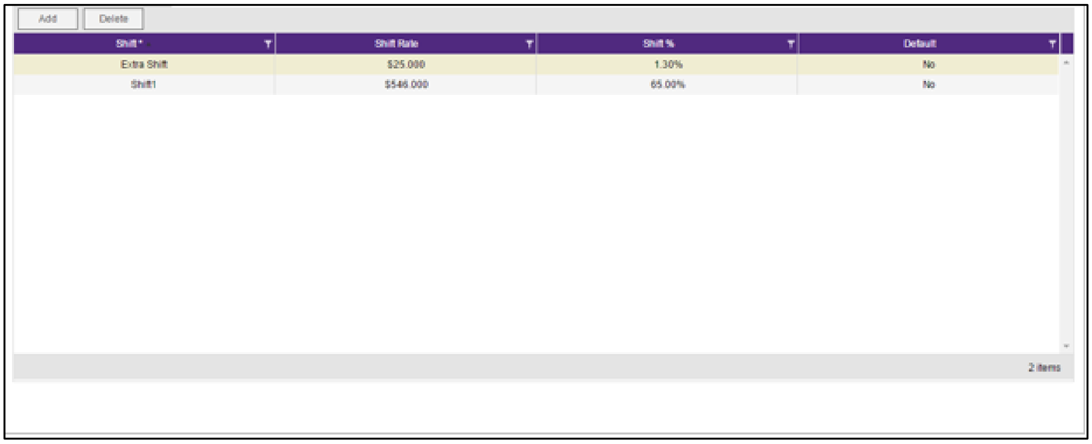


1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the Employees – Pay screen section in the Appendix at the end of this chapter.
2. If there are any overrides, click the **Add** button to add the required information.
3. Press the **TAB** key or click the **Next** button when you complete entering information on this screen.
   Result: The Employees – Federal screen opens.

Shifts Sub-menu

Shifts must be already created in Evolution, after which they can be applied to employees in Evolution Payroll. Some employees may be assigned multiple shifts.

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

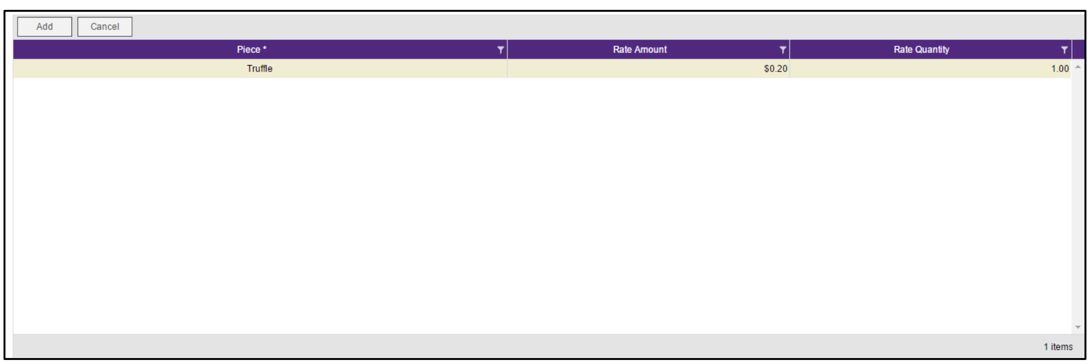


1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the [Employees – Pay screen - Shifts section] in the Appendix at the end of this chapter.
2. Press the **TAB** key or click the **Next** button when you complete entering information on this screen.
   Result: The Employees – Piecework screen opens.

Piecework Sub-menu

The Piecework screen is where piecework items are set up and to employees. Before these can be applied to employees, the piecework items must be set up in Evolution at the Client level.

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

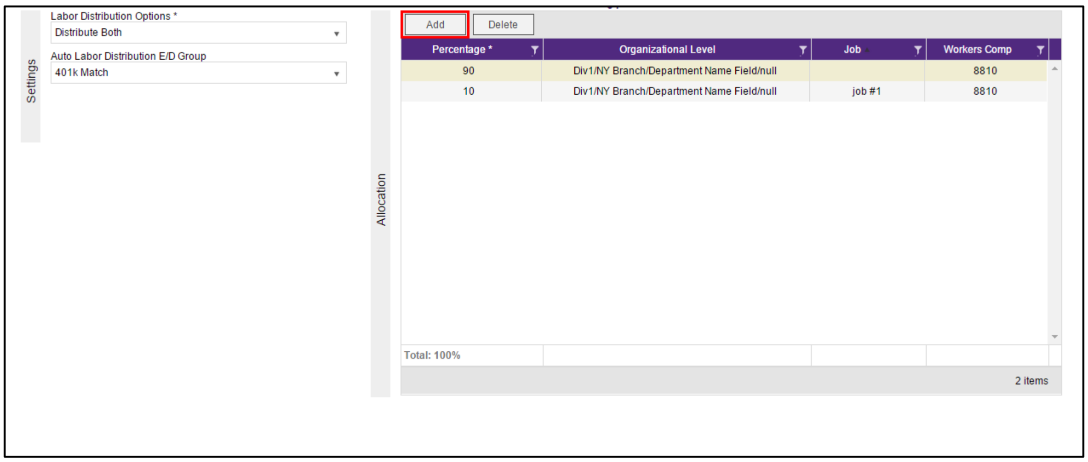


1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the Employees - Pay Screen - Piecework section in the Appendix at the end of this chapter.
2. Press the **TAB** key or click the **Next** button when you complete entering information on this screen.
   Result: The Employees – Auto Labor Dist screen opens.

Auto Labor Distribution Sub-menu

The Auto Labor Distribution screen is where employees' time and pay rates are set up and applied, based on the D/B/D/T levels employees work.

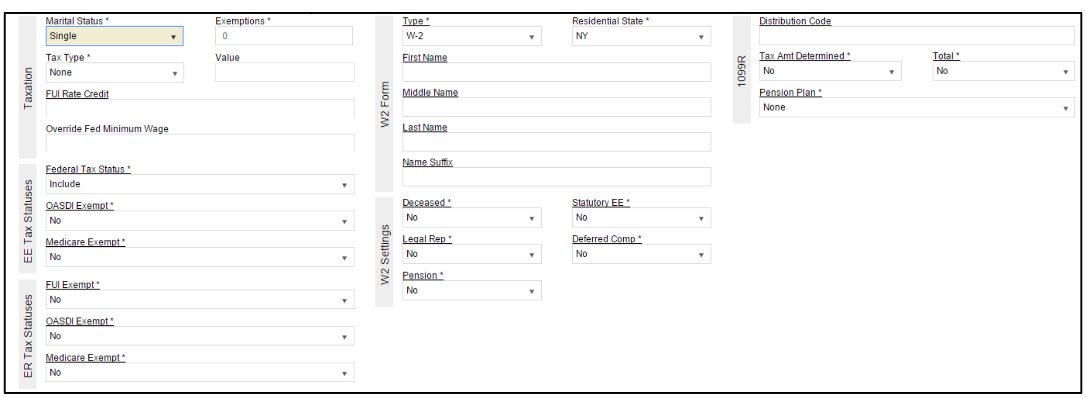
Note: Users must have **Employee – Auto Labor Distribution menu** access set up in Evolution to be able to create and apply Auto Labor Distribution.



1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the Employees – Pay screen - ALD section in the Appendix at the end of this chapter.
2. Press the **TAB** key or click the **Next** button when you complete entering information on this screen.

Employees - Federal screen

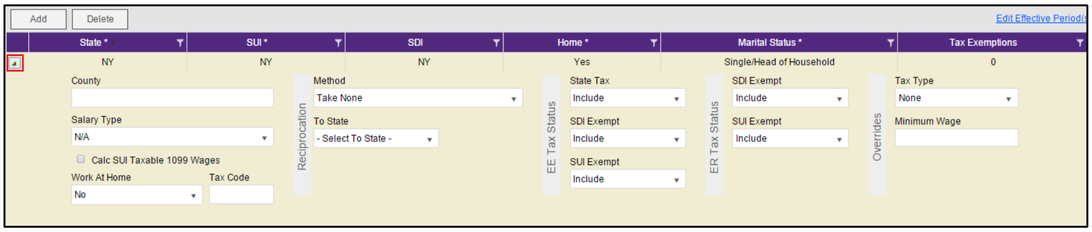
The Employees – Federal screen contains settings and statuses of federal tax information.



1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the [Employees – Federal screen section] in the Appendix at the end of this chapter.
2. Press the **TAB** key or click the **Next** button when you complete entering information on this screen.
   Result: The Employees – State screen opens.

Employees - State screen

The Employees – State screen is where state tax information can be added, deleted and viewed.



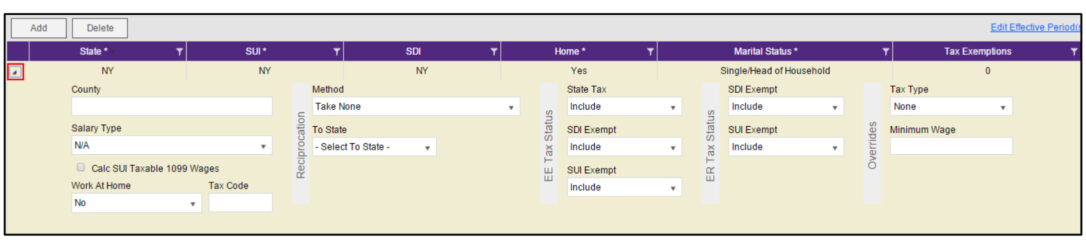
Click the small arrow(s) at the far left of the line on the information bar to minimize or maximize the state information. Users may also double-click the small arrow(s) to expand the information.

3. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the [Employees – State screen section] in the Appendix at the end of this chapter.
4. Click the **Add** button to add another state as needed, or click the **Delete** button to delete a state from the employee's record.
5. Press the **TAB** key or click the **Next** button when you complete entering information on this screen.
   Result: The Employees – Local screen opens.

Employees - Local screen

When creating a new employee in Evolution Payroll, the local taxes will either be set up automatically, the user will be prompted to attach local taxes, or local taxes will have to be added as part of the employee setup.
On the Company - Taxes - Local Tax - Details tab in Evolution Classic,

- If the **Auto-create on New Hire** field is set to **Yes**, local taxes are automatically applied to new employees of that company. Note that it does not apply to existing employees or rehires.
- If the **Auto-create on New Hire** field is set to **No**, no local taxes will be attached to new employees of that company. Users will need to manually add the local taxes when creating new employees in Evolution Payroll.
- If the **Auto-create on New Hire** field is set to **Ask** for any local taxes in Evolution Classic – a screen opens in Evolution Payroll, prompting the user to apply that local tax.

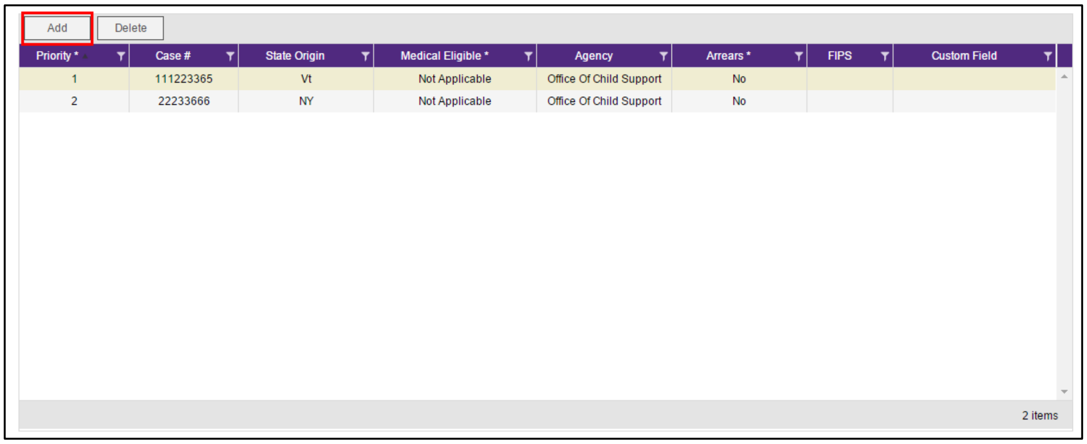


1. Click the **Add** button to add another local as needed, or click the **Delete** button to delete a local (if, for example, the employee moved) from the employee's record.

2. For detailed information about the fields on this screen, refer to the Employees – Local screen section in the Appendix at the end of this chapter.
3. Click **Save** at the top of the Menu bar on the left-hand side of the screen when you have completed entering information on this screen.
4. Click the **Next** button

   Result: The Employees – Child Support screen opens.

Employees - Child Support **screen**



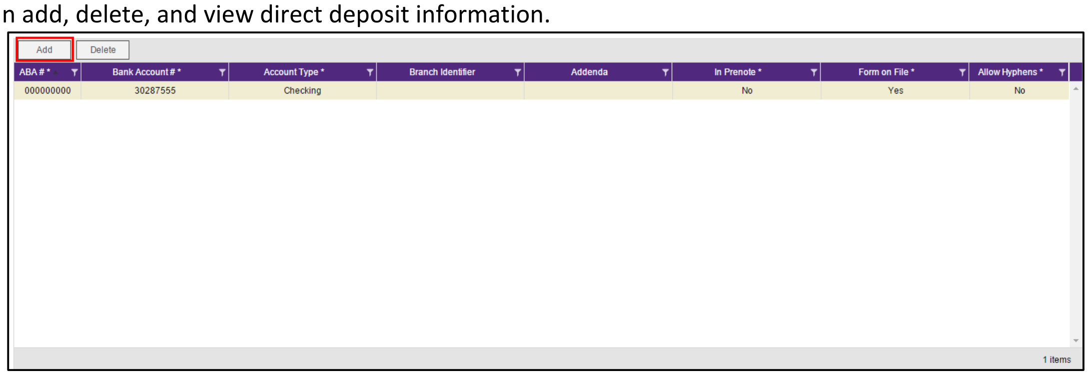
If the employee owes Child Support, the Child Support case information is displayed on this screen.

1. Click the **Add** button to add a Child Support case as needed, or click the **Delete** button to delete a case. For detailed information about the fields on this screen, refer to the Employees – Child Support screen section in the Appendix at the end of this chapter.
2. Click **Save** when you have completed entering information on this screen.
3. Press the **TAB** key or click the **Next** button.

   Result: The Employees – Direct Deposit screen opens.

Employees - Direct Deposit screen

Users can add, delete, and view direct deposit information.



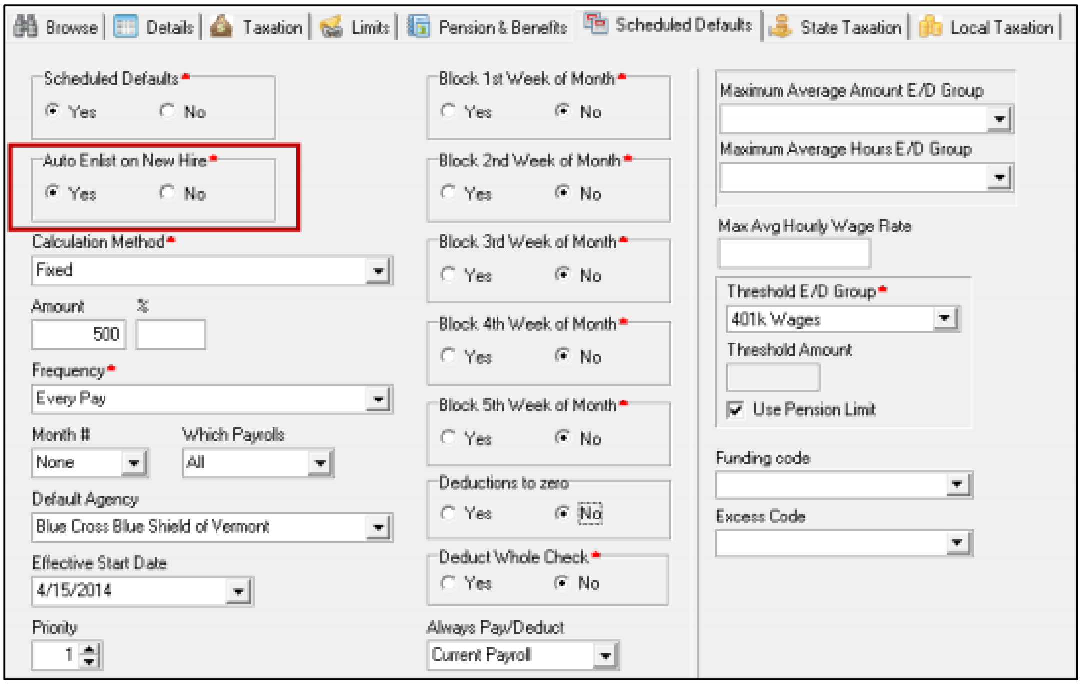
1. Click the **Add** button to add new direct deposit information as needed, or click the **Delete** button to delete a direct deposit setup. For detailed information about the fields on this screen, refer to the Employees – Direct Deposit screen section in the Appendix at the end of this chapter.

2. Click **Save** when you have completed entering information on this screen.
3. Press the **TAB** key or click the **Next** button.
   Result: The Employees – Scheduled E/Ds screen opens.

Employees - Scheduled E/Ds screen

Scheduled E/Ds can be automatically set up for new employees if they are Auto Enlisted in Evolution Classic. To Auto Create Scheduled E/Ds

1. Go to the Client – E/Ds – Scheduled Defaults screen.

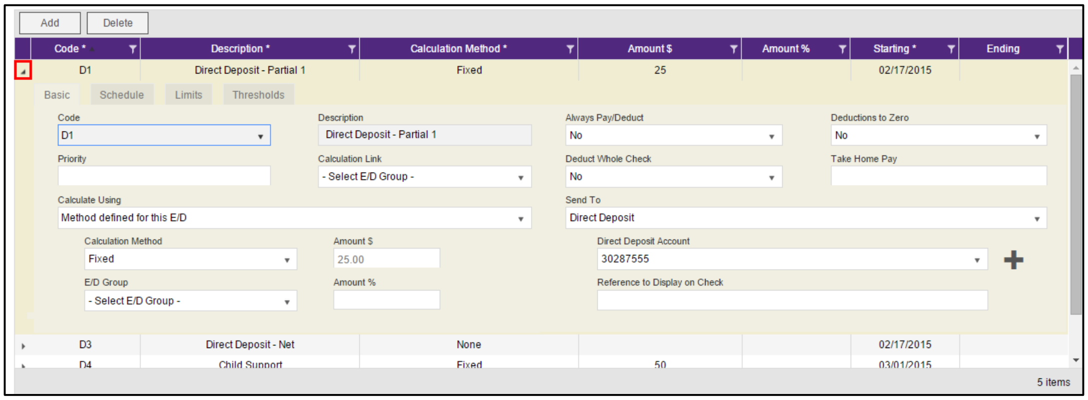


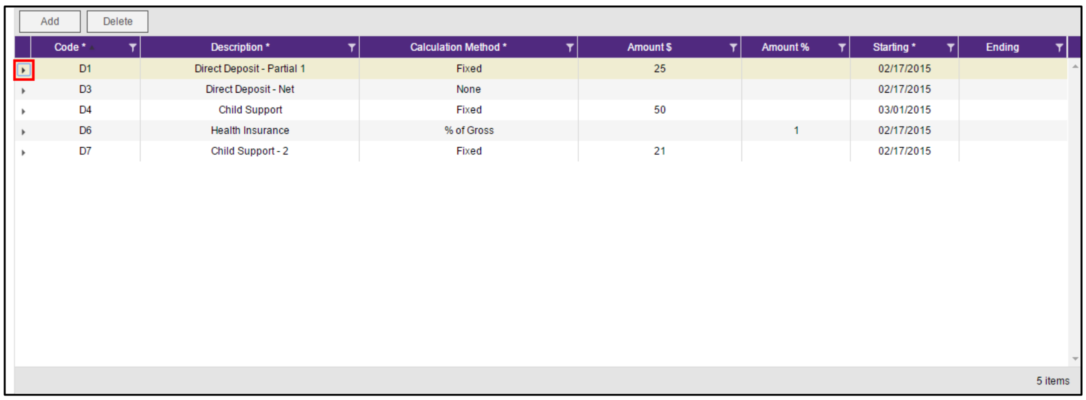
2. Select Yes in the **Auto Enlist on New Hire** field.

This setting only applies to new employees being created (not existing employees or re-hired employees). Note that the setting for the auto-creation of Scheduled E/Ds for new hires is at the Client level, as this is where Scheduled E/Ds are set up.

Users can add, delete, and view Scheduled E/Ds on the Employee menu – Scheduled E/Ds screen.

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



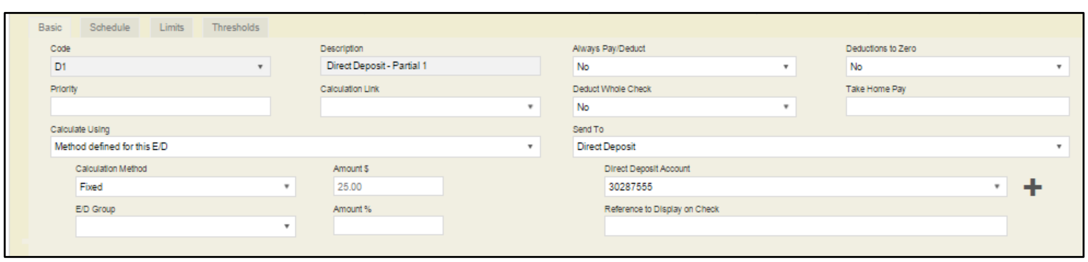


Scheduled E/Ds are earnings and deductions that are scheduled to be processed automatically with every payroll. E/D Codes are separated into three categories - Earning Codes, Deduction Codes, and Memo Codes.
The table below identifies some of the most common E/D Codes that are and those that are not considered Scheduled E/Ds.

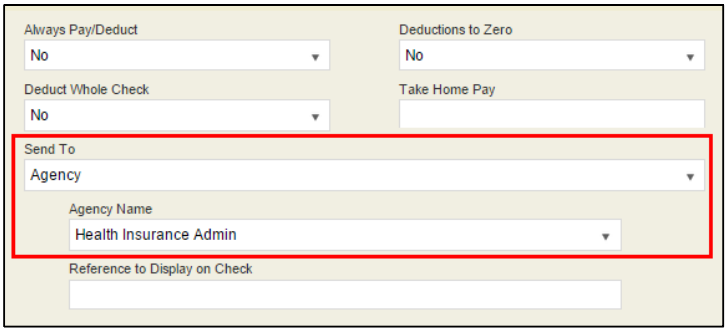
E/D Code Type	E/D Code Type	Scheduled E/Ds?
Benefits/Deductions	Health Insurance; Dental Insurance; EE 401(k) contributions, EE 401(k) catch-up contributions, Flexible Spending Accounts, Dependent Care	Yes
Memo Codes (money that is set aside by the employer for the employee)	401(k) match, ER paid insurance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

To set up employee-level Scheduled E/Ds

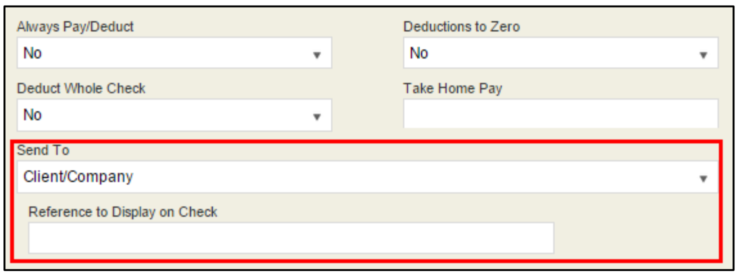
1. Click the **Add** button to add a Scheduled E/D, or click the **Delete** button to delete a Scheduled E/D from the employee's record. For detailed information about the fields on this screen, refer to the Employees - Scheduled E/Ds screen in the Appendix at the end of this chapter.



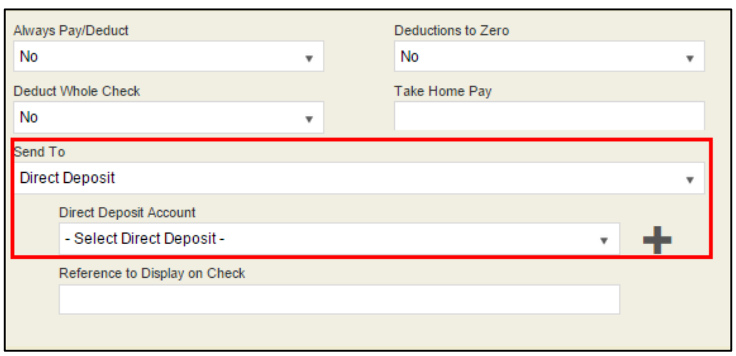
* After a selection is made in the **Send to** field, an additional field opens below, depending upon the selection:



- Agency - when Agency is selected in the Send To field, a dropdown field opens below, where the user selects the Agency.



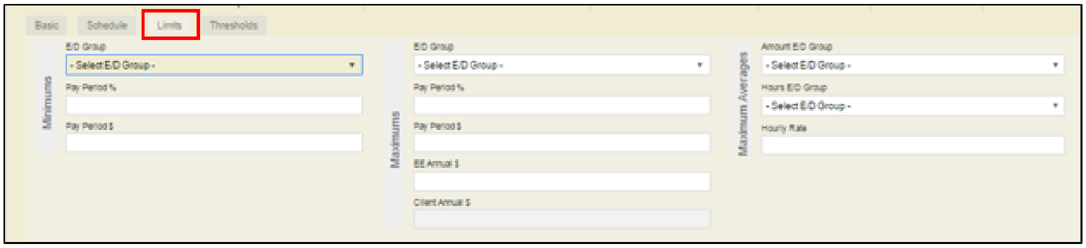
- Client / Company – When Client / Company is selected



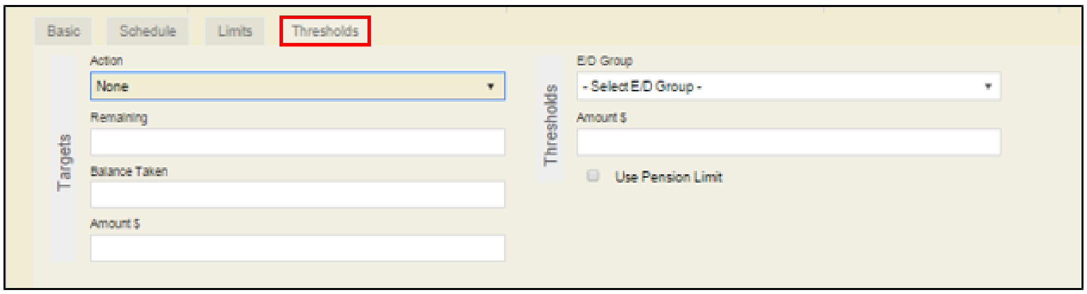
- Direct Deposit - when Direct Deposit is selected in the Send To field, a dropdown field opens below, where the user selects an account number, or clicks the **plus** sign to add a new account number.

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

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



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

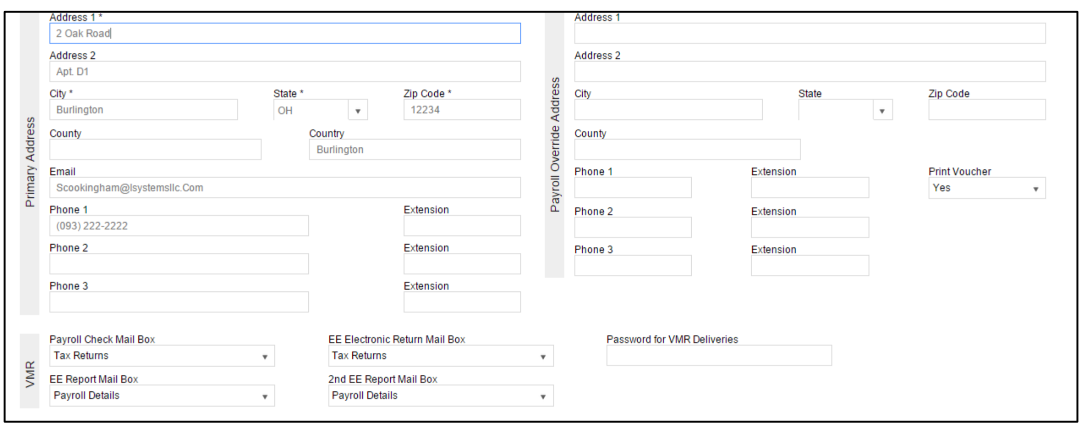


5. Click **Save** when you have completed entering information on this screen.
6. Press the **TAB** key or click the **Next** button.

   Result: The Employees – Delivery screen opens.

Employees - Delivery screen

Delivery information for all of the employees' payroll and tax forms is listed on the Delivery menu screen.



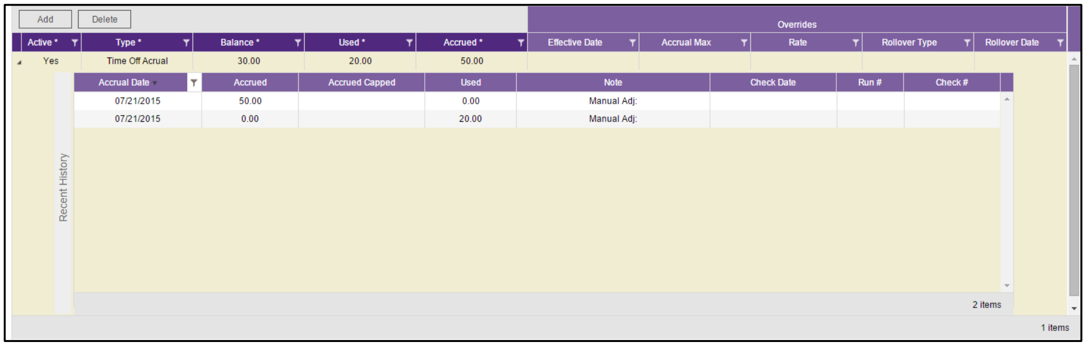
1. Click in the applicable fields to add new delivery information as needed. For detailed information about the fields on this screen, refer to the Employees – Delivery screen section Employees – Delivery screen section in the Appendix at the end of this chapter.
2. Verify that the Primary Address information is correct.
3. Enter VMR overrides if applicable.
4. Enter a Payroll Override Address if applicable.
5. Click **Save** when you have completed entering information on this screen.
6. Press the **TAB** key or click the **Next** button.

   Result: The Employees – Time off Accrual screen opens.

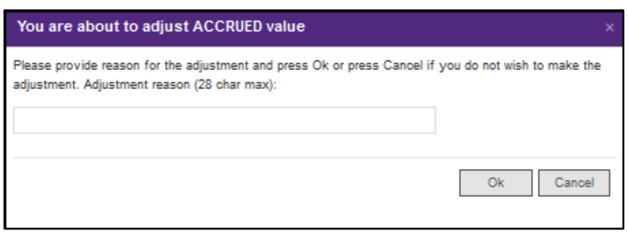
Employees - Time off Accrual screen

Depending upon your role / permissions, you may not see this menu-item.
The Time off Accrual screen displays a balance of unused paid time off, as well as used and accrued time off.

Note: the Time off Accrual menu item may not be displayed in the list, depending upon the company settings that determine whether to make TOA available to employees.



1. Click the **Add** button to add a new Time off Accrual plan as needed, or click the **Delete** button to delete a TOA. For detailed information about the fields on this screen, refer to the Employees – Time off Accrual screen section in the Appendix at the end of this chapter.
2. Select the Type of TOA being added.
3. Tab over to the Accrued tab and enter the amount the employee has accrued. A window opens requesting a reason for the adjustment. Enter a reason > click **OK**.



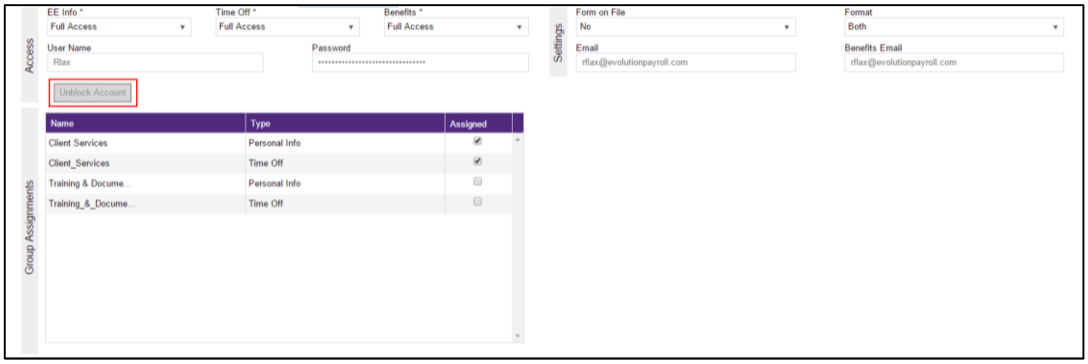
   Result: the Balance fills in.

4. Enter a Used amount if applicable.
5. Complete the following fields.
6. Click **Save** when you have completed entering information on this screen.
7. Press the **TAB** key or click the **Next** button.
   Result: The Employees – Notes screen opens.

Employees - Employee Portal

The Employee Portal screen contains the same fields as are on the Employee – Employee – Self Serve tab in Evolution Classic. For detailed information about the fields on this screen, refer to the Employees – Employee Portal screen section in the Appendix at the end of this chapter.

Note: When creating a new employee using the Basic employee entry method, the Employee Portal tab does not appear as a choice in the Employee menu.



Unblock Account Button

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

Group Assignments section

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

Available Groups - ESS Groups with a Personal Info or Time off Group Type, these groups are created on the Company- Benefits - ESS Group Assignment - Group Assignment tab in Evolution Classic.

Assigned Groups - groups to which this employee is assigned as a member.

Select the corresponding checkbox to assign or remove employees to/from various groups.

Employees - Notes screen

Payroll Notes

Notes entered here can be viewed by the payroll processor, or other internal colleagues. The information does not appear "publically" and cannot be viewed by the employees.

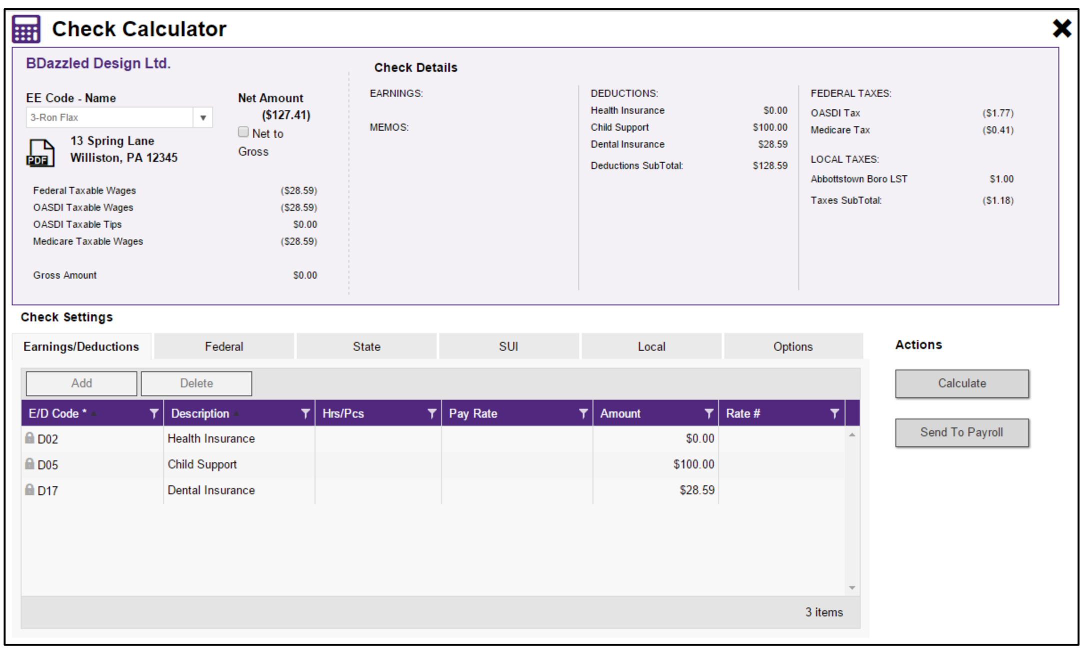
General Notes

General notes about the employee and payrolls are stored with the employee data and can also be viewed in the Payroll menu in the Notes flyout tab on the Employees – Payrolls - Payroll View screen.

Employees - Check Calculator Shortcut Button

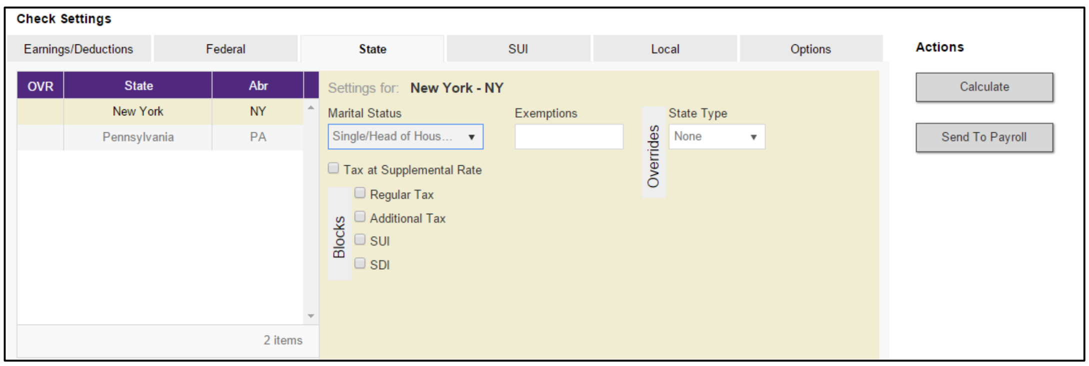
Check Calculator

The **Check Calculator** Shortcut button opens the Check Calculator screen on which **non-payroll** employee checks can be calculated from Gross-to-Net or Net-to-Gross. Once the check has been calculated, it can be sent to an existing payroll batch for processing, or a new payroll / batch can be created for processing the check.

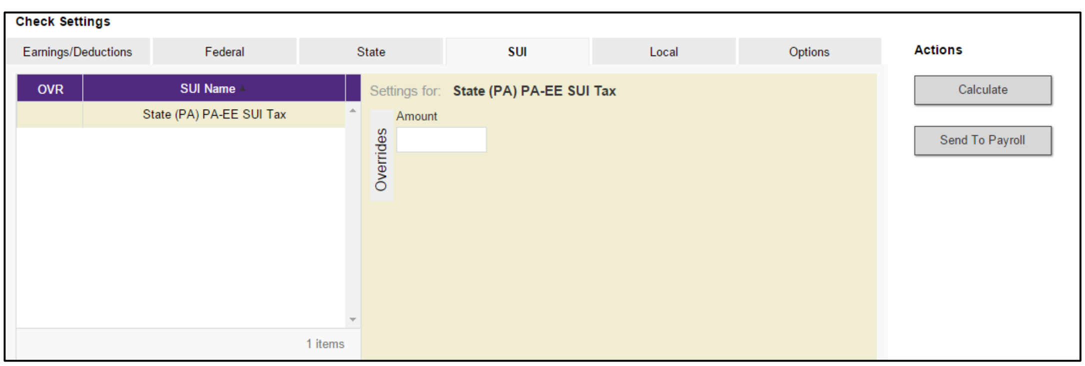


1. Select the Employee Number or name from the dropdown list.
2. Check the **Net Amount** checkbox if calculating a Net Amount to Gross.
3. Enter the **Net Amount** in the field that opens when selected.
4. Click the **Add** / **Delete** buttons to add or delete earnings or deductions to or from the check.
5. Click the **Calculate** button.
6. Click the **Federal** tab.

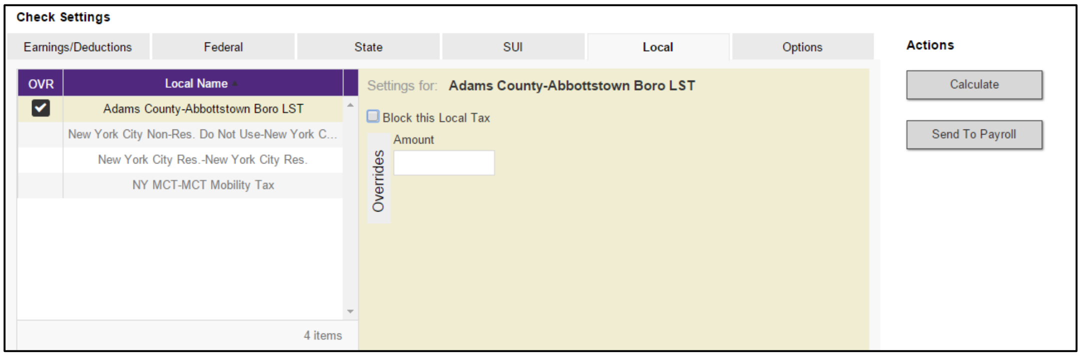
7. Click in the applicable fields to make changes, blocks, or overrides. For detailed information about the fields on this screen, refer to the Employees – Check Calculator screen section in the Appendix at the end of this chapter.
8. Click the **State** tab.



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

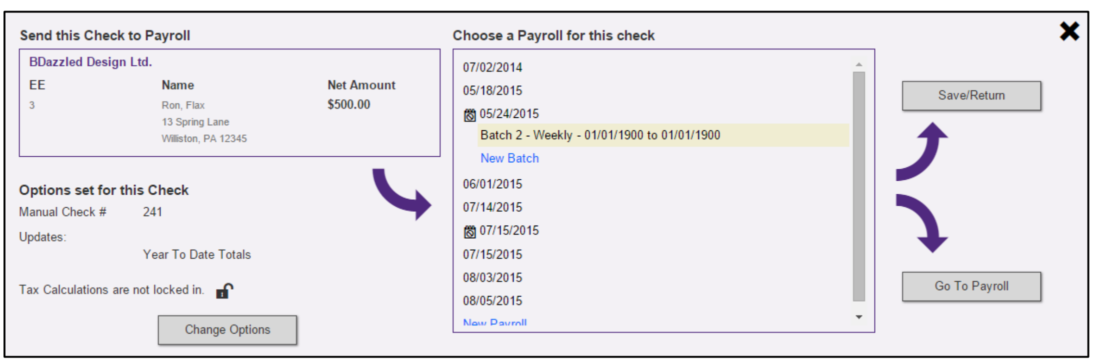


11. Click in the applicable fields to make a change or to add an override.
12. Click the **Local** tab.



13. Click in the applicable fields to block a local tax, or to add an override.
14. Click the **Options** tab.

15. If this is to be a Manual check, a check number is required.
16. Select all applicable fields.
17. Click the **Send to Payroll** button to send the check to a payroll batch for processing.



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

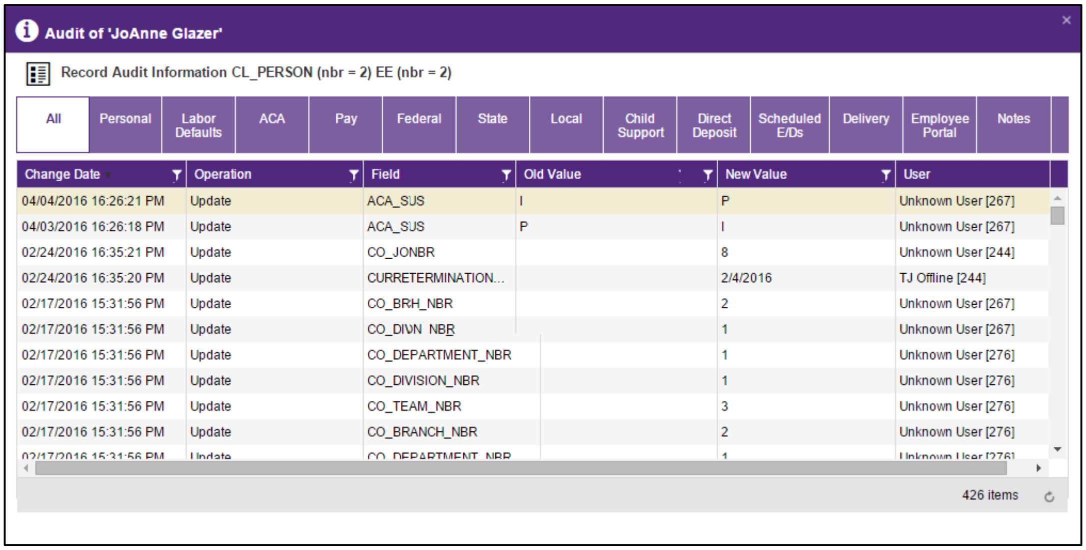
Audit History

To audit an employee's record in Evolution Payroll, click the **Show Audit History** button in the header.

Result: the highlighted employee's audit history is displayed listing

- Change Date - date/s any changes were made – this is the default sorting order.
- Operation performed
- Field changed

- Old Value
- New Value, and
- User who made the change.



Note: The Security Function "Display User Name in Audit" must be enabled for the user to see the name in the audit history of the user who made the change. If this function is not enabled, the UserID is displayed without the name.

Click the button on the far-right side of the header to export a CSV file to Excel, if applicable.

The information can be filtered by clicking the Filter symbol in the column header by which the user would like to sort/filter.

Effective Dating Dynamic Fields

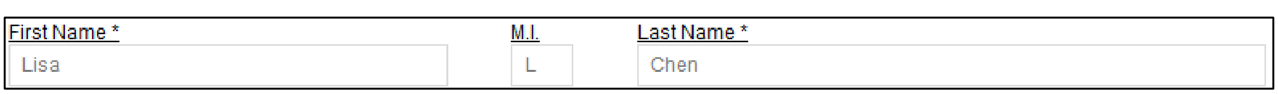
Dynamic fields are dependent upon the dates they were entered or changed. Effective dating enables service bureaus and their clients to edit and audit changes to dynamic fields in Evolution Payroll.

Security Settings

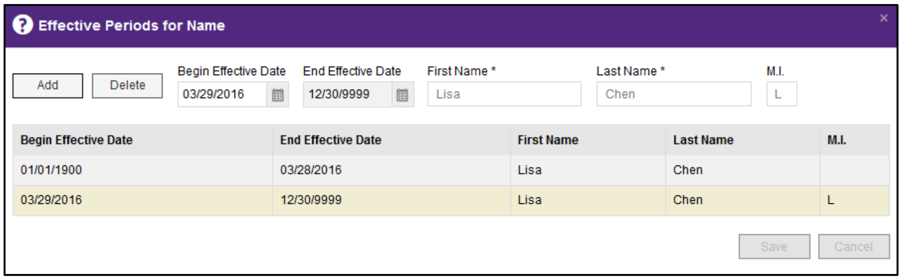
Security settings must be set to enable Dynamic field editing.

1. Go to the Admin – Security – Users.
2. Select the user from the list.
3. Click the **Details** tab.
4. Click the **User Rights** button.
5. Click the Functions button.
6. Enable the following rights:
   - Ability to update as of another date
   - Ability to change tax exemptions
7. Click **Save.**

Fields that can be effective dated have labels displayed as a hyperlink – **Example** First Name * , which can be clicked to view the dates any changes to that field became effective.

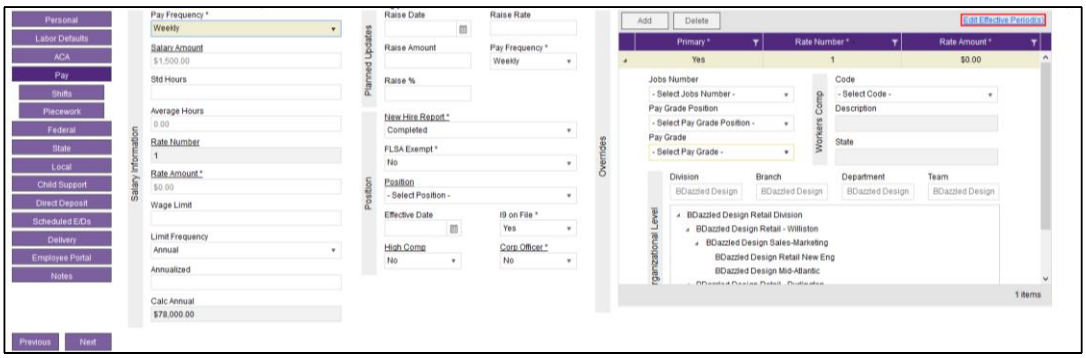


Click the name field label to view additional information about change effective dates.

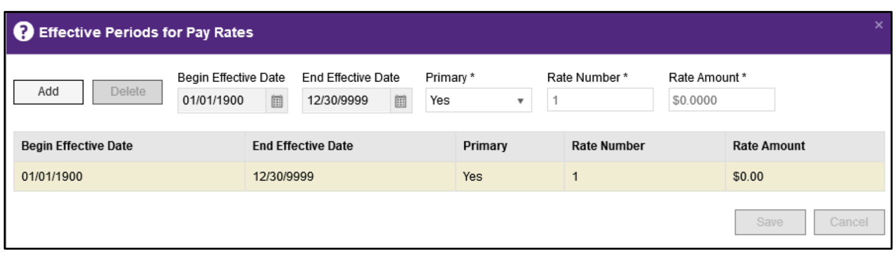


Editing information

To edit dynamic fields,



1. Click the **Edit Effective Period(s)** button (available on screens that support dynamic fields.) Result: The Effective Periods screen opens.



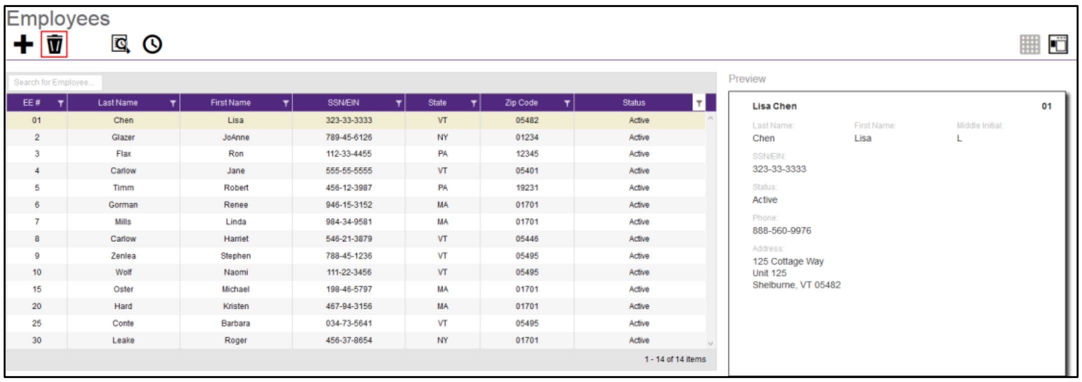
2. Click the **Add** button.
3. Change the **Begin Effective Date**.
4. Make other changes as applicable.
5. Click **Save.**

To delete an Effective Date record:

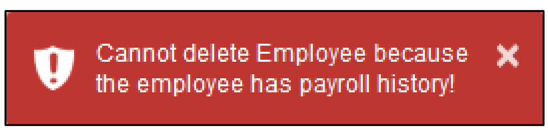
1. Click the Field hyperlink to display the Effective Periods screen for the applicable field.
2. Highlight the row to be deleted.
3. Click the **Delete** button.

Deleting an Employee

Employees can be deleted, as long as they do not have any payroll history and are not part of a pending payroll. To delete an employee



1. Highlight the applicable employee.
2. Click the Delete button.
   A confirmation screen opens asking for confirmation of the deletion.
   If the employee has any payroll history, the following error message with be displayed.



Employees Menu - Appendix

Employees - Basics screen

Field / Button	Description
SSN	This is the employee's Social Security Number or Employee Identification Number.
EE Code	(EE Number) must be alpha or numeric, up to 9 characters, and unique to the employee.
Employee Type	Select W-2 or 1099
First Name	The employee's first name
MI	The employee's middle initial
Last Name	The employee's last name
Address 1	The first line of the employee's address.
Address 2	The second line of the employee's address.
City	The city name of the employee's address
State	The state name of the employee's address
Zip Code	The employee's zip code
County	The county in which the employee lives
Phone	The employee's phone number
Email Address	Employee's email contact information
Birth Date	Birth date
Gender	Gender
Ethnicity	Required
Tribe	Required. If American Indian is chosen, enter the Tribe name in the adjacent field.
Benefits section	
ACA Status	This may be automatically filled for new employees with the default ACA Status set up on the Company - General - Company Info - ACA tab, used to determine whether the employees are to be included in the full-time eligibility determination.
Healthcare Coverage	The employee's coverage status
Dependent Coverage	If the employee is eligible, the coverage, if any, available for dependents
Benefit Eligible	Date on which the employee becomes eligible to receive benefits.

Field / Button	**Description**
Status section	
Status	Select the employment status from the dropdown list.
Current Hire Date	Date employee was hired
Organization Level	Organization level at which the employee works if the company is set up using Divisions, Branches, Departments, and Teams.
Employment Type	Select the Employment Type from the dropdown list
Workers' Compensation	Workers' Comp Code assigned to the Job associated with the claim if applicable.
Job	Job associated with the Workers' Comp Code selected.
Pay section	
Frequency	How often the employee's paycheck is processed.
Salary Amount	Salary earned per pay period
Rate 1	The primary rate number
Rate 2	The second rate number if the employee has two positions with the company doing two different jobs.
Rate 3	The third rate number if the employee has three positions with the company doing three different jobs.
Taxation section	
Fed Marital Status	Marital status for federal tax purposes
Fed Exemptions	Number of exemptions for the employee
State Marital Status	Marital status for state tax purposes
State Exemptions	Number of state exemptions for the employee
State	State to which the employee pays taxes
SDI	State to which the employer pays Disability taxes on behalf of the employee.
SUI	State to which the employer pays Unemployment taxes on behalf of the employee.

Field / Button	Description
VMR section	
Payroll Check Mailbox	Select the mailbox for the employee as needed to override the company settings.
EE Report Mailbox	
EE Electronic Return Mailbox	
2nd EE Report Mailbox	

Employees - Personal screen

Field / Button	Description
SSN	Required before any other information is entered, this is the employee's Social Security Number or Employee Identification Number.
EE Code	(EE Number) must be alpha or numeric, up to 9 characters, and unique to the employee.
Employee Type	Select W-2 or 1099
First Name	The employee's first name
MI	The employee's middle initial
Last Name	The employee's last name
Address 1	The first line of the employee's address.
Address 2	The second line of the employee's address.
City	The city name of the employee's address
State	The state name of the employee's address
Zip Code	The employee's zip code
County	The county in which the employee lives
Phone	The employee's phone number
Email Address	Employee's email contact information
Birth Date	Date of birth
Gender	Gender
Ethnicity	Required
Tribe	Required. If American Indian is chosen, enter the Tribe name in the adjacent field.

Field / Button	Description
Hire Status section	
Status	Select the employee's Status from the dropdown list.
Current Hire Date	Enter if this is a rehire
Original Hire Date	This may be the same or different from the Current Hire Date if the employee is a rehire.
Termination Date	Date of termination if applicable.
Rehire Eligible	Is the employee eligible for rehire?
Employment Type	Select the Employment Type from the dropdown list
On Call From	Date from which the employee is on call, if applicable.
On Call To	Date until which the employee is on call, if applicable.
Benefits section	
ACA Status	This may be automatically filled for new employees with the default ACA Status based on company setup, used to determine whether the employees are to be included in the full-time eligibility determination.
Healthcare Coverage	The employee's coverage status – applicable in Vermont only.
Dependent Coverage	If the employee is eligible, the coverage, if any, available for dependents
Benefit Eligible	Date on which the employee becomes eligible to receive benefits.
Group Term Policy	Total amount of employees' Group Term Life (GTL) policy.
GTL Hours	Number of hours worked annually by hourly employees. GTL Policy amount is calculated by multiplying the entered number of hours by the employees' primary pay rate.
GTL Rate	Rate used to calculate the GTL amount for salaried employees. GTL amount is calculated by multiplying the employees' salary by the rate entered. Example, enter 2 as the rate; the GTL policy amount is calculated by multiplying 2 times the employees' salary.

Employees - Labor Defaults screen

Field / Button	Description
Salary Information section	
Workers' Compensation	Workers' Comp Code assigned to the Job associated with the claim.
Job	Job set up by the company.
Pay Group	Select the pay group.
General Ledger Tag	**Enter if the company is using General Ledger.**
Reporting section	
Tipped Directly	If any of the employee's wages were from being tipped directly, click the link to establish an effective date, if applicable.
Ignore FICA on Cleanup Payroll	If at any time, the FICA is to be ignored for an employee when running a cleanup payroll, click the link to establish an effective date, if applicable.
Combine Returns on this EE	If at any time, returns are to be combined for this employee, click the link to establish an effective date, if applicable.
Generate Second Check	Default is No. Select Yes to generate a second check for the employee for reporting purposes.
Deductions to take First	Select the deductions to be taken first, if applicable.
Second Check Template	In the case of the generation of a second check, select the second check's template, if applicable.
Include in Analytics	Default is Yes. Change to No if the information for this employee is not to be included in the Analytics module, if applicable.

Employees - ACA Screen (identical to the Employee – Employee – ACA tab in Evolution Classic)

Field / Button	Description
ACA section	
ACA Status	Previously located on the Employee – Personal screen this field has been moved to the new ACA screen. May be automatically filled for new employees with the default ACA Status set up on the Company - General - Company Info - ACA tab, used to determine whether the employees are to be considered new employees or continuing employees, full-time eligibility, etc.
ACA Coverage	Select the applicable option for this employee from the 1095-C Instructions – Line 14
ACA Benefit	Select the name of the benefit that will be used to determine the Lowest Cost Benefit for this employee.
ACA Policy Origin	Select the appropriate option for this employee for use on the 1095-B – Line 8.

Field / Button	Description
ACA section	
Benefits Eligible	This field defaults to whatever was set as the default on the Company - General - Company Info – WComp & Benefits tab.
Reporting section	
Form on File	Is there a consent form on file for the employee to allow electronic publishing of the 1095 form(s)?
ACA Format	Select the form format that will be created for the employee. None, Both, or Paper
Form Type	New employees are assigned the default field that is assigned at the Company level. This can be overridden using this field. • Right-click and select **Copy to…** to copy to other employees.
ACA Standard Hours	Enter the standard number of hours for salaried employees, which will be used when calculating ACA hours.
Applicable Section 4980H	Select the appropriate option for this employee from the 1095-C Instructions – Line 16.
Lowest Cost Benefit	Select the Lowest Cost Benefit to be used on the 1095-C.

Employees - Pay Screen

Field / Button	Description
Salary Information section	
Pay Frequency	How often the employee's paycheck is processed.
Salary Amount	Salary earned per pay period (salaried employees only)
Standard Hours	Number of hours the employee is expected to work (this may be left blank for salaried employees working a 40-hour week.)
Average Hours	Average hours the employee works – this field is system-calculated and is not editable.
Rate Number	The rate number if not the primary rate – this is read only.
Rate Amount	The rate for the rate number above.
Wage Limit	Wage limit used for Workers' Comp billing and impounds
Limit Frequency	If there is a wage limit, to what period is the limit applied?
Annualized	If there is a wage limit for a period other than annual, what is the annualized total amount of the limit?
Calc Annual	The system automatically calculates the annualized salary or pay based on the value in Salary Amount times pay frequency or the value in Rate Amount times the pay frequency times standard hours.
Planned Updates section	The following fields are informational only, and do not affect pay amounts now or in the future.
Raise Date	The date a future raise takes effect.
Raise Amount	The potential amount of the future raise. Use this for salaried or hourly employees. If there is a value in this field, leave the Raise Rate field empty.
Raise %	The potential percentage of the future raise. Use this for salaried or hourly employees.
Raise Rate	The hourly rate of the potential raise.
Pay Frequency	The frequency the employee will be paid after the future raise.
Position section	These fields in this section used to be on the Positions screen.

Field / Button	Description
New Hire Report	Required field Pending - select this option any time prior to the employee's first payroll, after which time it is automatically updated to Complete. Completed - if the service bureau is 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 service bureau If an employee's status has changed from another code back to active, when the changes are saved, a message asks if this is a rehire. No - system saves the employee record and doesn't ask any more questions Yes - system changes the New Hire flag to Pending and opens the Rehire Wizard. The Wizard includes a series of employee screens for the user to verify the employee's set-up for pay rate, states, locals, TOA, Scheduled E/D's, and direct deposits. The Wizard only displays screens applicable to the employee.
FLSA Exempt	Is the employee exempt from minimum wage and overtime pay under the Fair Labor Standards Act?
Position	Employee's work position at the company, set up on the Company – Benefits – HR Positions screen.
Effective Date	Date the employee's position became effective
High Comp	Is the employee highly compensated?
I-9 on File	The employee's form I-9 is on file
Corporate Officer	Is the employee a corporate officer?
Overrides section	
Add / Delete buttons	Click to add a pay rate or delete a pay rate that is no longer applicable.
Primary column heading	Select **NO**, if this is not the employee's primary wage at the company.
Rate Number column heading	If a standard wage, the new line should have a Rate Number of 2 or more.
Rate Amount column heading	Enter the amount of the new rate.
Overrides – Job section	
Jobs Number	Number identifying the job that the employee has at the company. Overrides what was set up on the Employee – Pay Rates screen.
Pay Grade Position	Position the employee holds in the pay grade at the company. Overrides what was set up on the Employee – Pay Rates screen.
Pay Grade	Pay Grade in which the employee's position falls. Overrides what was set up on the Employee – Pay Rates screen.

Piecework Sub-menu

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

Auto Labor Distribution Sub-menu

Field / Button	Description
Labor Distribution Options	Defaults to **Distribute Both** - method used to distribute employee's labor for unions. They may be distributed for earnings, taxes, deductions, all, or none, and must be used in conjunction with the **Auto Labor Distribution E/D Group** field.
Auto Labor Distribution E/D Group	E/D Group used to distribute the employees' labor.
Allocation section	
Add	Click to create a new record
Delete	Click to delete an entry
Percentage	Percentage of the employee's pay attributed to that organizational level
Organizational Level	Name of the organizational level for which the employee works
Job	Title of the job worked in the level
WC Code	Workers' Comp code associated with that job

Employees - Federal screen

Field / Button	Description
Marital Status	Marital status for federal tax purposes
Exemptions	Number of exemptions for the employee
Tax Type	Additional or override tax amount.
Value	Based on the tax type, the corresponding value.
FUI Rate Credit	The amount by which to override a FUI Rate Credit, if applicable.
Override Fed Minimum Wage	Value used to override the Federal Minimum Wage rate used in payroll for minimum wage makeup calculations. • If a value is entered, the amount is used as the rate for minimum wage makeup calculations. • The value may be overridden if a State Minimum Wage override is entered on the Employee - States - Overrides tab. In that case, Evolution uses that rate in the calculation. • If both fields are populated, the Federal Override is used in the calculations for all states attached to the employee that do not have overrides set up. Otherwise, the state override rate is used. • If no overrides are entered, standard system logic is applied in the calculation (taking the higher of the Federal or State Minimum Wage rate at the system level). Right-click on the field and select 'Copy To...' to copy the information.
EE Tax Statuses section	The default values in this section are dependent upon whether the employee is W-2 or 1099.
Federal Tax Status	This is the employees' tax status. Select from the dropdown list whether the employee's tax is to be included, blocked or exempted.
OASDI Exempt	Whether or not the employee is exempt from paying OASDI
Medicare Exempt	Whether or not the employee is exempt from paying Medicare
ER Tax Statuses section	The default values in this section are dependent upon whether the employee is W-2 or 1099.
FUI Exempt	Whether or not the employer is exempt from paying FUI for this employee
OASDI Exempt	Whether or not the employer is exempt from paying OASDI for this employee
Medicare Exempt	Whether or not the employer is exempt from paying Medicare for this employee

Field / Button	Description
W-2 Form section	
Type	Type of tax form being filed if not W-2; select from the dropdown list.
Residential State	State for which tax forms are being filed as the employees' residence.
First Name	Legal name for whom all tax forms will be prepared – complete only if different from the information on the Basics tab.
Middle Name	
Last Name	
Name Suffix	
W-2 Settings section	
Deceased	Status is designated on the Form W-2 as deceased
Statutory Employee	Status is designated on the Form W-2 as statutory
Legal Rep	Is there a Legal Rep designated on the Form W-2?
Deferred Comp	Are these earnings designated as deferred compensation on the Form W-2?
Pension	Are these earnings from a Pension plan?
1099-R section	
Distribution Code	If a pension distribution was taken, this is the distribution code reported on the 1099-R.
Tax Amount Determined	Was there a tax amount determined and reported on the 1099-R?
Total	Was the distribution a total distribution of all assets in the pension plan?
Pension Plan	The type of pension plan reported on the 1099-R

Employees - State screen

Field / Button	Description
County	County within the state selected
Salary Type	Select the salary type for the employee, if applicable
Calc SUI Taxable 1099 Wages checkbox	If selected, the SUI taxable wages for this employee are calculated for the state.
Work at Home	For PA only.
Tax Code	This is a generic code and can be used to add details needed for returns.
Reciprocation section	
Method	Reciprocal method – select from the dropdown list.
State	Select the state with whom the residential state has the reciprocal agreement – the states listed are those the company sets up to do business with.
Amount / Percentage	Amount required to reciprocate; used based on Reciprocation Method.
EE Tax Status section	
Employees – State screen	Employees – State screen
State Tax	Employees' state tax status. Select from the dropdown list whether the employee's tax is to be included, blocked or exempted.
SDI Exempt	Whether or not the employee is exempt from SDI
SUI Exempt	Whether or not the employee is exempt from SUI
ER Tax Status section	
SDI Exempt	Whether or not the employer is exempt from paying SDI for this employee
SUI Exempt	Whether or not the employer is exempt from paying SUI for this employee
Overrides section	
Tax Type	Tax type to be overridden
Amount / Percentage	Amount of the override
Minimum Wage	Does the override revert to minimum wage?

Employees - Local screen

Field / Button	Description
Column Headings	
Local	Local tax added at the Company level
State	State in which the local agency resides
County	County in which the local agency resides
Local Type	Employee or employer tax
Tax Rate	Tax rate entered at the system level for the local tax
Misc Amount	The amount used to adjust the percentage of state taxes when that calculation method is used.
Tax Code	Used only if an additional tax code is necessary
Active	Whether or not the local tax is currently active.
Tax Status	Should the local be included, blocked, or is it exempt?
Deduct Behavior	Should the tax be always deducted, never deducted, or are there no overrides?
Work Address Location	PA only.
Overrides section	
Pre-tax Deductions	Does the taxable wage base used to calculate local taxes include pre-tax deductions?
Tax Type	Tax type of the overridden tax, if any
% of Taxable Wages	The percentage of taxable wages used to calculate local taxes.
Tax Value	If an Override Tax Type is entered, this field is required.

Employees - Child Support screen

Field / Button	Description
Priority	Priority in order of all Scheduled E/Ds – Child Support usually has number 1 priority over all other E/Ds.
Case #	Case number assigned by the Child Support agency
State Origin	The state in which the Child Support Order originated.
Medical Eligible	This field is pre-filled from the **Healthcare Coverage** field value on the Employees – Basics screen.
Agency	Child Support Agency responsible for collecting the money for payment.

Field / Button	Description
Arrears	Change to **Yes** if Child Support payments are in arrears on this case.
FIPS	Five-digit Federal Information Processing Standard (**FIPS**) code (**FIPS** 6-4) that identifies counties and county equivalents in the United States.
Custom Field	If the company has established a custom field to help with tracking.

Employees - Direct Deposit screen

Field / Button	Description
ABA#	Routing number identifying the financial institution
Bank Account#	Number of the account to which deposits are made
Account Type	Type of account to which deposits are made
Branch Identifier	Bank Identifier used when transferring money and wiring money
Addenda	Additional information (if any) to be added to the direct deposit instructions
In Pre-Note	Is the direct deposit within the period of validating the account credentials?
Form on File	Tracks whether or not there is a Direct Deposit Authorization form on file
Allow Hyphens	Yes means hyphens are allowable characters in the bank account number.

Employees - Scheduled E/Ds screen

Field / Button	Description
Basic tab	
Code	E/D Codes assigned at the system level – select from the dropdown list
Description	Entered automatically when the E/D Code is selected.
Priority	Priority to process the Scheduled E/D (Child Support E/Ds are always Priority 1)
Calculation Link	Select an E/D Group that the Scheduled E/D belongs to (if applicable)
Calculate Using	Select which calculation method will be used to calculate payroll deductions for the Scheduled E/D. There are three options: 1. Use the calculation method that has been defined for the E/D 2. Use the calculation method defined at the Company Benefit level

Field / Button	Description
	3. Use the calculation method defined at the Employee Benefit level
Calculation Method	Method used to calculate deductions from payrolls. Select the method from the dropdown list. Amount $ - If the Calculation Method selected is a fixed dollar amount enter that amount. Amount % - If the Calculation Method selected is based on a percentage enter the percentage amount.
E/D Group	Select an E/D Group if the Scheduled E/D is included in an E/D Group.
Note: Earnings must be set up as a member of an E/D Group, which simplifies the calculation of earnings such as 401(k)s.	
Always Pay / Deduct	Offers flexibility to override E/D, similar to Blocking Week 1 - 5 All payrolls - earnings are paid whether or not there are earned wages for the employee; deductions are tracked to be taken from the next payroll. Current Payrolls - the E/D is applied to the current the payroll whether or not there are earned wages for the employee. If deduction exceeds amount in check the amount is not tracked to be made up later. If there are insufficient earnings for the deduction, the Scheduled E/D is processed based on the selection in the **Deductions to Zero field**. No - if the employee has no wages in a payroll cycle, the system does not pay/deduct the E/D, nor is it tracked it to be made up later.
Important: to ensure that the remainder of the deduction is taken out of a subsequent pay cycle, the **Make Up Deducts Shortfall** field on the Client - E/Ds - Details tab must be set to Yes.	
Deductions to Zero	Defaults to the Deductions to Zero Default field on the Client - E/Ds - Scheduled Defaults tab. It can be overridden here by E/D, by employee, and instructs how much of a deduction should be taken if there is not enough to take the entire amount. This does not turn Shortfall / Deduction not Taken makeup on or off. It only tells the system whether or not to take partial amounts for deductions. Yes - the entire amount is deducted, until the check is zero. If there is shortfall it may be either a portion of or the total amount of the Scheduled E/D. No - a deduction is taken only when there are sufficient funds to take the whole deduction. If there are insufficient wages, the created shortfall is always the total amount of the Scheduled E/D. If there is a pre-existing shortfall, it takes the shortfall amount only when there are sufficient wages to take the whole amount. When there is a deduction and a pre-existing shortfall, and there are sufficient wages to take the shortfall but not all of the deduction, Evolution takes the shortfall, but not the deduction.

Field / Button	Description
Deduct Whole Check	Value selected defaults based on the setting applied on the Client - E/Ds - Scheduled Defaults tab Yes - deducts the net check (use for direct deposits) No - deducts a portion of the check
Send To*	Select Agency or Client, Company, or Direct Deposit
Reference to Display on Check	If being sent to Agency or Client/Company on behalf of the employee…
Schedule tab	All payment schedule-related information is on this screen.
Starting	Starting date for the scheduled deduction
Ending	Ending date for the scheduled deduction
Affects section	
Payrolls affected	Identify which payrolls are affected by the deduction
Frequency	How often the deduction of the Scheduled E/D occurs.
Blocks section	
Block Based On	If there are blocks on any of the payroll weeks identify whether it is custom defined or being blocked to keep the deduction at four weeks per month.
Weeks Blocked	Identify which, if any, week(s) is blocked from having the deduction taken

Field / Button	Description
Limits tab	
E/D Group	E/D Group to which the minimum Scheduled E/D belongs (same as **Minimum E/D Group** field on the Employee – Scheduled E/Ds – Advanced tab)
Pay Period %	Minimum percentage (if the deduction is quoted as a percentage) to be taken per pay period.
Pay Period $	Minimum dollar amount (if the deduction is quoted as an amount) to be taken per pay period.
EE Annual $	Maximum dollar amount the employee is allowed to contribute per year
Client Annual $	Maximum dollar amount the client can contribute per year for the employee
Maximum Averages section	
Amount E/D Group	This information is used for special Union dues calculations.
Hours E/D Group	
Hourly Rate	
Thresholds tab	
Action	These fields refer to the goal amounts at which deductions stop – the same information entered on the Employee – Scheduled E/Ds Advanced tab in Evolution.
Remaining	
Balance Taken	
Amount $	
Thresholds section	
E/D Group	

Employees - Delivery screen

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

Employees - Time off Accrual screen

Field / Button	Description
Active	Whether or not the TOA plan is currently active for the employee
Type	What type of TOA plan it is – PTO, Sick, Vacation, etc…
Balance	Tab over to the **Accrued** field to enter first. The balance will fill in automatically, after which, enter time used and the balance will be adjusted.
Used	How much of the accrued time has been used
Accrued	Enter manually
Effective Date	Date the Accrued amount begins
Accrual Max	Maximum set by the company that an employee can earn in a pre-defined period
Rate	Rate at which the time off accrues per pay period
Rollover Type	If the company plan allows for a rollover, on which type of accrual is rollover allowed?
Rollover Date	Date on which rollover occurs

Employees - Employee Portal screen

Depending upon your role / permissions set up in Evolution Classic, this menu-item may not be visible.

Field / Button	Description
Access Section	For access to the Employee Portal, the Access Level for EE Info must be Read Only or Full Access. The Time Off and Benefits Access Levels work independently.
EE Info	No - employees will not see any of their personal information in the Employee Portal Read-only - employees can view their payroll information but will not be able to request edits in the Employee Portal Full Access - employees can see and request edits to their payroll and W-4 information.
Time Off	No - employees do not see any of their time off information in the Employee Portal Read-only - employees can view their time off information but will not be able to request edits in the Employee Portal Full Access - employees can see and request edits to their time off information
Benefits	No - employees do not see any of their benefits information in the Employee Portal Read-only - employees can view their benefits information but will not be able to make elections in the Employee Portal Full Access - employees can see and request edits to their benefits elections in the Employee Portal (during Open Enrollment and/or a Qualifying Event Enrollment.)
User Name	The employees' user name in the Employee Portal.
Password	The employees' password in the Employee Portal.
Unblock Account button	If a user's Evolution Payroll account is blocked because they incorrectly answered their security questions three times, a user with access can unblock the account using this button.
Group Assignments section	Pre-filled based on the setup in Evolution Classic on the Company - Benefits - ESS Group Assignment screen.
Name	Name of the group/s to which the employee has been assigned.
Type	Type of group/s to which the employee has been assigned. (Pre-filled based on the setup in Evolution Classic.
Assigned checkbox	Designates whether the employee is assigned to the group.
Settings section	
Forms on file	Are the annual return forms on file?

Field / Button	Description
Email	Email address for account notifications
Format	Format of the returns; electronic, paper, or both
Benefits Email	Email address for benefits notifications

Employees - Notes screen

Field / Button	Description
Payroll Notes	Notes entered here can be viewed by the payroll processor, or other internal colleagues. The information does not appear "publicly" and cannot be viewed by the employees.
General Notes	General notes about the employee and payrolls are stored with the employee data and can also be viewed in the Payroll menu in the **Notes flyout tab** on the Employees – Payrolls - Payroll View screen.

Employees - Check Calculator Shortcut Button

Field / Button	Description
EE Code/Name	Select the Employee Number or name from the dropdown list.
Net Amount checkbox	Select if calculating a Net Amount to Gross – user will be required to enter the Net Amount in a field that is displayed when selected.
Net Amount	Net amount of the check being calculated if **Net Amount** checkbox is selected.
Calculate button	Click to calculate the Net or Gross amount.
Send to Payroll button	Click to send the check to a payroll batch for processing.
Add / Delete buttons	Use to add or delete earnings or deductions to or from the check.
Federal tab	
Marital Status	This information is pre-filled using the settings established in Evolution Classic.
Exemptions	
Tax Frequency	
Tax at Supplemental Rate	Select if there are supplemental wages requiring the employee to be taxed at a supplemental rate.
Blocks section	
Federal Tax	Select to block Federal tax from being deducted from this check.
Employee Overrides	Select to block any employee overrides from being included in this check.

Field / Button	Description
Additional Values	Select to block any additional values from being deducted from this check.
EE OASDI	Select to block the EE OASDI from being deducted from this check.
EE Medicare	Select to block the EE Medicare from being deducted from this check.
EE EIC	Select to block the EE EIC from being deducted from this check.
Overrides section	
Fed Type	Complete if there are any overrides to add to this check.
OASDI	
Medicare	
EIC	
Backup Withholding	
State tab	
Marital Status	This information is pre-filled using the settings established in Evolution Classic.
Exemptions	
Tax at Supplemental Rate	Select if there are supplemental wages requiring the employee to be taxed at a supplemental rate.
Blocks section	
Regular tax	Select to block any of these from being deducted from the check.
Additional tax	
SUI	
SDI	
Overrides section	
State Type	Select if any type of state tax should be overridden.
SUI tab	
Amount	Enter an override amount if applicable for the state highlighted in the left (if more than one is listed)
Local tab	
Block this Local Tax	Select to block the selected local tax from being deducted from the check.
Overrides section	

Field / Button	Description
Amount	Enter an override amount if applicable for the local highlighted in the left.
Make this a Manual Check	Select to create a Manual check.
Enter Check #	This is a required field if Manual Check is selected.
Update Year to Date Totals (Disable YTD)	Select to keep YTD totals from appearing on the employees' check stubs.
Update Tax & Deduction Shortages (Disable Shortfalls)	Select to keep shortages from appearing on the employees' check stubs.
Lock Calculations for this Check	Select to use the reviewed information when the payroll processes. Results are available on the Manual Tax tab.

The Payrolls Menu

Payrolls are processed quickly and easily through Evolution Payroll. This section covers creating both scheduled and unscheduled payrolls. Each will be discussed in detail.

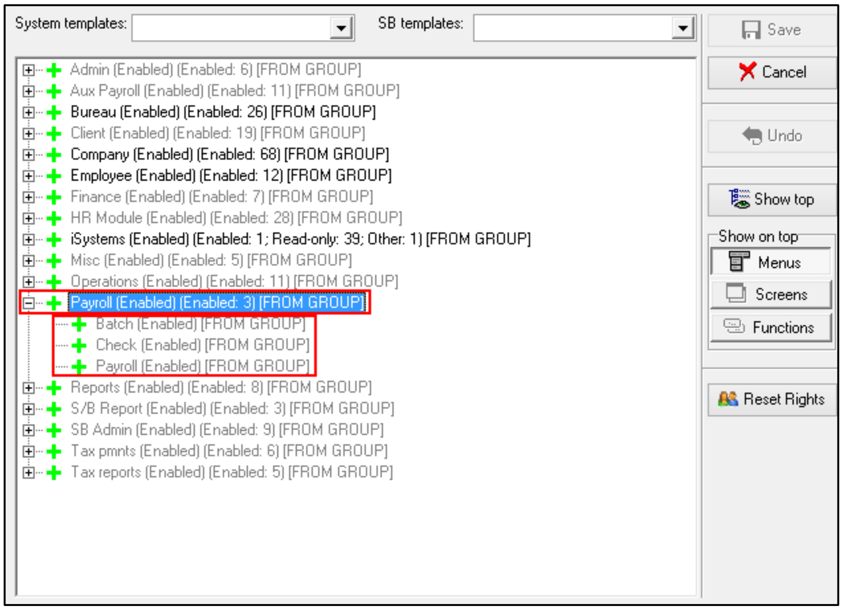
Security Settings

The following security settings must be enabled for a user to submit a payroll in Evolution Payroll. If the Payroll Menu options in Evolution Classic are disabled, the Payroll Menu button is not displayed as a menu option on the Evolution Payroll dashboard.

1. Go to the Admin – Security – Users.
2. Select the user from the list.
3. Click the **Details** tab.
4. Click the **User Rights** button.
5. Click the **Menu** button.
6. Enable the **Payroll** menu as well as
    - Batch - If this is disabled, in Evolution Payroll:
        - The Payroll – Batches screen is not displayed to the user.
        - The Payroll – Summary View screen is not displayed to the user.
        - The Payroll – Summary Detail View screen is not displayed to the user.
        - The Payroll – Detail View screen is accessible to the user.
        - The Block E/Ds button is disabled.
        - Users can still View or Edit payrolls.
        - Symbols for View / Edit will be displayed in the Payroll Card and Grid View.
    - Check - If this is disabled, in Evolution Payroll:
        - The Payroll – Detail View screen is accessible to the user.
        - The Payroll – Summary Detail View screen is not displayed to the user.
        - The Payroll – Summary View screen is not displayed to the user.
        - Users can still View or Edit payrolls.
        - Symbols for View / Edit will be displayed in the Payroll Card and Grid View.
    - Payroll - If this is disabled, in Evolution Payroll:
        - The Payroll Menu button is not displayed as a menu option on the Evolution Payroll dashboard.
        - The information in the Payroll Today section on the Evolution Payroll dashboard will be read-only (no hyperlinks).

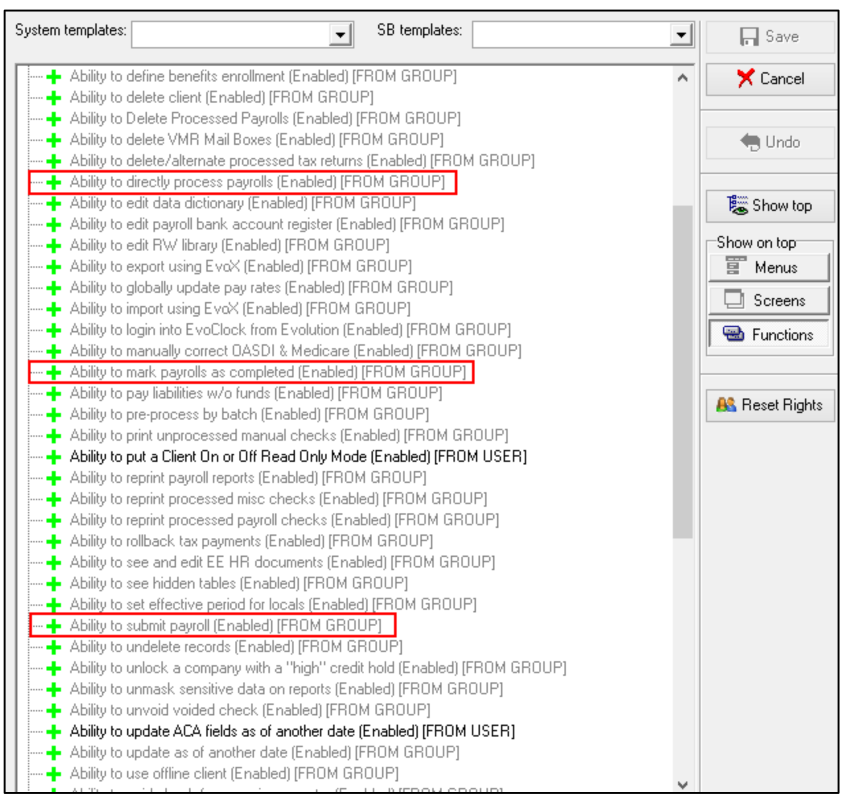
Note: If the Payroll – Batch AND Payroll – Check Security Rights are disabled, in Evolution Payroll:

- Users can view the Payroll Card and Grid Views.
- Users can create a new payroll (+ sign at top left of screen).
- Users can create/start a scheduled payroll (+ sign in the card).
- After creating or starting a Payroll, users will not see any batch or check details. o
    - The Batches and Check icon screens are disabled.
    - The Totals and Finish icon screens are enabled.
    - The Block E/Ds icon is enabled.



7. Click **Save.**
8. Click the **Functions** button.
9. Enable the following rights:

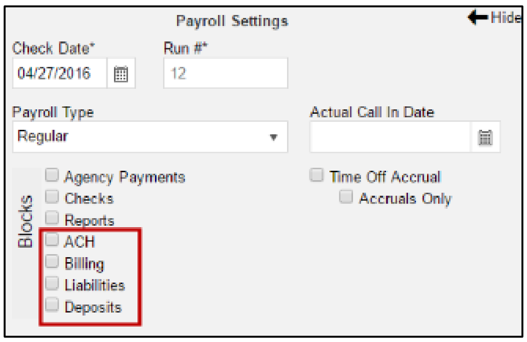
- “Ability to directly process payrolls”
- “Ability to mark payrolls as completed”
- “Ability to submit payrolls”

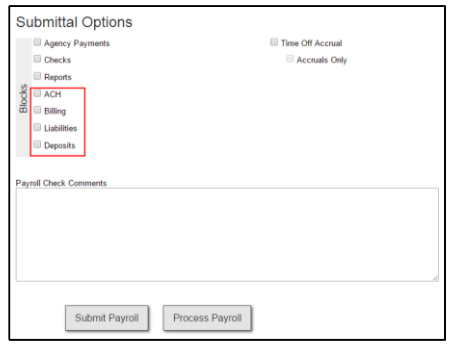


10. Click **Save.**

Security settings for blocking options

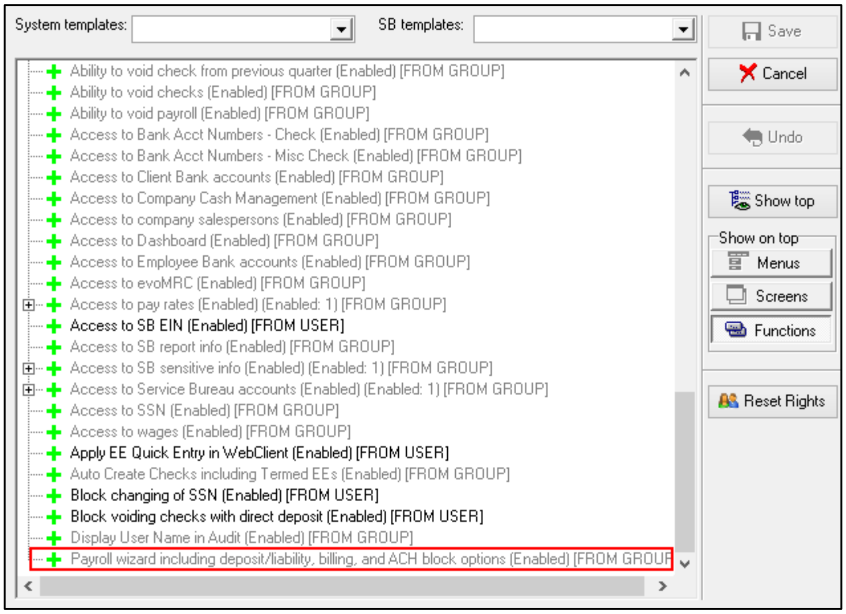
There are four items that can be blocked from payrolls – ACH, Billing, Liabilities, and Deposits - both on the Payroll Settings screen, and the Payroll Finish screen. An additional security setting must be enabled for a user to have the ability to block these from the payroll.





1. Go to the Admin – Security – Users.
2. Select the user from the list.
3. Click the **Details** tab.
4. Click the **User Rights** button.

5. Click the **Functions** button.
6. Enable "Payroll wizard including deposit/liability, billing, and ACH block options"



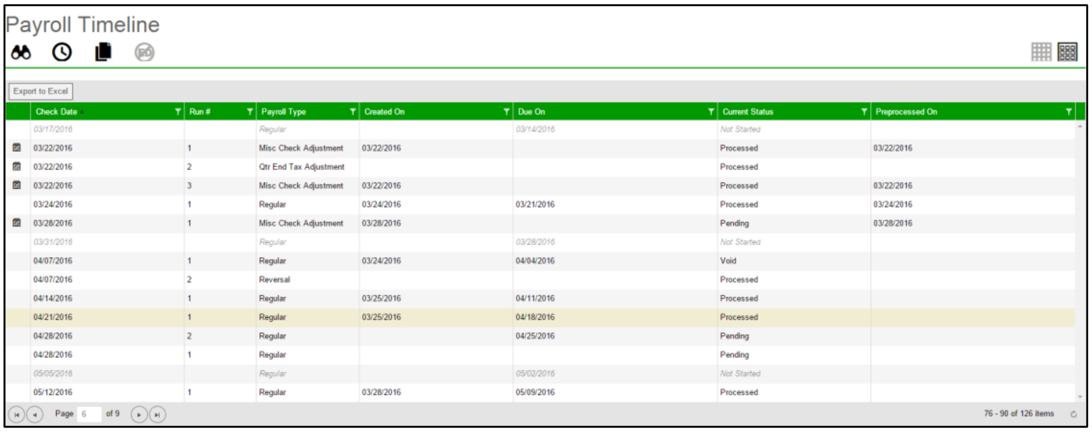
7. Click **Save.**

The Payrolls Menu

The first screen in the Payrolls Menu is the Payroll Timeline, displaying coupon- or card-like views of scheduled payrolls.
There are eight statuses you may see represented on the Timeline screen described in the table below.

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

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



Payroll Timeline

Export to Excel

	Check Date	Run #	Payroll Type	Created On	Due On	Current Status	Preprocessed On
	03/17/2016		Regular		03/14/2016	Not Started	
	03/22/2016	1	Misc Check Adjustment	03/22/2016		Processed	03/22/2016
	03/22/2016	2	Qtr End Tax Adjustment			Processed	
	03/22/2016	3	Misc Check Adjustment	03/22/2016		Processed	03/22/2016
	03/24/2016	1	Regular	03/24/2016	03/21/2016	Processed	03/24/2016
	03/28/2016	1	Misc Check Adjustment	03/28/2016		Pending	03/28/2016
	03/31/2016		Regular		03/28/2016	Not Started	
	04/07/2016	1	Regular	03/24/2016	04/04/2016	Void	
	04/07/2016	2	Reversal			Processed	
	04/14/2016	1	Regular	03/25/2016	04/11/2016	Processed	
	04/21/2016	1	Regular	03/25/2016	04/18/2016	Processed	
	04/28/2016	2	Regular		04/25/2016	Pending	
	04/28/2016	1	Regular			Pending	
	05/05/2016		Regular		05/02/2016	Not Started	
	05/12/2016	1	Regular	03/28/2016	05/09/2016	Processed	

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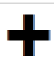
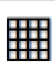
Several symbols are visible on various screens in the Payrolls menu, described in the table that follows.

Symbol	Description
	View – visible only on processed payrolls, click to view details of the payroll including batches, check lines, etc.
	Copy – visible on processed payrolls only, enabling them to be copied for processing.
	Payroll Results – click to view details about payrolls with a status of Processed (P) and Void (V).
	Edit – visible on payrolls that have been started, but not processed. Click to make changes, add a new batch, filter the information differently, or add new checks.
	Add – click to add a new batch to scheduled payrolls, or to add a new payroll.
	Delete – click to delete previous changes. Also, to delete a batch.
	Cancel Changes – click to cancel changes made to a screen or payroll.
	On the Check Batches screen – clicking takes the user to the Check Batch Settings screen for the batch selected.
	On the Check Batch Settings screen – clicking takes the user back to the Check Batches screen.
	On the Check Batch Settings screen – clicking takes the user to the Check Batch Settings Table View screen listing the company employees.
	On the Payroll Timeline screen – changes the view to a Table view from the Card view.
	On the Payroll Timeline screen – changes the view to the Card view from the Table view.
	On the bottom right of the Batch checks screen – click to open a list of E/D Codes to create additional columns on the checks list.

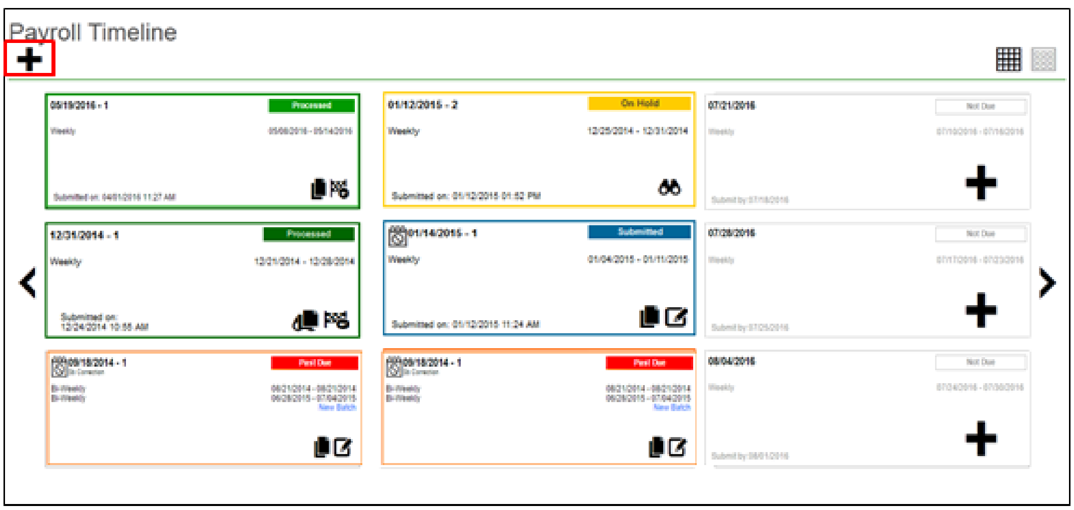
There are four symbols on the right-hand side of the Header that visually lets the user know where they are in the Payroll process. These can also be clicked to go to specific screens in the process.

Symbol	Description
Batches	Batches – this button is active (green) while batches are being created. To view batch information after they have been created, click this button.
Checks	Checks - this button is active (green) while checks are being created. To view, add or edit checks after they have been created, click this button.
Totals	Payroll calculations - click a payroll to view or edit. Click to calculate totals when checks have been added or deleted from batches.
Finish	Process Payroll - this button is active (green) while payrolls are being finished and submitted for review or processing.

Creating a Scheduled Payroll

The Payrolls – Timeline screen is the first screen to open when clicking the Payroll menu.
To create a payroll in Evolution Payroll,

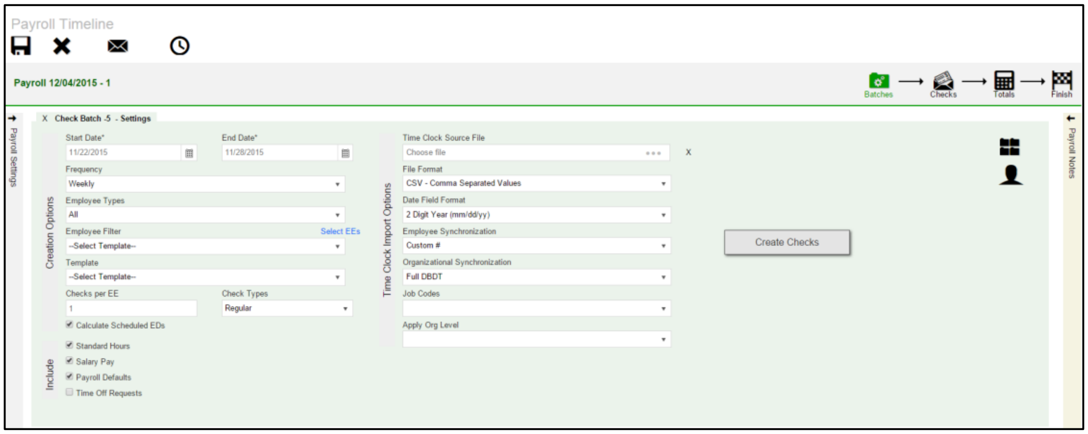
1. Click the **Payrolls** menu.



Click the large **plus** + **sign** in the header to create a new payroll.
Result: The Check Batch Settings screen opens.

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

Check Batch Settings Screen



1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the [Payrolls – Check Batch Settings Screen section]() in the Appendix at the end of this chapter.
2. Select the items to include in the payroll in the Include section.
3. Complete required and applicable fields in the Time Clock Import Options section.
4. Click the **Create Checks** button.
5. Click **OK** in the window that confirms the checks have been created.

   Result: The Batch Checks Screen opens.

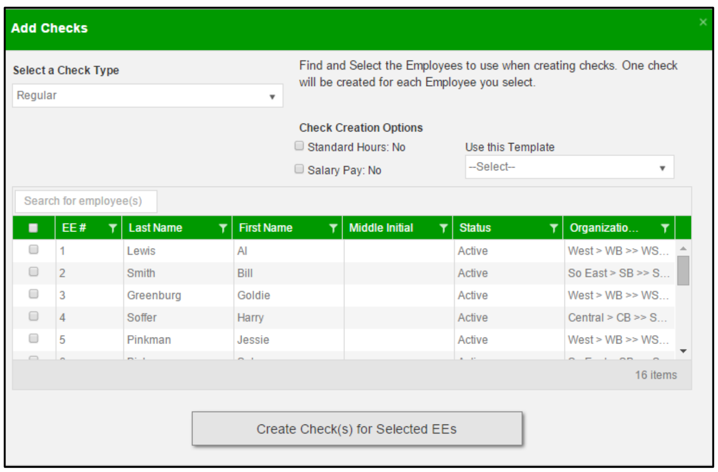
Batch Checks Screen

This screen offers three different viewing options, based upon the level of detail required by the user. The view is selected from the dropdown list in the far right of the Navigation Bar. For detailed information about the fields on this screen, refer to refer to the [Payrolls - Batch Checks Screen]() section in the Appendix at the end of this chapter.

Summary View

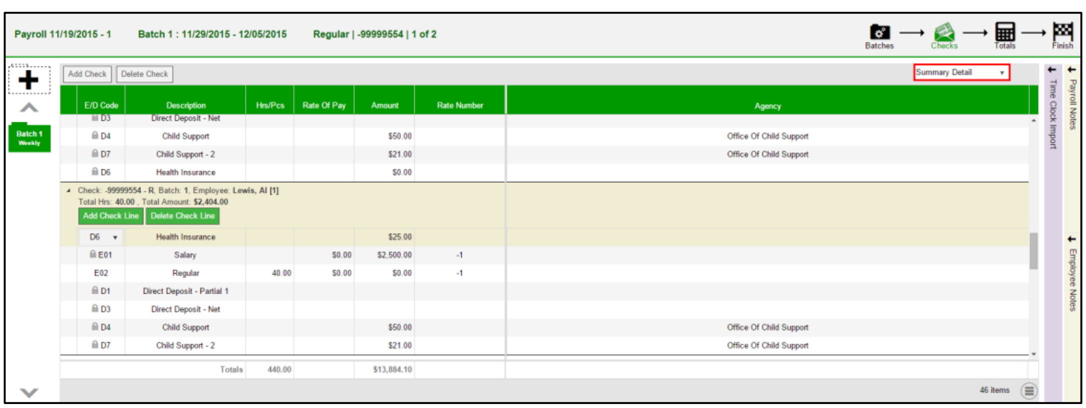
Default view, this is the check entry screen, on which the user can add checks and edit information for employee checks. The first five columns are read only. The columns that follow can be edited, as well as having columns added and subtracted.

- To add or edit a column
    1. Click within the column to edit of the check being modified.
    2. Once finished click **Save** in the Header.
- To add a check for employees
    1. Click the **Add Check** button in the Navigation bar.
       Result: The Add Checks screen opens.
    2. Select the Check Type being created.
    3. Select the employee(s) for whom to create a check.
    4. Click the **Create Check(s) for Selected EEs** button.
- To add additional E/D Codes as columns, click in the bottom right-hand corner of the screen, and select the E/D Codes from the list.



Summary Detail View

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



- To add a check for employees
    1. Click the **Add Check** button in the Navigation bar.
       Result: The Add Checks screen opens.

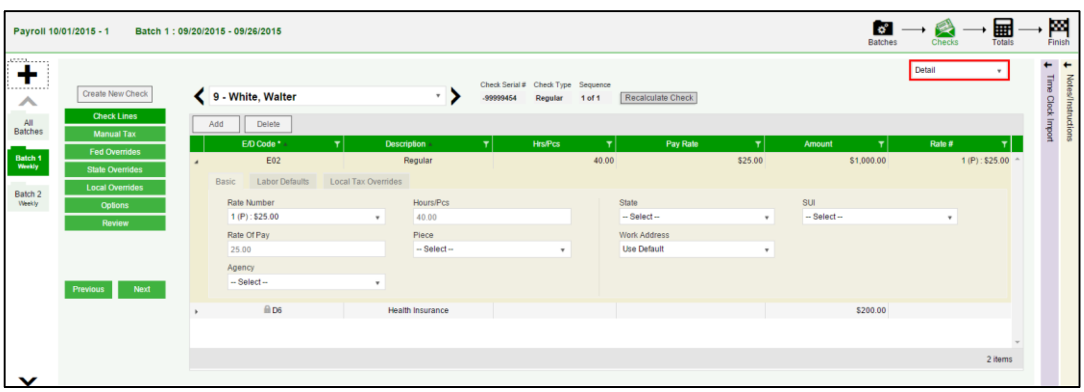
2. Select the Check Type being created.
3. Select the employee(s) for whom to create a check.
4. Click the **Create Check(s) for Selected EEs** button.

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

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

Detail View

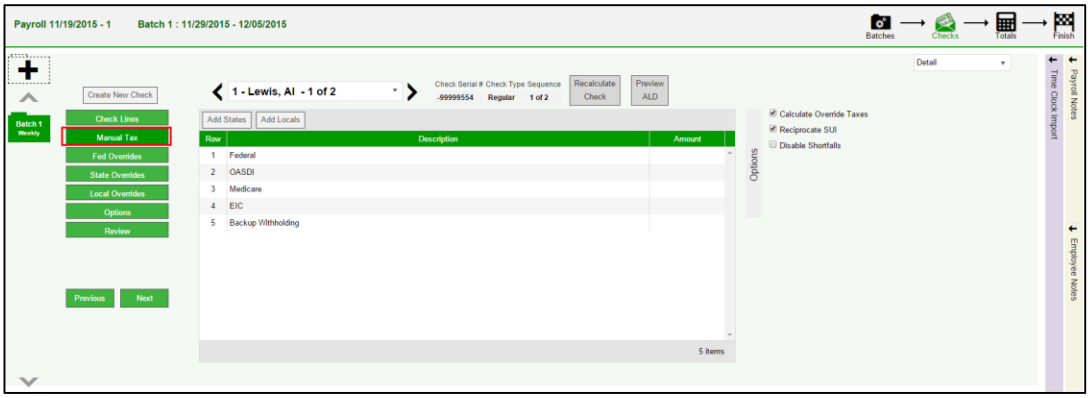
The Detail view provides the most detailed view of each check, and offers editing capabilities, as well as the ability to add (or delete) additional E/D Codes to the checks.



1. Complete the required and applicable fields on this screen as well as on the Labor Defaults and Local Tax Overrides tabs. For detailed information about the fields on these screens, refer to refer to the Payrolls – Check Lines Screen section in the Appendix at the end of this chapter.
2. Click the Payroll – Manual Tax menu item.
3. Press the **TAB** key or click the **Next** button when you complete entering information on this screen.

Manual Tax screen

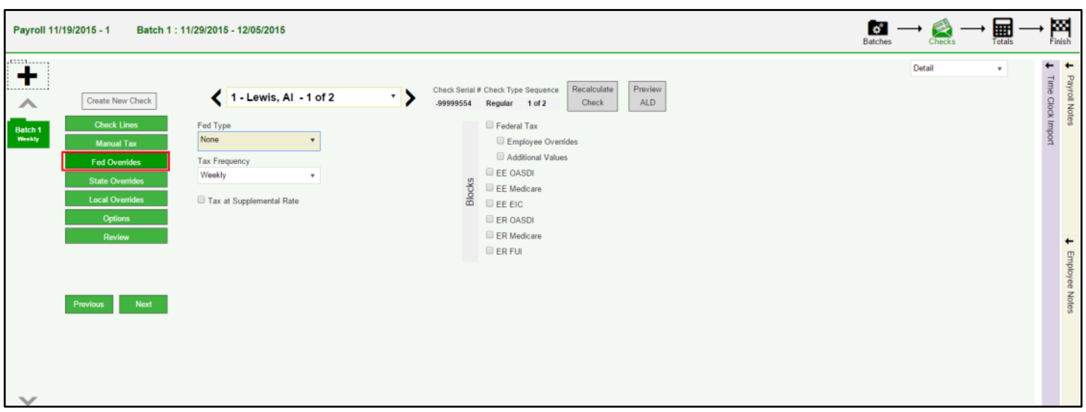
Click the **Manual Tax** tab to override a tax for the check if applicable. The information on this screen is the same as is on the Payrolls > Check > Manual Tax tab in Evolution. For detailed information about this screen, refer to the Payrolls – Manual Tax screen in the Appendix at the end of this chapter.



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

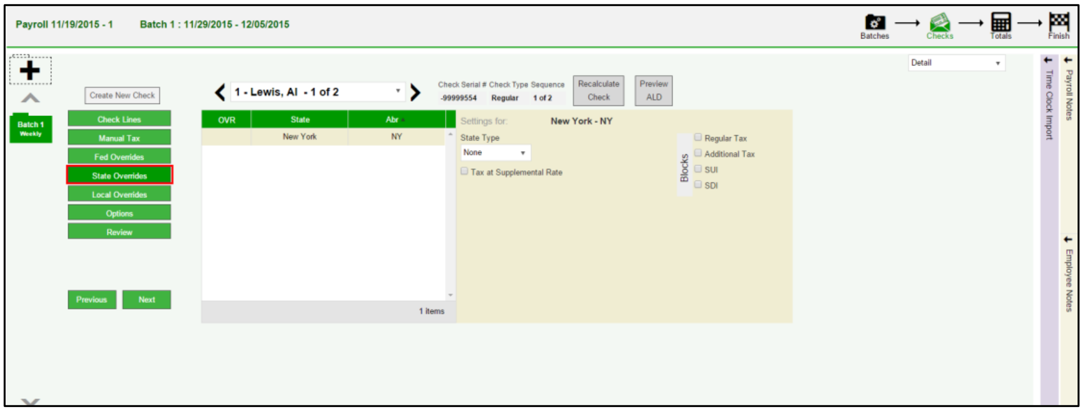
Fed Overrides screen

Click the **Fed Overrides** tab to block or override Federal taxes. Information on this screen is the same information as is found on the Payrolls – Check – Tax Overrides tab in Evolution. The State and Local tabs require the same information, regarding the state or local taxes for the employee. For detailed information about this screen, refer to the Payrolls – Fed Overrides screen section in the Appendix at the end of this chapter.



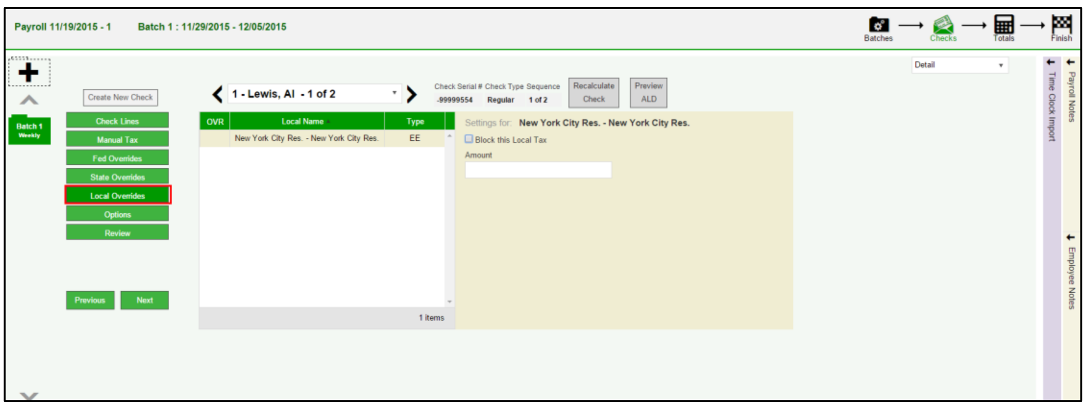
1. Complete the applicable fields. For detailed information about the fields on this screen, refer to page 89 in this document.
2. Click the **Payroll – State Overrides** tab.

State Overrides screen



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

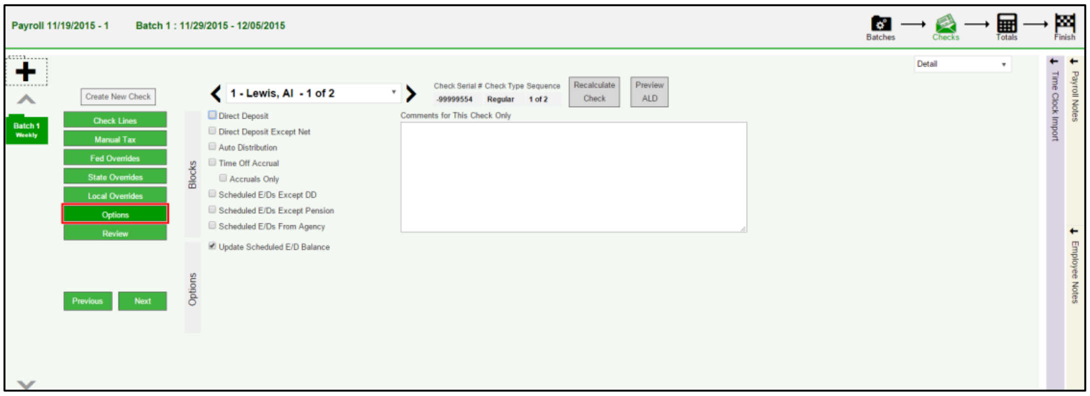
Local Overrides screen



3. Complete the applicable fields.
4. Click the **Payroll – Options** tab.

Payroll - Options screen

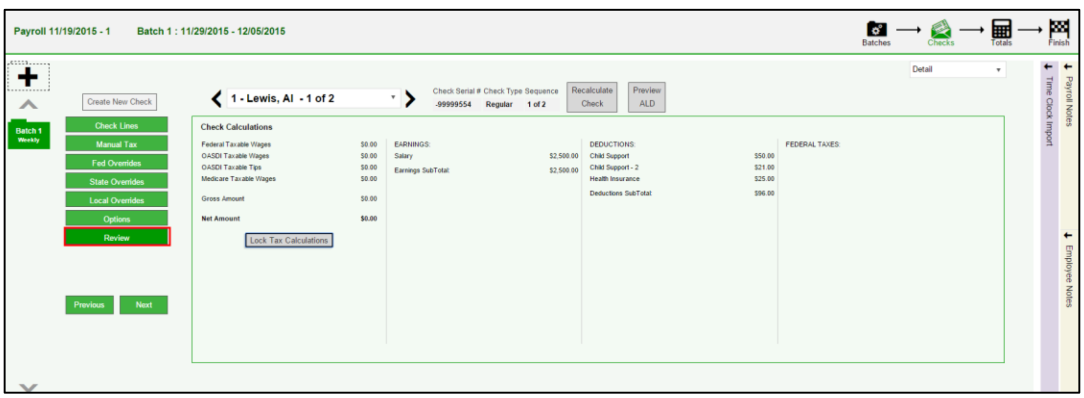
Click the **Payrolls –Options** tab to block scheduled earnings and deductions on employee checks. The information on this screen can be found mostly on the Payroll – Check – General tab.



1. Complete the applicable fields. For detailed information about the fields on this screen, refer to the Payrolls – Options Screen section in the Appendix at the end of this chapter.
2. Click the **Review** tab.
3. Click the **Review** tab to review [unprocessed] payroll checks with overrides, to verify for accuracy before submitting to payroll. For detailed information about these screens, refer to page 88 in this document.

Payroll - Review screen

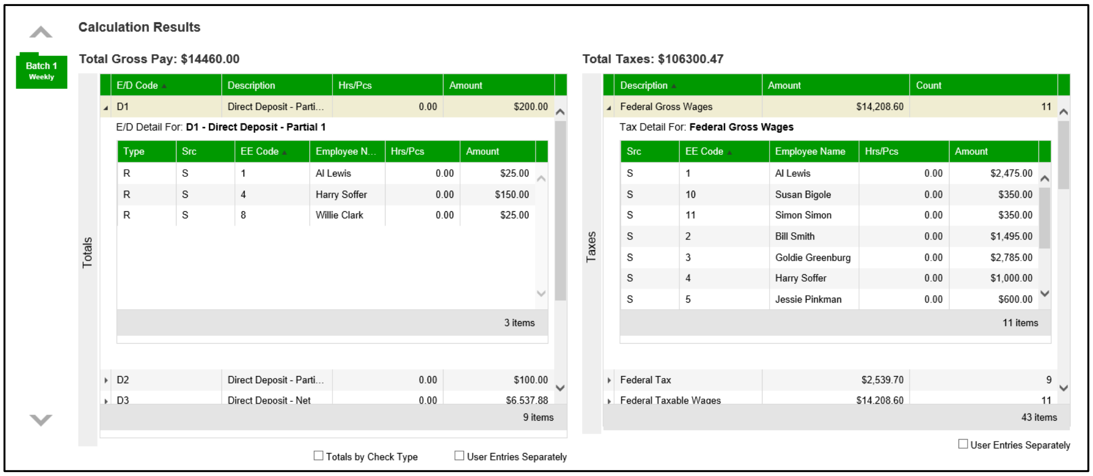
1. Click the **Review** tab to review [unprocessed] payroll checks with overrides, to verify for accuracy before submitting to payroll. For detailed information about these screens, refer to the Payrolls – Review Screen section in the Appendix at the end of this chapter.



2. Once verified, click the **Lock Tax Calculations** button to save those figures.
3. Click the **Recalculate Taxes** button to recalculate any changes made.

Calculation Results screen

Click Totals in the header to access the Payroll – Calculation Results screen to review totals of earnings and deductions, and taxes. For detailed information about the fields on this screen, refer to the Payrolls – Calculation Results section in the Appendix at the end of this chapter.

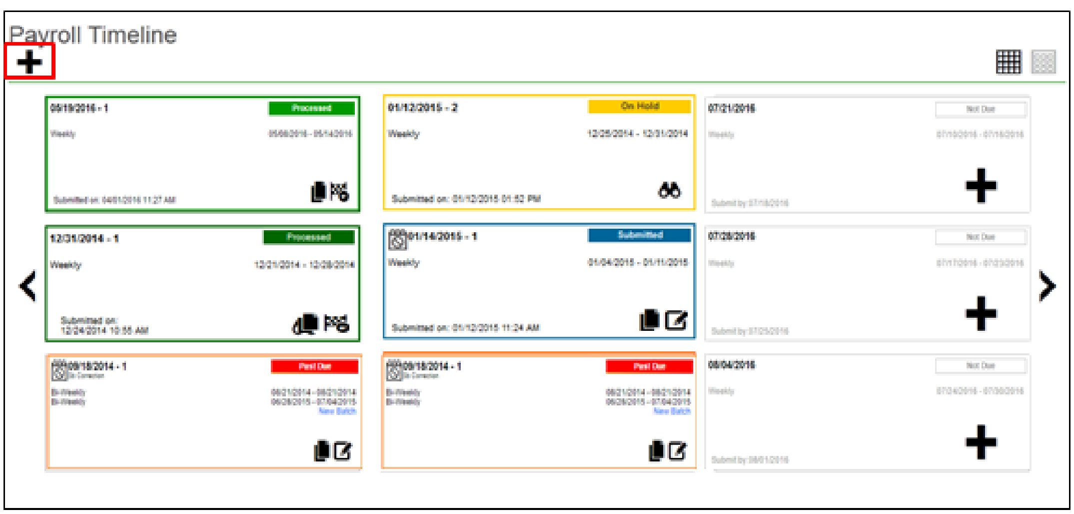


Note: if something needs to be edited, click the symbol in the header which brings you back to the Batch screen.

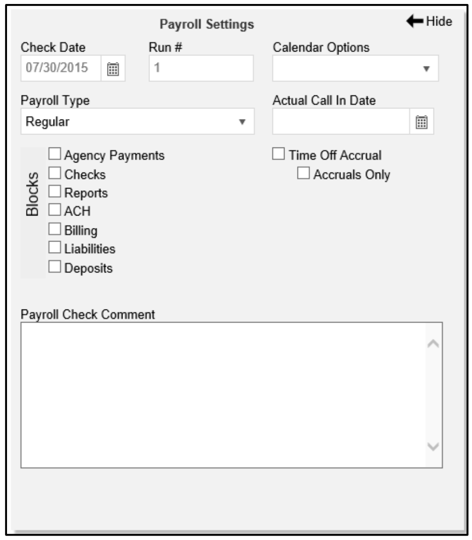
Creating an Unscheduled Payroll

To create a payroll that is not scheduled based on the calendar settings,

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

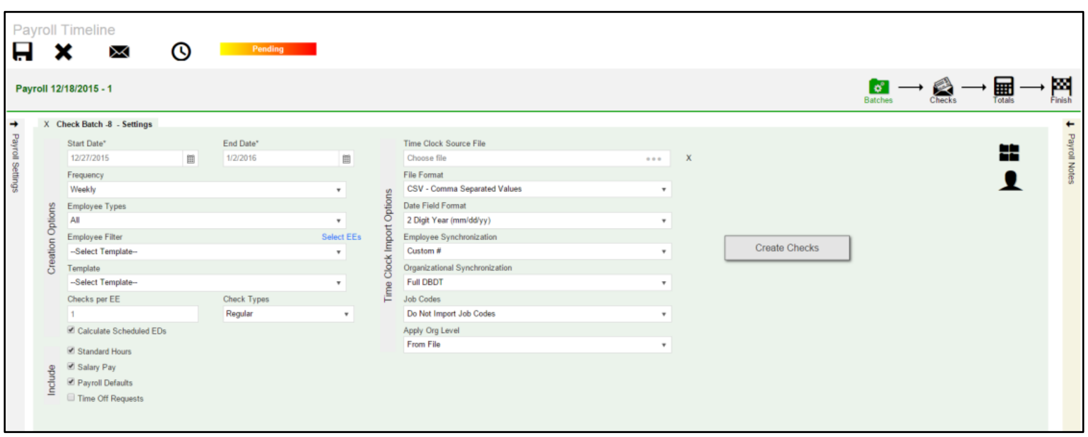


2. Click the large **plus** ✚ **sign** in the heading.
   Result: The Payroll Settings screen opens.



3. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the Payrolls – Payroll Settings screen section in the Appendix at the end of this chapter.
4. Click **Save** in the header on the left.
   Result: A status of Pending is displayed in the header on the left.
5. Click Hide in the upper right-hand corner of the Payroll Settings screen.
6. Click the large **plus sign** behind where the Payroll Settings screen was, to continue.
   Result: The Check Batch Settings screen opens.

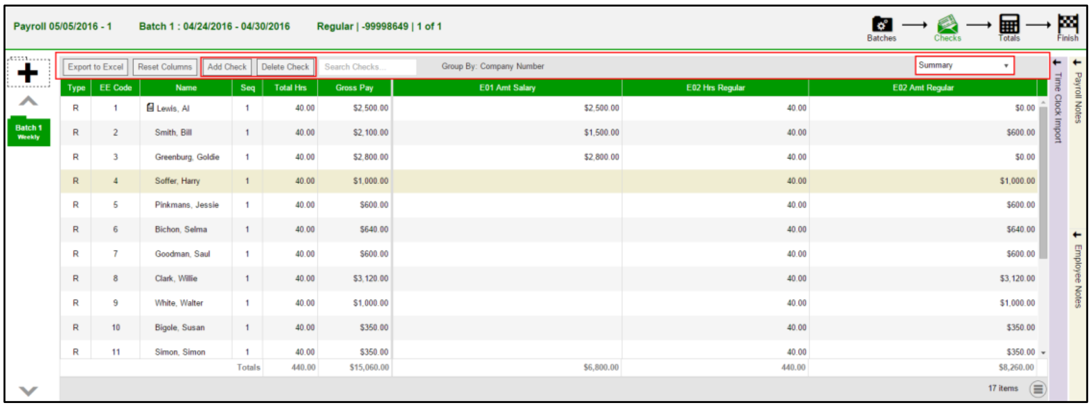
Check Batch Settings screen



1. Complete the required and applicable fields. For detailed information about the fields on this screen, refer to the Payrolls – Check Batch Settings screen section in the Appendix at the end of this chapter.
2. Select the items to include in the payroll in the Include section.
3. Complete required and applicable fields in the Time Clock Import Options section.

4. Click the **Create Checks** button.
5. Click **OK** in the window that confirms the checks have been created.
   Result: The Batch Checks Screen opens.

Payrolls - Batch Checks Screen

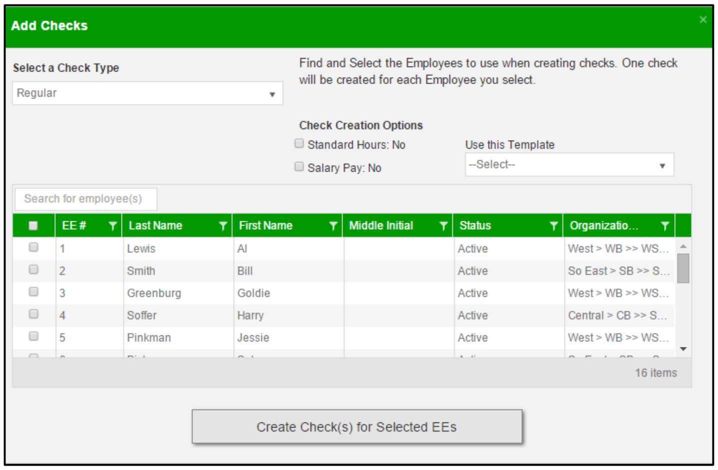


This screen offers three different viewing options, based upon the level of detail required by the user. The view is selected from the dropdown list in the far right of the Navigation Bar. For detailed information about the fields on this screen, refer to the Payrolls – Batch Checks screen section in the Appendix at the end of this chapter.

Summary View

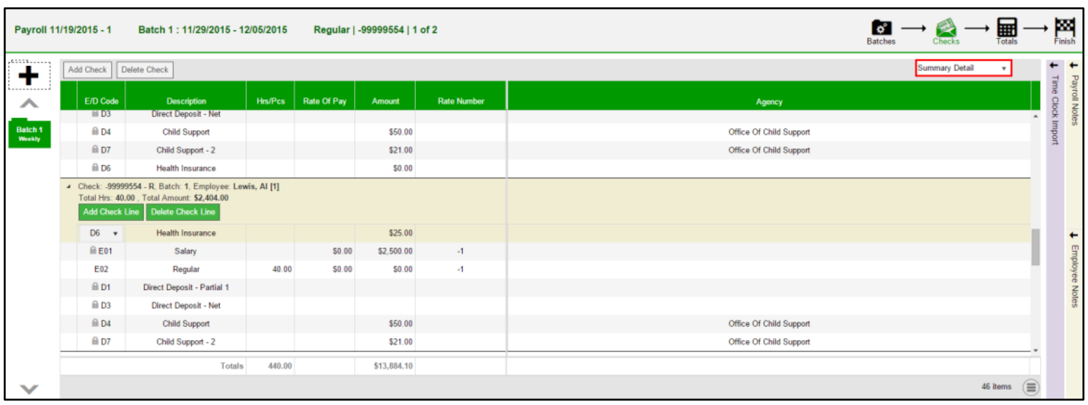
Default view, this is the check entry screen, on which the user can add checks and edit information for employee checks. The first five columns are read only. The columns that follow can be edited, as well as having columns added and subtracted.

- To add or edit a column
  1. Click within the column to edit of the check being modified.
  2. Once finished click **Save** in the Header.
- To add a check for employees
  1. Click the **Add Check** button in the Navigation bar.
     Result: The Add Checks screen opens.
  2. Select the Check Type being created.
  3. Select the employee(s) for whom to create a check.
  4. Click the **Create Check(s) for Selected EEs** button.
     Result: The Batch Checks screen reopens with the new check(s) listed.
- To add additional E/D Codes as columns, click  in the bottom right-hand corner of the screen, and select the E/D Codes from the list.



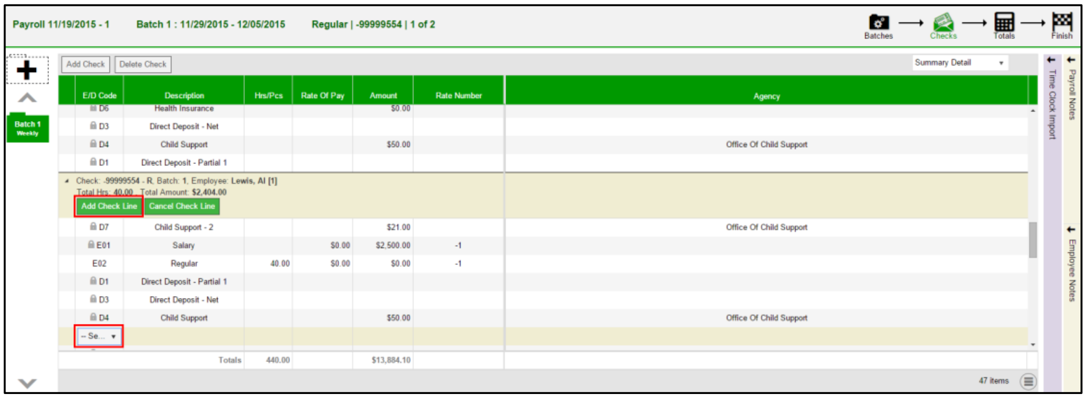
Summary Detail View

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



- To add a check for employees
  1. Click the **Add Check** button in the Navigation bar.

     Result: The Add Checks screen opens.
  2. Select the Check Type being created.
  3. Select the employee(s) for whom to create a check.
  4. Click the **Create Check(s) for Selected EEs** button.
- To add a Check Line click the **Add Check Line** button.

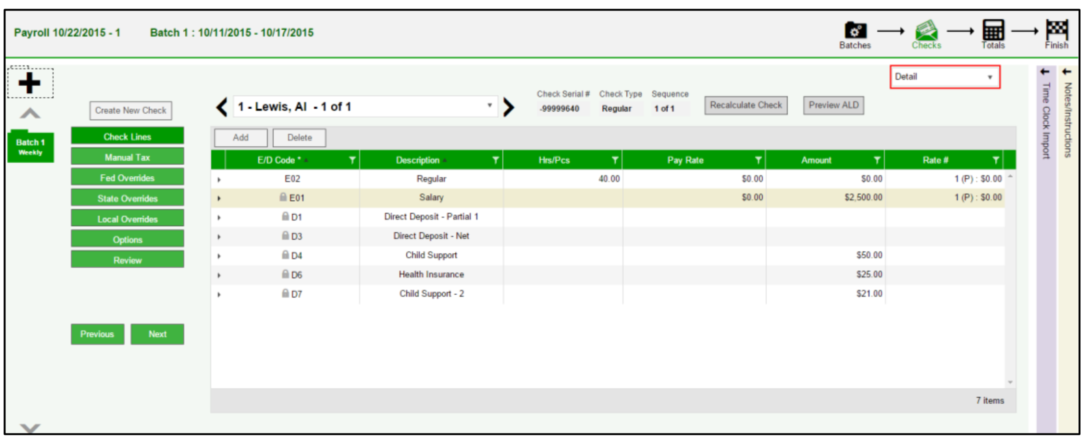


5. Select an E/D Code from the dropdown list.
6. Click **Save** in the Header.

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

Detail View

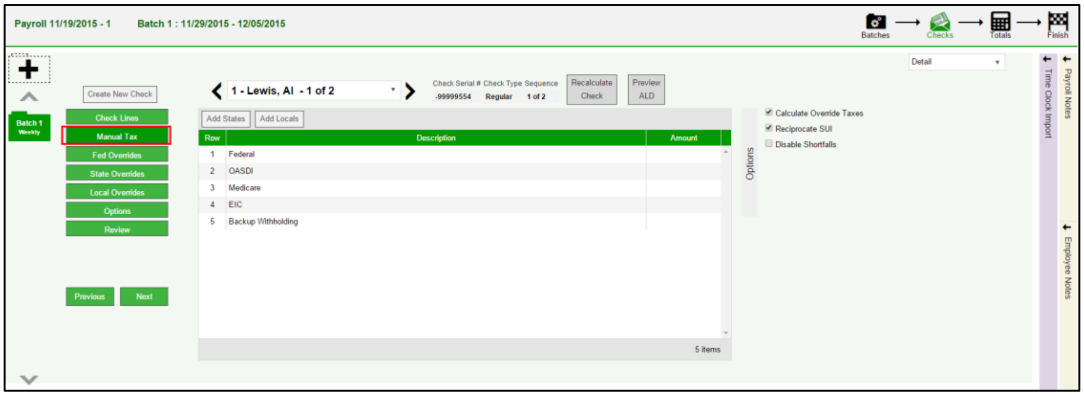
The Detail view provides the most detailed view of each check, and offers editing capabilities, as well as the ability to add (or delete) additional E/D Codes to the checks.



1. Complete the required and applicable fields on this screen as well as on the Labor Defaults and Local Tax Overrides tabs. For detailed information about the fields on this screen, refer to the pages beginning at the Payrolls – Batch Checks screen section in the Appendix at the end of this chapter.
2. Click the Payroll – Manual Tax menu item.
3. Press the **TAB** key or click the **Next** button when you complete entering information on this screen.

Manual Tax screen

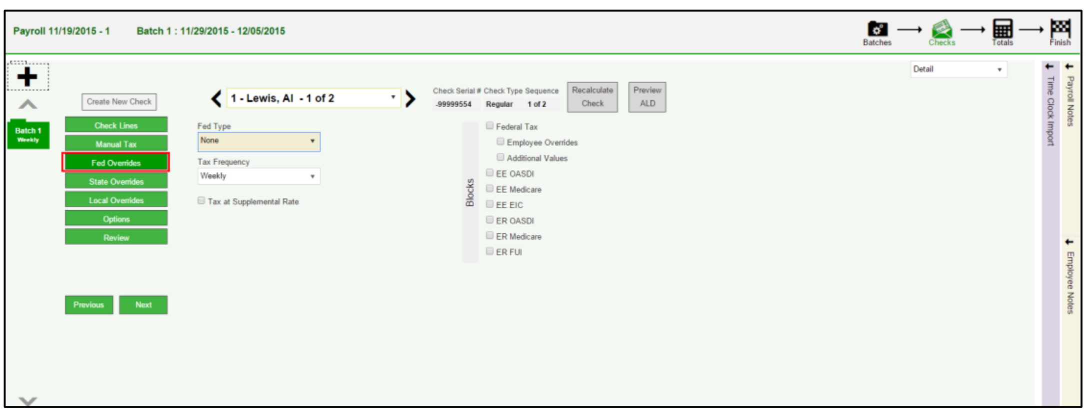
Click the **Manual Tax** tab to override a tax for the check if applicable. The information on this screen is the same as is on the Payrolls > Check > Manual Tax tab in Evolution. For detailed information about this screen, refer the Payrolls – Manual Tax screen section in the Appendix at the end of this chapter.



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

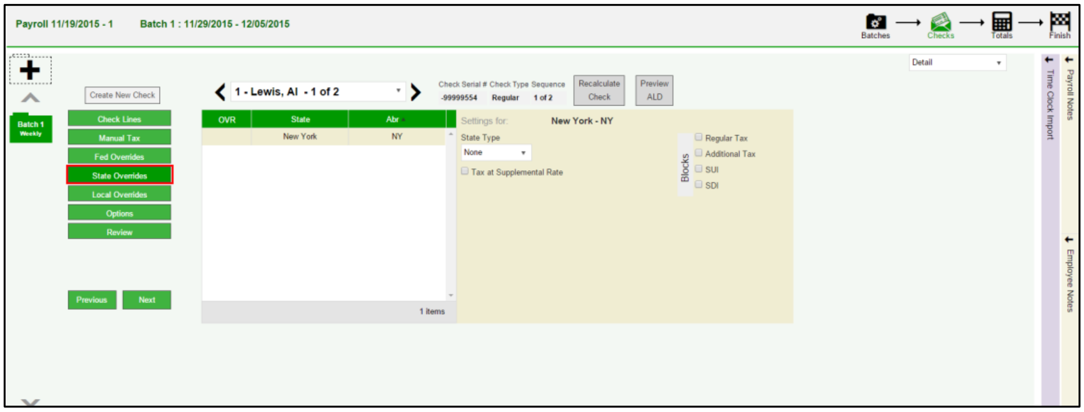
Fed Overrides screen

Click the **Fed Overrides** tab to block or override Federal taxes. Information on this screen is the same information as is found on the Payrolls – Check – Tax Overrides tab in Evolution. The State and Local tabs require the same information, regarding the state or local taxes for the employee. For detailed information about this screen, refer the Payrolls – Fed Overrides screen section in the Appendix at the end of this chapter.



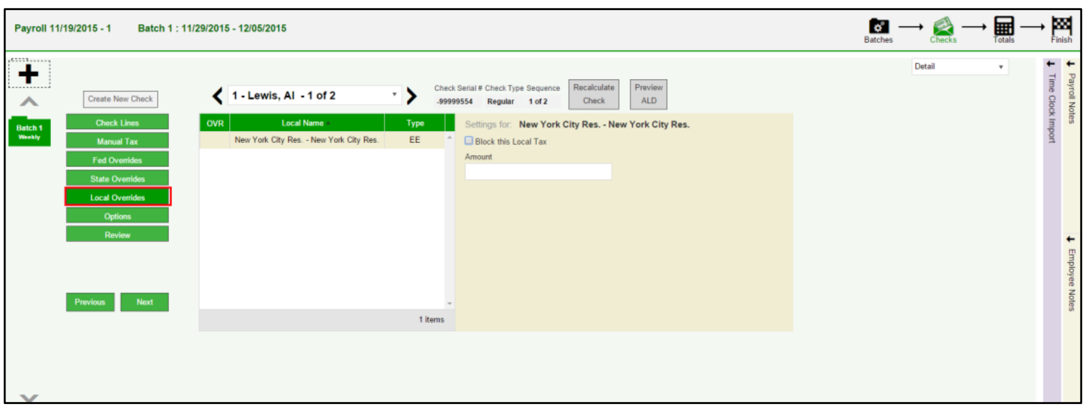
1. Complete the applicable fields. For detailed information about the fields on this screen, refer to page 89 in this document.
2. Click the **Payroll – State Overrides** tab.

State Overrides screen



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

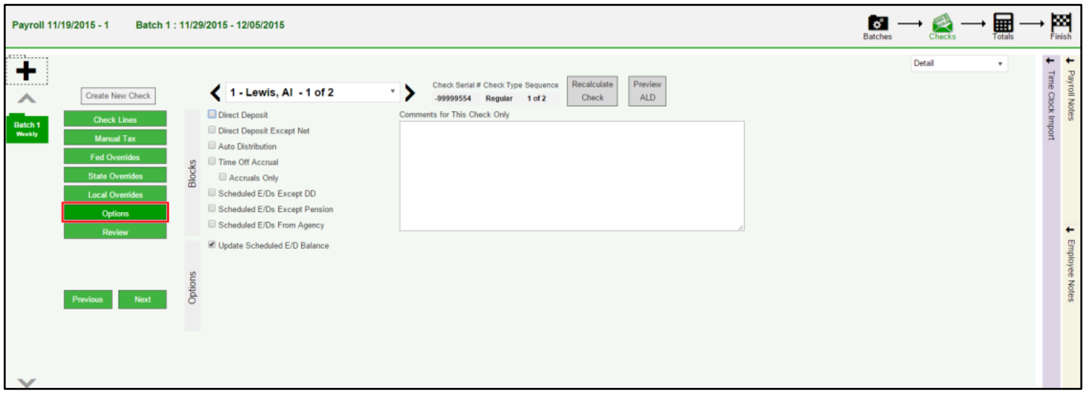
Local Overrides screen



3. Complete the applicable fields.
4. Click the **Payroll – Options** tab.

Payroll - Options screen

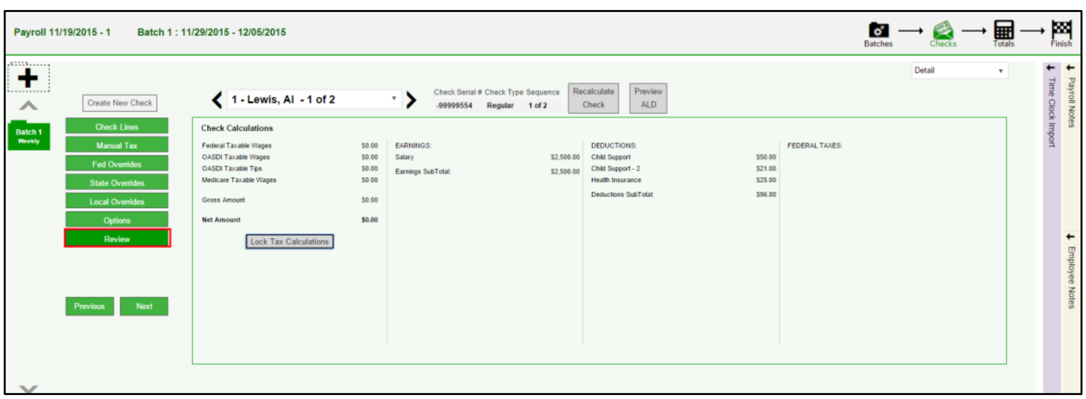
Click the **Payrolls –Options** tab to block scheduled earnings and deductions on employee checks. The information on this screen can be found mostly on the Payroll – Check – General tab.



1. Complete the applicable fields. For detailed information about the fields on this screen, refer to the Payrolls – Options screen section in the Appendix at the end of this chapter.
2. Click the **Review** tab to review [unprocessed] payroll checks with overrides, to verify for accuracy before submitting to payroll.

Payroll - Review screen

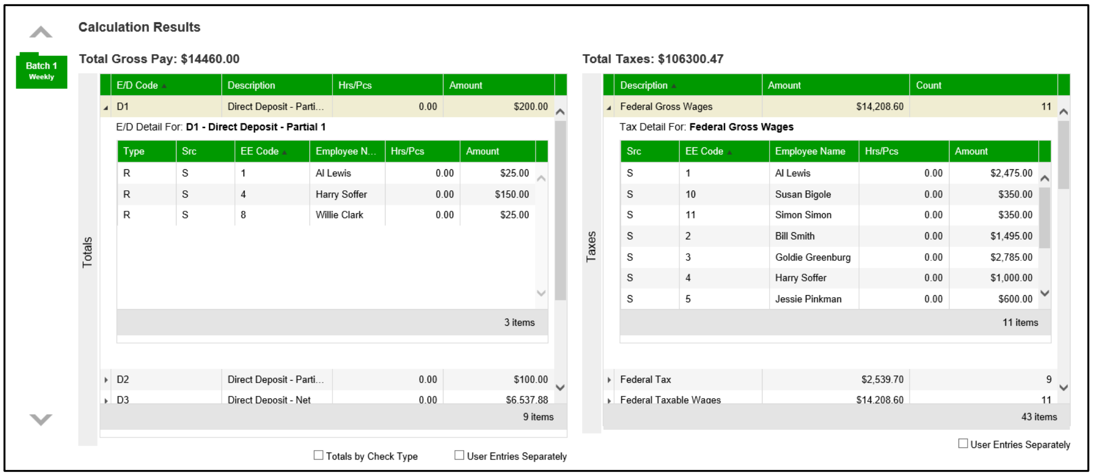
1. Click the **Review** tab to review [unprocessed] payroll checks with overrides, to verify for accuracy before submitting to payroll. For detailed information about these screens, refer to the Payrolls – Review screen section in the Appendix at the end of this chapter.



2. Once verified, click the **Lock Tax Calculations** button to save those figures.
3. Click the **Recalculate Taxes** button to recalculate any changes made.

Calculation Results screen

Click Totals in the header to access the Payroll – Calculation Results screen to review totals of earnings and deductions, and taxes. For detailed information about the fields on this screen, refer to the [Payrolls – Calculation Results screen] in the Appendix at the end of this chapter.

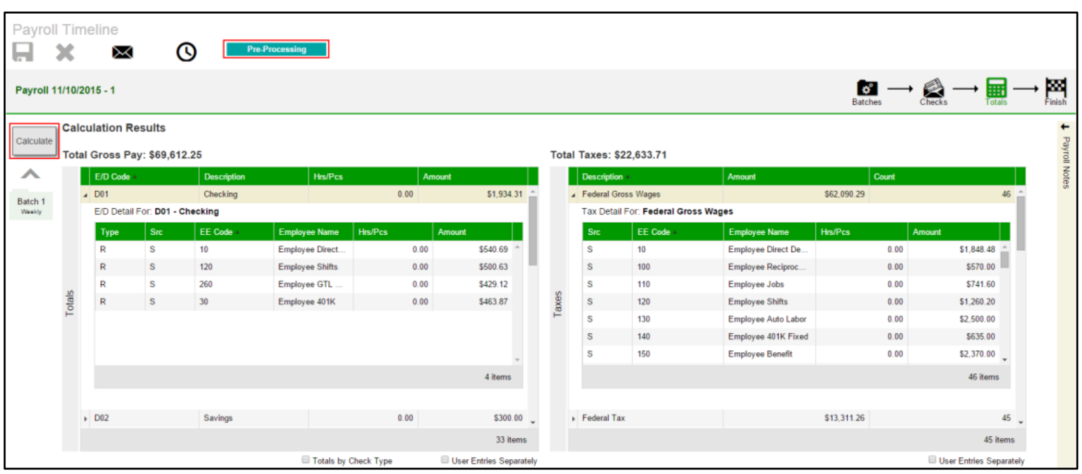


Note: if something needs to be edited, click the Batches symbol in the header which brings you back to the Batch screen.

Pre-Processing and Submitting the Payroll

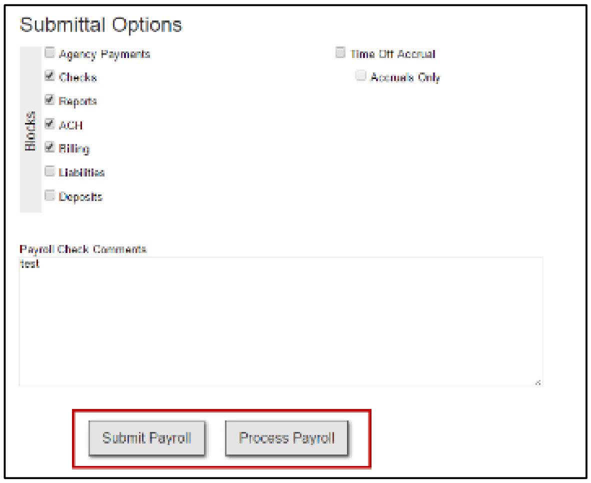
Prior to submitting the payroll, we recommend pre-processing the payroll as we do in Evolution.

When you click **Calculate** Calculate to the left of the screen name the Status changes from **Pending** to **Pre-Processing**, and a message is created in the upper right corner of the screen advising that the task was added to the queue (lower left-hand corner as is in Evolution).



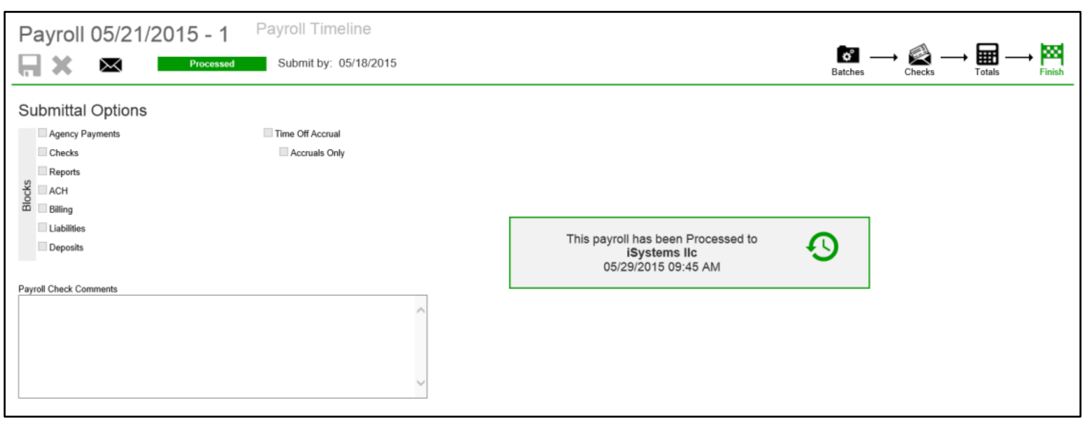
Result: The Status changes back to **Pending** once the Pre-Processing is complete.

4. Finally, click **Finish**  in the header.
   Result: the Submittal Options screen opens.



5. Add final Submittal Options.
6. Click **Submit Payroll** or **Process Payroll**, depending on the arrangement with the client.
   Submit Payroll – The Status of the payroll is changed to **Submitted** until the payroll is processed by the service bureau; at which time the Status will change to **Processed**.
   Process Payroll – The payroll is processed directly, and the Status will change to **Processed**, rather than being submitted for processing at the service bureau. (Additional security rights are required, and are described at the beginning of this section.)

Note: The Manager Approval requirements established in Evolution Classic apply in Evolution Payroll. If a payroll requires manager approval, the payroll goes into the Approve Payroll queue in the Evolution Classic Operations tab. If a payroll does not require manager approval, the payroll goes into the Process Payroll queue in the Evolution Classic Operations tab.



Editing / Completing a Payroll

Payrolls with a status of **Past Due** or **Pending** are the only payrolls that can be edited, and have an Edit symbol in the lower right-hand corner of the coupon.

To edit a payroll,

1. Go to the Payroll – Payroll Timeline screen.
2. Click the **Edit** symbol on the payroll to be edited.

   Result: The Batch Checks screen opens.
3. Make all necessary edits and process the payroll.

Viewing the Results Screen

Security Settings

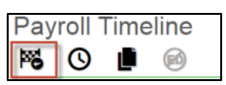
The following security settings must be enabled in Evolution Classic for a user to have access to the full features on the Results screen.

1. Go to the Admin – Security – Users screen.
2. Select the user from the list.
3. Click the **Details** tab.
4. Click the **Functions** button.
5. Enable the following functions:
   a. Ability to reprint payroll reports.
   b. Ability to reprint processed payroll checks
   c. Ability to reprint processed misc checks.

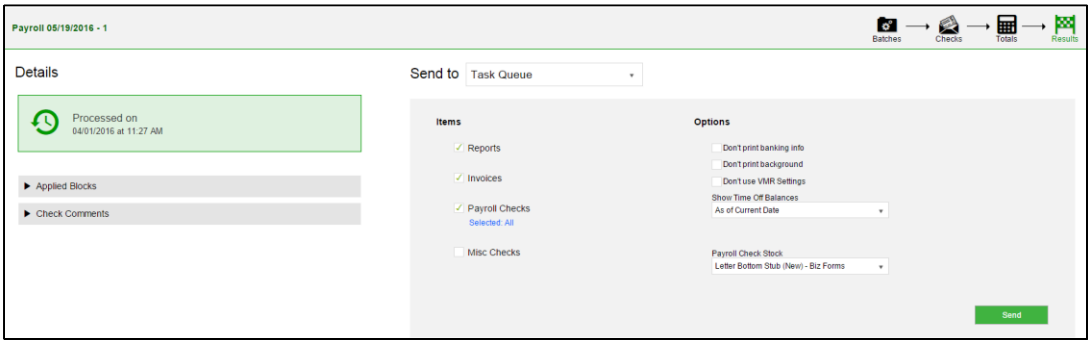
Note: If a specific item is disabled for a user (Payroll Checks, Misc Checks, Reports (including invoice) – the corresponding checkbox on the Results screen will be disabled and the text "(No Access)" below it.

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

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



Result: The Results screen opens.

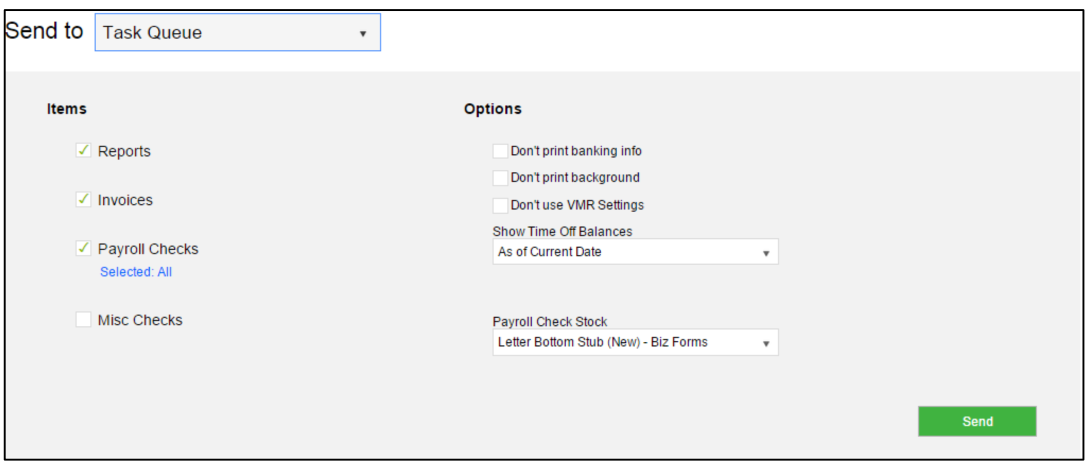


The Results screen includes the following

- Date and time the payroll was processed
- Any blocks applied to the payroll while setting it up
- Comments entered for the payroll processors
- On Premise Printing - users can reprint reports, invoices, payroll checks, or miscellaneous checks from the Results screen. Users can select one or more individual payroll and/or miscellaneous checks to reprint.
- Send to – reprinted reports, invoices and/or checks can be sent through the Task Queue or via VMR if applicable. Select the location from the dropdown list.

Reprinting Reports and Invoices

1. In the Items section of the Results screen, select the checkbox (es) next to the items to be reprinted.

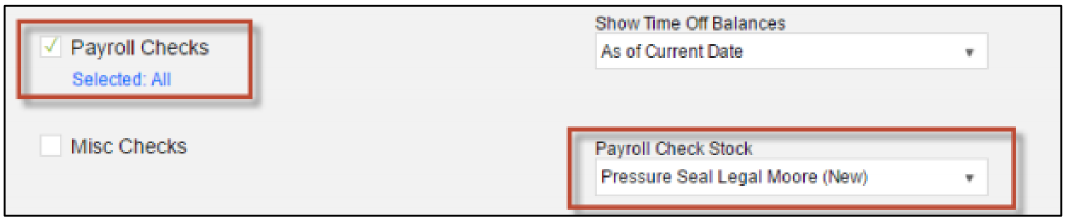


2. Select the applicable options for the reports and/or invoices being reprinted.
   a. Don't print banking info
   b. Don't print background
   c. Don't use VMR settings (this option displays only when the user selects Send to: Task Queue; it does not appear when the user selects Send to: Virtual Mailroom.)
3. Time-off balances can be shown as of the **Current Day** or as of a **Historical Date**, using the dropdown field.
4. Click the **Send** button to send to the location specified in the **Send to** field. Note that the user is not printing directly to a printer.

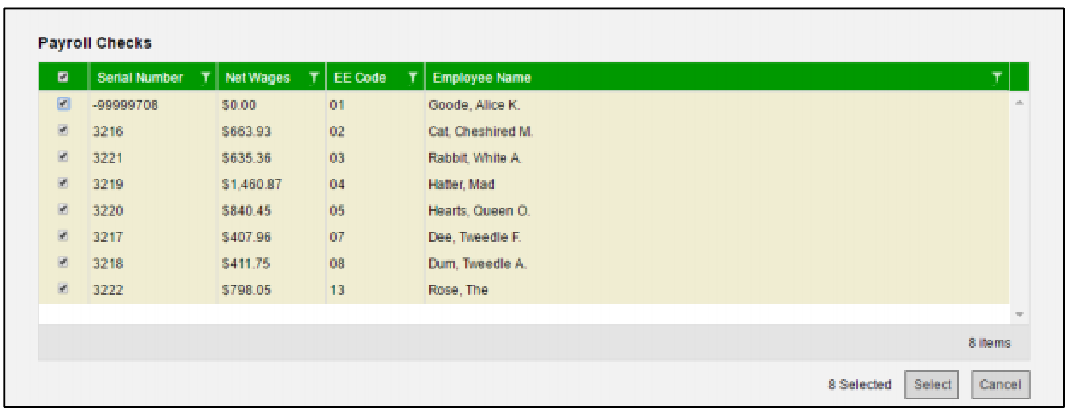
Reprinting Payroll Checks

Users can select one or more individual payroll checks to reprint. To do this,

1. Select **Payroll Checks** in the Items section of the Results screen.
2. When the user selects Payroll Checks, the **Selected: All** link is displayed, signifying that the system is applying the default, which is to select all Payroll Checks.
3. Select the payroll check stock for printing the checks from the Payroll Check Stock dropdown on the right side of the screen.



4. To select a specific payroll check(s) to reprint, rather than all checks, click the **Selected: All** link.
   Result: The Payroll Checks screen opens, where specific checks are selected for reprinting.



☑	Serial Number	Net Wages	EE Code	Employee Name
☑	-99999708	$0.00	01	Goode, Alice K.
☑	3216	$663.93	02	Cat, Cheshired M.
☑	3221	$635.36	03	Rabbit, White A.
☑	3219	$1,460.87	04	Hatter, Mad
☑	3220	$840.45	05	Hearts, Queen O.
☑	3217	$407.96	07	Dee, Tweedle F.
☑	3218	$411.75	08	Dum, Tweedle A.
☑	3222	$798.05	13	Rose, The

5. Select the checkboxes for the checks to be reprinted.
6. Click the **Select** button.
7. Select the applicable options for the reports and/or invoices being reprinted.
   a. Don't print banking info
   b. Don't print background
   c. Don't use VMR settings
8. Time-off balances can be shown as of the **Current Day** or as of a **Historical Date**, using the dropdown field.
9. Click the **Send** button to send to the location specified in the **Send to** field. Note that the user is not printing directly to a printer.

Reprinting Misc Checks

Users can select one or more individual miscellaneous checks to reprint. To do this,

1. Select the Misc Checks option in the Items section of the Results screen.
2. Result: The **Selected: None** link appears below signifying that the system is applying the default: no Misc checks are selected – Note that this is the opposite of the behavior with the Payroll Checks option.
3. Select the payroll check stock for printing the checks from the Payroll Check Stock dropdown on the right side of the screen.

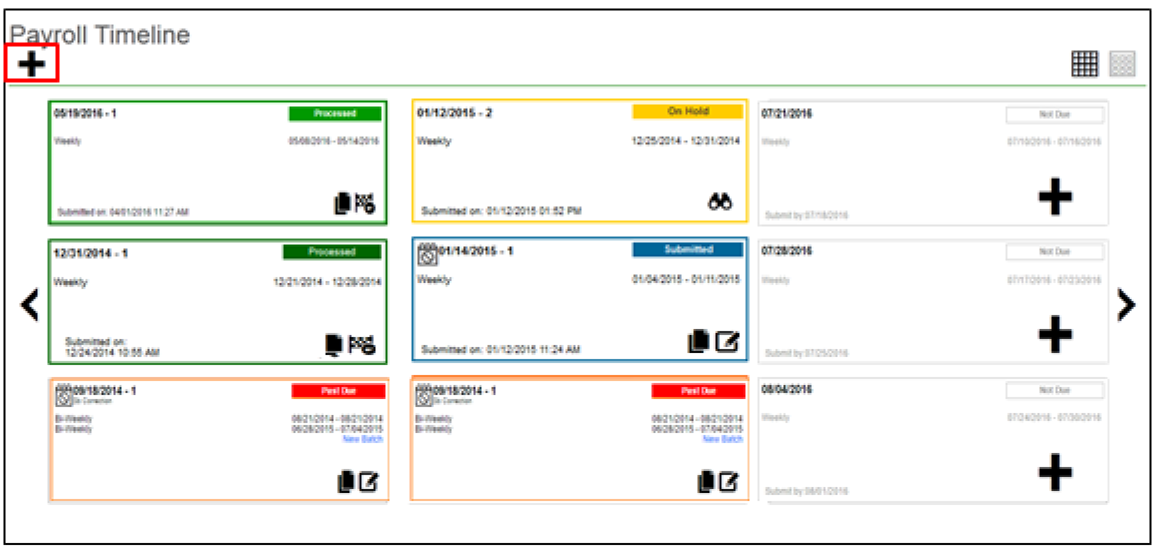
4. To select a specific miscellaneous check(s) to reprint, rather than all checks, click the **Selected: All** link.
5. Select the checkboxes for the checks to be reprinted.
6. Click the **Select** button.
7. Select the applicable options for the checks being reprinted.
    a. Don't print banking info
    b. Don't print background
    c. Don't use VMR settings
8. Time-off balances can be shown as of the **Current Day** or as of a **Historical Date**, using the dropdown field.
9. Click the **Send** button to send to the location specified in the **Send to** field. Note that the user is not printing directly to a printer.

Copying a Payroll

Payrolls can be copied directly from the Payroll Timeline screen (in either the Payroll Table view or the Payroll Card view) in Evolution Payroll. Note that void checks, or a voided check, will not be copied by the system.

Copying a payroll in Card view

1. Click the Payrolls menu on the left-hand side of the screen.
   Result: The Payroll Timeline screen is displayed in Card view.

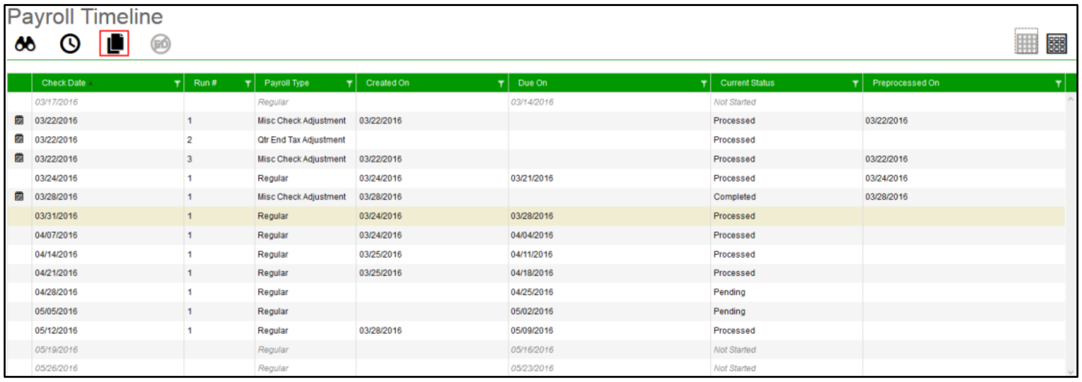


2. Click the Copy Payroll symbol in the bottom right corner of the Payroll Card to be copied
3. A confirmation message is displayed: "Any voids or manual checks in the original payroll will be ignored. Are you sure you want to copy this payroll."
4. Click **Yes**.
   Result: The selected payroll is copied. The run number for the new copied payroll is automatically incremented by 1 from the highest current payroll run number.

Copying a Payroll in Table view

1. Go to the Payroll Timeline screen

2. Click the Table view symbol in the header.

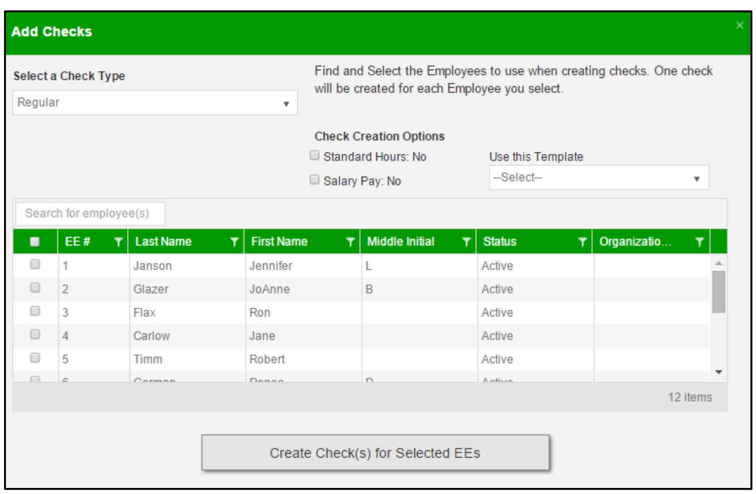


3. Select a payroll (row) on the screen that you want to copy.
   - The Copy Payroll symbol is not displayed if a payroll with a status of Void or Not Started is selected.
   - You cannot copy a processed setup-run.
   - Payrolls with a status of Submitted or On Hold can be copied.
4. Click the **Copy Payroll** symbol in the top left of the header

Adding Additional Checks

To add additional checks to a payroll,

1. Go to the Payroll – Payroll Timeline screen.
2. Click the **Edit** symbol on the payroll to be edited.
   Result: The Batch Checks screen opens.
3. Click the **Add Check** button in the Navigation bar.
   Result: The Add Checks screen opens.



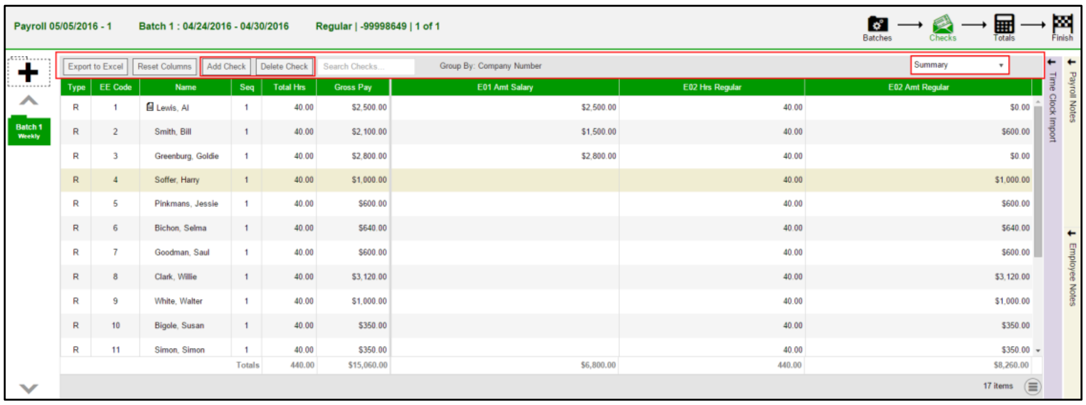
4. Select the Check Type being created.
5. Select the employee(s) for whom to create a check.
6. Click the **Create Check(s) for Selected EEs** button.

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

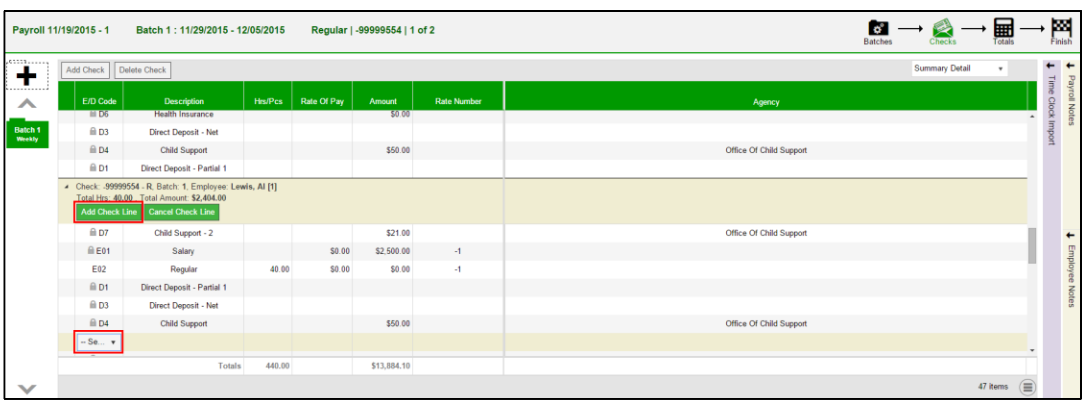
Adding Check Lines

1. Go to the Payroll – Payroll Timeline screen.
2. Click the **Edit** symbol on the payroll to be edited.

   Result: The Batch Checks screen opens.



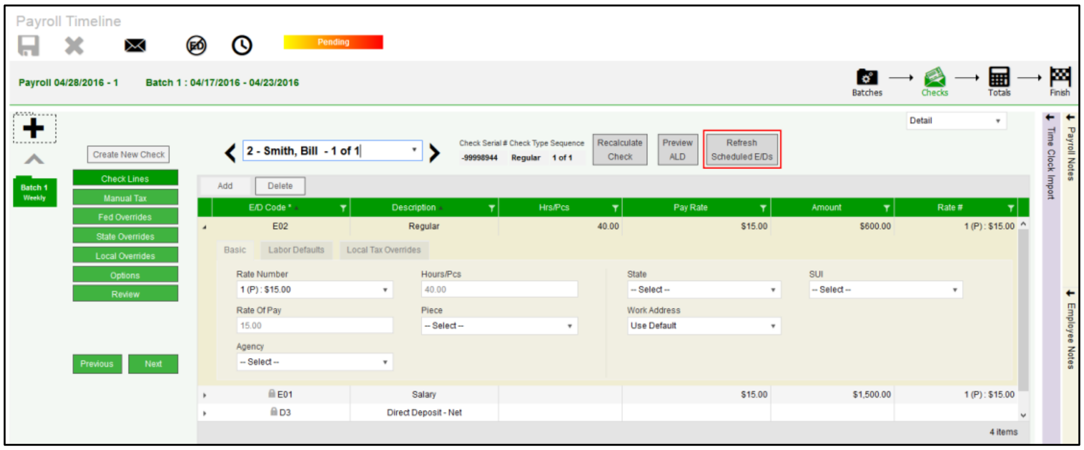
3. Change the view from **Summary** to **Summary Detail**.
4. Click the **Add Check Line** button.



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

Refreshing Scheduled E/Ds for Individual Checks

The Refresh Scheduled E/Ds button can be used to refresh E/Ds on selected Payroll screens, for example, after making changes to a check line for an individual pending check to revert all the Scheduled E/Ds in the check line to the values originally set up on the **Employee – Scheduled E/Ds** screen before doing the final processing for a check.



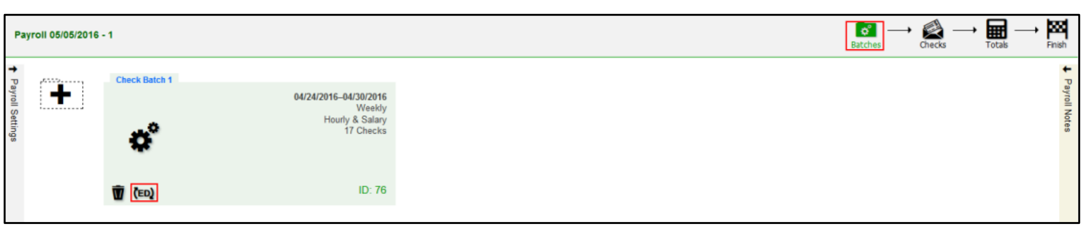
This feature can also be performed for check Batches.
After a user clicks the Refresh Scheduled E/Ds button, the payroll is locked from any adjustments while the refresh process is executing; it displays a “Refreshing E/Ds – Please wait” message. The Payroll hotkeys also do not work while the system is locked for the refreshing task.

- This feature is available for Checks in the Payroll – Detail view screen and for Batches, on the Batch Card on the Batches screen
- Manually-added check lines are not impacted by the Refresh Scheduled E/Ds process. If a user deletes a manually added check line – refreshing will not revert it back to the original value.
- If a user deletes a locked check line (E05 for example) and then adds a new check line of E05, when they click the Refresh Scheduled E/Ds button, the system will return the original E05 and leave the new one, so that there are now two check lines
- The Refresh Scheduled E/Ds button is not enabled for Third Party or Void checks.
- If a check has no check lines – the button remains enabled.
- The Copy Payroll button can be used if the user wants to use the default Scheduled E/D setup and the payroll being copied had changes to some of the Scheduled E/Ds.

Refreshing Scheduled E/Ds for Batches

Scheduled E/Ds can be refreshed at the Batch level.

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



2. Select the Batch for which to refresh the scheduled E/Ds

3. Click Refresh the E/Ds symbol for this Batch

Blocking Scheduled E/Ds from a Payroll

One or more Scheduled E/Ds can be blocked from a specific payroll.

1. Go to the Payroll – Payroll Timeline screen.
2. Click the Table view symbol in the header.
3. Select a payroll and click the Block Scheduled E/Ds symbol in the top left of the header
   Result: The Block Scheduled E/Ds screen is displayed.
4. Select all the Scheduled E/Ds to block from the payroll.
5. Select which batches from which the Scheduled E/Ds should be blocked.
6. Click **Apply**
   Result: The system displays a confirmation message "Are you sure you want to block the Scheduled E/Ds from the selected Batches? The selected batches will be refreshed and any previously applied blocks will be overwritten.
7. Click **Yes**.
   Result: The system displays a screen asking if you want to include Manual Checks.
8. Click **Yes** to include manual checks or No.
   - If **Yes**, the system performs the Block Scheduled E/Ds function including refreshing the Scheduled E/Ds for all (regular and manual) checks.
   - If **No**, the system performs the Block Scheduled E/Ds function for regular checks only and excludes manual checks.

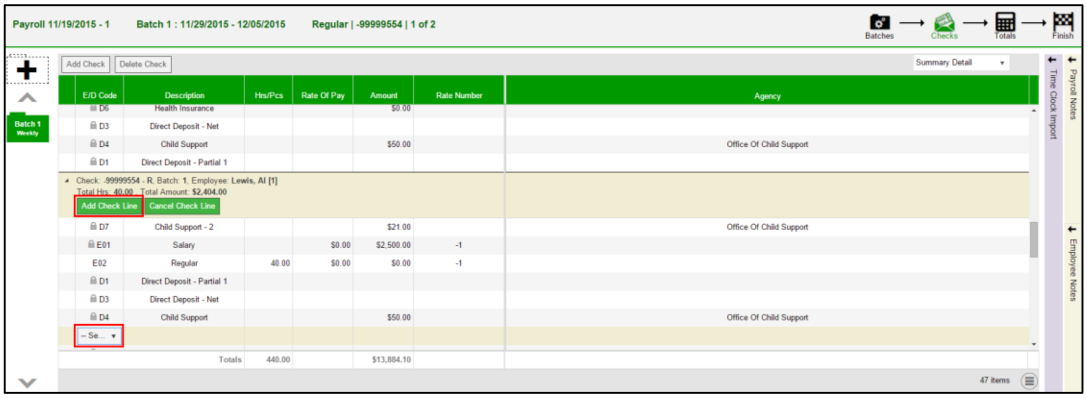
Note that this is a difference/improvement over Evolution Classic where if there were manual checks there were two Block Scheduled E/D buttons – Block Scheduled E/Ds & Block Scheduled E/Ds with manual.

Manual Checks

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

Creating a new batch

1. On the Payroll Timeline screen select a payroll with a status of Pending by clicking the **Edit** symbol.
2. Click the **Plus** sign on the Batch Checks screen to create a new batch.
   Result: the Check Batch Settings screen opens.

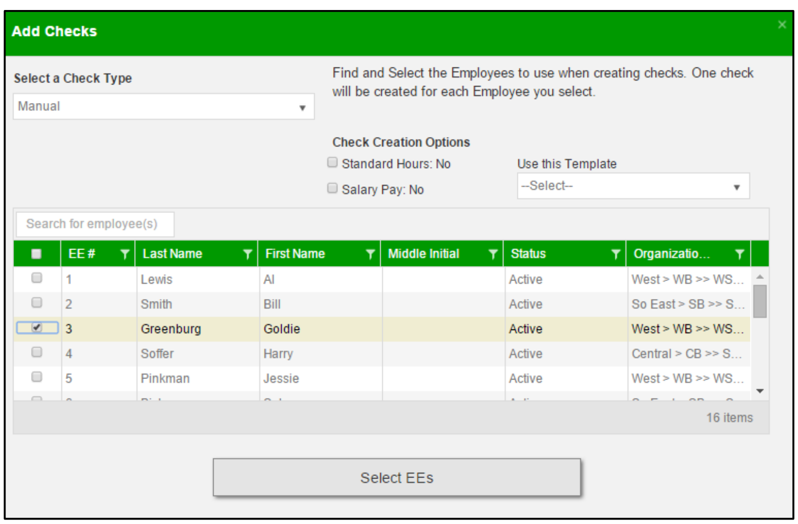


3. Complete the required and applicable fields, making sure to select **Manual** from the Check Types dropdown list.
4. A new field **Update Scheduled E/Ds Balance**, is displayed with a default value of **Yes**. Leave it as is, or change to **No** if applicable.
5. Click the **Create Checks** button and proceed as normal when running a payroll.

Adding to an existing batch

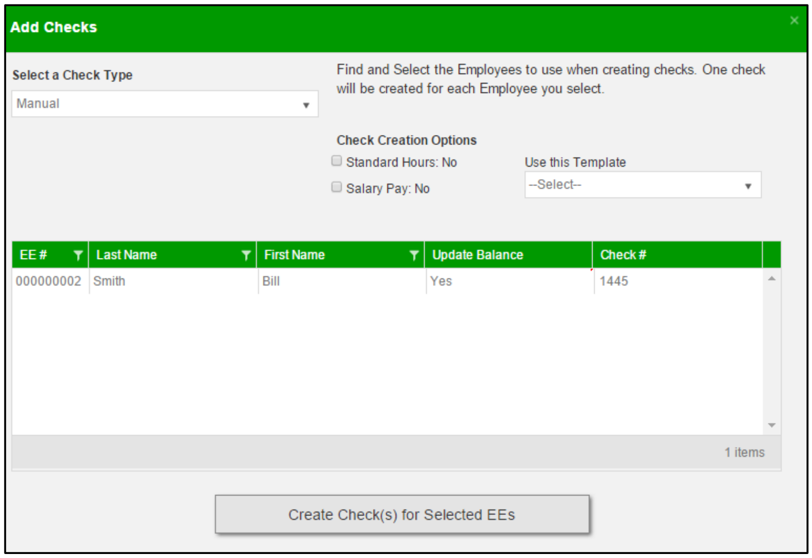
1. On the Payroll Timeline screen select a payroll with a status of Pending by clicking the **Edit** symbol.
2. Click on a batch that has already been created.
3. Click the **Add Check** button in the Navigation bar.

   Result: The Add Checks screen opens.



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

   Result: A Confirmation screen opens listing the check(s) to be created.
7. Click in the **Check#** column and give the check(s) a number.
8. Click the **Create Check(s) for Selected EEs** button.



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

9. Click the **Create Checks** button
10. Continue the payroll process as usual.

Notes

- Manual checks do not inherit salary/standard hours but do inherit payroll defaults
- Rate of pay/rate number is not applied automatically.
- Users must enter hours/rate and perform calculation to populate amount (does not calculate automatically).
- Scheduled E/D amounts like Child Support should accept entered amounts.
- No EP, EO or EQ hours or amounts in manual checks.

Creating Third Party Checks

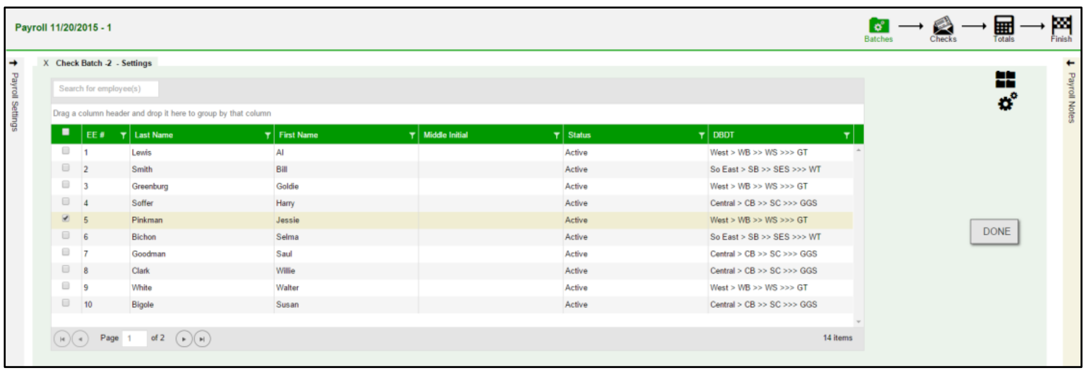
Users can create third party checks to be added to a payroll when creating a batch, or added to an existing batch. The difference in process is basically the same as creating a Manual check.

Creating Third Party Checks in a new batch

1. On the Payroll Timeline screen select a payroll with a status of **Pending** by clicking the **Edit** symbol.
2. Click the **Plus** sign on the Batch Checks screen to create a new batch.

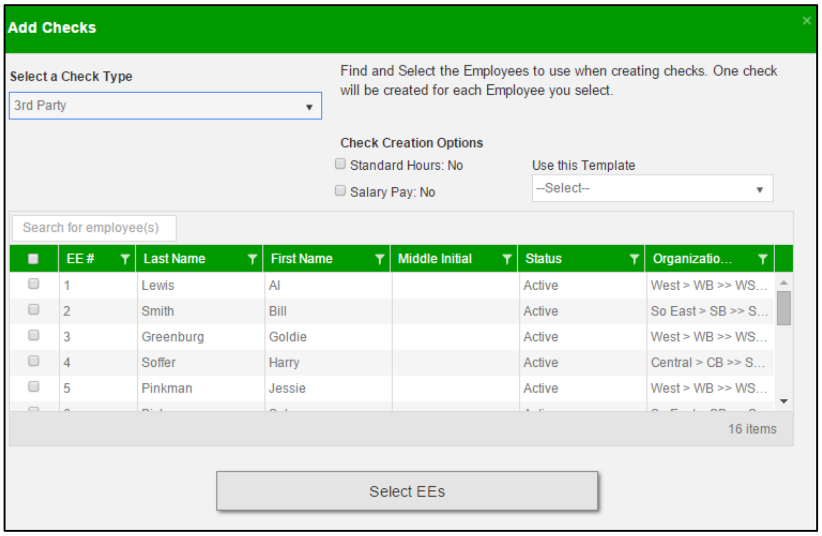
   Result: the Payroll Settings screen opens.

3. Select the **Employee(s)** to receive 3rd Party Checks
   Result: A Check Batch Settings screen opens, showing the employee selected to receive the check.
4. Select any additional employees if applicable and click the **Done** button.



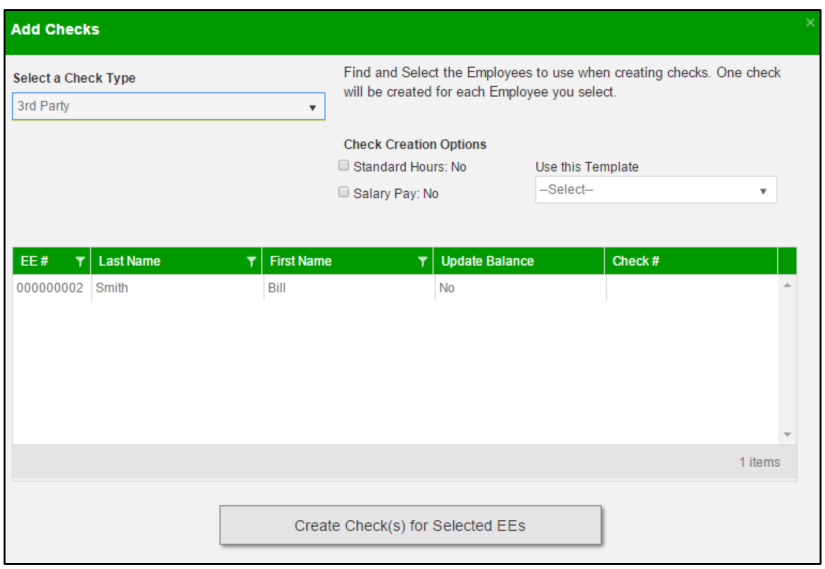
5. Select the **Check Type** 3rd Party from the dropdown list on the Payroll Settings screen.
6. Complete the additional applicable fields.
7. Click the **Create Checks** button.
   Result: the Batch Checks screen opens.
8. Select the batch just created to view the employee(s) selected

9. Click the **Add Check** button in the Navigation bar.
   Result: The Add Checks screen opens.



10. Select **3rd Party** from the Check Types dropdown list.
11. Select the employees in the checkboxes who are to receive a manual check.
12. Click **Select EEs**

    Result: A Confirmation screen opens listing the check(s) to be created.
13. Click in the **Check#** column and give the check(s) a number.



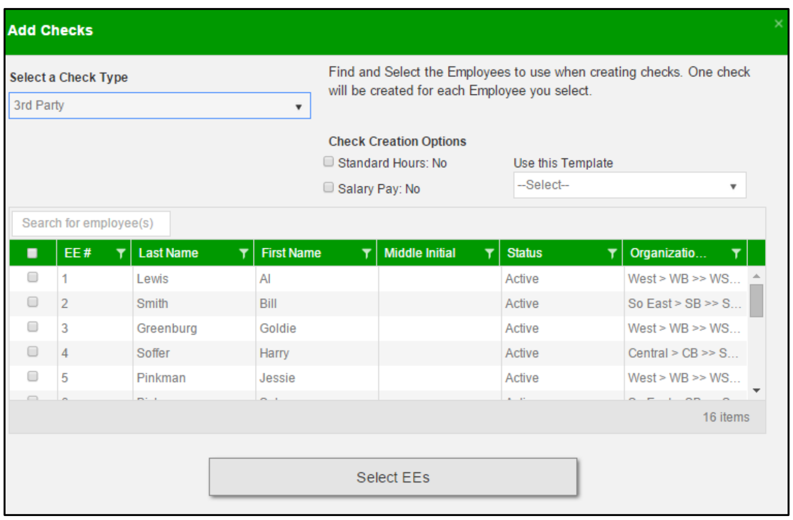
14. **Result:** The Batch Checks screen opens listing all checks in the batch. In the Type column, the 3rd Party check is listed with a “3”.
15. Click the **Create Checks** button

16. Click the **Check Calculation** button if desired, or process the payroll as usual.

Adding Third Party Checks to an existing batch

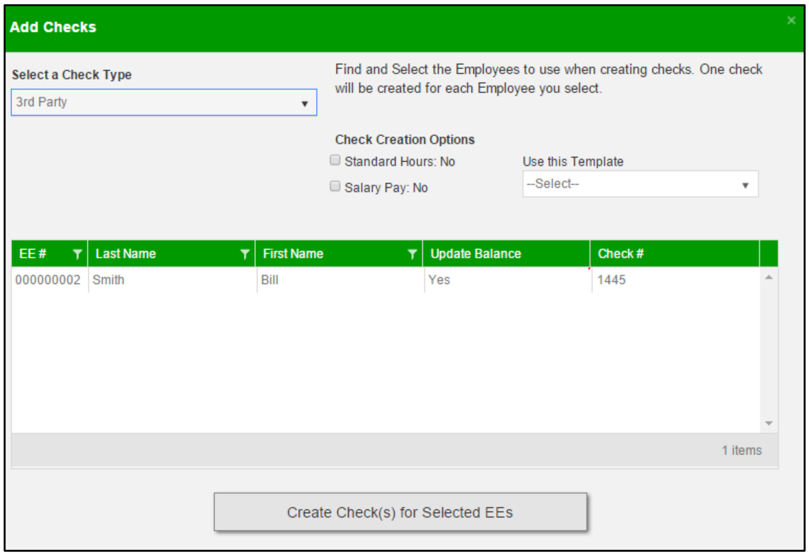
1. On the Payroll Timeline screen select a payroll with a status of Pending by clicking the **Edit** symbol.
2. Click on a batch that has already been created.
3. Click the **Add Check** button in the Navigation bar.

   Result: The Add Checks screen opens.



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

   Result: A Confirmation screen opens listing the check(s) to be created.
7. Click in the **Check#** column and give the check(s) a number.



Result: The Batch Checks screen opens listing all checks in the batch. In the Type column, the Manual check is listed with a "3".

8. Click the **Create Checks** button
9. Continue the payroll process as usual.

Notes

- Only E/D Code types associated with 3rd Party Sick Pay are available for selection
  EP - Short term 3rd Party Sick
  EO - Long term 3rd Party Sick
  EQ - Non-taxable 3rd Party Sick
- Third Party checks do not inherit salary/standard hours
- Rate of pay/rate number is not applied automatically.
- Users must enter hours/rate and perform calculation to populate amount (does not calculate automatically).

Voiding Checks

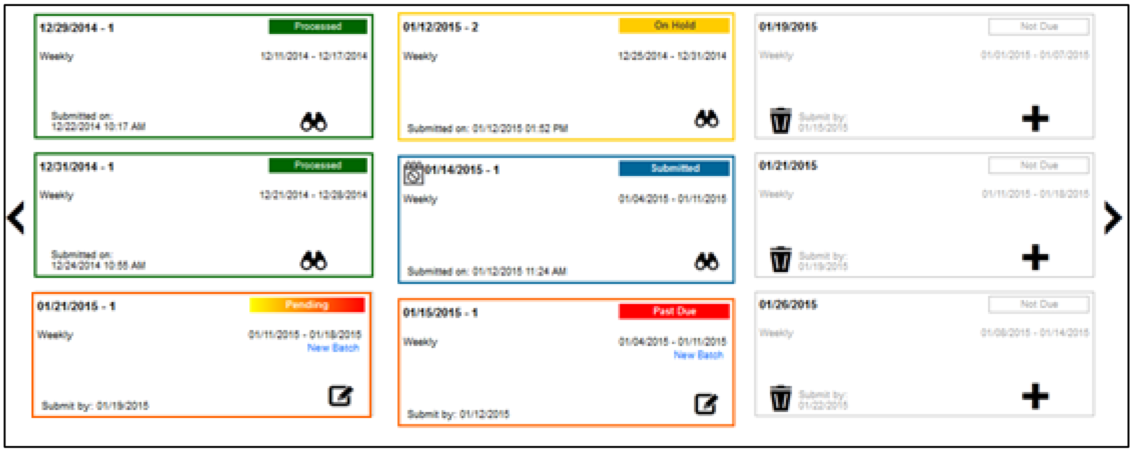
In addition to the security rights required to work on payrolls, the following must also be enabled for the user to be able to void checks:

- Ability to Void Checks
- Ability to Void Checks from Previous Quarter (not recommended!)

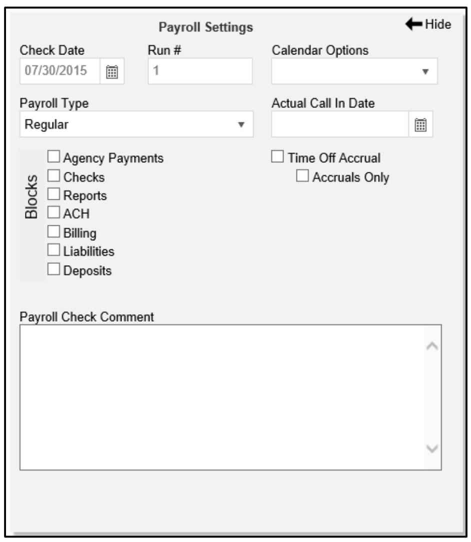
Users can void individual checks via the Payroll menu, either by creating a new payroll, or by editing a waiting payroll. The first step in voiding a check is finding the check to void.

Voiding a check by creating a new payroll

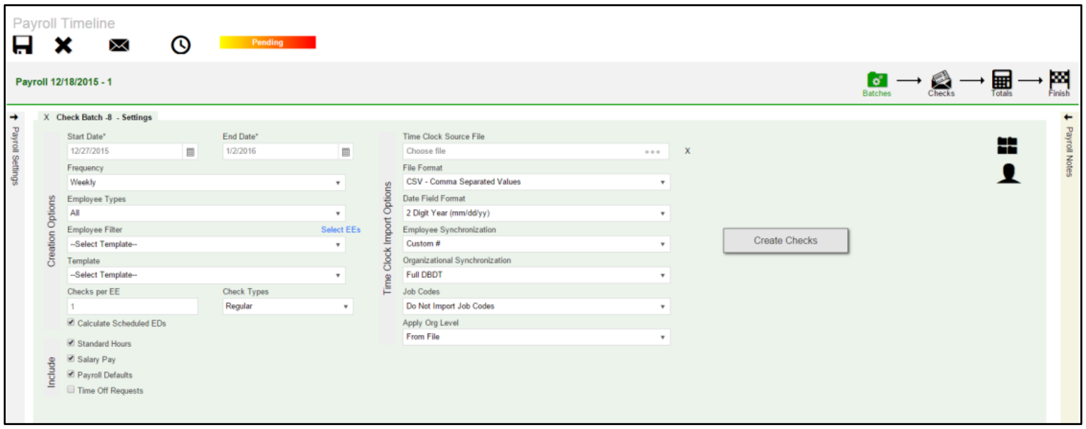
1. Click the **Payrolls** menu, bringing you to the Payroll Timeline screen.



2. Click the large **plus** sign in the heading to create a new (unscheduled) payroll.
   Result: The Payroll Settings screen opens.

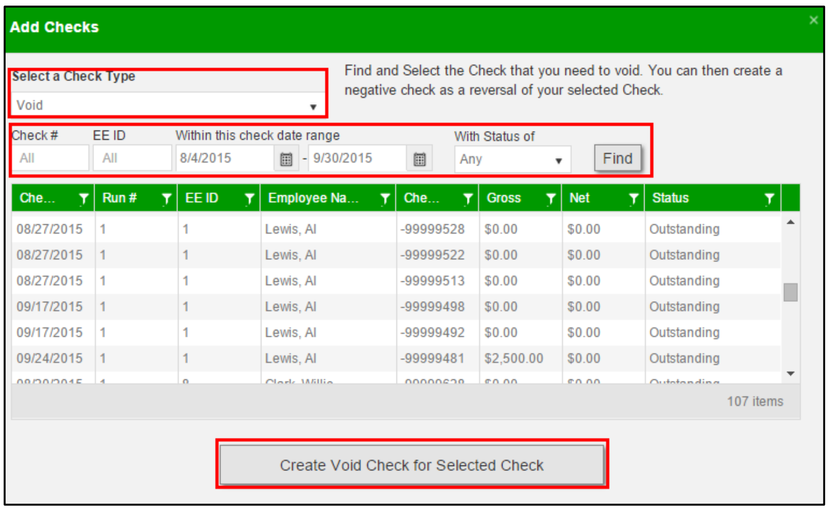


3. Complete the required and applicable fields.
4. Click **Save** in the header on the left.
5. Click Hide in the upper right-hand corner of the Payroll Settings screen.
6. Click the large **plus sign** behind where the Payroll Settings screen was, to continue.
   Result: The Check Batch Settings screen opens.
7. Complete the required fields and click **Create Checks**.



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

   Result: The Add Checks screen opens.



9. Select **Void** for the Check Type.
10. Enter search criteria to find the check to void
11. Click the **Find** button.

    Result: The system searches company payrolls for the current year, displaying a list of checks that fit the criteria selected.

Warning: it is not recommended that checks from previous quarters be voided.

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12. Highlight the check line to be voided.
13. Click **Create Void Check for Selected Check**.

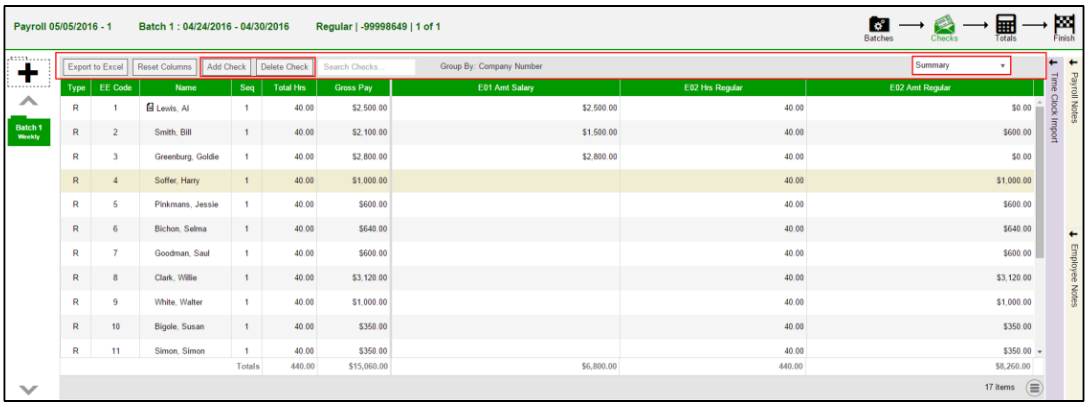
    Result: user is brought back to the Batch Checks Screen. The Check Type for the voided check is now **V** and the selected check is highlighted.

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

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

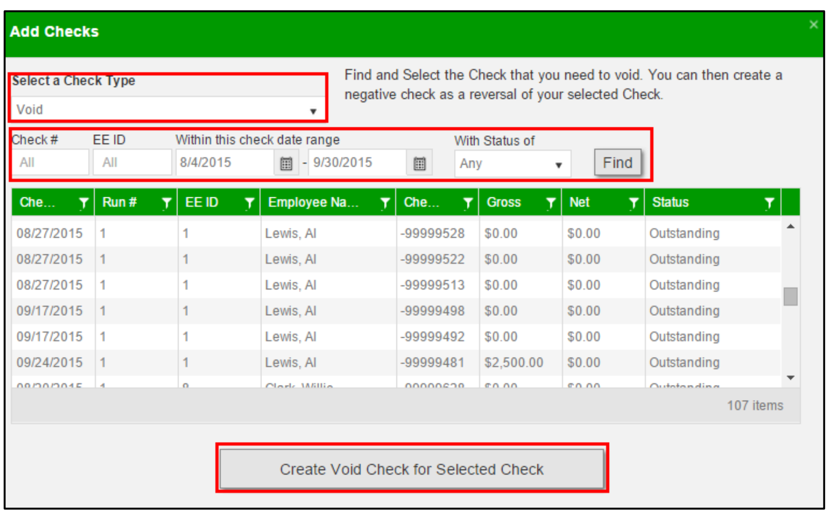
Voiding a check by editing a waiting payroll

1. On the Payroll Timeline screen select a payroll with a status of Pending by clicking the **Edit** button.
2. Click on a batch that has already been created.



3. Click **Batches** in the upper right-hand corner of the header, opening the Check Batch Settings screen.
4. Click the **Add Check** button in the Navigation bar.

   Result: The Add Checks screen opens.



5. Select **Void** for the Check Type.
6. Enter search criteria to find the check to void
7. Click the **Find** button to display a list of checks that fit the criteria selected.
8. Highlight the check line to be voided.
9. Click **Create Void Check for Selected Check**.
10. **Result:** user is brought back to the Batch Checks Screen. The Check Type for the voided check is now **V** and the selected check is highlighted.

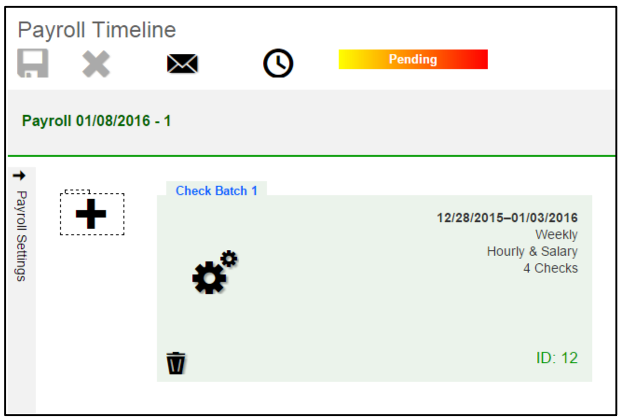
Note: Voided checks are read only and cannot be adjusted.

11. Process the payroll as usual.

Deleting Batches

1. From the Payroll Timeline screen, select a Pending payroll in which at least one batch was created and click the **Edit** symbol.

   Result: the Batch Checks Screen opens.
2. Click Batches in the upper right corner.
3. If there is more than one batch created, select the batch to be deleted.



4. Click **Delete** in the left-hand corner of the Check Batch.

   Result: a message will open asking if you are sure you want to delete this batch > click **Yes**.

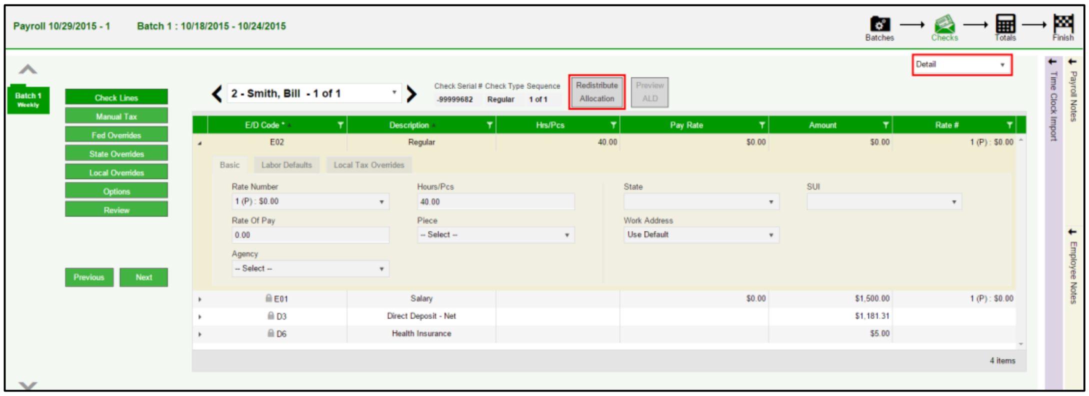
   The batch is deleted, and the batch sequence number is updated accordingly.

Redistributing Labor Allocation

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

To redistribute labor allocation in Evolution Payroll,

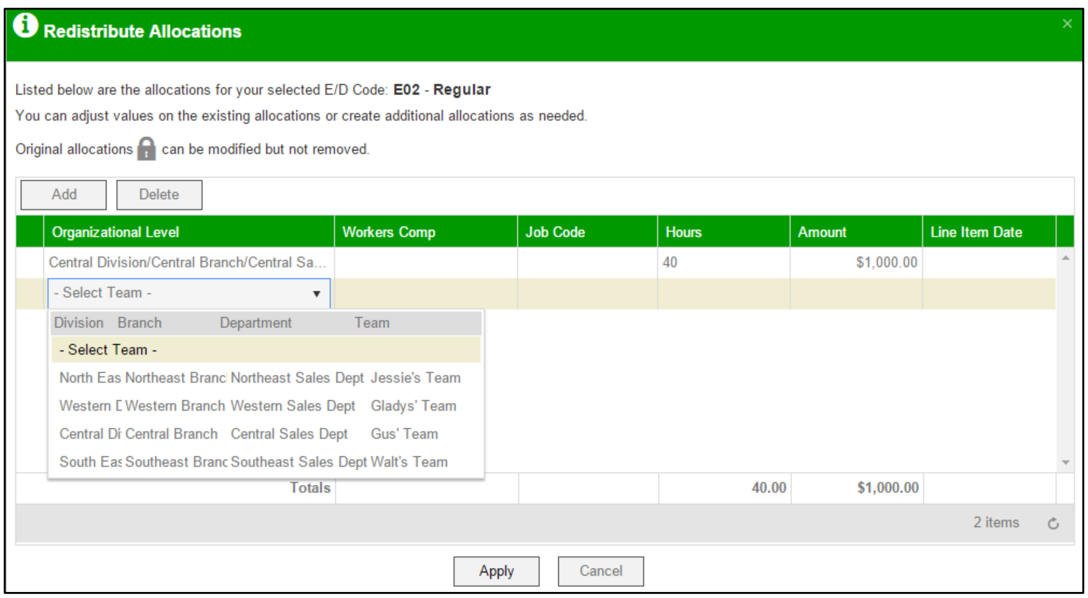
1. Go to the Payrolls – Payroll Timeline screen.
2. Click the **Table View** button on the far right-hand side of the header.
3. Highlight the processed payroll that requires adjustment from the grid and click the **View** symbol on the far left-hand side of the header.
4. Select the **Detail** view from the dropdown list.



5. Click the **Redistribute Allocation** button.

Note: To have access to the **Redistribute Allocation** button and its functionality, you must be running Evolution Classic version 16.36 or higher.

Result: The Redistribute Allocations screen is displayed for the selected E/D Code. Users can modify the existing labor allocations or add a new allocation.



6. Click the **Add** button to change the allocation by selecting from the dropdown field that opens. Original allocations can be modified but not removed.
7. Click **Apply** to save changes.

The Payrolls Menu - Appendix

Payrolls - Check Batch Settings screen

Field / Button	Description
Creation Options section	
Start Date	The beginning of the Payroll Batch period
End Date	The end of the Payroll Batch period
Frequency	The Payroll frequency
Employee Types	The employee types to include in the payroll
Employee Filter – Select EEs	Click to select specific employees to include in the payroll
Template	The Payroll Template to use for this payroll, if any.
Checks per EE	The number of checks per employee
Check Types	The type of checks for this payroll
Include section	
Standard hours	Select to use Standard Hours in the payroll
Salary Pay	Select to use Salary Pay in the payroll
Payroll Defaults	Select to use Payroll Defaults in the payroll
Time Off Requests	Select to use Time Off Requests in the payroll
Time Clock Import Options section	
Time Clock Source File	The source file of time clock data being used for the payroll.
File Format	The format of the source file
Date Field Format	The format of the date in the source file.
Employee Synchronization	Method by which employees are synced (EE Number, Last Name, and First Name).
Organizational Synchronization	Level of D/B/D/Ts used for the company.
Job Codes	Whether or not Job Codes are used in the imported file.
Employee Pay rates	Whether or not Employee Pay Rates are used in the imported file.
Scheduled E/Ds	Whether or not Scheduled E/Ds are refreshed in the imported data.
Scheduled E/Ds on Additional Checks	Rule on allowing Scheduled E/Ds on Additional Check.
Create Check button	Begins the process of creating payroll checks.

Payrolls - Payroll Settings screen

Field / Button	Description
Check Date	The check date of the payroll
Run Number	Defaults to the next available number for payrolls processed on the date. If no payrolls processed or created for this date, the Run defaults to "1"
Calendar options	Choose whether to add a new payroll date, change a payroll date, or ignore the payroll calendar. Defaults to Ignore when selected.
Payroll Type	The type of payroll to be processed
Blocks	Select each item to be blocked on this payroll
Actual Call In Date	The date the payroll was called in
Time Off Accrual	Select to allow Time Off Accrual to show in the payroll
Accruals Only	Select to allow the payroll to Accrue time off, but not use show in the payroll.
Payroll Check Comment	The text to be displayed on checks.

Payrolls - Batch Checks Screen

Field / Button	Description
Create New Check	Click to create a new check for the employee
Add button	Click to add a new check line to the employee's check
Delete button	Click to delete a check line from the employee's check

Payrolls - Add Checks screen

Field / Button	Description
Check Types	Type of check being added to the payroll
Use this Template	Select a template to use if applicable
Standard Hours: Yes checkbox	Select if checks for regular hours are being added
Salary Pay: Yes checkbox	Select if checks for salaried hours are being added
Create Check(s) for Selected EEs button	Click to create check(s) for the selected employees

Payrolls - Check Lines - Basics tab

Field / Button	Description
E/D Code column heading	Earning or deduction for which an addition or subtraction is made
Description column heading	Description of the E/D Code added
Hrs/pcs column heading	Number of hours or pieces for which the earning or deduction represents
Rate of Pay column heading	Pay rate (if applicable) for hours added
Amount column heading	Dollar amount of the earning or deduction being added
Rate # column heading	Pay rate number if the employee has more than one job/pay rate at the company
Basic tab	
Rate Number	The primary rate number is #1. Others are subsequent numbers if the employee has two or three different positions with the company
Rate of Pay	Hourly pay rate for the rate number entered
Agency	Agency name if this is an agency check
Hours/Pieces	Number of hours or pieces the employee is expected to work/produce per pay period
Piece	Identify the piece if the employee is doing piecework
State	State in which the employee is employed
Work Address	Work address of the company
SUI	SUI amount the company pays per employee

Payrolls - Check Lines - Labor Defaults tab

Field / Button	Description
Labor Defaults tab	
Division	**Enter the Organization Level(s) with which the employee is associated**
Branch	**Enter the Organization Level(s) with which the employee is associated**
Department	**Enter the Organization Level(s) with which the employee is associated**
Team	**Enter the Organization Level(s) with which the employee is associated**
Job Code	**Job associated with the Workers' Comp Code selected. Click the plus sign to add a new Job Code, as long as the user's security is set up.**
Shift	**Shift the employee works**
Line Item Begin Date	**Beginning date of the override**
Workers' Compensation	**Workers' Comp Code assigned to the Job associated with the claim.**
Line Item End Date	**End date for including the override**

Payrolls - Check Lines - Local Tax Overrides tab

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

Payrolls - Manual Tax screen

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

Payrolls - Fed Overrides screen

Field / Button	Description
Federal Type	Type of federal tax to override
Tax Frequency	Frequency of tax payments
Tax at Supplemental Rate	Supplemental rate, if applicable
Amount	Dollar or percentage amount of the tax
Blocks	
Additional tax	Block the supplemental tax
EE OASDI	Block the employee OASDI
EE Medicare	Block the employee Medicare
EE EIC	Block the employee Earned Income Credit
ER OASDI	Block the employer OASDI
ER Medicare	Block the employer Medicare

Payrolls - State Overrides screen

Field / Button	Description
State	State for which there is an override.
Abr	State abbreviation
State Type	Is the override for regular tax or additional
Amount	Dollar or percentage amount of the tax override
Blocks	
Regular Tax	Is there a regular tax to block
Additional tax	Is there an additional tax to block
SUI	Is SUI being blocked
SDI	Is SDI being blocked

Payrolls - Options screen

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

Payrolls - Review screen

Field / Button	Description
Lock Tax Calculations button	Click to save any changes made to the information before the payroll processes.

Payrolls - Time Clock Import tab

Field / Button	Description
Time Clock Source File	Identifies the source file of time clock data being used for the payroll.
File Format	Format of the source file
Date Field Format	Format of the date in the source file
Employee Synchronization	Method by which employees are synced (EE Number, Last Name, and First Name)
Organizational Synchronization	Level of D/B/D/Ts used for the company
Job Codes	Whether or not job codes are used in the imported file
Employee Pay Rates	Whether or not employee pay rates are used in the imported file.
Scheduled E/Ds	Whether or not Scheduled E/Ds are refreshed in the imported data.
Schedule E/Ds on Additional Checks	Rule on allowing Scheduled E/Ds on additional checks.
Import button	Begins the process of importing the time clock data.

Payrolls - Calculation Results screen

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

The Reports Menu

The Reports menu lets the user see reports that have been published to Evolution Payroll from VMR, as well as process additional reports as needed.

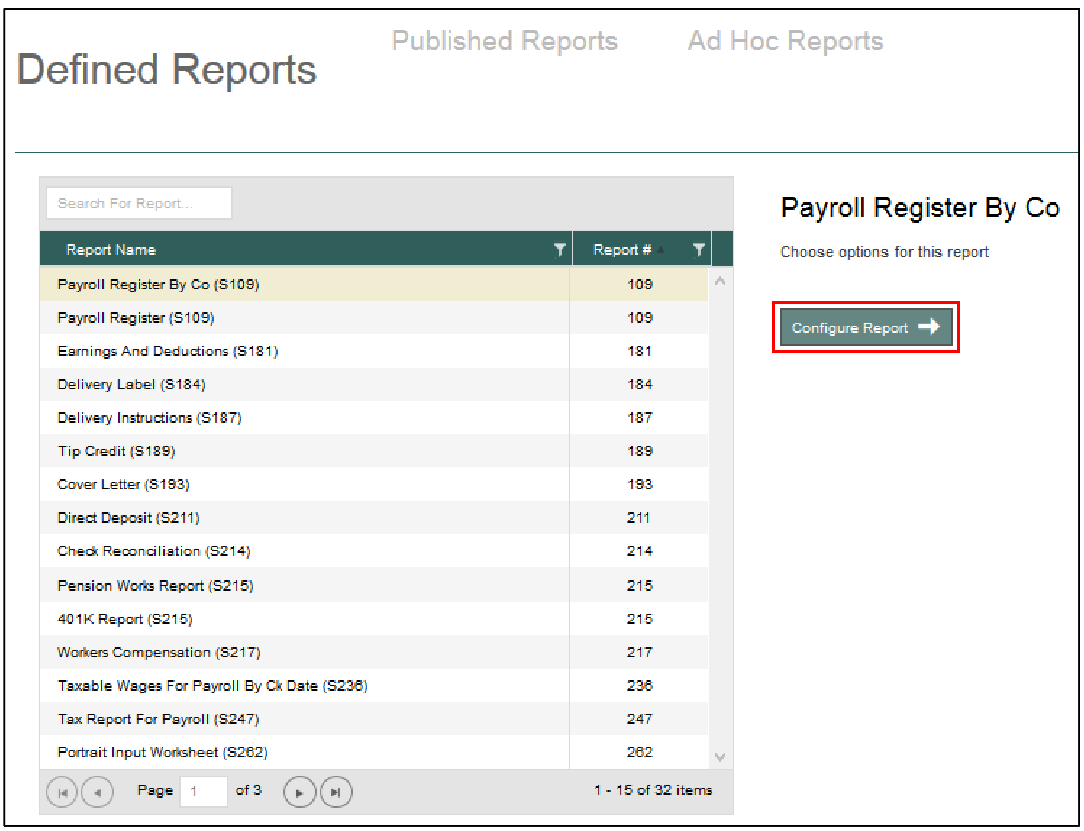
There are two report types identified that we refer to:

- Defined Reports , and
- Published Reports.

Defined Reports are reports that can be generated from Evolution Payroll on demand.
Published reports are reports that are generated in Evolution and sent to Evolution Payroll using VMR.

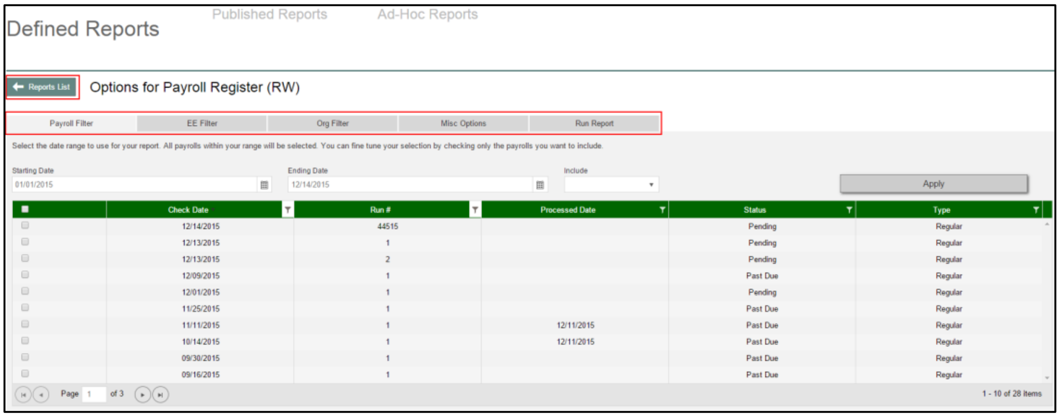
Defined Reports

Defined reports are the Company level reports that can be generated by the user on demand in Evolution Payroll. These reports must be set up for the company in Evolution on the Reports – Setup Reports screen. Refer to the Appendix at the end of this chapter for a list of available reports that can be generated in Evolution Payroll.

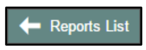


1. Select the report from the table on the left-hand side of the screen.
2. Click the **Configure Report** 

button to establish or edit the parameters for the report selected.
Result: The Report Generation screen opens.

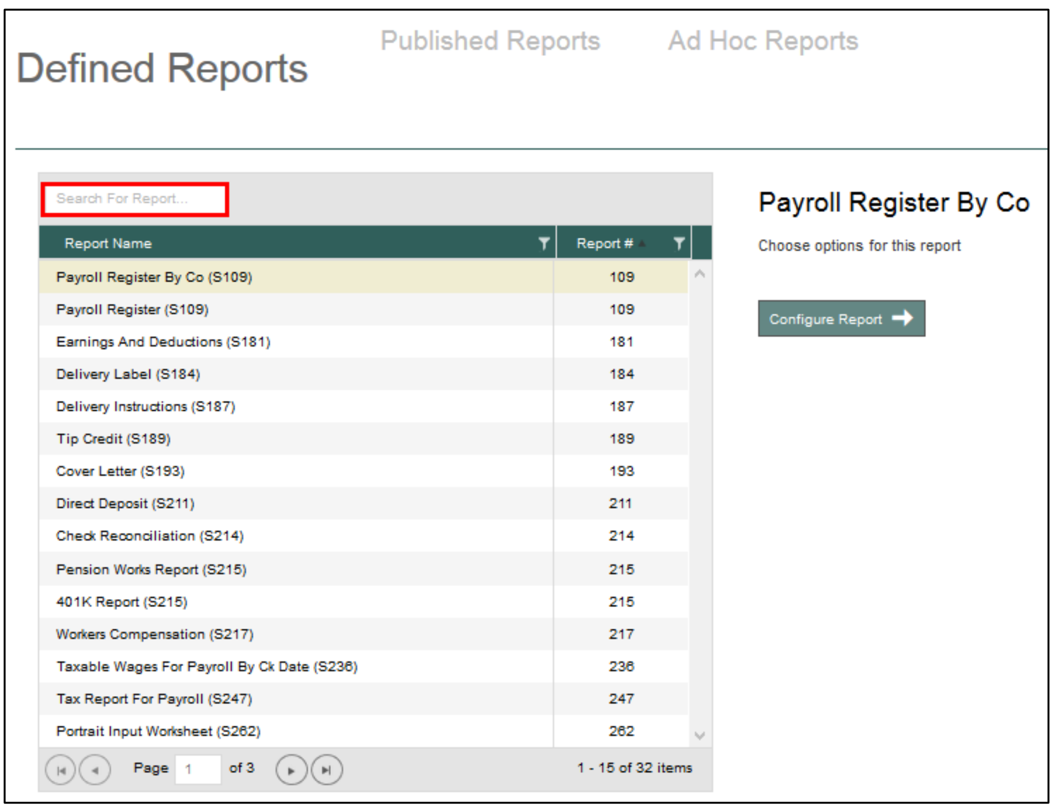


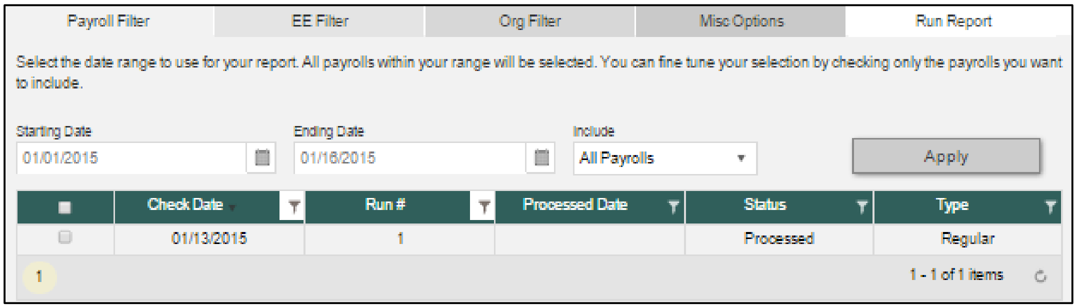
3. Click the tabs above the grid to access the report parameters. Each report can be filtered by Payroll, Employee (EE), and Organization Level (Org). Parameters on each tab are specific to the report that is being generated.

4. Click the **Reports List** 

button to return to the previous page listing the Defined Reports.

Users can search for a specific report by using the **Search for Report** tool at the top of the table, or by using the filters as described in the Navigation section of this document.





To generate a report from the Defined Reports screen:

1. Select the report from the list of the Reports.
2. Click the **Configure Report** button.
3. On the **Payroll Filter** tab select the Starting Date and Ending Date to filter the payrolls to a specific date range (optional), or use the **Include** dropdown list to select from displaying All Payrolls or Processed Payrolls only.
4. Click **Apply** to return a list of payrolls based on the filters selected.
5. Select the payroll(s) for which to run the report.

Note: Users must select at least one payroll to be able to select other filters and parameters or generate the report.

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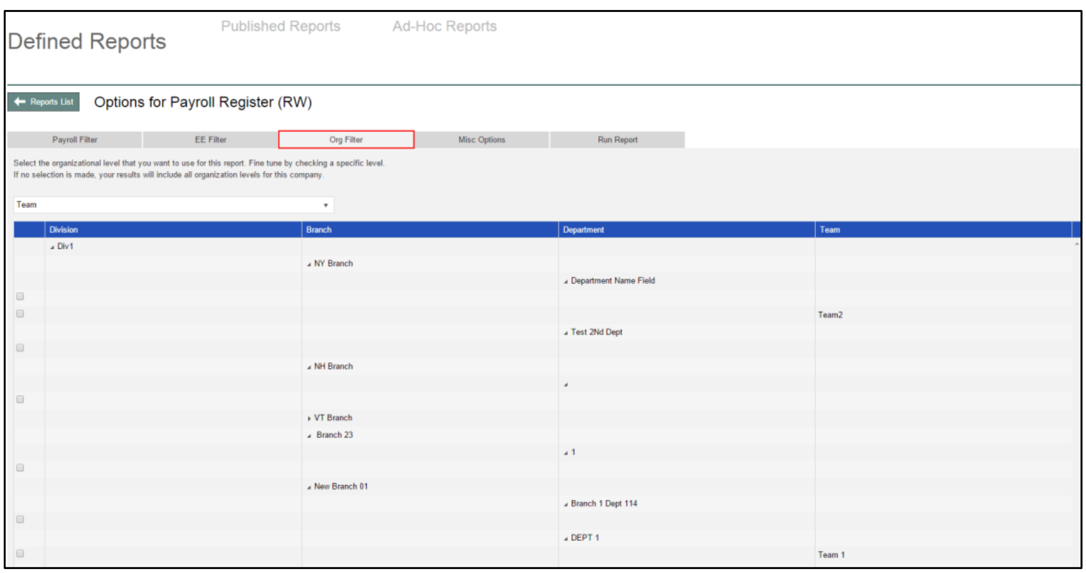
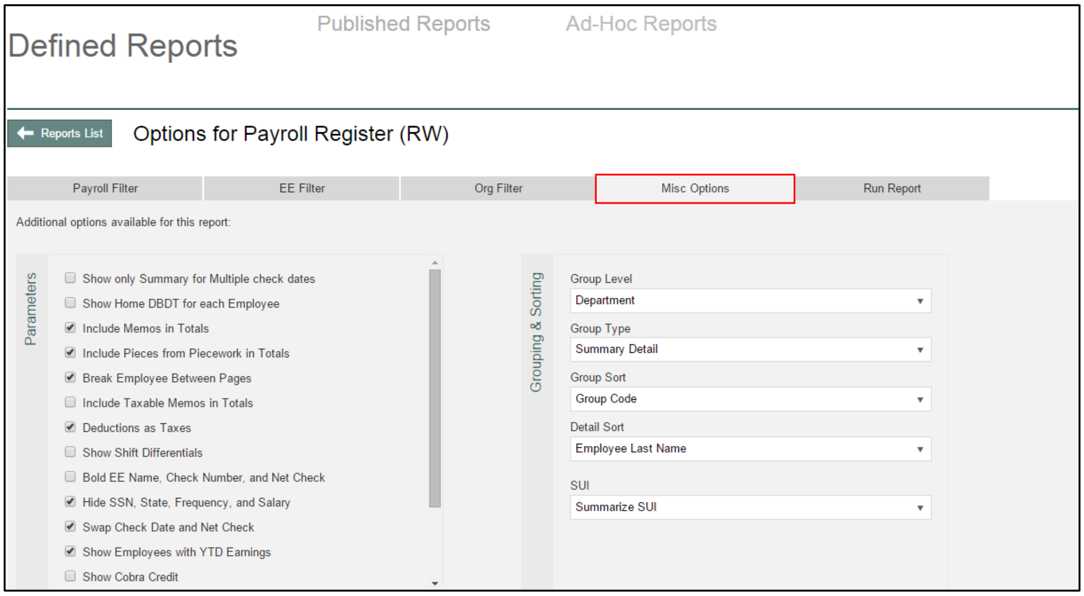
6. Click the **EE Filter** tab to select or deselect employees from the report.
7. Click the **Org Filter** tab to filter by organization (D/B/D/T) level

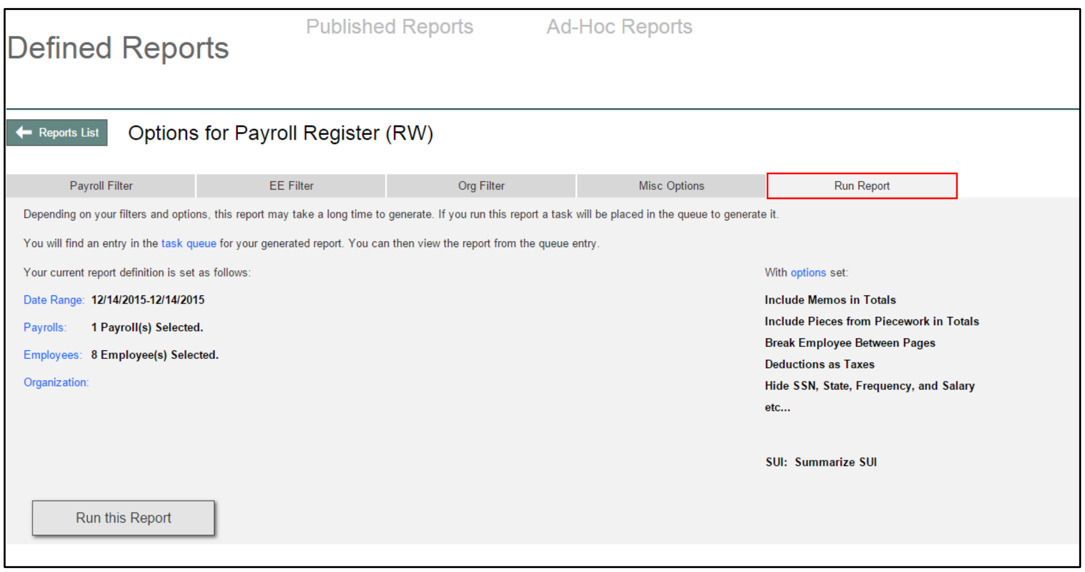


8. Click the **Misc. Options** tab to update parameters specific to this report.

   This screen offers instructions for running the report, as well as grouping and sorting methods to choose from.



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



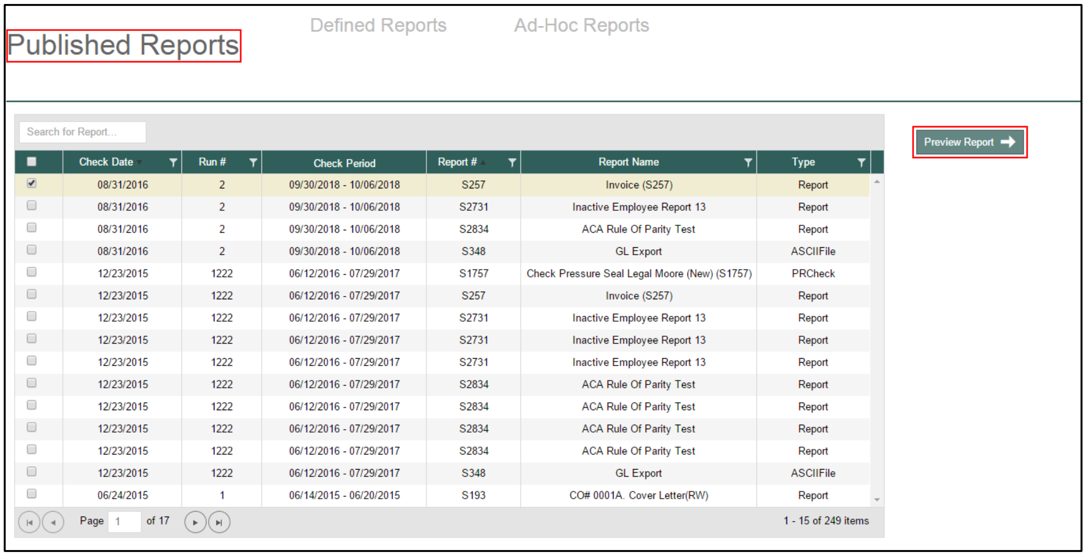
10. Click **Run This Report**.

11. Click the **Task Queue**  symbol once the report is generated to view and print the report.

Published Reports

The Published Reports screen offers access to reports, tax returns and ASCII files generated in Evolution Classic and sent through the Virtual Mail Room (VMR) to Evolution Payroll. To display a preview of a Published Report,

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



	Check Date	Run #	Check Period	Report #	Report Name	Type
☑	08/31/2016	2	09/30/2018 - 10/06/2018	S257	Invoice (S257)	Report
☐	08/31/2016	2	09/30/2018 - 10/06/2018	S2731	Inactive Employee Report 13	Report
☐	08/31/2016	2	09/30/2018 - 10/06/2018	S2834	ACA Rule Of Parity Test	Report
☐	08/31/2016	2	09/30/2018 - 10/06/2018	S348	GL Export	ASCIIFile
☐	12/23/2015	1222	06/12/2016 - 07/29/2017	S1757	Check Pressure Seal Legal Moore (New) (S1757)	PRCheck
☐	12/23/2015	1222	06/12/2016 - 07/29/2017	S257	Invoice (S257)	Report
☐	12/23/2015	1222	06/12/2016 - 07/29/2017	S2731	Inactive Employee Report 13	Report
☐	12/23/2015	1222	06/12/2016 - 07/29/2017	S2731	Inactive Employee Report 13	Report
☐	12/23/2015	1222	06/12/2016 - 07/29/2017	S2731	Inactive Employee Report 13	Report
☐	12/23/2015	1222	06/12/2016 - 07/29/2017	S2834	ACA Rule Of Parity Test	Report
☐	12/23/2015	1222	06/12/2016 - 07/29/2017	S2834	ACA Rule Of Parity Test	Report
☐	12/23/2015	1222	06/12/2016 - 07/29/2017	S2834	ACA Rule Of Parity Test	Report
☐	12/23/2015	1222	06/12/2016 - 07/29/2017	S2834	ACA Rule Of Parity Test	Report
☐	12/23/2015	1222	06/12/2016 - 07/29/2017	S348	GL Export	ASCIIFile
☐	06/24/2015	1	06/14/2015 - 06/20/2015	S193	CO# 0001A. Cover Letter(RW)	Report

To preview, save, or print a published report,

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

Ad Hoc Reporting

Evolution Payroll contains an Ad Hoc Reporting feature, similar to Evolution Classic. Users can add a new Ad Hoc report, edit an existing Ad Hoc report, and run an Ad Hoc report.

Ad Hoc reports are executed at the user's discretion and can be customized. Capabilities include:

- Adding / removing columns
- Defining column headers and captions
- Filtering on any field (not just those in the visible columns)
- Grouping by fields
- Completing selected summary tasks in grouping such as Count, Sum of Integer Values
- Creating calculations based on columns in the reports
- Exporting the report results to Microsoft Excel

Similar to Evolution Classic there are three general categories of Ad Hoc Reports:

- Ad Hoc - Payroll (S1132)
- Ad Hoc - Employee (S1134)
- Ad Hoc - Company (S1153)

These reports serve as templates can be selected and used as a base Ad Hoc report to which modifications can be made and saved with a new report name.

Security Settings

Users must be granted security rights access to Ad Hoc reports in Evolution Classic to use Ad Hoc reports in Evolution Payroll.

1. Go to SB Admin - Security - SB Templates.
2. Select the template used.
3. Scroll down to Reports, and click the small **plus sign** to the left.
4. Verify there is a green plus sign to the left of Ad Hoc Reports. If there is a red minus sign, right-click on the **Minus-sign** and select Enabled.

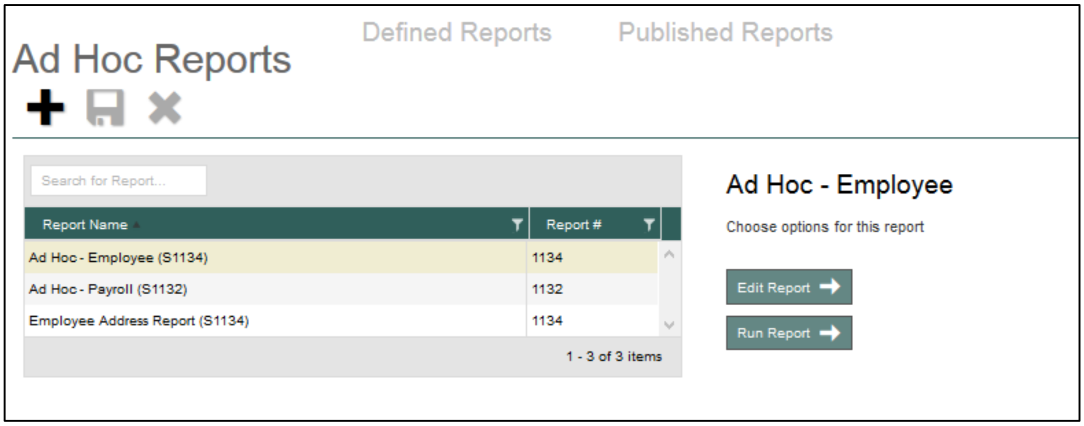
Setting up the Report

The report must be added at the Service Bureau level, so it is available at the report level in Evolution Classic.

1. Go to the Bureau - Company Default Reports - Details tab.
2. Click the **plus sign** in the toolbar to create a new record.
3. Select System in the Level field dropdown list.
4. Select the report to be added in the Report field dropdown list.
5. Click the check mark and the commit button in the toolbar to post and commit changes

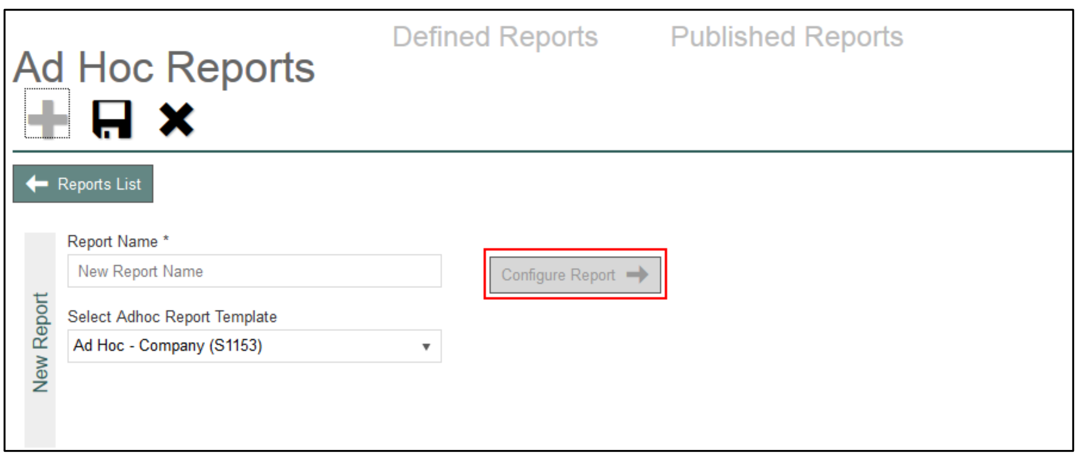
Adding a New Ad Hoc Report

1. Click the **Reports** menu to open.
   Result: The Published Reports screen opens.
2. Click **Ad Hoc Reports** in the header.

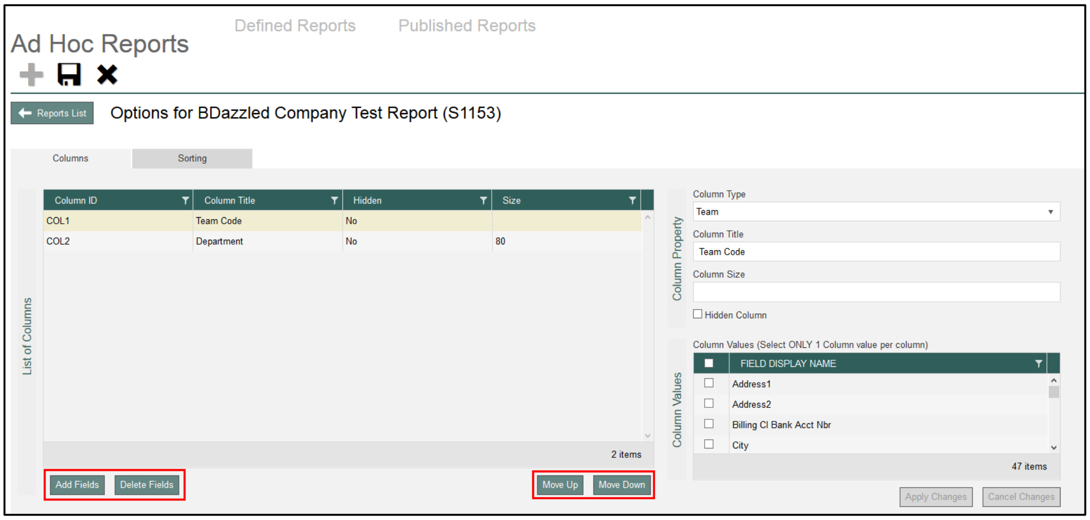


There are three standard Ad Hoc Report templates (Company, Employee, and Payroll) listed on the screen.

3. Click the large plus sign in the header.
4. Enter a Report Name for the new report.
5. Select a template on which to base the new report (the default template is Company).



6. Click the Configure Report button.



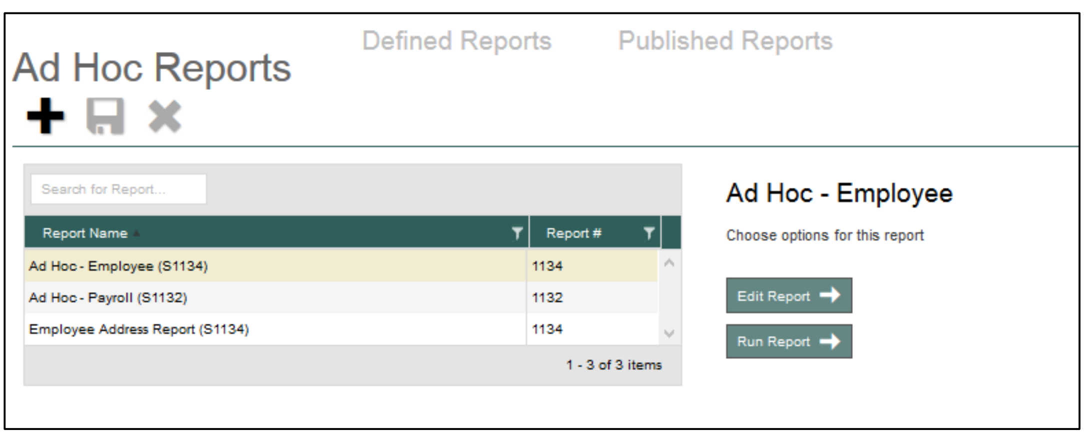
7. Click the buttons at the bottom of the screen to add or delete columns, or to move columns up or down.
8. Click Add Fields to add a column to the table.
   a. The column properties on the right-hand side of the screen become active.
   b. Enter the information about the column being added.
   c. Select the column values to define the information that will be populated in the columns.
9. Click Apply Changes or Cancel Changes at the bottom of the Column properties sections.

The tabs contain parameters to set for generating the report. The number of tabs available is dependent upon the type of report selected.

10. Click the Sorting tab to set additional parameters for the report.
11. Click the Save or Cancel symbol in the header when finished.

Editing an Existing Ad Hoc Report

1. Click the **Reports** menu to open.
   Result: The Published Reports screen opens.
2. Click **Ad Hoc Reports** in the header.

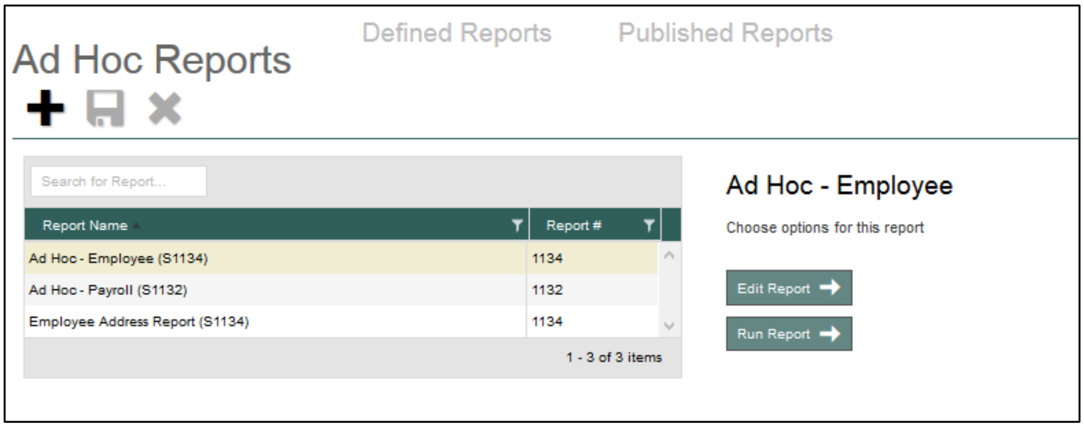


3. Select the Ad Hoc report from the list that is to be edited.
4. Click **Edit Report**.

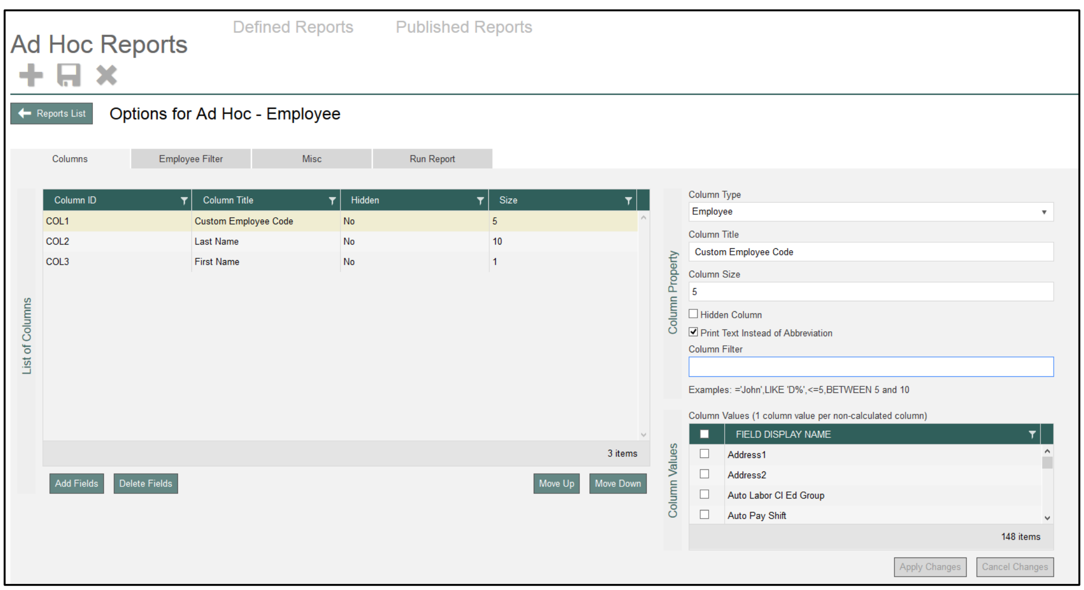
5. Make any changes to the report parameters.
6. Click **Apply Changes**.
7. Click the **Save** symbol in the header.

Running an Ad Hoc Report

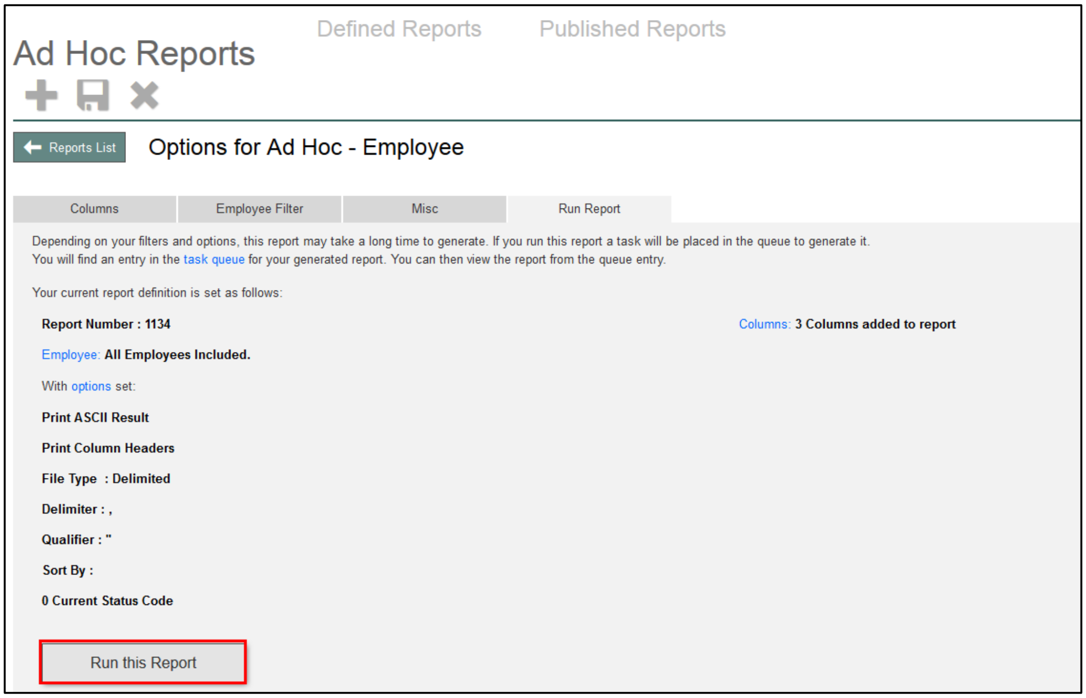
1. Click the **Reports** menu to open.
   Result: The Published Reports screen opens.
2. Click **Ad Hoc Reports** in the header.



3. Select the Ad Hoc report from the list (in this example the Employee report template is selected.
4. Click the **Run Report** button.
   Result: The system displays the Configure Report screen, with four tabs: Columns, Employee Filter Misc, and Run Report.

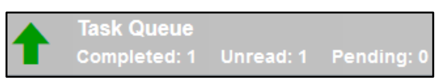


5. Click each tab to set up all of the report parameters.
6. When complete, click the **Run this Report** button on the Run Report tab.



Result: The system displays a confirmation message at the top right of the screen that your report task has been added to the queue.

7. Open the Task Queue to view or print the report from the Task Queue once the Ad Hoc report is generated.



Ad Hoc Report Restrictions

Note the following restrictions concerning Ad Hoc reports:

- Report orientation is landscape only with a maximum of 133 bytes or characters.
- Reports may contain as many columns as can fit into a horizontal row of 133 characters.

Note: If a field is added that extends the row length beyond 133 characters, the report may or may not execute. If it executes, truncation of all data beyond the 133rd character will take place.

- There is no word or column auto-wrap to the next line
- The Output ASCII File Name and Add to Existing File features are not active
- The Duplexing check box is active. If selected, and the printer supports duplex printing, output will be printed on both.

The Reports Menu - Appendix

Reports - Defined Reports

Report
401(K) Report (S215)
ACA Eligibility Analysis Report (S2713)
ACA FTE Report (S2711)
ACA Rule Of Parity Test Report (S2834)
ACA Status Audit Report (S3085)
Birthday Report (S457)
Certified Payroll Report (S518)
Check Reconciliation Report (S214)
Check Stub Detail Report (S2590)
Compensation Detail Report (S601)
Cover Letter Report (S193)
Cover Letter With Tax Report (S1082)
Direct Deposit Report (S211)
Employee Audit Report (S1075)
Employee Change Listing Report (S539)
Employee Change Listing Report (New) (S1075)
Employee HR Date Report (S457)
Employee Profiles Report (S263)
GL Export Report (S348)
General Ledger Report (S183)
HR Alert (S759)
HR EEO-1 Report (S455)
HR EEO-1 Section D Employment Data Report (S1537)

Report
HR EEO-4 Headcount Report (S566)
HR EEO Ethnic ID Report (S467)
HR EEO Standard Report (S450)
HR Emergency Listing by Emergency Contact Report (S452)
HR Employee Review Report (S850)
HR Mailing Labels (S449)
HR OSHA 300 Report (S462)
HR OSHA 300A Report (S567)
HR OSHA 301 Report (S451)
HR OSHA Injury Report By Cost (465)
HR OSHA Injury Report by Home Dept. (S453)
HR OSHA Report By Body Part Code (S466)
HR OSHA Report by Injury Code (S464)
HR OSHA Report By Status (S568)
HR Personnel Report (S463)
HR Veterans Report (S714)
HR Workers Compensation Code Report (S454)
Inactive Employees Report (S2731)
Individual Earnings Report (S431)
Input Worksheet (S351)
Job Costing Report (S229)
Labor Distribution Report (New) (S1077)

Report
New Hire Pending Report (S292)
New Job Costing Report (S554)
Payroll Register Report (S109)
Period Summary Report (S404)
Personnel Register (S344)
Portrait Input Worksheet (S262)

Report
Tax Notices Report (S341)
Tax Report for Payroll (S247)
Taxable Wages for Payroll Report (S236)
Time Off Register Report with Hours (S920)
Workers' Compensation Report (S217)

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

Reports - Published Reports

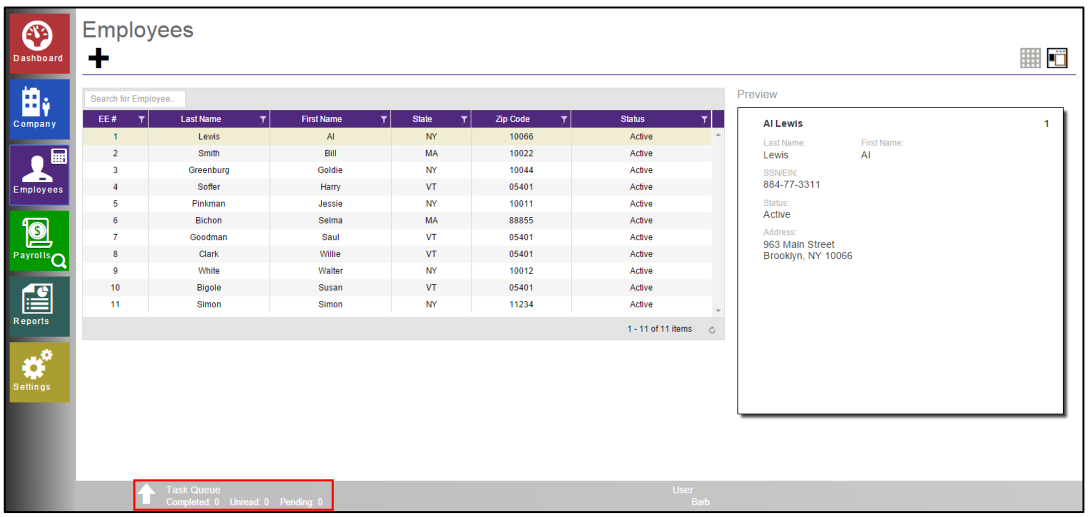
Column Name	Description	Example
Check Date	The date of the payroll from which the report was generated. For Tax Returns, this is the last date entered on the tax return screen when tax returns are processed.	1/20/2015 – Check Date 12/31/2014 – Tax Return Date
Run #	The payroll run from which the report was created. Tax Returns will show a run number of 0	1, 2, 3, etc… 0
Check Period	The batch period of the payroll for which this report was generated. Tax Returns will not display a batch period.	1/10/2014 – 1/16/2015
Report #	The Evolution report number for this report.	S193, S257, S356, etc….
Report Name	The name of the report or tax return.	Cover Letter, SUI Tax Wages by Quarter, etc…
Type	The type of document displayed	Report, Tax Return

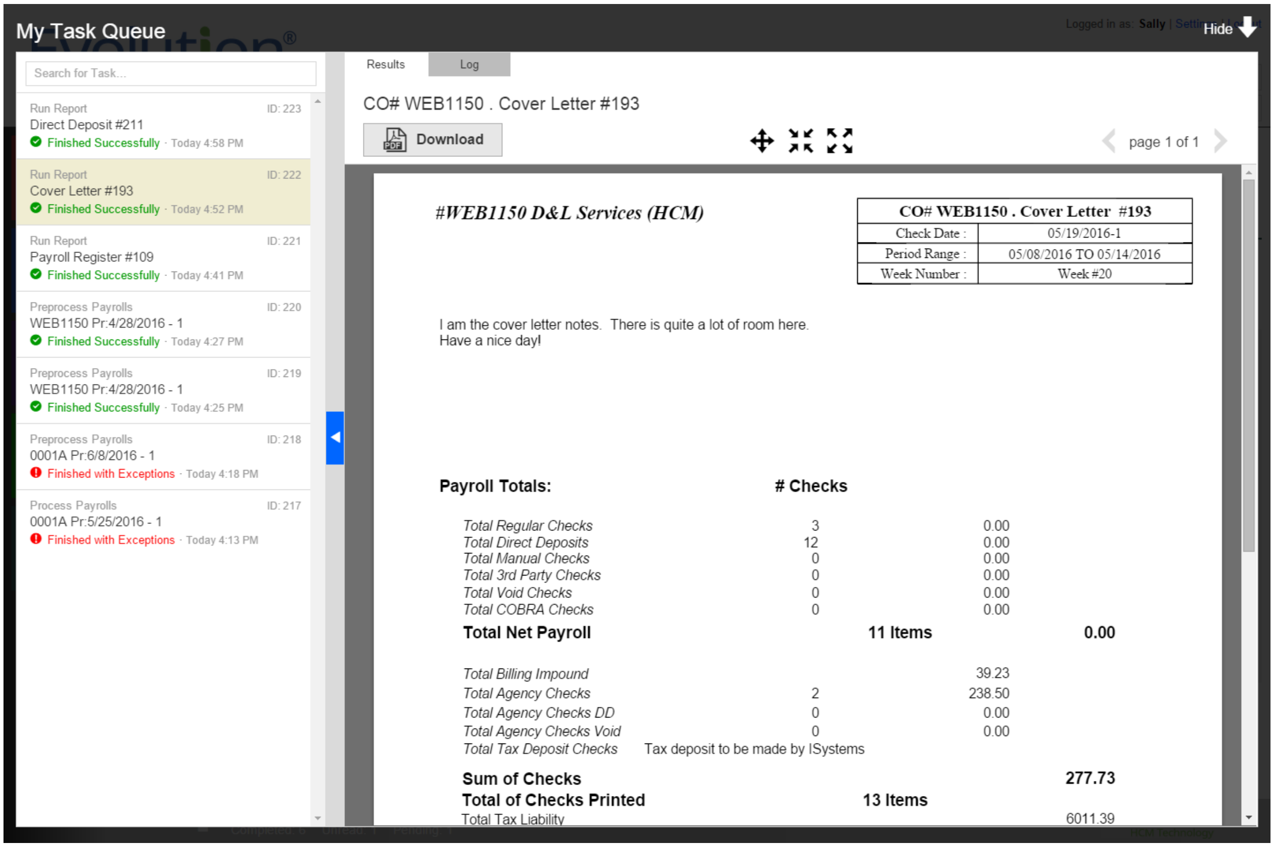
The Task Queue

The Task Queue contains all tasks for the current user. Tasks marked as read remain in the Task Queue for three (3) days before they are automatically deleted by the system. Unread tasks remain in the Task Queue for 10 days before they are automatically deleted by the system. ACH files and tax payments remain in the Task Queue for 10 days, whether they have been viewed or not.

The Task Queue has a table view listing of tasks – similar to the Task View in Evolution, which you can use to display report results or more details about each task.

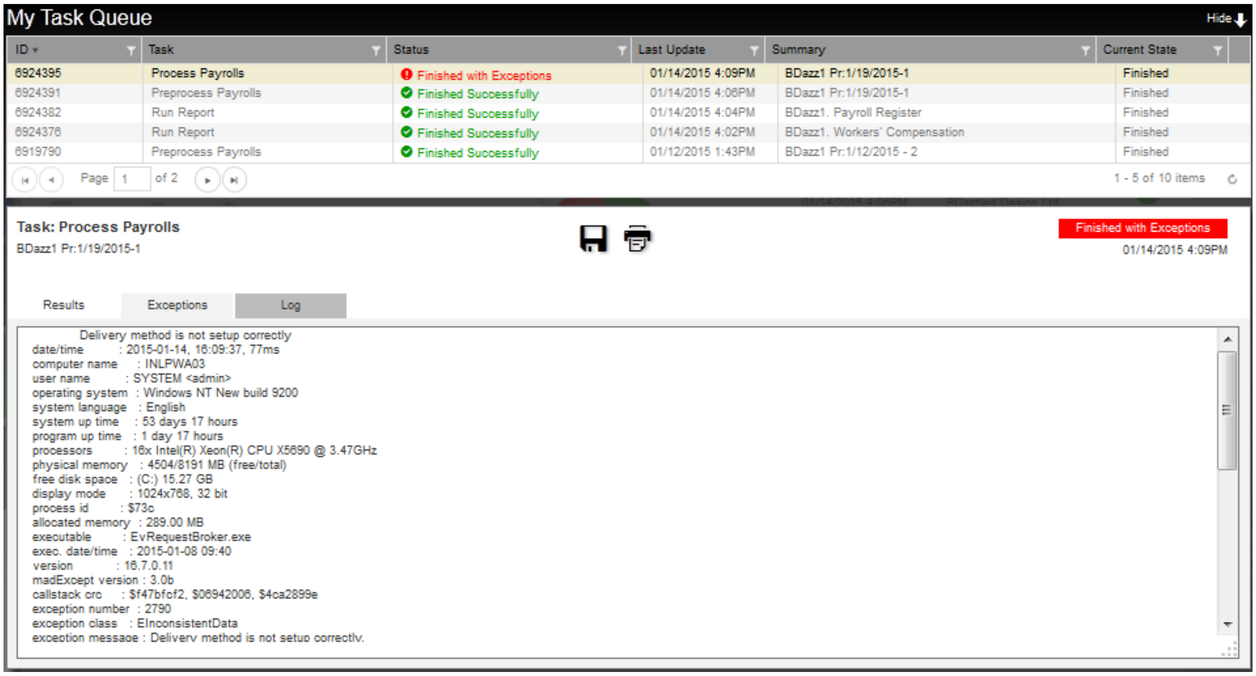
The Task Queue can be viewed from the Dashboard using the two navigation methods shown in the Navigating Evolution Payroll section of this document, or by clicking the arrow in the bottom left-hand corner of any screen in the application.





To review the report results, select a task (row) in the Navigation Panel on the left-hand side of the screen. The report results appear in the Preview pane in the right. In the screen above, the Preview Pane shows a preview of *The Cover Letter Report (S193).* The Status shows as **Finished Successfully** in the Navigation Panel.

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



Click **Hide** Hide in the upper right-hand corner of the screen to close the Task Queue and return to the previous screen.

Note: a task might return any of the following tabs, which are only shown if applicable to the specific task: Results / Exceptions / Warnings / Messages / Notes / Log.

Click **Save** to save a local copy of the Results / Exceptions / Warnings / Messages / Notes / Log.

* Saving can only be applied to the active tab.

Viewing/Downloading Reports

Users can view multiple reports that were run as part of processing the payroll, which enables the user to download all reports, as a group, in a zipped file format.