

Unique Payroll Solutions



# ***Evolution Training Manual***

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## Evolution Install on your Desktop

1. Go to: <http://www.paydayinc.com/>
  - a. Click the “Clients” button at the top of the page
  - b. Click the “Secure Transfer / Download Files” bullet point
  - c. Click the “Download Files” option – this link opens <http://www.paydayinc.com/clientdownloads.php>
  - d. Click the “Evolution Install” bullet point
  - e. Select each of the available hyperlinks
    - i. Evolution Training Manual
    - ii. EvoRMT.zip
    - iii. RemoteHelpInstaller.zip

Unique Payroll Solutions  
**PAYDAY** INC

Resources **Clients** Employees | CPAs

Payroll Human Resources Health Insurance Ac

### Client Downloads

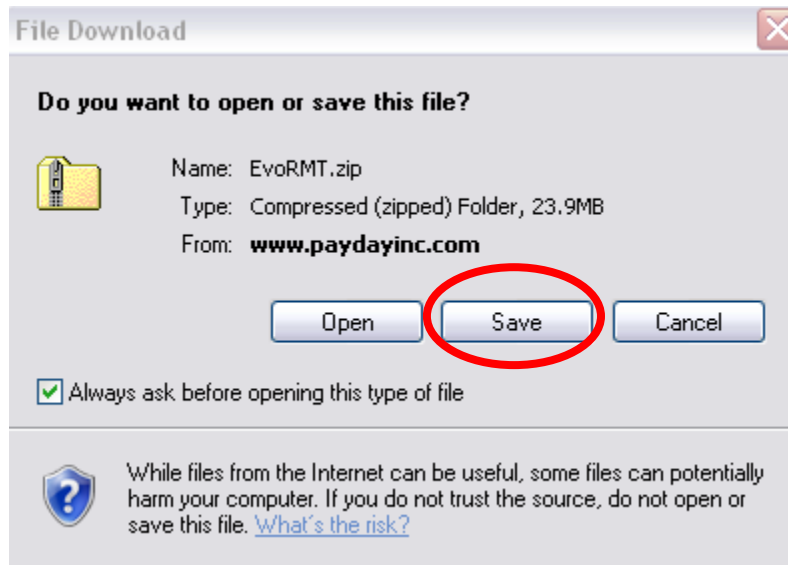
Downloads

- ▶ API
- ▼ **Evolution Install**
  - ★ Evolution Training Manual
  - ★ EvoRMT.zip
  - RemoteHelpInstaller.zip
- ▶ EvoQ
- ▶ Report Viewer
- ▶ Tools

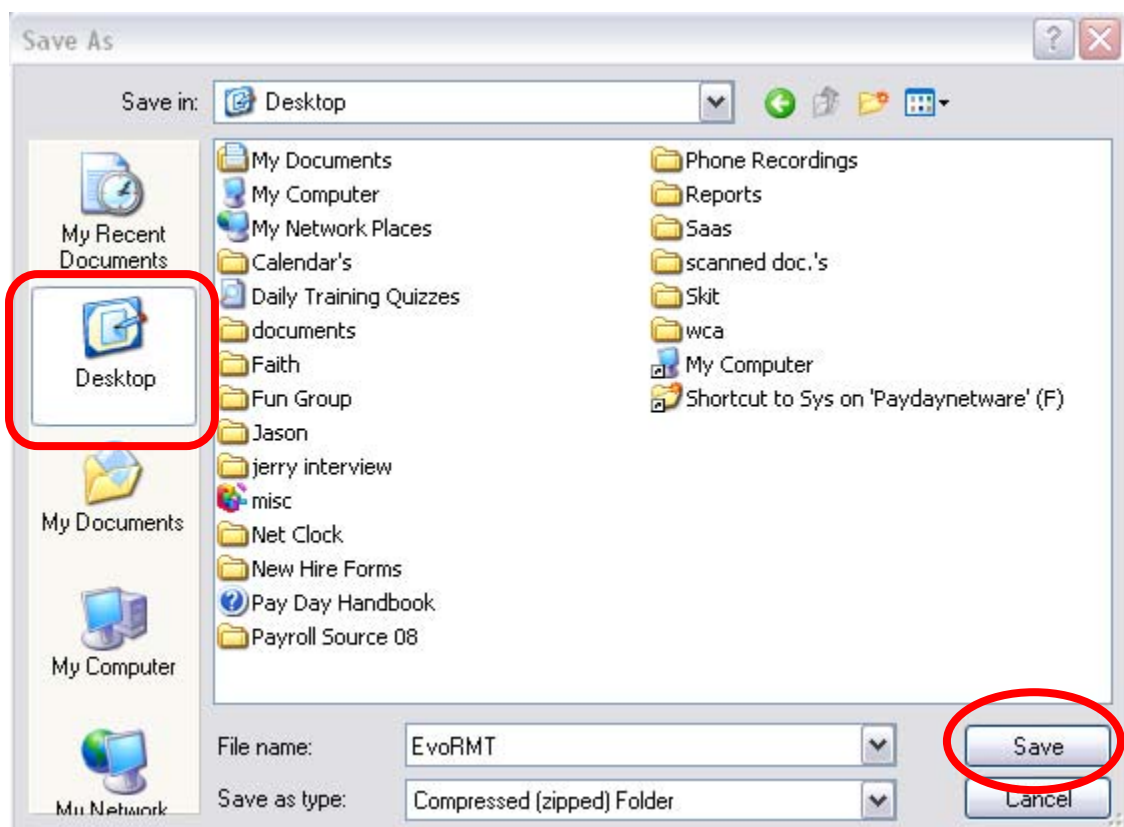
» [Click Here for Peace of Mind](#)



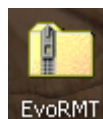
If a File Download box comes up, select Save



Select to save in your Desktop. The File name, and Save as type will fill in correctly automatically. Select Save



The file will download. When it is complete you will see a folder like the one below on your desktop.



Double Click on the folder on your desktop.



Double Click on the EvoRMT Icon that is in the folder.



The File Download – Security Warning box will come up. Select Run

The Evolution Software Install will run leaving you with an Evolution Icon on your desk top.

You will double click on the Evolution Icon to access Evolution. The login screen will come up when you do this.



Your username and password will be provided to you by Pay Day.

The Server ID will be populated with "evolution.paydayinc.com"

The connection type is your internet connection – typically T1 (this will default)

If you click the Settings button, you will find the port used for communication (default is port 443); this port setting is relevant to your IT department

Repeat the above instructions for the Evolution Help Installer (RemoteHelpInstaller.zip)



## Print Key – Evolution v4.0 Print Screen

1. Print Key is an excellent add-on. It is activated when you press the Print Screen Key and allows you to capture the entire screen or any portion of it. You can then make changes to the screen capture and save in a variety of formats including .gif, .bmp, .jpeg, .emf and .wmf. You can also swap colors, convert to grayscale or black and white, change picture size and send to the printer.
2. Below are instructions on how to install “Print Key” on your desktop in order to print selected screens directly to your printer.
3. Go to <http://www.paydayinc.com/> .
  - a. Click the “Clients” button at the top of the page
  - b. Click the “Secure Transfer / Download Files” bullet point
  - c. Click the “Download Files” option – this link opens <http://www.paydayinc.com/clientdownloads.php>
  - d. Click the “Tools” bullet point
  - e. Click the “Print Screen” bullet point
  - f. Select the available hyperlink, “PrintKey5.exe”

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**PAYDAY** INC

Resources: **Clients** | Employees | CPAs

Payroll | Human Resources | Health Insurance

### Client Downloads

Downloads

- ▶ API
- ▶ Evolution Install
- ▶ EvoQ
- ▶ Report Viewer
- ▼ **Tools**
  - ▶ Aloha
  - ▶ Intercept
  - ▼ **Print Screen**
    - Printkey5.exe



## Your Username and Password

Username \_\_\_\_\_

Password \_\_\_\_\_

## Evolution Password Requirements

1. Evolution has an improved security feature that has been added since the upgrade to the latest version in Sept. 2010
2. Passwords that are created for Evolution must now meet the below requirements. You must have at least 3 of the 4 below options in your password.
  - a. Lowercase letters: a, b, c...z
  - b. Uppercase letters: A, B, C...Z
  - c. Numbers: 0, 1, 2...9
  - d. Special characters: ! @ # % ^ & \* ( ) \_ - = + { } [ ] | \ : ; " ' < , >
    - i. The \$ (dollar Sign) is **Not** included in the special characters





# Payday Contact List

Main number 505-255-5433  
Fax number 505-962-2758

5011 Indian School Rd. NE  
Secondary Fax 505-213-0177

Albuquerque, NM 87110  
after hrs 505-260-7627

	Extension	Email
<b>Operations</b>		
• <u>Client Service Manager</u>		
○ Liz Mink, CPP	x327	liz@paydayinc.com
○ <u>Platinum Service Team</u>		
▪ Cindi Pohl – Team Lead	x310	cindi@paydayinc.com
• Donna Sellers, CPP	x309	donna@paydayinc.com
○ <u>Client Service Supervisor</u>		
▪ Myra Armstrong	x322	myra@paydayinc.com
▪ <u>Customer Service Representatives (CSR)</u>		
• Sherry Clees	x326	sherry@paydayinc.com
• Dolores Griego	x369	dolores@paydayinc.com
• Dena Parmeter	x307	dena@paydayinc.com
• Sarah Ruiz	x364	sarah@paydayinc.com
• Michelle Sena	x333	michelle@paydayinc.com
• Mandy Vialpando	x367	mandy@paydayinc.com
• April Wiebenga	x315	april@paydayinc.com
▪ <u>Payroll Checks/ Reports Packaging</u>		
• Monique Archuleta	x350	monique@paydayinc.com
• Janice Lujan	x328	janice@paydayinc.com
▪ <u>Couriers</u>		
• Julio Deleon		
• Juan Vialpando		
▪ <u>401(k) Benefits Reporting</u>		
• Becky Hoover	x303	becky@paydayinc.com
• <u>Receptionist</u>		
○ Lina Alvarez	x301	lina@paydayinc.com
▪ Back-up		
• Becky Hoover	x303	becky@paydayinc.com
• Kathy Wagy	x363	kathy@paydayinc.com



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Albuquerque, NM 87110  
after hrs 505-260-7627

## Extension

### Tax/ Accounting

- Finance Manager
  - Leanne Rich, CPP x320 leanne@paydayinc.com
    - Tax
      - Elvira Romero x336 elvira@paydayinc.com
      - Kathy Wagy x363 kathy@paydayinc.com
    - Accounting Department
      - Natalia Beinenson x324 natalia@paydayinc.com
      - Mireya Bejarano x313 mireya@paydayinc.com

### Implementation

- Business Development Manager
  - Russ Loidolt x354 russ@paydayinc.com
    - Customer Service Coordinators
      - Esther Vialpando x329 esther@paydayinc.com
      - Jerry Galindro x330 jerry@paydayinc.com

### Benefit Offerings **benefits@paydayinc.com**

- Paula Sherwood x331 paula@paydayinc.com
- Tana Trujillo x323 tana@paydayinc.com
- Tiffany Haworth x353 tiffany@paydayinc.com
- Delphina Inez x359 delphina@paydayinc.com

### Owners

- Andy Siegel x311 asiegel@swcp.com
  - Administrative Assistant
    - Pat Peterman x321 pat@paydayinc.com
- Sylvana Siegel x304 sylvana@paydayinc.com
  - Project Coordinator
    - Maria Romero x332 maria@paydayinc.com



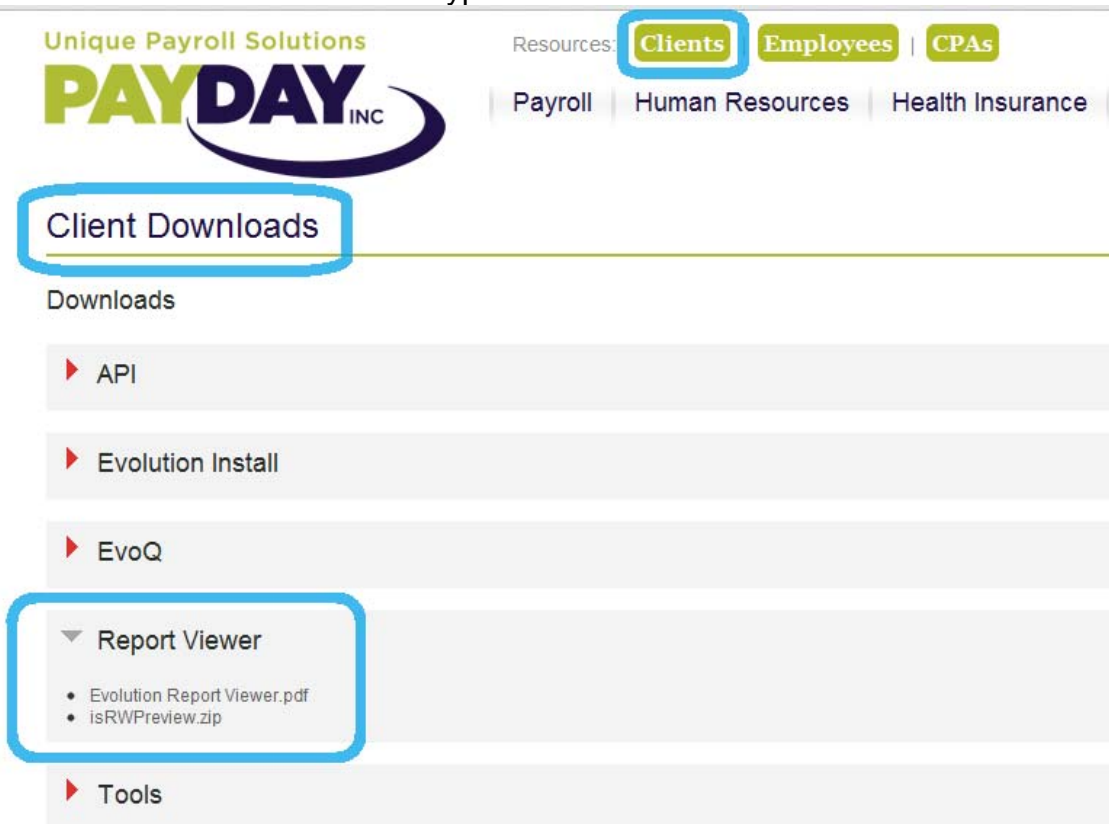
## Client Control Considerations

1. Ensuring that only authorized and properly trained personnel are allowed logical access to Payday, Inc. systems, fax input worksheets and coversheets.
2. Establishing proper controls over the use of user ids and passwords that are used to access and enter payroll information on Evolution.
3. Review of the annually prepared payroll processing schedule and notifying Payday, Inc. of any changes in a timely manner.
4. The preparation of worksheets, faxes and control totals that are sent to Payday, Inc..
5. Notifying Payday, Inc. of changes in the authorized contacts list.
6. Accuracy of the data entry when using remote client entry in Evolution.
7. Reviewing the Pre-Processing Payroll Register report before submitting on a timely basis to ensure that all payroll information has been recorded completely and accurately.
8. Reviewing the reports produced by Payday, Inc. after initial account set-up. This is to ensure that employee-level and company-level information has been initially recorded completely and accurately.
9. Review of error messages that result from entering payroll data, addressing errors and resolution in a timely manner.
10. Submitting payroll data in accordance with the mutually agreed upon schedule.
11. The completeness and accuracy of client-specified deductions.
12. Submitting client-specific deduction changes to Payday, Inc. in a timely manner.
13. Establishing procedures to notify Payday, Inc. if employees report problems with checks.
14. Signing upon receipt of payroll reports, checks and vouchers.
15. Receiving and distributing checks.
16. Reconciling bank accounts used for payroll processing on a timely basis each month.
17. Retention of payroll reports and supporting documentation for the appropriate length of time to comply with all federal, state and local compliance agencies.
18. Submitting all relevant correspondence with tax agencies to Payday, Inc. promptly.



## Downloading RWA Viewer from Payday Inc. Website

1. All reports will be sent electronically as an rwa file. This is a secure file that is created when your payroll is being processed. To open this file you will need to have preview.exe installed on your computer.
2. Create a new Folder on your desktop: "Reports"
3. Open an internet browser and navigate to <http://www.paydayinc.com/>
  - a. Click the "Clients" button at the top of the page
  - b. Click the "Secure Transfer / Download Files" bullet point
  - c. Click the "Download Files" option – this link opens <http://www.paydayinc.com/clientdownloads.php>
  - d. Click the "Report Viewer" bullet point
  - e. Select each of the available hyperlinks



4. The File Download – Security Warning window will come up. Select Save; save it to the Reports folder
5. The "isRWPreview.exe" program is in the "isRWPreview.zip" compressed folder
6. Double-click the "isRWPreview.zip" folder to see the contents
7. Once the compressed folder is open, right-click on the "isRWPreview.exe" programme
8. Select Copy
9. Close the folder window
10. Right-click in the Reports folder; select Paste
11. Double-click the isRWPreview.exe program to open it up and allow Windows to set the file associations; once open, you may click the "X" to close it
12. When you receive your report you will want to save them to the Reports Folder.
13. Double-clicking the Report .rwa file will open the Preview.exe and the report(s)



# Navigating



Buttons

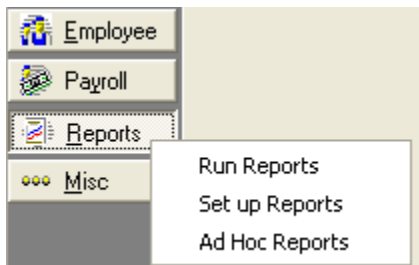
Top Navigational Bar

Tabs

Select the Header Column to put the information in order by the column you select

The Browse Tab will always be where your, "list" is.

- Buttons are located on the left hand side of the screen. Some of the buttons will have a subfolder of other buttons you can choose within that button. For instance the Reports Button has subfolders run reports, set-up reports, etc.



**Filter records to view**

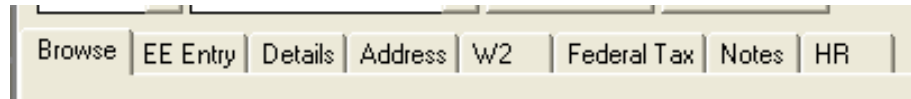
Enter text to use to filter records.

Field names	Filter
EE Code	
Last Name	
First Name	
MI	
SSN	
Status	ACTIVE

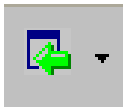
☐ Not
 ☐ Exact Match



2. Tabs are located along the top of the screen. You can access further information within each tab by selecting each tab.



3. The Top Navigational Bar helps you navigate and perform actions within Evolution.



[Back to previously viewed window](#)



Forward to next viewed window (The last few places you have been.)



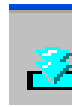
## First Record



### Prior Record



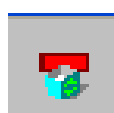
Next Record



### Last Record



## Create a record



## Delete a record



View field audit history



Refresh data



## Post Changes



## Cancel Changes



## Commit data changes to database on server



## Abort Changes

Notes: \_\_\_\_\_

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# Changes

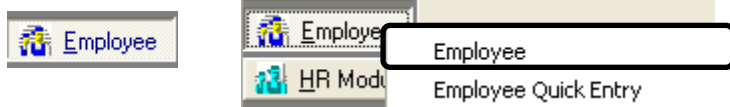




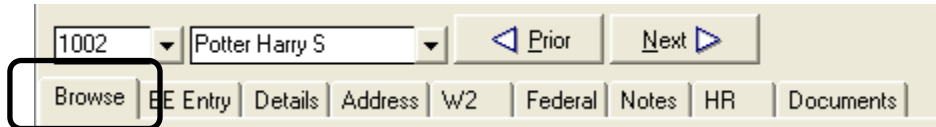
## Entering a Change to Employee Information On the Employee/ Employee/ EE Entry Screen

1. To Enter a change to employee information you will need to select the Employee Button.

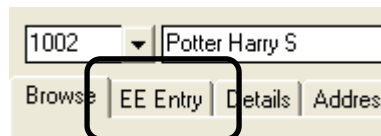
2. Select the Employee Sub Folder



3. Select the Employee that you need to make a change on from the Browse Area



4. Select the EE Entry Tab



5. Select the Information that needs to be changed

6. Enter the change to the information

7. Select the Green Check Mark

8. Select the Yellow Sun.



**\*\*Note\*\*** Changes that need to be made in other areas of Evolution are basically the same. Select the information that needs to be updated. Make the change... Save.

Notes: \_\_\_\_\_

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# Creating a New Employee

1. Select Employee on the side bar. Select Employee from the Subfolder that appears.
2. Open the Company you want to add a new employee to.
3. This action opens the company and displays its employees in the employees list. (EE list is in the Browse Tab)
4. Click the Create New Record  button on the upper tool bar to create a new record for the new employee
5. A new employee will be created and it will be displayed in the EE Entry tab.
6. Once this has occurred, you can begin to key information about the employee. All the fields highlighted in dark red **must be entered**-This information is sufficient enough to create the new employee and pay him or her.
7. SSN is required to be entered first.
8. Starting at the upper left of your page use your Tab Key on your Keyboard to enter all of the employee's information.

456 Glover Joseph < Prior Next

Browse EE Entry Details Address W2 Federal Notes HR Documents

**Always key SSN first**

**SSN** 333-44-4444

**EE Code** 456

**Last Name** Glover

**First Name** Joseph MI

**Address 1** 123 Clover Lane

**Address 2**


**City** Somewhere **State** 3

**Zip Code** 88003 **County**

**Primary Phone**

**Ethnicity** Not Applicable

**Date of Birth** 4/21/2010

**Gender** N/A 

**Division** Division 1 **Division 1**

**Branch** ALBQ **ALBQ**

**Department** 100 **Dept 1**

**Team**

**Current Hire Date** 4/21/2010 **Original Hire Date**

**Current Term. Date** **Rehire OK** Yes

**Current Status Code** Active

**Pay Frequency** Weekly **Standard Hours**

**Salary Amount** **Average Hours** 0.00

**Rate Number** 1 **Rate Amount** 8.50

**Combined Position**

**Position**

**Pay Grade**

**Default WC** **Description** **State**

**Default Job**

**Federal Marital Status** ☒ Single ☐ Married

**Federal Dependents** 2

**State** NM


**SDI** NM

**SUI** NM

**State Marital Status** **State Dep** S


**Healthcare Coverage** No ER Paid Ins/Not Eligible

**Reciprocal Method** Take None

**Reciprocal State** 

Notes: \_\_\_\_\_

9. When entering the employee's Division, Branch, Department, or Team you must select the DBDT button. This will allow you to select the DBDT

**Gender** Male 

**Division**

**Branch**

**Department** 100 **Home**




**Team**

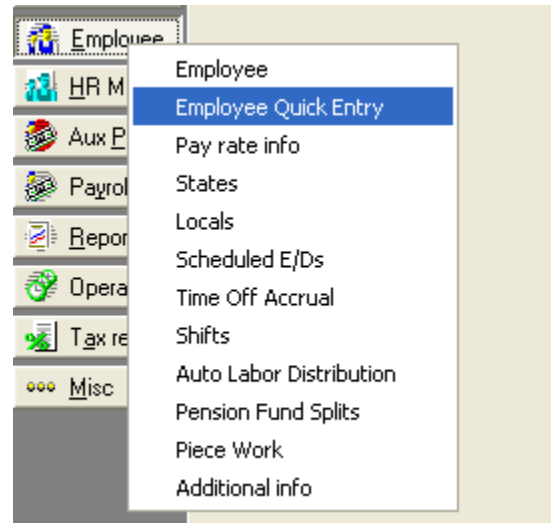
10. If the employee that you are entering is salaried you will enter the salary based on the Pay Frequency. This is what they will actually be paid on their check per pay period (not the employee's annual salary). You will leave the Rate Number as 1 and the Rate Amount as 0.00. If they employee's is hourly you will enter the employee's pay rate in the Rate Amount. You will leave the Rate number as 1.





## Entering your Employee's Using Employee Quick Entry

1. Select the Employee Button
  2. Select the Employee Quick Entry Subfolder
  3. Select the Employee Quick Entry Tab
- 
- A screenshot of a software interface showing a 'Browse' button. The button has a dropdown menu open, and 'EE Quick Entry' is selected and highlighted. The button itself is yellow with a black border, and the dropdown menu is white with a black border.
4. Select the Green Plus Sign at the top of the page.
- 
- A screenshot of a green plus sign icon inside a grey square button. The plus sign is green and the button is grey with a black border.
5. Enter the employee's information
    - a. All required information is **Bolded in Red**
  6. To save the employee select the Green Check Mark.
  7. Then select the Yellow Sun.
- 
- A screenshot of a green checkmark icon inside a grey square button. The checkmark is green and the button is grey with a black border.



Notes: \_\_\_\_\_



# Terminating an Existing Employee

Note: When terminating an employee you should consider if the employee needs to be paid again before actually terminating the employee in the system. The system creates checks in the Batch area based on the employee's that are active in the system. If you terminate the employee before running your payroll, and you still need to pay this employee you will have to manually create a check to pay this person.

1. Select Employee on the side bar. Select Employee from the Task List items that appear.
2. Open the Company you want to add a new employee to.
3. This action opens the company and displays its employees in the employees list. (Browse Tab)
4. From the list of employee's select the employee that needs to be terminated. (You can either double click on the employee's name or select the employee and then the EE Entry Tab to enter the employee's information.)
5. Enter the termination date, and change the status to one of the available status listings. As well as if the employee can be rehired.
6. Any status that is not active will cause the employee to not automatically come into the payroll when auto creating checks.

1042	Feet Happy	Prior	Next	Remove Employee				
Browse	EE Entry	Details	Address	W2	Federal	Notes	HR	Documents
<b>Always key SSN first</b>								
SSN	215-25-2645							
EE Code	1042							
Last Name	Feet							
First Name	Happy MI							
Address 1	100 Feet Feel Good Rd.							
Address 2								
City	Moving		State		NM			
Zip Code	87124		County					
Primary Phone								
Ethnicity	Not Applicable							
Date of Birth								
Gender	N/A		D/B/D/T					
Division	Division 1		Division 1					
Branch	ALBQ		ALBQ					
Department	300		Dept 3					
Team								
<b>Current Hire Date</b> Original Hire Date								
4/25/2007								
Current Term. Date <b>Rehire OK</b>								
6/1/2010 Yes								
<b>Current Status Code</b>								
Terminated								
<b>Federal Marital Status</b>								
Single Married								
<b>Federal Dependents</b>								
0								
<b>Pay Frequency</b> Standard Hours								
Bi-Weekly								
Salary Amount Average Hours								
0.00								
<b>Rate Number</b> <b>Rate Amount</b>								
1 6.75								
Combined Position								
Position								
Pay Grade								
Default WC Description State								
Default Job								
<b>State</b>								
NM								
SDI								
NM								
SUI								
NM								
<b>State Marital Status</b> State Dep								
S 0								
<b>Healthcare Coverage</b>								
No ER Paid Ins/Not Eligible								
<b>Reciprocal Method</b>								
Take None								
Reciprocal State								
Locals								

Notes: \_\_\_\_\_

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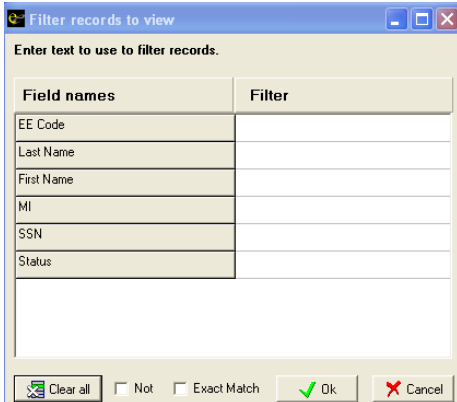
\_\_\_\_\_



# Rehiring an Employee

If you start entering a new employee, and the system auto populates the Employee's information, this employee is already in the system. You should select the red  Now you should go through the steps to rehire the employee.

1. Select the Employee Button, then the Employee Subfolder
2. Select the filter beside the employee list  clear list so that you are seeing all employee's



Filter records to view

Enter text to use to filter records.

Field names	Filter
EE Code	
Last Name	
First Name	
MI	
SSN	
Status	

Clear all ☐ Not ☐ Exact Match ☒ Ok ☒ Cancel

Notes: \_\_\_\_\_

\_\_\_\_\_

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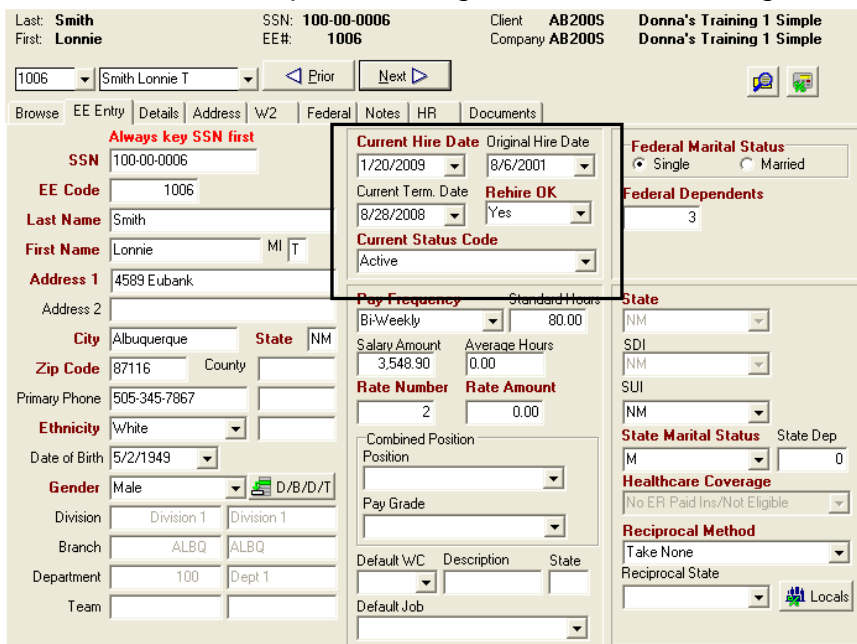
\_\_\_\_\_

\_\_\_\_\_

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3. Select the employee that you want to rehire (either double click on the employee's name or select the employee and then click on the EE Entry Tab)
4. Change the Current Hire Date to reflect the new hire date. Change the Original Hire Date to reflect the hire date that was this person's original hire date. Change the status to Active



Last: **Smith** SSN: **100-00-0006** Client: **AB200S** Donna's Training 1 Simple  
First: **Lonnie** EE#: **1006** Company: **AB200S** Donna's Training 1 Simple

1006 Smith Lonnie T < Prior Next >

Browse EE Entry Details Address W2 Federal Notes HR Documents

**Always key SSN first**

SSN: 100-00-0006

EE Code: 1006

Last Name: Smith

First Name: Lonnie MI: T

Address 1: 4589 Eubank

Address 2:

City: Albuquerque State: NM

Zip Code: 87116 County:

Primary Phone: 505-345-7867

Ethnicity: White

Date of Birth: 5/2/1949

Gender: Male

Division: Division 1

Branch: ALBQ

Department: 100 Dept 1

Team:

**Current Hire Date** 1/20/2009 **Original Hire Date** 8/6/2001

**Current Term. Date** 8/28/2008 **Rehire OK** Yes

**Current Status Code** Active

**Federal Marital Status** Single ☒ Married ☐

**Federal Dependents** 3

**Pay Frequency** Bi-Weekly **Standard Hours** 80.00

**Salary Amount** 3,548.90 **Average Hours** 0.00

**Rate Number** 2 **Rate Amount** 0.00

**Combined Position** Position:

**Pay Grade**

**Default W/C** Description: State:

**Default Job**

**State** NM

**SDI** NM

**SUI** NM

**State Marital Status** M **State Dep** 0

**Healthcare Coverage** No ER Paid Ins/Not Eligible

**Reciprocal Method** Take None

**Reciprocal State**

**Locals**

5. Depending on your company you may have other areas that will need to be updated.
  - a. Address
  - b. Pay-rate
  - c. Scheduled E/D's
  - d. Direct Deposit
  - e. Etc.



## Details Tab

1. The Details Tab in Evolution is located in the Employee Button Employee Subfolder. This area holds extra information about the employee.
2. Payday sends the New Hire Report for most of our Clients unless specifically asked to not perform this service. You can see the status of the New Hire report in the upper left hand corner of the Details Tab.

3. Keep track of your employee's Position. The Effective Date of that employee starting in that Position. Also keep track of if the employee's Position Status.

Last: **Austin** SSN: **123-22-3333** Company: **Donna's Training 1 Simple**  
 First: **Jane** EE#: **1010** Number: **AB2005#**

1010 Austin Jane P < Prior Next >

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

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

**Position**  
 Bookkeeper  
 Position Effective Date  
 10/30/2008  
**Position Status**  
 Full Time  
 Highly Compensated  
☐ Yes ☒ No  
 Corporate Officer  
☐ Yes ☒ No

**Labor Distribution Options**  
 Distribute Both  
 Auto Labor Distribution E/D Group  
 Pay Group  
 Delivery  
 Group Term Policy Amount  
 GTL Hours GTL Rate  
 On Call From On Call To  
 G/L Tag

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

YTD (F3)

4. To build the list that is available in the drop down box under Position right click over the position column. Select the Edit Lookup Table from the box.

Notes: \_\_\_\_\_

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Position  
Bookkeeper

Position Effective Date  
10/30/2008

**Position Status**  
Full Time

Highly Compensated  
☐ Yes ☐ No

Edit lookup table

Undo

Cut

Copy

Paste

Delete

Select all

5. This will direct you to the area in Evolution where you can build the list available in this drop down box.

6. By selecting the Green Plus Sign at the top of the screen you can add a Description. Enter the Description at the bottom of the page. Save by selecting the Green Check Mark and then the Yellow Sun. When done entering the Descriptions that you would like to have available hit the back arrow button at the top of the screen to have Evolution navigate you back to the Employee/Employee/Details Tab.

Notes: \_\_\_\_\_

Client AB200S# Donna's Training 1 Simple

Company AB200S# Donna's Training 1 Simple

Browse Details

? Description

Bookkeeper

Outside Sales Representative

Test

Description Bookkeeper







## Address Tab

1. In the Address Tab the required Red Bold areas default with what is entered in the EE Entry Tab.
2. The Alternate Address area allows you to keep more than one address in the system.
3. This area also allows space for extra phone numbers

Last: **Austin** SSN: **123-22-3333** Company: **Donna's Training 1 Simpl**  
 First: **Jane** EE#: **1010** Number: **AB2005#**

1010 Austin Jane P < Prior Next >

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

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

**Address 1** 255 Meadow LnNW  
 Address 2  
**City** Albuquerque  
**State** NM  
**Zip Code** 87121  
 County  
 Primary Phone  
 Secondary Phone  
 Tertiary Phone  
 E-mail  
 VMR Password  
 Country

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

8412 Pink Car Dr NW  
 Albuquerque  
 NM  
 87105  
 County  
 Primary Phone  
 Secondary Phone  
 Tertiary Phone  
 E-mail  
 VMR Password  
 Country

Self Serve  
**Enabled** ☒ Yes ☐ No **Print Voucher** ☒ Yes ☐ No  
 User Name  
 Password

4. Employee's that are having their vouchers emailed to them must have Direct Deposit that is **not in pre-note** on their account.
  - a. Enter the employee's email address (this is where the voucher will be emailed) enter the VMR Password (this will be what the employee must enter to be able to view the check voucher ~ this is usually the last four digits of the employee's social)
  - b. Make sure that you let your CSR know that you set up an employee to receive their check through email. The CSR has a final step that they must do to make this process work properly.
  - c. **Note!!! If an employee needs to receive a paper check you will need to notify your CSR so that they can make a change in Evolution so that this will happen.**
5. If you are using our Self Serve service you will enter the employee's User Name and Password in the Self Serve box.



## W-2 Tab

1. The W-2 Tab allows you to control information for the W-2. This area is used mostly to control if you are paying 1099 employees through Evolution.

<b>Social Security Number</b> <input type="text" value="123-12-1234"/>	<b>Annual Form Type</b> <input type="text" value="1099"/>
<b>Treat as EIN or SSN</b> <input type="radio"/> EIN <input checked="" type="radio"/> SSN	<b>Deceased</b> <input type="radio"/> Yes <input checked="" type="radio"/> No
<b>1099 or Employee</b> <input checked="" type="radio"/> 1099 <input type="radio"/> W-2	<b>Statutory Employee</b> <input type="radio"/> Yes <input checked="" type="radio"/> No

- a. If paying a 1099 employee through Evolution you must change the form type to 1099 instead of W-2. You must also change the 1099 or Employee box to show 1099.
  - b. It also important to check the Employee/Scheduled E/D area on 1099's to make sure that there is no Worker's Comp codes on the employee. (Note: this only affects NM employers)
  - c. 1099 employees should only be paid under a code that is specific to 1099 employees. If you are paying 1099 employees through Evolution you will need to have a special Earnings Code set up to pay them under in the payroll.
2. The other area used in the W-2 area is the First Name, Middle Name, Last Name, and Name Suffix. These Columns allow you to override what will show on the W-2. Normally the system takes the information from the Employee/EE Entry area, but when these columns are filled out the system will use what is enter here over what is in the Employee/EE Entry area.

First Name	<input type="text" value="Raymond"/>
Middle Name	<input type="text" value="John"/>
Last Name	<input type="text" value="Doe"/>

### Notes:

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# Federal Tax Tab

1. To take additional Federal taxes on an employee who has designated to do so, on their W-4 you will need to go to the Federal Tax Tab in the Employee/Employee area of Evolution.

2. Once in this tab you will need to change the Override Fed Tax Type. You will then put in the amount or percentage in the Override Fed Tax Value.
3. Available options in the Override Fed Tax Type drop box and what they mean:

**None** ~ no additional taxes will be taken  
**Regular Amount** ~ this will tell the system that this is the only taxes to be taken for federal. This will override the employee withholding status on the EE Entry Tab  
**Regular Percent** ~ this will tell the system to only take this percentage for the Federal Taxes. This will override the employee withholding status on the EE Entry Tab.  
**Additional Amount** ~ this will take the amount entered as well as what the system calculates the EE's withholding to be based on their withholding status.  
**Additional Percent** ~ this will take this percentage as well as what the system calculates the EE's withholding to be based on the withholding status.

4. If you have an employee who enters Exempt on the W-4 you will need to contact your CSR to have them set this up on your Employee.



## Notes Tab

1. The notes area in the Employee/ Employee/ Notes Tab: will allow you to keep notes on your employee's.
  - a. The Payroll Notes will show in the payroll as a reminder of something that needs to be done for this employee in the payroll.
  - b. The General Notes gives you a place to keep notes on this employee. These notes will only show in this area.

Notes:

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## HR Tab

Last: **Potter** SSN: **525-79-8693** Company: **Donna's Training 1 Simple**  
First: **Harry** EE#: **1032** Number: **AB2005**

1032 Potter Harry < Prior Next

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

Picture   
  
Badge ID  
123456

Recruiter  
Albus Dumbeldore

Performance Rating  
Excellent

Citizenship

Referral  
Hermione Granger

Review Date  
1/1/2009

Next Review Date  
1/1/2010

Automobile  
Reliable Vehicle  
☒ Yes ☐ No

Drivers License Number D/L Expiration

Insurance Carrier

Insurance Policy Number

Policy Expiration

Veteran  
☐ Yes ☒ Not Applicable  
☐ No

Discharge Date

Vietnam Veteran  
☐ Yes ☒ Not Applicable  
☐ No

Disabled Veteran  
☐ Yes ☒ Not Applicable  
☐ No

Military Reserve  
☐ Yes ☒ Not Applicable  
☐ No

Security Clearance  
High

Supervisor  
Wiebenga

EEO Code  
2 Professional

Smoker  
☐ Yes ☒ No

VISA  
VISA Number VISA Type Expiration Date  
None

1. The HR Tab allows you to keep basic HR information on your employee.
2. You can load a picture
  - a. The picture must be a bitmap format that does not exceed 50 KB
  - b. Select the Load button and navigate to where the picture is located on your computer or server.
3. The other areas on this tab that have drop boxes are customizable
  - a. Right clicking in the box that you would like to customize.
  - b. Select Edit Look-up Table
  - c. This takes you to the area of Evolution that you can build the list for this box.
  - d. Once you have built your list using the plus sign to add more than one entry hit the back button to get back to the Employee/ Employee/ HR Tab
  - e. The list you just built should now be available.

## Notes:

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# Tracking Workers Comp in Evolution

1. There are two ways that Evolution allows tracking of Workers Comp.
  - a. The first option is from the Employee/ Employee/ EE Entry Tab.
  - b. Tracking can be done from the drop down box Default WC.

The screenshot shows a form titled "Pay Frequency". It contains several input fields and dropdown menus. The "Pay Frequency" dropdown is set to "Bi-Weekly". The "Salary Amount" field is empty, and the "Average Hours" field is set to "0.00". The "Rate Number" field is set to "2", and the "Standard Hours" field is empty. The "Rate Amount" field is set to "16.00", and the "Pay Grade" dropdown is set to "Technical". The "Default WC" dropdown is set to "8810", the "Description" field is set to "Clerical", and the "State" dropdown is set to "NY". The "Default Job" dropdown is empty.

- c. The second option is for the workers comp code to be attach to a DBDT. This would allow that when you select an employee's home department in the Employee/Employee/ EE Entry area that the Default WC would be selected based on the home department that was selected.

The screenshot shows a form titled "Employee/Employee/ EE Entry". It contains several input fields and dropdown menus. The "Gender" dropdown is set to "Male". The "Division" field is empty. The "Branch" field is empty. The "Department" field is set to "100", and the "Home" field is set to "Home". The "Team" field is empty.

2. Workers Comp can also be changed on the check lines of a payroll. This allows tracking if an employee works in different jobs that need to be coded under different workers comp codes.

Notes: \_\_\_\_\_

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## Life Insurance over \$50K

1. Group Term Life Insurance can be tracked in the Evolution System so that it does not need to be entered in all at the end of the year.
2. To enter this is you will need to have Payday set up a code in the system. This code will need to be set up in the Scheduled E/D's area so that it will come into the check.
3. You will also need to make sure that the employee's Date of Birth is entered correctly in the Employee/ Employee/ EE Entry Tab.

Browse	EE Entry	Details	Address	W2	Feder.
<b>Always key SSN first</b>					
SSN	123-12-1234				
EE Code	10				
Last Name	Doe				
First Name	John				MI
Address 1	123 Main St.				
Address 2	2				
City	Albuquerque			State	NM
Zip Code	15885		County		
Primary Phone	505-328-2584				
Ethnicity	White				
Date of Birth	12/4/1969				

In the Details Tab you will enter the Group Term Life Poli

y	Details	Address	W2	Federal Tax	Notes	HR	D
<b>Report Sent</b>		<b>Labor Distribution Options</b>					
		Distribute Both					
<b>empt</b>		Auto Labor Distribution E/D Group					
		Auto Labor					
licable		Pay Group					
umber		Live Checks					
		Delivery					
ative Date		Group Term Policy Amount					
		150,000.00					





## Employee/ Pay rate Info


1. The Employee Pay rate area of Evolution allows you to update and maintain your employee's pay information.

2. For employee's that are hourly the rate entered in the Employee/ EE Entry area of Evolution will default into this area as the Primary Rate. To update the hourly rate you would change the rate in the Rate Amount Field and save.
3. If an employee needs to have more than one hourly rate; select the plus sign at the top of the page. This will give you another line to add a separate pay rate. The rate number will be the next available number. Enter the rate amount and then save.

4. Pay rates can have a DBDT attached to them. This will cause the system to connect the pay rate with the attached department. If an employee is paid a different rate when working in a different department this would work in the system for this employee.
  - a. Highlight the pay rate that needs to have a department attached to it.
  - b. Select the DBDT Icon, and select the DBDT that you want to attach.



5. Employee's that are salary will have the salary amount that was entered in the Employee/EE Entry are defaulted into this area. The system calculates based on what you entered what the annual salary is.

Salary Amount	Standard Hours
<input type="text" value="1,477.88"/>	<input type="text"/>
Annualized Salary	<b>Pay Frequency</b>
<input type="text"/>	Bi-Weekly 
Average Hours	Calculated Annual Salary
<input type="text" value="0.00"/>	<input type="text" value="38,424.88"/>

### Notes:

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[illegible]

# Employee/ States

1. The Employee/ States area of Evolution will allow you to change the State on an employee
  - a. First you will need to make sure that the state is setup and available
  - b. Go to Employee/ States
  - c. Select the employee that you need to change the state on
  - d. Select the plus sign from the details tab.

Last: **Rock** SSN: **525-00-0000** Company: **ABC Test Company**  
 First: **Stone** EE#: **1009** Number: **AB001**

1009 Rock Stone < Prior Next >

Browse Details Tax Overrides

**Home State**  
 NM

St...	Marital Status	Withholding Allowances
NM	M	5

- e. In the State, SDI, and SUI drop boxes select the State that the employee is being changed to.

**State**  
 NV

**SDI**  
 NV

**SUI**  
 NV

DE  
 NM  
 NV  
 NY  
 OH  
 TN  
 VT  
 WA

County Reciprocal Amount/Percentage **Marital Status**  
 Tax Code **Reciprocal Method**  
 Withholding Allowances Take None  
 Reciprocal State

**Import Marital Status**  
☐ Single  
☒ Married

- f. Select the Marital Status for the new state. Enter the Withholding Allowances Amount for the new state as well.
- g. Save with the green check mark and yellow sun.
- h. Change the Home State at the top of the Details Tab.

Browse Details Tax Overrides

**Home State**  
 NV

St...	Marital Status	Withholding Allowances
NM	M	5
NV	M	5

Browse Details Tax Overrides

**Override State Tax Type**  
 Additional Amount

Override State Tax Value  
 15.00

- i. To affect an employee's state withholding go to Employee Side Button/States Sub-Folder/Tax Overrides Tab. You will be able to affect the employee's state withholding by selecting the Override State Tax Type. Enter the amount or percentage in the override state tax value.



## Employee/Scheduled E/Ds

Last: **Potter** SSN: **525-79-869**  
First: **Harry** EE#: **1032**

1032 Potter Harry

Browse Browse Scheduled E/Ds Details 1

**E/D Code**  
D40 Cafe Medical

**Calculation Method**  
Fixed  
Amount 35.00 %

**Frequency**  
Every Pay

**Month #** None **Which Payrolls** All

E/D Group

Agency

**Effective Start Date** 2/18/2009 **Effective End Date**

1. The Scheduled E/D's area of Evolution is used for Earnings and Deductions that you want to come into the payroll automatically when starting the payroll.
2. When in the Employee/Scheduled E/D's/ Browse Tab you will be viewing your company(s) on the left side of the page and the list of employee's on the right side of the page. Select an Employee either by double clicking on the Employee's name or by highlighting the employee's name then select Browse Scheduled E/D's tab.

- a. From the Browse Scheduled E/D's tab you can view the Scheduled E/D's that are already set up for this employee.
- b. If you need to edit an already created E/D select the E/D then select the Details 1 tab or any other tab that may hold information about that E/D.
- c. Change the information that needed to be updated and save
- d. Note to stop a deduction enter an end date that is before the beginning date for the pay period.

3. To create a new Scheduled E/D select the green plus sign at the top of the screen. This will automatically direct you to the Details 1 tab.

- a. Most Scheduled E/D codes are specific to your company needs so that you should be able to select the E/D Code, enter the amount or percentage that should be paid or taken, and then save.
- b. It is important to note that each employee should only have an E/D code set up on them once. The system will not allow a code to be active on an employee more than once.

- c. If you find that you are in need of another E/D code on your company setup please let your CSR know. We can add more E/D codes to your set up for your use.

- d. Some codes may require more information to be filled out in the Details 2 tab.

Codes that require a target to be setup will require that the information is setup in the Detail's 2 tab. Under Target Action select from the drop down box

Target Action

None

None

Reset Balance

Reset Balance and Issue Agency Check

Do Not Reset Balance but Leave Line

Do Not Reset Balance and Remove Line

~Do not reset Balance but Leave Line – will leave the balance in Evolution and will leave the line on the ee's check.

~Do Not Reset Balance and Remove Line- will leave the balance in Evolution and will remove the line on the ee's check once the target has been met.

Enter a Target Amount. The system will take the amount that was set in the Detail's 1 tab for the deduction and will update the Balance Taken until the total Target Amount has been taken. Then the system will automatically put an end date in the Detail's 1 to stop the code.

4. All Child Supports, Garnishments, and Liens need to be set up in the system by Payday. Contact your CSR to send them the information to be set up.



## Future Dating in Scheduled E/D's

1. Evolution will allow you to date a Scheduled E/D to start or stop in the future.
2. Future dating is done in the Scheduled E/D Details 1 Tab
  - a. The Effective Start Date is the date that the system looks at for starting a Scheduled E/D
  - b. The Effective End Date is the date that the system looks at for stopping a Scheduled E/D

Effective Start Date Effective End Date

9/17/2008

3. When Future dating you must think about what pay period the date that you want the Scheduled E/D to start or stop in.
  - a. The Pay Period is the time frame that you are paying for on a specific check date. The Beginning and End Date show in the Batch Area when you are running payroll.

Batch	Period Begin Date	Period End Date	Frequency
182	6/26/2009	7/2/2009	W

Payroll Filter

Payroll Check Template

Frequency

Weekly

Period Begin Date Period End Date

6/26/2009 7/2/2009

Batch Creation Options

Checks per EE

1

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

Pay

☒ All ☐ Salary ☐ Hourly

Create Checks

☒ Regular ☐ Manual ☐ 3rd Party

Pay Salary

☒ Yes ☐ No

Pay Standard Hours

☒ Yes ☐ No

Load Payroll Defaults

☒ Yes ☐ No

Create Batch

Create Cobra Batch

Refresh ED

Refresh ED No Man

Delete Batch

- b. As long as the date that you enter in the Scheduled E/D Detail 1 (Effective Date or End Date) fall within the Period Begin Date and Period End Date that Scheduled E/D will either start or stop for that Pay Date.

Notes: \_\_\_\_\_

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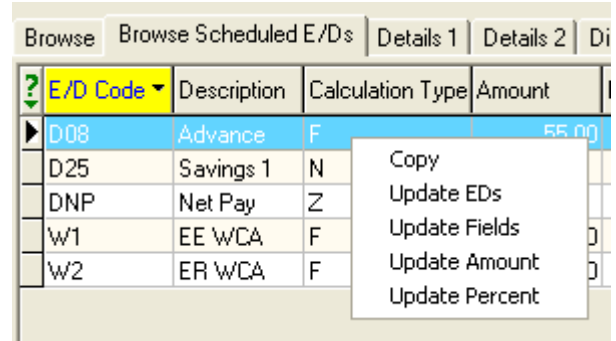


## Mass Updates in the Scheduled E/D Area

1. In the Employee Scheduled E/D Area of Evolution select an employee from the Browse Tab who needs to have an E/D updated.
2. Select the Browse Scheduled E/D's Tab
3. Select the E/D that needs to be updated
4. Right click and select the Action that you would like to perform.

a. Copy

- i. Select the Employee's that you would like to copy this E/D onto.
- ii. Say Yes to overwrite existing enteries
- iii. This will only work if the EE's that are selected do not have this E/D setup on them
- iv. This is best used when you are setting up a completely new E/D

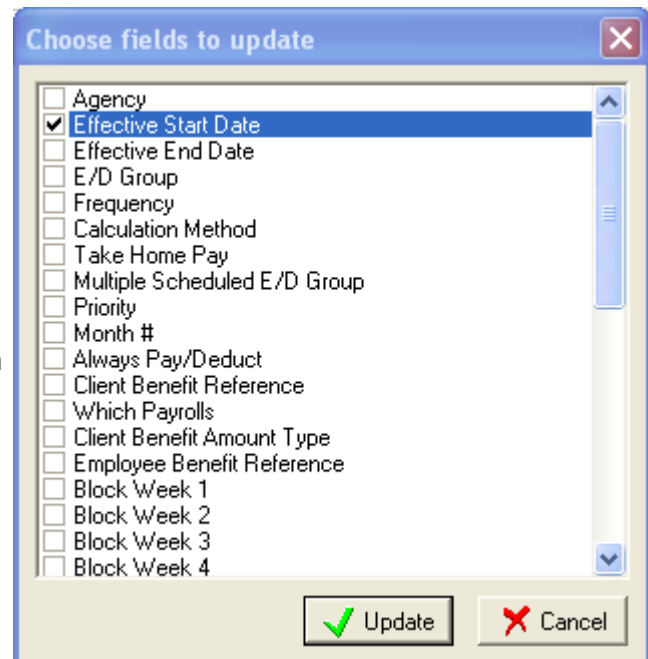


b. Update E/D's

- i. Select the Employee's that you would like to have the E/D selected updated on them as well.
- ii. This is best used on E/D's that already are setup on Employee's that need to be updated.

c. Update Fields

- i. This function allows you to update the E/D that you are on right now. This will give you a Choose fields to update pop up screen. Select the fields that you want to update.
- ii. Select the update button at the bottom of the box.
- iii. Select the Employee's that you would like to update these fields on.
  1. If you are updating on more than one Employee select the Ctrl key on your keyboard to select more than one name.
  2. If you are selecting all select the first name in the list hold down your Shift key on your keyboard then select the last name in the list. This will select all of the names.



Notes: \_\_\_\_\_

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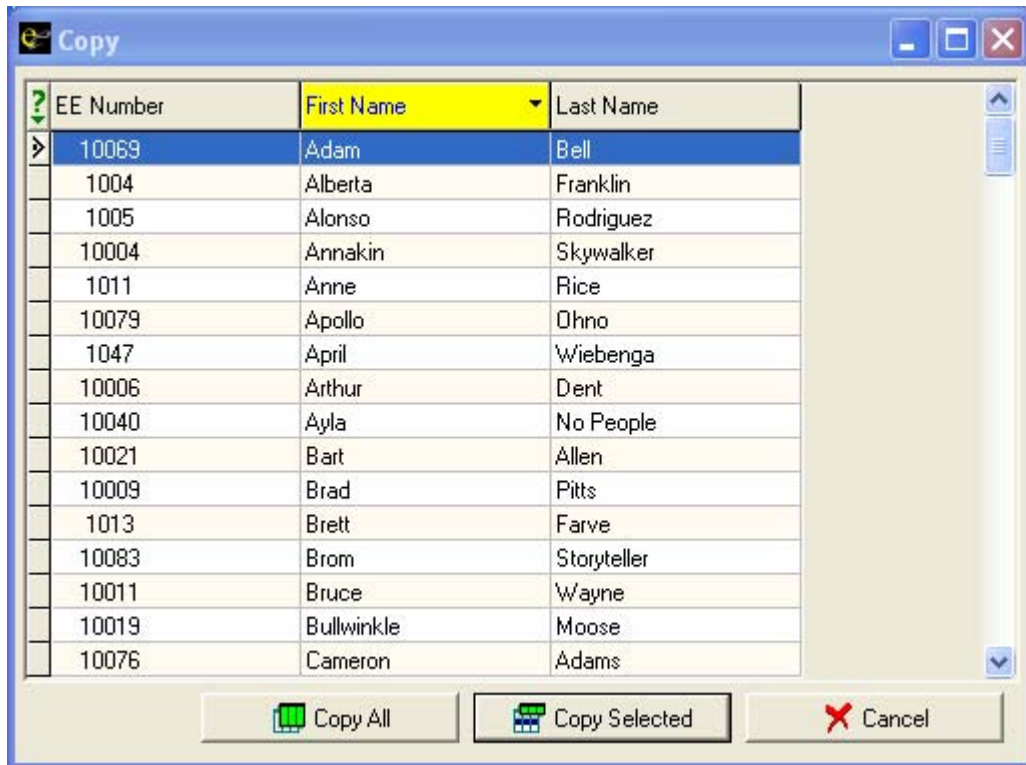
\_\_\_\_\_

\_\_\_\_\_

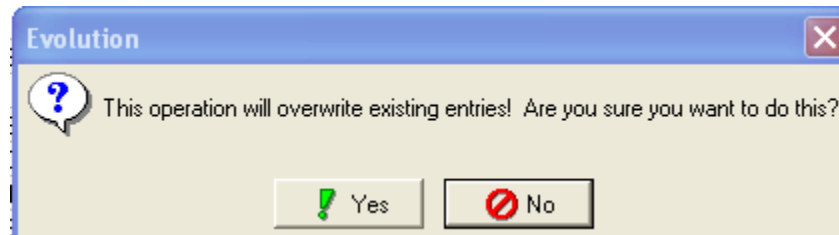
\_\_\_\_\_



### 3. Select the Copy Selected Button

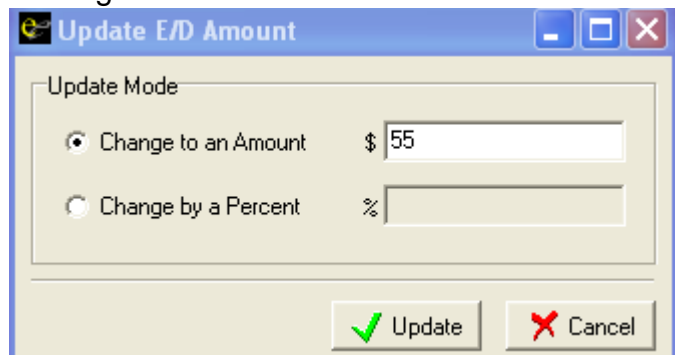


iv. A message box will pop up Select Yes



d. Update Amount/ Percentage

- This will give you a pop up box that will allow you to change the amount or percentage on this E/D.
- Enter the new amount of percentage
- Select the update button.

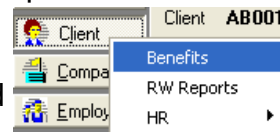


- You will be prompted to select the Employee's that need to be updated.
- Select Employee's
- Select copy Selected
- Say yes to the message to overwrite existing entries.



## Client Benefits

1. The Client Benefits area allows for a Scheduled E/D to be updated to affect everyone who has that specific setup of that Scheduled E/D
2. Go to the Client Button and then the Benefits Subfolder.
3. From the Browse Tab the Benefits that have been created can be seen.
4. To add a new Benefit hit the Green plus sign at the top of the page. Fill out the Details Tab and % and Amounts Tab
5. To update an already created Benefit select the Benefit from the right column. Then select the Details Tab.
6. From the Details Tab you can update the information for the Benefit.
7. There is further information that can be updated for each level of the Benefit under the % and Amounts Tab.



A screenshot of the 'Client Benefits' form. The 'Browse' tab is selected. It shows a table with columns: Rate Description, Type (% or Amt), EE Part, ER Part, and Cobra Amount. The table lists three benefits: Double Amount, Family Amount Test, and Single Amount. Below the table, there are input fields for Description, Type (Amount or Percent), and various amounts and ratios. A green plus sign is circled in the top right corner of the form.

Rate Description	Type (% or Amt)	EE Part	ER Part	Cobra Amount
Double Amount	Amount	116.77	350.31	
Family Amount Test	Amount	155.48	466.43	
Single Amount	Amount	75.00	200.00	

8. By selecting the Rate Description you can update the Amounts that will Globally affect everyone who has that Rate set up on the Employee File.
9. To add a new Rate Description select the plus at the lower right part of the page.
10. In the Employee/ Scheduled E/D's you would follow normal procedure. Select the green plus at the top of the page to create the scheduled E/D.
11. From the Details 1 Tab select the E/D Code.
12. Select the Benefit Reference from the middle of the page
13. Select the Benefit Amount Type.
14. The Calculation Method and Amount will gray out because you will control this from the Client Benefit area.

A screenshot of the 'Client Benefit Reference' form. It shows three dropdown menus: Client Benefit Reference (Lovelace HMO), Client Benefit Amount Type (Single Amount), and Employee Benefit Reference (empty). A green plus sign is visible next to the Employee Benefit Reference dropdown.

15. If you have the HR Module portion of Evolution you can control the Benefit Reference by selecting from the drop down box with the plus sign beside it. This allows you to reference the HR Module information, which is connected to the Client Benefit Area

A screenshot of the 'Client Benefit Reference' form, similar to the previous one, but with the Employee Benefit Reference dropdown set to 'Lovelace HMO'. A green plus sign is visible next to the dropdown.





## Employee/Scheduled E/D's/ Direct Deposit

1. Click Employee and then select Scheduled E/D's
2. The Browse tab will be displayed.
3. Select a company in the left browse grid and select an employee in the right browse grid.
4. Once the employee is selected, click the Direct Deposit tab.
5. In the Direct Deposit tab, create a new bank account record for the employee by clicking the plus button.

Evolution 7.0.10.2 [192.128.100.70] - Employee - Scheduled E/Ds

1/13/2006

Last: Doe SSN: 123-49-5678 E/D Code: D02 Type: D1 Company: AB Test Company  
First: John EE#: 10 Desc: Savings Number: AB001



Company: [Dropdown] Doe John M [Dropdown] [Prior] [Next] [Remove E/D]

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

EE Bank Account Nu...	ABA Number
111222333	307000127
1123	107006813
123	064000017
4567	064000020

ABA Number: 307000127 Bank Account Number: 111222333 Account Type: Checking In Prenote: ☐ Yes ☒ No

Addenda: [Text Box]  
Branch Identifier: [Text Box]  
☐ Allow Hyphens

6. Enter a valid ABA or Transit Number
7. Type a valid Bank Account Number.
8. Select an Account Type.
9. Select whether the direct deposit is In Pre-note. Remember: When pre-noting a payroll, it takes 10 working days for the bank before direct deposits take effect. Weekly payroll clients could wait two payrolls and biweekly could wait one to two payrolls. Remember to save changes by selecting the green check  or yellow sun  when applicable on the toolbar!
10. Once you have set up the bank account for the employee, you need to set up a scheduled E/D for the employee.
11. Click on the Browse Scheduled E/D's Tab. Then click the plus sign (this will take you to the Details 1 Tab.)
12. Select the E/D Code from the drop down box at the top of the page. If the Direct Deposit is going to be for the entire Net Check Select DNP as the E/D Code.
13. Select EE Direct Deposit drop down box (select the correct account)
14. **Select YES under the Deduct Whole Check.**
15. To "remove" a direct deposit permanently, you should go into the Scheduled E/D's and enter an effective end date. The information will be retained in the system, but the direct deposit will stop.



# Direct Deposit At a Glance Creating Direct Deposit

1. Employee Button
2. Scheduled E/D's
3. Select Employee the Direct Deposit need to be added to.
4. Select Direct Deposit Tab
5. Click green plus sign at middle right of pg.
6. Enter account information
7. Select green check mark & yellow sun.
8. Select Browse Scheduled E/D's
9. Click green plus sign (create new record)
10. Select Direct Deposit Deduction Code
11. Select EE Direct Deposit drop down box (select the account)
12. Select Yes under Deduct Whole Check
13. Save by selecting green check mark & yellow sun.

## Creating Multiple Account Direct Deposit

1. Employee Button
2. Scheduled E/D's
3. Select Employee the Direct Deposit need to be added to.
4. Select Direct Deposit Tab
5. Click green plus sign at middle right of pg.
6. Enter account information
7. Select green check mark & yellow sun.
8. Select Browse Scheduled E/D's
9. Click green plus sign (create new record)
10. Select Direct Deposit Deduction Code
11. Select EE Direct Deposit drop down box (select the account)
12. Select Yes under Deduct Whole Check
13. Save by selecting green check mark & yellow sun.
14. Select Direct Deposit Tab
15. Click green plus sign at middle right of pg.
16. Enter account information
17. Select green check mark & yellow sun
18. Select Browse Scheduled E/D's
19. Click green plus sign (create a new record)
20. Select direct deposit deduction code (cannot be the same code as the other direct deposit account)
21. Select EE Direct Deposit drop down box (select account)
22. Select either fixed or % under calculation method
23. Enter either amount or % to be put in the account under amount or %
24. Save by selecting green check mark and yellow sun.



# Employee/ Time Off Accruals

1. The Employee Time Off Accrual area of Evolution allows you to maintain your Employee's TOA's.
2. The TOA area can be set up to accommodate many types of plans. It can facilitate balance only plans as well as accruals. We can also have maximum's and roll over plans.
3. Payday can set up your company's TOA's to automatically create on employee's or it can be set up where you must create the TOA line for it to start to accrue.
4. Once the type line has been created depending on your company's setup the system will take care of the accruals.
5. By entering the employee's used Time Off in the Payroll the system can deduct the used from the accrued to show a remaining balance.

1001 Simpson Jake L. < Prior Next > ☒ Active TOA Only

Type	Balance	Accrued	Used	Override Eff Date	Override Accrual Maximum	Override Rate	Override Rollover Date	Active
Test Accrual	64.00	64.00	0.00					Y
Test Accrual II	0.00	0.00	0.00					Y

Type: Test Accrual II

Current Accrued: 0.00 Current balance: 0.00

Current Used: 0.00

Active: ☒ Yes ☐ No

Reason:

Show TOA History

You will be prompted to put a reason for the change

Adjusting is done with Current Accrued or Current Used

Task Queue: 15 New Finished; 22 Total; 22 Finished UserID: aw152 Recd: 2.74M 4.2M/sec Sent: 85.22K

6. If you need to make an adjustment to an employee's balance you will have to adjust the Current Accrued amount or the Current Used Amount.
7. To view the history of a TOA highlight the accrual at the top of the page and then select the Show TOA History Button on the right part of the page. This will show you the detail for the dates selected.

10 Doe John < Prior Next > ☒ Active TOA Only

Browse Details History

Show transactions in period from: 1/ 1/2008 to: 2/25/2009 Refresh Annual Accrue Reset Test 15 Mos

Accrual ...	Accrued	Accrued Capped	Used	Note	Created	Changed by	Check Date	Run#
12/12/2008	8.00		0.00	Accrual Pr:12/12/2008-1 Px8	12/17/2008 2:05:47 ...	SF161	12/12/2008	1
11/28/2008	8.00		0.00	Accrual Pr:11/28/2008-1 Px8	12/9/2008 11:49:46 ...	RL103	11/28/2008	1
11/14/2008	8.00		0.00	Accrual Pr:11/14/2008-1 Px8	12/9/2008 11:49:05 ...	RL103	11/14/2008	1
10/31/2008	8.00		0.00	Accrual Pr:10/31/2008-1 Px8	10/29/2008 10:01:5...	Super	10/31/2008	1
10/17/2008	8.00		0.00	Accrual Pr:10/17/2008-1 Px8	10/29/2008 2:51:14 ...	Super	10/17/2008	1



# Employee/ Auto Labor Distribution

1. Auto Labor Distribution is an area in Evolution that will allow you to Distribute an Employee's wages. It is important that this is going to be the break out for that employee's wages every time, and that 100% of the wages are broken out.
2. If you do not already have an E/D Group set up for Auto Labor Distribution you will need to contact your CSR to get this set up.
3. To set up on an employee Select the Employee button, then the Auto labor distribution Subfolder.
4. Select the E/D Group from the top of the page.
5. Select the Division Code
6. Enter the percentage of wages that go to this Division Code.
7. Save
8. Hit the plus sign to add another division code
9. Repeat steps until 100% of the wages have been assigned.

## Notes:

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## Employee/ Additional Info

1. This area of Evolution gives you a place to keep any additional information on your employee's.
2. To access this area go to the Employee button then the Additional Info subfolder

Last: **Potter** SSN: **100-00-0002** Company: **Donna's Training Company**  
First: **Harry** EE#: **1002** Number: **AB201M**

1002 Potter Harry S < Prior Next >

Browse Values

Name	String	Date	Amount	Value_nbr
Favorite Sports Team	Griffindor Quiddich Team			

Field

Favorite Sports Team

String

Griffindor Quiddich Team

Date

Amount

Value

Edit lookup table  
Undo  
Cut  
Copy  
Paste  
Delete  
Select all

Browse Fields

Name

Emergency Contact

Favorite Flower

Favorite Food

Favorite Sports Team

Shirt Size

VALUE

Name

Emergency Contact

Value

3. To build the list that is available in the drop down box under Field right click over the Field then select the Edit lookup table.
4. The system will direct you to the area of Evolution where the list for this Field is kept.
5. To add to the list hit the green plus sign at the top of the page and add the information you want to be available in the Name and Value columns.
6. Hit the back button at the top of the page to be directed back to the Employee/ Additional Info area.
7. The information you have added to the list will be available for your use.

## Notes:

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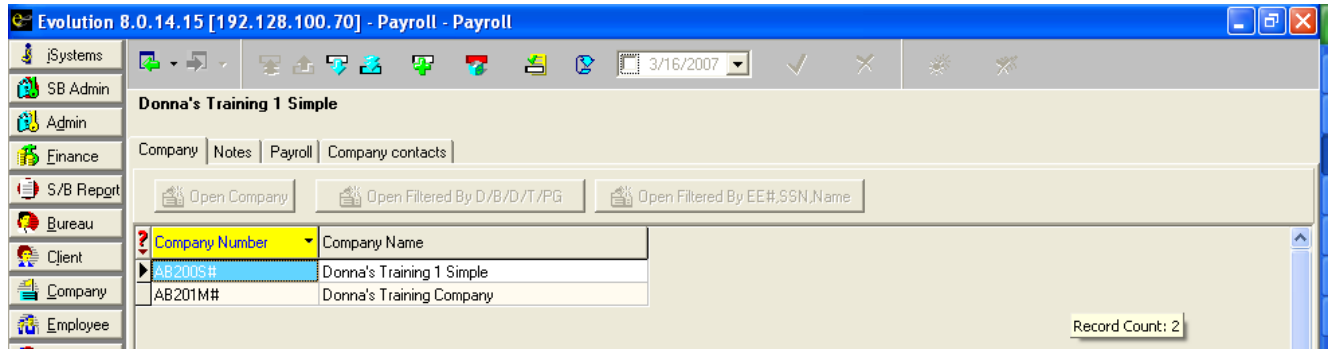


# Payroll

Entering Your Payroll → Regular → No Overrides in Batch → pg. 77  
Entering Your Payroll → Regular → pg. 79  
Entering Your Payroll → Net Clock (Web Clock) → pg. 82  
Creating a Manual Check → pg. 62

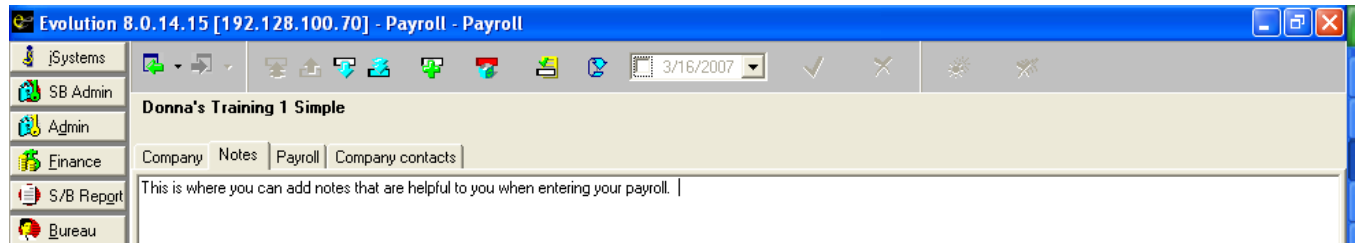


# Payroll/ Company



In the Company Tab you can select your company. If you have more than one company this is where you will select the company you are working in.

# Payroll/ Notes



The Notes Tab is where you can have your notes that are useful to you when entering your payroll. We only ask that you leave the top line as this is for the CSR's.

Notes: \_\_\_\_\_

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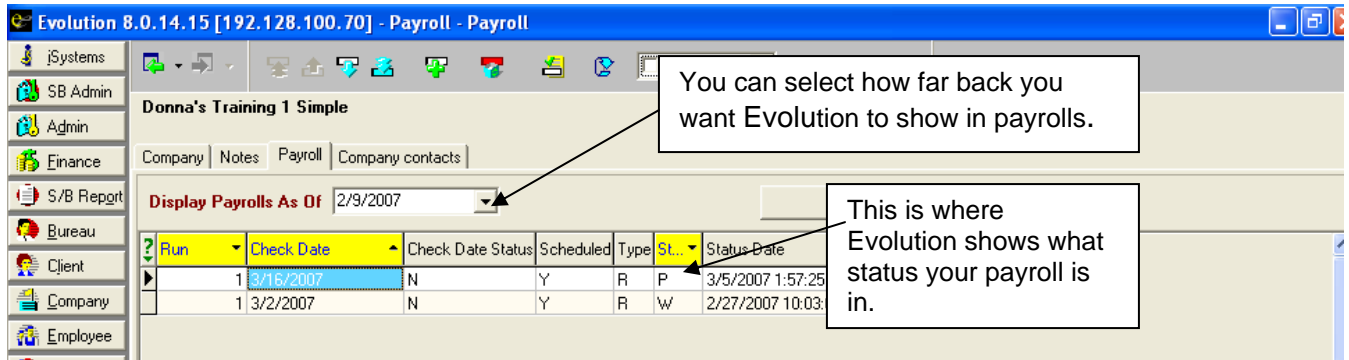
\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



# Payroll/ Payroll



1. The Payroll Tab is where you can start your payroll. It is also where you can view the payrolls that have already been run and the status that they are in. Under status the letter tells you what status your payroll is in. W = working, H = on hold (this means you have submitted your payroll) P = means that your payroll has been processed, C = the wrap room at Pay Day has begun to work on your payroll, and Y = means the system is working on the process you have asked it to do for that payroll (sometimes if you refresh).

2. The bottom of the Payroll/ Payroll tab has some important buttons and options. The Payroll Check Comment area allows you to put a note on your employee's checks. Notes enter in this box will show on everyone check stub.
3. You want to make sure that the Block areas are not blocked! This is very important. Blocking should only be done by Payday under special circumstances.
4. To the right are the Payroll buttons. The Create Payroll Button will allow you to create your next scheduled Payroll. The SB Review button is the button you will be using when you are ready for Payday to process your payroll. You will submit your payroll Payday by selecting the SB Review button. The Submit Payroll button is used by Payday to submit your payroll for processing. The Delete Payroll button is used when wanting to delete a payroll that has not been processed. The Copy Payroll button is only available to Payday for internal use.

Notes:

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# Payroll/ Payroll/ Batch

1. Batches are simply containers for checks. You can have as many Batches as you would like in a payroll. Each batch will hold separate checks.

**Donna's Training 1 Simple #1 2/20/2009**

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

?	Bat...	Period Begin Date	Period End Date	Frequency
▶	171	2/4/2009	2/17/2009	B

Payroll Filter:

Payroll Check Template:

Frequency:

Period Begin Date:  Period End Date:

**Pay Salary**  
☒ Yes ☐ No

**Pay Standard Hours**  
☒ Yes ☐ No

**Load Payroll Defaults**  
☒ Yes ☐ No

Batch Creation Options

Checks per EE:

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

Pay: ☒ All ☐ Salary ☐ Hourly

Create Checks: ☒ Regular ☐ Manual ☐ 3rd Party

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

2. The Payroll Filter and Payroll Check Template are ways of filtering and paying checks with special circumstances.
3. The Frequency will default with your pay frequency. If your company has more than one pay frequency you will have to change the frequency based on what employee's are being paid. The system will only bring employee's with the frequency that is selected into the batch.
4. The Pay period Beginning and Ending date simply show the dates the employee's are being paid for. This should come up correctly based on what we have built into your schedule. If for some reason these dates are not correct please let your CSR know so that we can update your calendar.
5. The Pay Salary, Pay Standard Hours, and Load Payroll Defaults should default all saying yes.
6. The Batch Creation Options allow you some options when creating your batch of checks. By changing the Checks per EE the system will create 1 or more checks for each active employee that is brought into the system.
7. The Pay box allows you to specify what employee's are to come into this batch. This is useful if you would like to have your hourly and salary employee's in separate batches.
8. The Create Checks box will allow you to specify what types of checks should be created. Note: once the checks have been created if you add another check into the batch the check will default to regular.





## Tabs within the Batch

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

1. The Batch Tab will allow you to view the batches you have created. You can select the batch that you would like to view from this tab.
2. The Quick Entry Tab allows you to quickly and easily view and enter your payroll information.
  - a. The Quick Entry Tab allows you to select the E/D's that you would like to have in a grid format.
  - b. This area does not show all E/D's that are on the EE's checks just the codes you choose to view.
  - c. Totals are seen at the bottom of the page
  - d. This area allows you to overriding Salaries and Scheduled E/D's by simply typing in the new amount from the Quick Entry Tab.
3. The Quick Entry W/ Overrides tab has the same options as the Quick Entry tab, but it also has some other override options available.
  - a. Options that are available from the check lines can be accessed from here as well.
4. The Earnings and Deductions Tab gives the totals of all of the Earnings and Deductions that are in the payroll as well as a break out of what is on each employee for each E/D.
  - a. By selecting a specific E/D on the left you can view the detail of what is on each EE on the right.

Agency	Add Check Line Field ▶
Job	Add E/D ▶
Line Item Date	Add E/D...
Line Item End Date	Add all E/Ds in the batch
Piece	
Rate Nbr	Remove Check Line Field ▶
Rate Of Pay	Remove E/D ▶
Shift	
	Restore Defaults

Batch   Quick Entry   Quick Entry W/Overrides   Earnings and Deductions   Taxes   Import   Company contacts								
Display User Entries Separately <input type="checkbox"/> Display Totals By Check Type								
E/D Code	Description	Hours/Pie...	Amount	Count	EE Code	Employee Name	Hours/Pie...	Amount
D04	401k Contributions		125.55	2	1003	Clark Mary J	80.00	1,200.00
D05	401K ER Match		62.78	2	10001	Demo1 Employee	80.00	1,200.00
D06	Catch up contributio		75.00	1	10002	Demo2 Employee	80.00	2,000.00
D21	Checking 1		100.00	1	10003	Demo3 Employee	75.00	750.00
D22	Checking 2		150.00	1	10008	Doe John F	56.00	420.00
D40	125 Medical		93.38	2	1004	Franklin Alberta K	80.00	1,580.00
D41	125 Dental		14.57	2	10009	Seinfeld Jerry	80.00	1,040.00
D42	Vision		6.01	1				
D43	FSA		38.46	1				
DNP	Net Pay		2,797.72	2				
E01	Regular Earnings	531.00	8,190.00	7				
E02	Overtime	60.00	1,470.00	4				
E07	Salary		6,375.16	3				
E10	PTO	5.00	50.00	1				
E11	Bonus		200,000.00	4				

5. The Taxes tab show the Tax Type and total on the right and then the detail for the specific tax you have highlighted will show on the right.
6. The Import Tab allows you to import a file that is in a format that Evolution recognizes.

Notes: \_\_\_\_\_

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## Payroll/ Quick Entry

1. The Payroll Quick Entry area of Evolution is the area of Evolution that allows you to enter your payroll quickly and easily.
2. The Tab allows you to customize the columns that you are viewing so that you can view the columns that you use to enter hours and earnings for your Employee's Pay.
3. You can enter any of the Earnings or Deductions that you have set up in your company to show as a column in the Quick Entry Tab.
4. When you first come into the Quick Entry Tab for the very first time the columns showing will be as seen below.

Type	Notes	EE Code	Name	Amt E07 Salary	Hrs E01 Regular	Amt E01 Regular
------	-------	---------	------	-------------------	--------------------	--------------------

5. The columns default in this manner based on company and based on computer. So, if you have more than one company this will be the default for each company. When you work on more than one computer, each computer defaults to this as well.
6. Once the columns have been set on a specific company and specific computer the columns will show as you have set them on that computer and company the next time you enter into Evolution.
7. To customize the Quick Entry "Grid" with the Columns that you would like to see you right click in the gray area of the "Grid." Select E/D, Select Add or Delete. This will bring up the available list of E/D's. Select the E/D you would like to add, then either Hrs. or Amt.
8. Continue to add and delete columns until your "Grid" has all the E/D's you would like to have.
9. You can size the columns and move the location of the columns as well. Simply grab between the columns in the header, this will allow you to size the column. To move the columns select the header and drag the E/D to where you would like it to be located.

Year to date F3
E/D
Manual Tax

Amt E07 Salary	1,252.65	Amt E03 Bonus	Amt E04 Sick
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Put cursor right here to resize

Drag the E/D to where you would like it to be located.

10. By typing over the amount in a scheduled Earning or Deduction you are overriding what will be paid or deducted for that check. This allows you to make adjustments that will only affect this payroll. The next time you start your payroll the Earning or Deduction would be the normal scheduled amount.
11. Employee's who have a note entered in the Employee/EE Entry/ Notes Tab/Payroll notes area of evolution will show highlighted in yellow in the Quick Entry Tab. By double clicking on the employee's name you will be directed to the Payroll/Check area where you can see and change the note on the employee.
12. The Quick Entry Tab gives you totals at the bottom of the page for the columns that you have selected in your "Grid."
13. It is a good practice to check the Earning and Deductions tab to check your totals because this tab shows you all Earnings and Deductions not just the ones that you have selected to see on the Quick Entry "Grid."
14. Always have totals from outside of Evolution to check against the totals that you have in your payroll.



## Payroll/ Quick Entry W/ Overrides

1. The Quick Entry w/ Overrides Tab is very similar to the Quick Entry Tab. There are a few extra's in the Quick Entry w/ Overrides Tab that are not available in the Quick Entry Tab.
2. Employee's that are paid a Salary will have their name and text in the Salary line show in Red text.

Batch	Quick Entry	Quick Entry W/Overrides	Earnings and Deductions	Taxes	Import	Company contacts	Aut		
10021 Allen Bart									
?	Type	Notes	EE Code	Name	Check #	Amt E01 Regular Earnings	Hrs E01 Regular Earnings	Amt E07 Salary	Hrs E07 Salary
▶	R	N	10021	Allen Bart	1			1,252.65	
	R	N	10021	Allen Bart	1				
	R	N	1035	Amidala Padme	1				
	R	N	1010	Austin Jane P	1				
	R	N	1023	Brazzi Luca	1				
	R	N	10022	Caine Horatio	1			1,687.46	
	R	N	10022	Caine Horatio	1				
	R	Y	1003	Clark Mary J	1				
	R	N	10037	Clause Santa	1			1,500.00	
	R	N	10037	Clause Santa	1				
	R	N	10015	Cobblepot Oswald	1			1,000.00	
	R	N	10015	Cobblepot Oswald	1				

3. You can enter another line for an employee by hitting your insert key on your keyboard. You would then enter the employee's number under the EE Code Column. If this were going to be a separate check you would enter 2 or 3, etc. in the check # Column.
4. If you are just entering more information for the first check for that employee you would enter check 1 under the check #.
5. The Quick Entry w/ Overrides allows you to enter information that is also available in the check lines. Department Allocations, Job Costing, Certified Payrolls can be keyed from this Tab. To add the needed columns, right click in the gray of the page. You can add or delete Check Line fields and E/D's

Add Check Line Field	▶
Add E/D	▶
Add E/D...	
Add all E/Ds in the batch	
Remove Check Line Field	▶
Remove E/D	▶
Restore Defaults	

Notes: \_\_\_\_\_

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## Payroll/ Earnings and Deductions

1. The Earnings and Deductions Tab shows all of the Earnings and Deductions in your payroll.
2. By selecting one of the codes on the left you can see all of the detail of who has this code and hours and amounts on the right.

Batch	Quick Entry	Quick Entry W/O overrides	Earnings and Deductions	Taxes	Import	Company contacts	Auto Reduction
-------	-------------	---------------------------	-------------------------	-------	--------	------------------	----------------

<input type="checkbox"/> Display User Entries Separately	<input type="checkbox"/> Display Totals By Check Type
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E/D Code	Description	Hours/Pie...	Amount	Count
D08	Advance		432.00	13
D21	Checking 1			11
D22	Checking 2			2
D25	Savings 1			13
D26	Savings 2			1
D40	Cafe Medical		60.00	2
D99	Miscellaneous Deduct		406.00	15
DCS	Child Support		637.00	3
DGN	Garnishment		25.00	1
DNP	Net Pay			21
E01	Regular Earnings	320.00	800.00	72
E02	Overtime			1
E03	Vacation			1
E06	PTO			1
E07	Salary		51,341.23	15
E14	Commissions		500.00	2
W1	EE WCA		132.00	66
W2	ER WCA		34.50	69

EE Code	Employee Name	Hours/Pie...	Amount
10015	Cobblepot Oswald		16.00
1017	Corleone Sonny		10.00
10014	Dent Harvey		40.00
1013	Farve Brett		25.00
1021	Goober Funny		15.00
1037	Grainger Hermione		27.00
10028	James Cody		25.00
1009	Lopez Jane J		29.00
1022	Montoya Pedro		50.00
10032	Palin Sarah		15.00
1024	Patterson James		30.00
1026	Sawyer Tom		100.00
1039	Wallace William		50.00

Select the E/D that you would like to see detail on.

View the detail for the E/D that you selected.

3. Some of the codes will not show accurate numbers until you have done a Pre-Process. For instance Net Pay will not show until the checks have been calculated.

[illegible]

## Payroll/ Taxes

1. The Payroll/ Taxes Tab will show you the taxes in your payroll and the detail broken out by employee.
2. You must preprocess before you will see any information in this area.
3. Select the tax that you would like to see detail for on the left. You will see the detail amount for each employee on the right.

<div> <div>Batch</div> <div>Quick Entry</div> <div>Quick Entry W/O verrides</div> <div>Earnings and Deductions</div> <div>Taxes</div> <div>Import</div> <div>Company contacts</div> </div>			
<input type="checkbox"/> Display User Entries Separately			
Description	Amount	Count	
FEDERAL EE OASDI TIPS	0.00	21	
FEDERAL EE OASDI WAGES	57,474.73	21	
FEDERAL EE_MEDICARE_TAX	833.38	21	
FEDERAL EE_MEDICARE_TAXAB...	57,474.73	21	
FEDERAL OASDI TAX	3,563.43	21	
FEDERAL_TAX	7,942.87	18	
FEDERAL_TAXABLE_WAGES	47,483.97	18	
STATE (NM) NM-SUI TAX	1,149.50	21	
STATE (NM) NM-SUI WAGE	57,474.73	21	
STATE (NM) TAX	2,176.51	21	
STATE (NM) WAGE	57,474.73	21	

EE Code	Employee Name	Amount
10021	Allen Bart	12.45
1035	Amidala Padme	85.22
1010	Austin Jane P	42.21
1023	Brazzi Luca	8.36
10022	Caine Horatio	54.31
1003	Clark Mary J	44.07
10037	Clause Santa	34.39
10015	Cobblepot Oswald	28.98
1048	Corleone Don Vito	3.07
1017	Corleone Sonny	346.95
10024	Elway John	614.93
10012	Gordon Jim	6.89
1037	Grainger Hermione	11.18
10025	Helton Todd	120.57
1027	Hemingway Ernest	254.89
1036	Howeth Eva	87.46
10007	Morrison Jim	59.04
1011	Rice Anne R	84.63
10023	Sharpe Shannon	56.80
1006	Smith Lonnie T	143.60
1014	Weasley Ginny	76.51

Notes: \_\_\_\_\_



# Payroll/ Import

1. The Payroll/ Import tab allows you to import a file that is compatible with Evolution.

The screenshot shows the 'Import' tab in the Evolution software. The 'Timeclock import' section contains the following fields and options:

- Source file name:** C:\Documents and Settings\april\Desktop\evolution.txt (with a browse button '...')
- Exception report file name:** C:\Documents and Settings\april\Desktop\error.txt (with a browse button '...')
- Look EE up by:** Radio buttons for Custom # (selected), Name, and SSN.
- DBDT match:** Radio buttons for Full (faster) and Partial (slower) (selected).
- File format:** Radio buttons for Fixed positions and Comma delimited (selected).
- Checkboxes:** Use four digits for year, Auto import job codes, Use employee pay rates, Auto Refresh ED, and Block Sched E/Ds Except DD on Additional Checks (all are unchecked).
- Buttons:** 'Import to the payroll' (with a green arrow icon) and 'View the report file' (with a magnifying glass icon).

2. The source file name allows you to select where on your computer or server to go to get the file to import. By selecting the three dots to the side of the line you can select your file.
3. The exception report file name is where you are telling Evolution to send an error report if any of the information does not come in correctly when importing. You should have a notepad saved somewhere that you can tell Evolution to use to send an error report.
4. The Look EE up by should be by Custom #. If for some reason you have a file that only has names or SSN's then you would have to use the Name or SSN option.
5. The DBDT match should be on Partial (slower)
6. The File Format should be the type of file you have. If you have a comma delimited file (CSV) you would select the Comma delimited option. If you have a txt file then you would use the fixed positions.
7. None of the boxes below this should be selected.
8. You select the Import to the Payroll button to import the file.
9. Once the system has imported you will have a yellow sun at the top navigational bar. (This is how you will know information came in)
10. Before selecting the yellow sun you will want to select the View the report file to see if any error messages were created.
11. Select the Earnings and Deductions Tab to check your totals. If everything looks ok then you can select the yellow sun.
12. If you save before you checked your totals and need to start over simply go to the batch and delete the batch. Then you would re-create your batch and re-import your file.

Notes: \_\_\_\_\_

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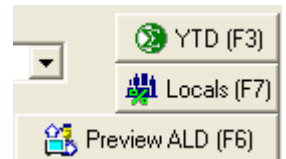
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# Payroll/ Check

1. The Payroll Check area in Payroll is where you can view and enter information on each employee's check.
2. To get into the employee's payroll check you will need to start in the Quick Entry Tab. You can either double click on the employee's name or you can select the check button at the bottom of the page while the employee's name is highlighted.
3. Once you are in the employee's payroll check you can select the Batch button at the bottom of the page to get back to the Quick Entry "Grid."
4. In the employee's check the check lines that have text in red are the Earnings or Deductions that are Scheduled. (Salary, 401K, Medical, etc.)
5. To add a check line you can either go to the last line and hit your down arrow on your keyboard, or you can hit your insert key on your keyboard.
6. To delete a check line select the line that you need to delete. Hit your ctrl and delete buttons at the same time on your keyboard. The system will prompt you Do you want to delete this check line. You can select yes or no.
7. If you have deleted a scheduled E/D that did not need to be deleted you can either just enter the code back in or you can select the General Tab. Select the Refresh Scheduled E/D's and the system will put the scheduled E/D's back into this employee's check.
8. From a specific employee's check you can scroll through the list of employee's checks in the Quick Entry by selecting your plus key on your keyboard(+) to go forward and your star key on your keyboard (\*) to go back.
9. You can calculate the check that you are on by selecting the Recalculate Check Button at the bottom of the Check Lines Tab in the Payroll Check.
10. The YTD Button in the Payroll Check will give you same YTD break out that you can get from the Employee/ Employee area.
11. The Local's Button will allow you to see the employee's Locals.
12. The Preview ALD Button allows you to preview the Auto Labor Distribution for that employee.



Notes: \_\_\_\_\_

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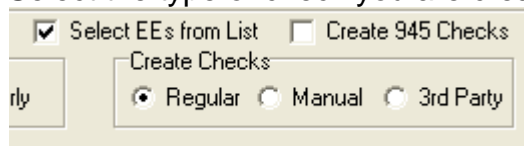
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## Creating an Additional Check

1. There are a 3 ways to create an additional check for an employee.
  - a. Green Plus sign from the Payroll Check
    - i. Double click on an employee from the Quick Entry Tab
    - ii. Hit the Green Plus Sign at the top Navigational Bar
    - iii. Select the type of Check you need to create. Select Next
    - iv. Select your employee
      1. You can change the top drop down box so that you can select the employee by either
        - a. EE Code
        - b. EE Name
        - c. SSN
      2. Then you can select your employee, Select Next
    - v. If you have any check templates set up that you need to use on this check select the check template. If not just leave blank, Select Next.
    - vi. Say Yes or No to if you want to pay Salary
    - vii. Say Yes or No to if you want to pay regular hours. This will only affect the check if you have hours set up in the EE Entry area.
    - viii. The system will create the check.
  - b. Down Arrow or Insert
    - i. In Quick Entry Tab you can hit your insert key on your keyboard. You could also go to the bottom of the page and hit your down arrow while on the last person in the "Grid."
    - ii. This will give you another line. You will have to select the employee from the EE Code area.
      1. This will show you everyone who has ever worked for your company (Active or Inactive)
      2. These are in order by EE Code
  - c. Separate Batch
    - i. From the Payroll Batch Tab select the Create Batch Button
    - ii. Put a check mark in the select EE from list.
    - iii. Select the type of check you are creating.


    - iv. Save by selecting the green check mark and yellow sun.
    - v. The system will prompt you do you want to auto create checks. Say Yes
    - vi. This gives you the list of employee's. You can select your employee from the list.
      1. If you need to select more than one employee hold down your ctrl button on your keyboard while selecting the employee's. Select the ok button once done.

Notes: \_\_\_\_\_

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## Creating a 3<sup>rd</sup> Party Sick Check

1. 3<sup>rd</sup> Party Sick Checks must be entered when you are doing your payroll.
2. From the Payroll Batch area of Evolution Select the Create Batch Button.
3. Put a check mark in the Select EEs from List box. Select 3<sup>rd</sup> Party from the Create Checks box. Both of these functions are located at the bottom right of the screen.

☒ Select EEs from List    ☐ Create 945 Checks  
 Create Checks:  
☐ Regular    ☐ Manual    ☒ 3rd Party

4. Select the Green Check mark at the top of the page.



5. A pop up will ask you:

Evolution  
 ? Would you like to auto-create checks for this batch?  
   

6. Say Yes

7. This will give you the list of Employees. Select the Employee(s) that you need to create 3<sup>rd</sup> party sick checks for. (To select more than one employee hold your CTRL key on your keyboard down while selecting employees.)

EmployeeSelector


EE Code	Last Name	First Name	SSN	Status
1001	Simpson	Jake	100-00-0001	Termination ...
1002	Ortega	Roberto	100-00-0002	Active
1003	Clark	Mary	100-00-0003	Active
1004	Franklin	Alberta	100-00-0004	Voluntary Re...
1005	Rodriguez	Alonso	100-00-0005	Active
1006	Smith	Lonnie	100-00-0006	Active
1007	Hayworth	Thomas	100-00-0007	Terminated
1008	Wallace	Teresa	100-00-0008	Terminated
1009	Lopez	Jane	333-44-5555	Active
1010	Austin	Jane	123-22-3333	Active
1011	Rice	Anne	555-55-6666	Active
1012	Chavez	Josh	888-77-9999	Termination ...
1013	Farve	Brett	555-55-5555	Active
1014	Weasley	Ginny	354-17-1351	Active
1015	Yellow	Scratch Pad	500-00-0001	Active
1016	Training	Sample	100-10-0123	Active
1017	Corleone	Sonny	100-10-0101	Terminated
1018	Hagen	Tom	100-00-0012	Active
1019	Valenzuela	Maria	424-36-8989	Active
1020	Jones	Mary	111-00-0002	Suspended
1021	Goober	Funny	111-00-3541	Active




8. Your 3<sup>rd</sup> Party provider will give you the information that needs to be entered.
9. Double click on the employee's name to enter the information into the system. This takes you to the payroll check area.
  - a. Select the proper Third Party Sick Code.
  - b. Enter in the Amount


Check Lines   Manual Tax   General   Tax Overrides   Preview   Employee Notes				
E/D Code	E/D Description	Hours/Pieces	Rate of Pay	Amount
E90	Short Term Third Party Sick Pay			
E91	Long Term Third Party Sick Pay			


10. Select the Manual Tax Tab.
  - a. Your 3<sup>rd</sup> party administrator will also have provided you with tax information if there are taxes being taken out of the sick pay.
  - b. If provided with tax amounts enter them into the appropriate line.
  - c. You may have to select the Add States Button if there are State Taxes for those lines to show.
  - d. Make sure that you select the Yellow Sun after each tax that is entered. 

11. Select the Recalculate Check Button at the bottom of the page. Make sure that the Net Amount matches the information that was given to you by the 3<sup>rd</sup> party administrator.

 Recalculate Check

Check Lines   Manual Tax   General   Tax Overrides   Preview   Employee Notes		
Row	Description	Amount
1	Federal	
2	OASDI	
3	Medicare	
4	EIC	
5	Back-up Withholding	
6	STATE - NM	
7	SDI - NM	
8	SUI - NM-SUI	
9	SUI - ER WCA	
10	SUI - EE WCA	


 Add States

 Add Locals

**Calculate Override Taxes**  
☒ Yes ☐ No

**Reciprocate SUI**  
☒ Yes ☐ No

**Disable Shortfalls**  
☐ Yes ☒ No

 Prorate FICA

12. If you have more than one employee that you are entering 3<sup>rd</sup> party sick information for select the Batch Button at the bottom of the page.
13. Double click on the employee that you need to enter information for and follow steps 9-12 until all Employees information is entered.
14. Now you can select the Batch Tab to create your regular payroll Batch. Select the Batch button making sure that the Select EE's from List is not selected and the check type is regular.



# Job Costing

1. Job Costing can be done from the Payroll Check. Your company must have jobs created at an upper level.
2. Double Click on the employee from the Quick Entry Tab
3. Right click in the gray area of the Check Lines to add the Job Column in the Check Lines Tab.
4. Select the Job from the Job Column/ either on the line with the correct E/D code or add a line (by hitting the down arrow on your keyboard while on the last row) or hit insert on your keyboard and select the correct E/D code.
  - a. Enter hours and/or earnings

Notes: \_\_\_\_\_

This image shows a single sheet of white paper with horizontal blue ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

# Creating a Manual Check



1. To Create a Manual Check in Evolution there are a few ways that you can do this. The first way is by Using the Check Calculator to create a Manual Check
  - a. Tax & Check line Calculator when the Tax & Check line Calculator is selected it takes you to a calculator for the employee that you are currently in.

Enter the E/D's here.

Check Type: ☒ Manual ☐ Regular

Copy to payroll (F8)

While in the Tax Calculator you can select the Earnings or Deductions that you need to be in the check. Then enter the amount for those E/D's. You can select how the taxes are to be handled. You can even Gross up a check by check the Net to Gross box and putting in the Net Amount.

Select the net to Gross box and enter the Net amount that you want.

Control the taxes here.

- a. By selecting the Check Type as Manual you can create a manual check.
- b. Select the Copy to Payroll Button.
- c. You will be directed to the Payroll Tab
  - i. You can select to attach the manual check
    1. To a New Payroll
      - a. The system will ask if you would like to attach to the next scheduled payroll:

Evolution

Would you like to attach to the next scheduled payroll?

Yes No

- b. You will then be prompted with the next available scheduled Payroll check date.

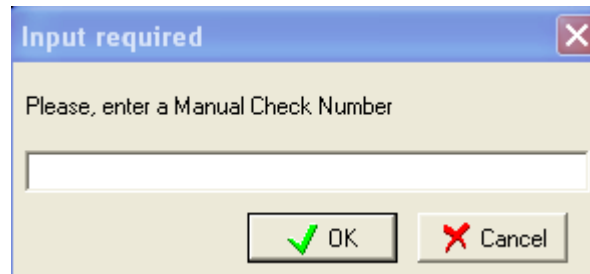
Evolution

The next scheduled payroll check date is 4/3/2009. Would you like to use it?

Yes No



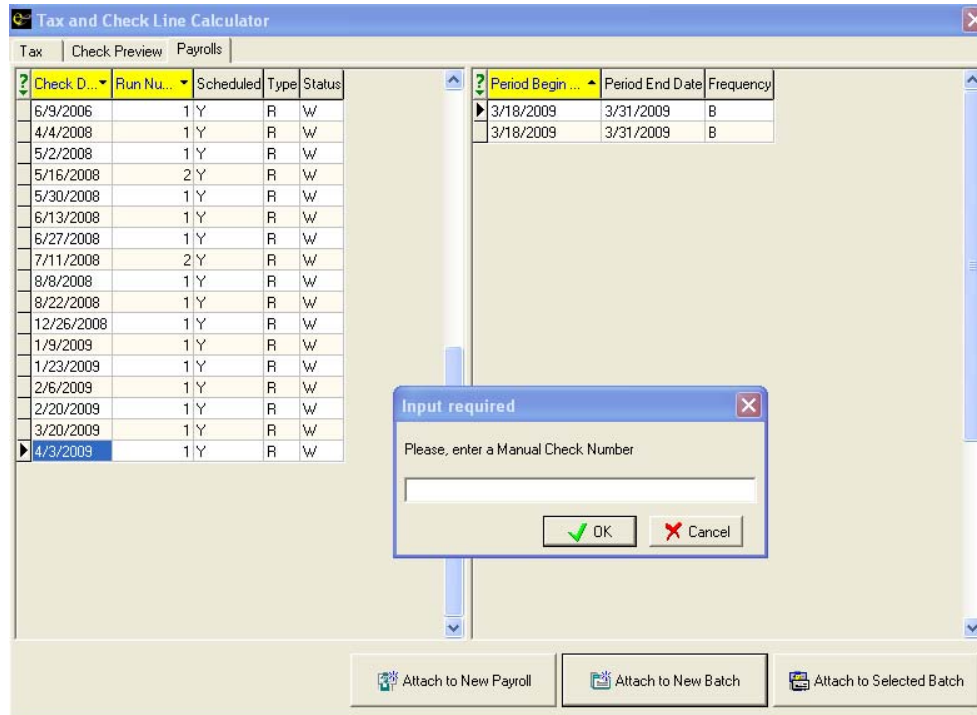
c. You then enter the Manual Check Number:



A dialog box titled "Input required" with a close button (X) in the top right corner. The text inside says "Please, enter a Manual Check Number". Below the text is a text input field. At the bottom are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon.

## 2. To a New Batch

- You will select the check date from the list of payrolls open on the left.
- The system will prompt you to enter the Manual check number.



The "Tax and Check Line Calculator" window has three tabs: "Tax", "Check Preview", and "Payrolls". The "Payrolls" tab is active, showing a list of payrolls on the left and a table of periods on the right. A dialog box is overlaid on the window, prompting for a Manual Check Number.

Check D...	Run Nu...	Scheduled	Type	Status
6/9/2006	1	Y	R	W
4/4/2008	1	Y	R	W
5/2/2008	1	Y	R	W
5/16/2008	2	Y	R	W
5/30/2008	1	Y	R	W
6/13/2008	1	Y	R	W
6/27/2008	1	Y	R	W
7/11/2008	2	Y	R	W
8/8/2008	1	Y	R	W
8/22/2008	1	Y	R	W
12/26/2008	1	Y	R	W
1/9/2009	1	Y	R	W
1/23/2009	1	Y	R	W
2/6/2009	1	Y	R	W
2/20/2009	1	Y	R	W
3/20/2009	1	Y	R	W
4/3/2009	1	Y	R	W

Period Begin...	Period End Date	Frequency
3/18/2009	3/31/2009	B
3/18/2009	3/31/2009	B

Buttons at the bottom: Attach to New Payroll, Attach to New Batch, Attach to Selected Batch.

## 3. To Selected Batch

- You will select the check date from the list of open Payrolls on the left.
  - You will select the batch that you want the check to be attached to from the list of available open batches on the right.
- The other way of creating a manual check is in the Payroll Area
  - Open your next scheduled Payroll (unless the payroll for your next check date has already been opened. If so jump to # 4)
  - Select Create Payroll
  - Select Green check mark
  - Select Create Batch
  - Select Payroll Filter (if you do not have a payroll filter to choose from in the drop box jump to #18)
  - Select manual in the create checks box at bottom of the page.
  - Select EE's from List box





10. Select Green Check (when prompted do you want to auto create checks say yes)

The screenshot shows the 'Payroll Batch' window for 'AB Test Company II' on 5/25/2007. The window has a sidebar with navigation options: iSystems, Admin, Client, Company, Employee, Payroll, Reports, and Misc. The main area contains a 'Batch' table with columns for Period Begin Date, Period End Date, and Frequency. Below this are sections for 'Payroll Filter' (set to 'Manual Run'), 'Payroll Check Template', 'Frequency' (set to 'Bi-Weekly'), 'Period Begin Date' (5/6/2007), and 'Period End Date' (5/19/2007). There are also sections for 'Pay Salary', 'Pay Standard Hours', and 'Load Payroll Defaults'. At the bottom, there are 'Batch Creation Options' including 'Calculate Scheduled E/D's' (checked), 'Select EE's from List' (checked), and 'Create Checks' (checked). A 'Create Batch' button is circled and labeled 'Create a New Batch'. A callout box on the left says 'Select Payroll Filter, Select EE's from List, and Manual in Create Checks box'. Another callout points to the 'Create Batch' button.

9. Select Employee (s) in list that you need to create a new batch (hold your Ctrl button on your keyboard down)

10. Click on ok when you have selected the Employee(s)

11. Select Quick Entry

12. Select the employee you want to enter information on. (Either Double Click on the Employee or select the employee and then click on the check button at the bottom of the Quick Entry screen.

13. Enter information for manual check

- Useful tool: If you need to bring in the Scheduled Earnings and Deductions for the employee you are creating a manual check for go to the General Tab. Then select the Refresh Scheduled E/D's button. Then select the Check Lines Tab to see the information.
- To Delete check lines hit Ctrl + Delete on your keyboard while the line you want to delete is highlighted.

EE Code	Last Name	First Name	SSN	Status
0001	Aird	Stephanie	526-65-0356	Active
0024	Bond	Steven	585-26-8193	Active
0003	Caiozzi	Nhu	586-44-9878	Termination...
9011	Colion	Coco	522-35-5489	Active
9006	Deere	John	413-21-9994	Active
0004	Dow	M Scher	523-13-7487	Termination...
0005	Duran	Yolanda	525-73-6571	Termination...
8991	Francie	Meek	789-12-4578	Active
0018	Garcia	Natalie	525-29-1344	Active
0023	Garcia	Melanie	525-71-4451	Termination...
5789	Gauge	Mary	889-12-3456	Active
0022	Gonzales	Diane	585-37-0187	Active
0006	Hunter	Rose	450-92-1333	Active
9001	Laloy	Elmer	441-44-4442	Active
11	Laredo	John	234-55-5555	Active
8989	Mink	Liz	589-42-4565	Active
8990	Road	Runner	123-56-4159	Active
0026	Rodriguez	Lisa	585-55-3624	Active
0027	Segura	Daniel	585-25-6966	Active
29	SMITH	Sally	001-01-0155	Active
100	Smith	Freddie	564-78-9744	Active






- c. Useful tool: When creating a manual check you must enter everything into the system. You must also tell it to calculate information. If you enter hours into the check line you must enter the rate that the hours need to be paid at and then you must right click with your mouse and then select Calculate Check Line or hit Ctrl+F5.

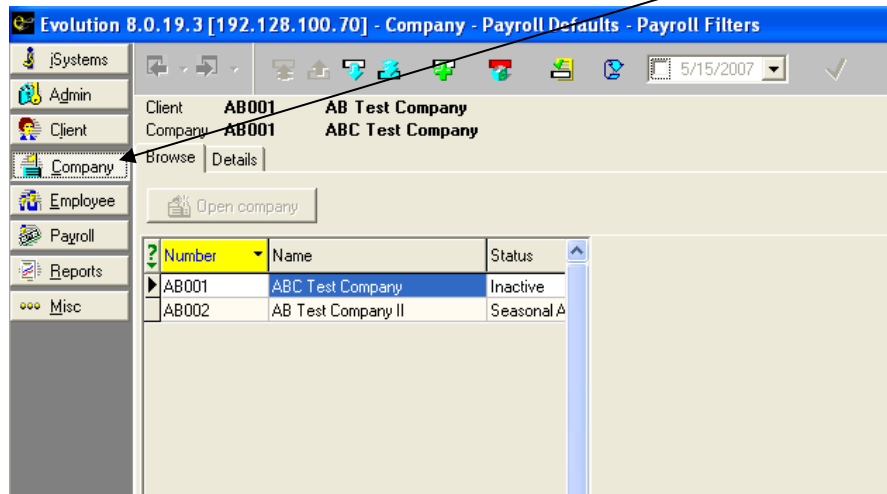
- d. Useful tool: If you need to enter the check number that you will be using for the check that you will cut you can enter that in the Check Lines. There are boxes above the Tabs in the Check Lines Screen. You can select the box above the Preview Tab and enter your check number.

14. Once all information for the manual check is entered select Recalculate Check at the bottom of the Check Lines screen.

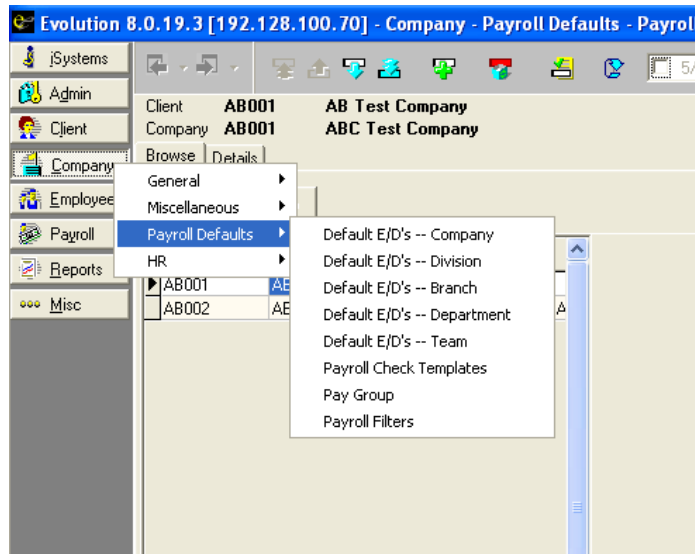
15. Evolution will calculate the check and take you to the preview screen. This is where you will see the taxes, and the net amount. You will write the check for the net amount.



16. Make sure that you commit  (click the Yellow Sun) to save the manual check information to the Evolution database.
17. You can now select the Batch Button or the Quick Entry Button at the bottom of the screen. This takes you back to the Quick Entry Screen. (If entering more than one manual check you will follow # 11 - 16 for each manual check.)
18. Useful Information: Creating a Filter in Evolution.
- You may want to add a Payroll Filter to your company for instances when you have more than one batch in your payroll. Creating a Payroll Filter will allow you to identify the batch's in your payroll. For instance you may want to create a batch with manual checks in it. You could use a filter called manual checks to identify that Batch.
  - To add a Payroll Filter to your Company go to the Company side Button



- c. Now you will want to select the Payroll Defaults Subfolder. Then select Payroll Filters.





- d. Select the Detail Tab at the top of the page.
- e. Select the green plus sign
- f. Enter the name of the Filter that you are creating on the Name line at the bottom of the page.

**Name**

Division

Branch

Department

Team

PayGroup



- g. Select the green check mark and then the Yellow Sun to save your work.



- h. You can continue to select the green plus sign to add filters for the Batches that you create.

**jSystems**

**Admin**

**Client** **AB001** **AB Test Company**

**Company** **AB001** **ABC Test Company**

**Browse** **Details**

Name	Division	Branch
Pay Filter 2	APS	1
Payroll Filter	APS	1

**Name**

Division

Branch  Home

Department  Dept 2

Team

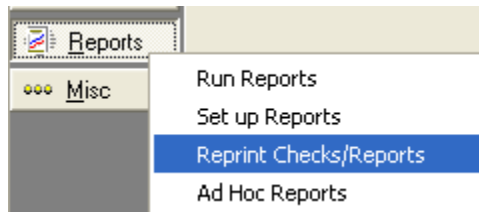
PayGroup

Notes:



# Print Back Checks/Manual Check

1. Go to Reports/ Reprint Checks/Reports



2. In the Browse Tab open your company.
3. On the right side of the screen select the check-date.

A screenshot of a software interface. The 'Browse' tab is selected. The 'Check Form' section has two drop-down menus, both set to 'Check Letter Stub Only (New)'. The 'Reprint TO Balances' section has a 'Current' drop-down and a 'Destination' drop-down set to 'Print'. There are checkboxes for 'Don't Print Banking Info on Checks', 'Don't Print Background on Checks', and 'Do Not Use VMR Settings' (checked). A 'Reprint for Payroll' button is also visible. Below this is a table with columns: Number, Name, Fein, Run Nu..., Check D..., Scheduled, Type, St..., Exclude Ach, and Exclud. The table contains several rows of data, with the second row highlighted in blue.

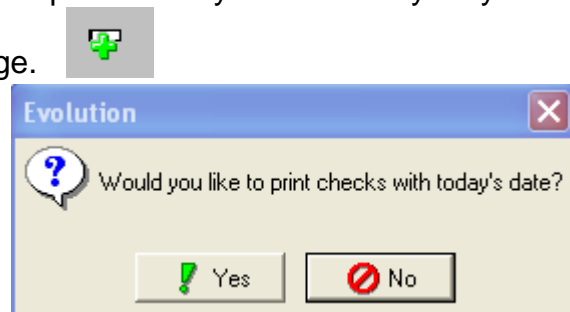
Number	Name	Fein	Run Nu...	Check D...	Scheduled	Type	St...	Exclude Ach	Exclud
AB001	ABC Test Company	123456789	1	10/15/2010	Y	R	W	N	N
AB002	AB Test Company II	123456789	1	9/17/2010	Y	R	W	N	N
Ab003	Sample Client	123456789							
AB003	Basic Copy	123456178							
AB010	Eva Test Co	999999999							

4. Select Check Letter Stub Only (New) from the Check Form, and Misc Check Form drop boxes.
5. Leave the Destination as Print.
6. Select the Payroll Checks Tab

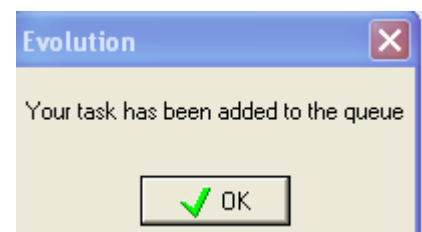
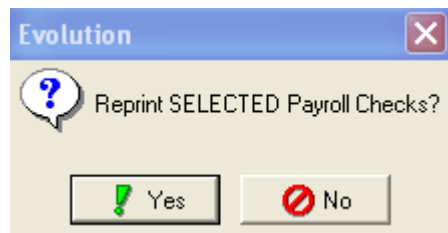
A screenshot of a software interface showing the 'Payroll Checks' tab. The client is 'AB200S Donna's Training 1 Simple' and the company is 'AB200S Donna's Training 1 Simple'. The payroll number is '1' and the date is '5/1/2009'. Below this is a table with columns: Serial Number, Net Wages, EE Code, Employee Name, and SSN. The first row is highlighted in blue.

Serial Number	Net Wages	EE Code	Employee Name	SSN
-99990495	123.52	10049	Black, Jacob	585-45-8545

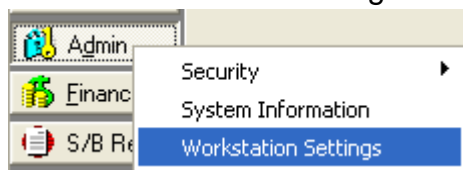
7. Select the Manual Check that you would like to print the stub for.
  - a. If you are selecting more than one check to print select your CTRL key on your keyboard and then select the checks.
8. Select the Green Plus Sign at the top of the page.
9. The system will prompt you with this message.
10. Select Yes.



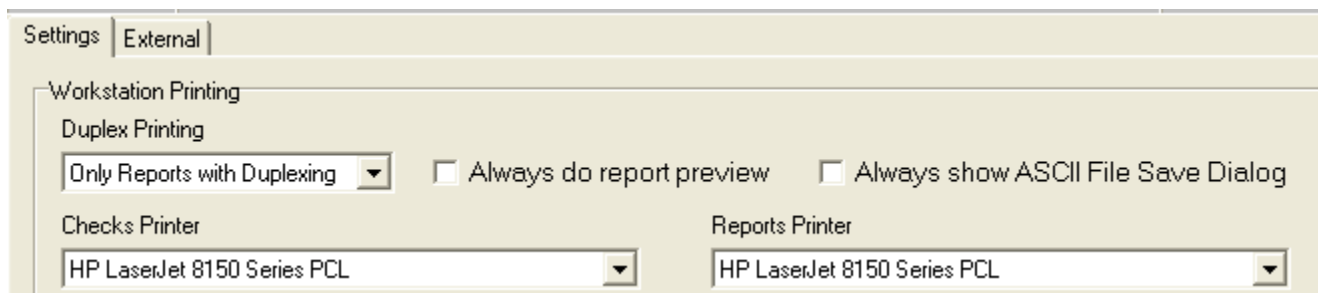
11. The system will prompt you with this message.
12. Select Yes.
13. The system will ask you to enter a reason for the Reprint



14. The system notifies you that this has been added to the Queue.
15. Your check stub(s) will print to the printer that you have defined as your default printer in the Workstation Settings area of Evolution.
16. If you need to set your printer in the Workstation Settings Area
  - a. Go to Admin/ Workstation Settings



- b. Set the printer that you want to print the check to as the Checks Printer



## Correction/Additional Runs

1. Correction and Additional Runs must be run through Payday. There are many security policies that Payday has in place when it comes to Correction and Additional Runs.
  - a. Examples of Corrections Runs:
    - i. Voiding a check
    - ii. Missed paying an employee
      1. This could also be handled with a Manual Check to document what was paid, and the Client writing a check on site.
  - b. Examples of Additional Runs:
    - i. Bonus Run
    - ii. Terminated an employee that must be paid right away
      1. This could be handled with a Manual Check as well.
2. To request a Correction or Additional Run simply contact your CSR at Payday.
  - a. Your CSR will take any information that is needed to do the Run
  - b. Your CSR will enter the run
    - i. Unless this is a large run in which case we will work closely with you to enter the information.
  - c. This is because of some of the security procedures in place.


## Notes:

This image shows a single sheet of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.


# Voiding Checks

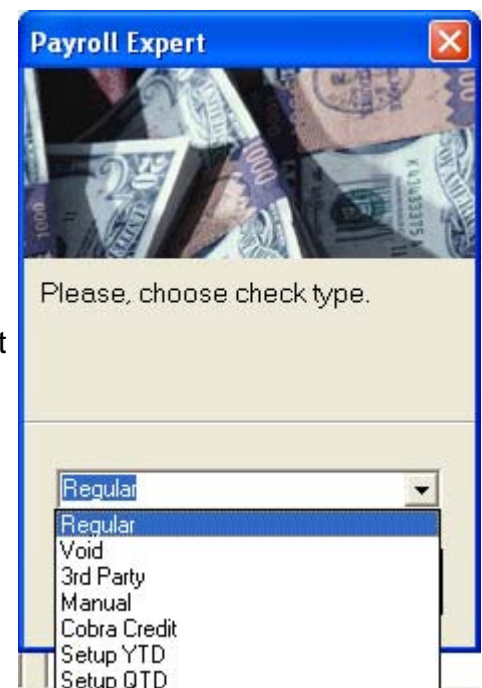
1. When voiding a check in Evolution you need to make sure that you have the information about the check that you will be voiding.
  - a. Have the check number, employee number, name, and net amount for the check that you will be voiding.
  - b. If the wrong check is voided in accident it is difficult to correct this mistake.
2. **It is very important that if the check that needs to be voided was Direct Deposited you will need to call your CSR for assistance.**
3. There are two ways that you can void a check.
4. The first way to void a check
  - a. In Evolution select the Payroll Tab
  - b. Select the Payroll Tab
  - c. If your payroll is already open you will select the payroll then select Batch at the bottom of the page.
  - d. If you payroll is not open select the Create Payroll Button
  - e. From the Batch Tab select Create Batch Button
    - i. Select the EEs from List check box
    - ii. Select Manual from the Create Checks area

The screenshot shows the Evolution payroll software interface. It features several sections with radio buttons for 'Yes' and 'No' selections. The 'Pay Salary' section has 'Yes' selected. The 'Pay Standard Hours' section has 'Yes' selected. The 'Load Payroll Defaults' section has 'Yes' selected. On the right side, there are buttons for 'Create Batch', 'Create Cobra Batch', 'Refresh ED', 'Refresh ED No Man', and 'Delete Batch'. At the bottom, there are checkboxes for 'Select EEs from List' and 'Create 945 Checks'. Below these is a 'Create Checks' section with radio buttons for 'Regular', 'Manual', and '3rd Party'. The 'Create Batch' button and the 'Manual' radio button are highlighted with black boxes.

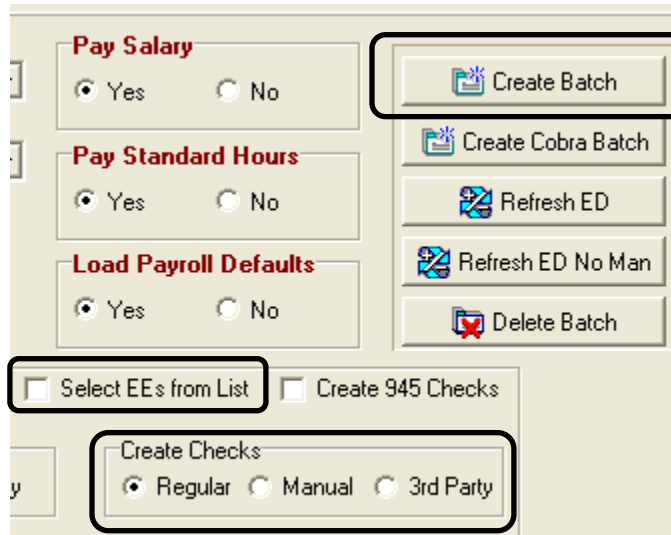
- iii. Click on the Green Check mark at the top of the page. 
- iv. A question box will come up. Select Yes to the question: "Would you like to auto-create checks for this batch?"
- v. Another question box will come up. Select No to the question: "Do you want the balance of the scheduled EDs for manual checks to be updated?"
- vi. Select the employee that you will be voiding the check for.
  1. If you will be voiding more than one check you need to select each of the employee's that you will be voiding checks for. Select more than one employee by holding the CTRL key on your keyboard down.
- f. Select the Quick Entry Tab or Button
- g. Double Click on the manual check that is in the Quick Entry Tab




- h. Hit the Green Plus Sign at the top of the screen. 
- i. Select Void from the drop down box in the first option from the Payroll Expert box
- j. Select Next
- k. Change the Begin Check Date and the End Check Date so that the check date for the check that needs to be voided will show.
- l. Select the Filter Button
- m. Select the check that needs to be voided.
  - i. Be sure that you have the correct check selected it is difficult to bring a check that has been voided back.
- n. Select the Ok Button
- o. Your check is now voided.
- p. If you are voiding more than one check you will need to go into the Quick Entry area (from here select Batch at the bottom of the page) follow steps g through o to complete.



5. The second way that you can void a check.
  - a. In Evolution select the Payroll Tab
  - b. Select the Payroll Tab
  - c. If your payroll is already open you will select the payroll then select Batch at the bottom of the page.
  - d. If you payroll is not open select the Create Payroll Button
  - e. From the Batch Tab select Create Batch Button
    - i. Select the EEs from List check box
    - ii. Select Manual from the Create Checks area



- iii. Click on the Green Check mark at the top of the page. 
- iv. A question box will come up. Select Yes to the question: "Would you like to auto-create checks for this batch?"
- v. Another question box will come up. Select No to the question: "Do you want the balance of the scheduled EDs for manual checks to be updated?"
- vi. Select the employee that you will be voiding the check for.





1. If you will be voiding more than one check you need to select each of the employee's that you will be voiding checks for. Select more than one employee by holding the CTRL key on your keyboard down.
- f. Select the Quick Entry Tab or Button
- g. Double Click on the manual check that is in the Quick Entry Tab
- h. Select the General Tab
- i. Select the Void Next Check button

- j. Change the Begin Check Date and the End Check Date so that the check date for the check that needs to be voided will show.
- k. Select the Filter Button
- l. Select the check that needs to be voided.
  - i. Be sure that you have the correct check selected it is difficult to bring a check that has been voided back.
- m. Select the Ok Button
- n. Your check is now voided.
- o. If you are voiding more than one check you will need to go into the Quick Entry area (from here select Batch at the bottom of the page) follow steps g through o to complete.
6. For both ways that you void a check once you have voided the check you will need to go back to the quick entry and delete the manual check.
  - a. Select Batch from the Check screen to get back to the Quick Entry screen. Select the manual check that needs to be voided there will be an M in the type column.
  - b. Hit your Ctrl key and your delete key on your keyboard at the same
  - c. A message Box will come up. Select OK to Delete this check?



## DBDT Allocating

1. DBDT Allocating allows you to allocate your employee's pay between different departments.
2. From the Quick Entry Tab double click on your employee.
3. Right Click in the gray area to add the Division, Branch, Department, and Team Columns.
4. You can just add the columns which you need to use to allocate the wages.
5. You can drag the columns into the order that is best for you to key the information onto the check.

Add ▶	DEPARTMENT
Delete ▶	DIVISION
	BRANCH
	TEAM

Check Lines	Manual Tax	General	Tax Overrides	Preview	Employee Notes	
?	DEPARTMENT	E/D Code	E/D Description	Hours/Pieces	Rate of Pay	Amount
		W2	ER WCA			
		W1	EE WCA			2.00
		D99	Miscellaneous Deduction			20.00
▶	500	E01	Regular Earnings	10.00	8.00	80.00
	200	E01	Regular Earnings	20.00	8.00	160.00
	400	E01	Regular Earnings	30.00	8.00	240.00
	100	E01	Regular Earnings	20.00	8.00	160.00

6. Above is an example of how the wages could be allocated. By selecting the department from the drop box in the department column, and then entering in the hours that go to each department.
7. Once you have entered in all of your hours for your employee's then you can run a pre process. Once the pre process has run you can run a labor report. We offer many different types of labor reports.

Notes: \_\_\_\_\_

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

# One time entries in Payroll

- Any one time changes to your payroll can be entered in the Payroll Check and those changes will only affect that check.

- Entering one time changes

- Usually the best place to enter one time changes is in the payroll check.

- From the Payroll Quick Entry Tab double click on the employee you are working on.

- Select the last line in the Check Lines Tab or select your insert key on your keyboard.

- This will give you another check line to enter in your one time entry. You can enter any of your E/D's as the code.

- You can override the pay rate.

~The lines with Red Text are Scheduled E/D's.  
~ On this check the EE's rate has been overridden.  
~ On this check the EE needed to have an additional \$20. Of 125 Medical taken to catch the EE up on this code.

Check Lines	Manual Tax	General	Tax Overrides	Preview	Employee Notes
E/D Code	E/D Description	Hours/Pieces	Rate of Pay	Amount	
E07	Salary		0.00	2,884.00	
D08	125 Dental			15.00	
D07	125 Medical			170.00	
D01	Advance			35.20	
DNP	Net Pay				
D04	401k				
E01	Regular	30.00	20.00	600.00	
D07	125 Medical			20.00	

- If you are changing a Scheduled E/D it is easier to change these from the "Grid" or Quick Entry Tab.

- Add the column that you need to affect. Override the amount or hours that are in the Scheduled E/D. This will change this on the employee you are working on for only this payroll check.

Batch	Quick Entry	Quick Entry W/Overrides	Earnings and Deductions	Tax		
1004      Weasley Ronald K						
?	Type	Notes	EE Code	Name	Amt D08 125 Dental	Amt E07 Salary
	R	N	1054	Dunns Esther V		
	R	N	1019	Duran Scott E		
	R	N	1038	Federer Roger J		5,555.00
	R	N	1042	Federline Kevin A	3.00	

~ If I wanted to override the amount being taken for Dental for this payroll check for Kevin Federline I could simply type over the 3.00 with the amount that needs to be taken.  
~ If I needed to override the Salary amount that is being paid on this payroll check for Rodger Federer I could simply type over the salary amount with what should be paid this time.

- Deleting for one time changes in the payroll

- If you are deleting in a payroll check for a one time payroll change it will be a scheduled E/D that you will be deleting.

- From the Quick Entry Tab double click on the Employee
- Select the line that needs to be deleted in the Payroll Check Lines Tab.
- Select CTRL + Del on your keyboard.
- The system will ask if you want to delete this check line. Select Ok to delete.

- You may need to delete an employee's payroll check.

- This is done from the Payroll Quick Entry Tab.
  - Select the employee that's check needs to be deleted.
  - Select CTRL + Del on your keyboard.
  - The system will ask if you want to delete this check. Select Ok to delete.



## Comments on Checks

1. From the Payroll/ Payroll area you are able to enter a comment on your employee's checks.
  - a. The Payroll Check Comment area allows you to put a note on your employee's checks. Notes enter in this box will show on everyone check stub.

The screenshot shows a web form titled "Payroll Check Comments". It features a large text input box for comments. To the right of the input box are several sections: "Block TO Accrual" with radio buttons for "All" and "No" (selected), and "Accrual"; "Block Agencies" with radio buttons for "Yes" and "No" (selected); "Block Checks/Reports" with radio buttons for "Reports", "Both", "Checks", and "None" (selected); "Run Nbr" with a numeric input set to "1"; "Type" with a dropdown menu set to "Regular"; "Check Date" with a date dropdown set to "12/31/2009"; and "Actual Call-In Date" with an empty dropdown. On the far right, there is a vertical column of buttons: "Create Payroll", "SB Review", "Submit Payroll", "Pre-Process", "Delete Payroll", and "Copy Payroll".

2. You can enter a comment on just one Person's check so that the comment will show on the employee's check stub.
3. This is entered in the employee payroll check.
  - a. From the Payroll Quick Entry Tab double click on the employee that you will be entering a note on.
  - b. Select the General Tab.
  - c. The box at the bottom of the page that says Current Check Comments will allow you to enter a comment on this person's check.

The screenshot shows a web form titled "Employee Payroll Check". It has a tabbed interface with tabs for "Check Lines", "Manual Tax", "General", "Tax Overrides", "Preview", and "Employee Notes". The "General" tab is selected. The form contains several sections with radio buttons: "Block DD" (Yes/No, No selected), "Block Sched E/Ds Except DD" (Yes/No, No selected), "Block DD Except Net" (Yes/No, No selected), "Block Sched E/Ds Except Pension" (Yes/No, No selected), "Block Time Off Accrual" (All/Accrual/No, No selected), "Block Scheduled E/Ds From Agency" (Yes/No, No selected), and "Block Auto Distribution" (Yes/No, No selected). There is also a "945 Check" dropdown menu set to "None". On the right side, there is a vertical column of buttons: "Create New Check", "Apply Check Template", "Refresh scheduled E/Ds", "Create Next Check", "Void Next Check", and "Create Manual Check". At the bottom, there is a text input box labeled "Current Check Comments".

### Notes:

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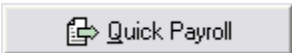
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# Entering Your Payroll Regular No Overrides in Batch

1. Do all Employee Maintenance first. (Ex: new employee's, terminations, address changes, pay rate changes, deduction changes or additions)
  - a. Note: most employee maintenance can be done throughout the pay period so that when it is time to do payroll all maintenance will already be done.
2. Select the Payroll Button.
3. Read Company Notes, if any.
4. Select the Payroll Tab
5. Select the Quick Payroll Button. 
6. The Quick Entry Tab holds a grid that looks like a spreadsheet. You can customize this Tab to allow you to enter your payroll quickly and easily. Please reference the Quick Entry Tab in previous pages on how to customize this area.
7. Input your payroll.
8. Check your totals by selecting the Earnings and Deductions Tab.
  - a. Any Codes that require the check to be calculated for the amount to show will not show accurately until you do your pre process.
9. Select the Quick Entry Tab
10. Select the Pre Process Payroll Button at the bottom of the page.

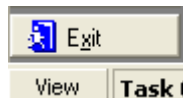


11. This calculated all of your checks.
  - a. Any checks that did not have any earnings will fall out of the payroll.
12. At the bottom of the page the status of the pre process can be seen.
 

**Task Queue: New Finished: 1 Total: 6 Finished: 6**

 When the total amount and the finished amount match the pre process is done running.

13. Select the small View button located below the Exit to enter the Queue.
  - a. This is where you can see if your pre process ran successfully.
  - b. If your pre process ran with any errors call your CSR.



14. Once your pre process has run successfully you can run reports to check your payroll before submitting it.

15. Select the Favorite Reports Button at the top of the screen. 

16. The Favorite Reports will pop up.
17. Select the Payroll Register Report by clicking in the box beside the name.

18. Select the Details Tab

19. Select Preview

20. Select Last Waiting Payroll

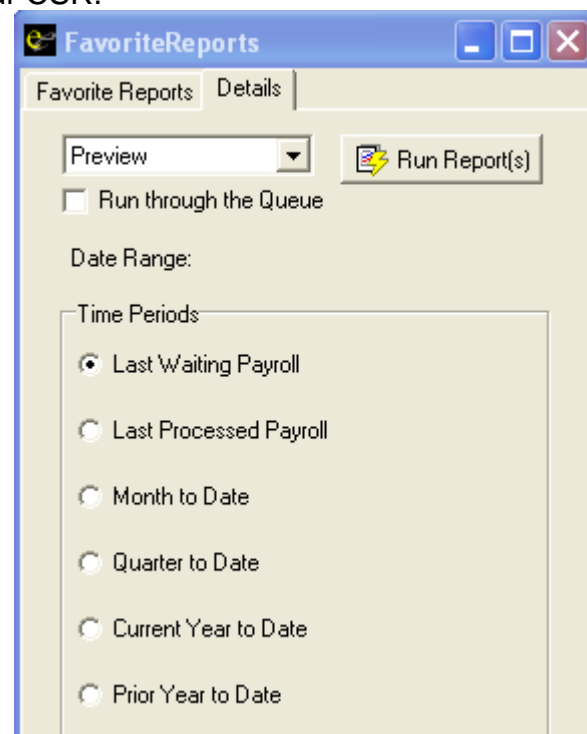
21. Uncheck the Run through the Queue box.


22. Select the Run Reports Button.

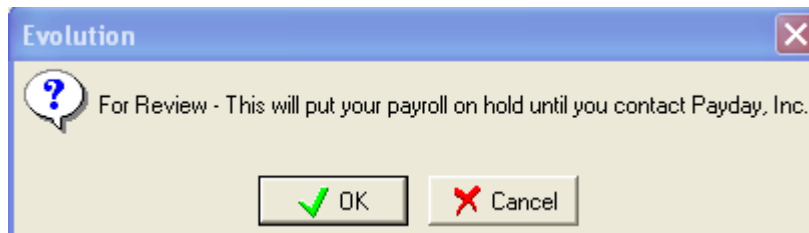
23. The report will run and come up on your screen.

24. You can either print or save your report from here.

25. Review the report for any errors in the payroll.



26. If you need to make any corrections in your payroll before you submit
  - a. Select the Payroll Button, then Payroll Tab
  - b. Select the Check Date that you are working in.
  - c. Select the **Batch Button** at the bottom of the page.
  - d. If you only have one Batch open it will take you straight into the Quick Entry tab for your Batch
  - e. If you have more than one Batch in your payroll select the batch that you need to enter from the Batch Tab, and then the Quick Entry Tab.
  - f. Enter your corrections
  - g. Re-run your Pre Process and Payroll Register Report.
27. Once you are sure that your payroll is correct and ready to be submitted. Select the Payroll Button, then Payroll Tab
28. Select the check date you are working on.
29. Select the SB Review Button 
30. The System will ask:



- a. This will make everything in the system go gray so that you will not be able to enter or do anything until your payroll has been processed.
- b. Select OK



31. The system will pop up:
  - a. This will allow you to email your payroll contact to let them know that your payroll is done and note anything that you would like them to look over for you.
  - b. It is very important that you contact your CSR to let them know you are done, and to note anything that you want them to check. If you do not want to email them then call.
  - c. Your payroll will be on Hold until the payroll has been processed. Once the Status changes to P you will be able to make changes in the system.

Notes: \_\_\_\_\_

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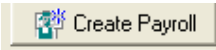

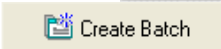

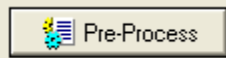
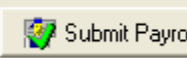

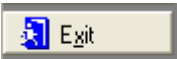


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\_\_\_\_\_



# Entering Your Payroll Regular

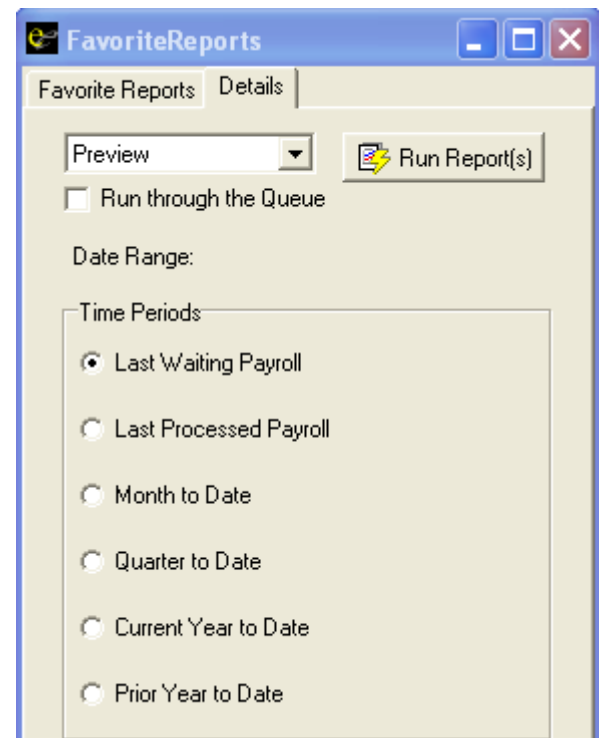
1. Do all Employee Maintenance first. (Ex: new employee's, terminations, address changes, pay rate changes, deduction changes or additions)
  - a. Note: most employee maintenance can be done throughout the pay period so that when it is time to do payroll all maintenance will already be done.
2. Select the Payroll Button.
3. Read Company Notes, if any.
4. Select the Payroll Tab
5. Select the Create Payroll Button. 
6. Verify your check date and click the green check mark to save 
7. This will then take you to the Payroll Batch Screen. 
8. Select the Create Batch Button
9. Verify the beginning and ending pay period dates. 
10. Select the green check mark to save your batch.
11. Answer Yes to auto-create checks for this batch. This will create a check for everyone who is Active in the system.
12. Select QUICK ENTRY at the bottom of the page. You will now see the "Grid" with all your Active employees.
13. The Quick Entry grid looks like a spreadsheet. You can customize this Tab to allow you to enter your payroll quickly and easily. Please reference the Quick Entry Tab in previous pages on how to customize this area.
14. Input your payroll.
15. Check your totals by selecting the Earnings and Deductions Tab.
  - a. Any Codes that require the check to be calculated for the amount to show will not show accurately until you do your pre process.
16. Select the Quick Entry Tab  
17. Select the Pre Process Payroll Button at the bottom of the page.
18. This calculated all of your checks.
  - a. Any checks that did not have any earnings will fall out of the payroll.
19. At the bottom of the page the status of the pre process can be seen.  
 When the total amount and the finished amount match the pre process is done running.
20. Select the small View button located below the Exit to enter the Queue.   
 
  - a. This is where you can see if your pre process ran successfully.
  - b. If your pre process ran with any errors call your CSR.

Notes: \_\_\_\_\_

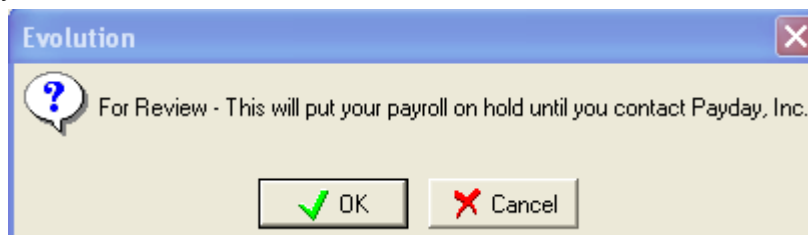
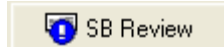




21. Once your pre process has run successfully you can run reports to check your payroll before submitting it.
22. Select the Favorite Reports Button at the top of the screen.
23. The Favorite Reports will pop up.
24. Select the Payroll Register Report by clicking in the box beside the name.
25. Select the Details Tab
26. Select Preview
27. Select Last Waiting Payroll
28. Uncheck the Run through the Queue box.
29. Select the Run Reports Button.
30. The report will run and come up on your screen.
31. You can either print or save your report from here.
32. Review the report for any errors in the payroll.
33. If you need to make any corrections in your payroll before you submit



- a. Select the Payroll Button, then Payroll Tab
  - b. Select the Check Date that you are working in.
  - c. Select the **Batch Button** at the bottom of the page.
  - d. If you only have one Batch open it will take you straight into the Quick Entry tab for your Batch
  - e. If you have more than one Batch in your payroll select the batch that you need to enter from the Batch Tab, and then the Quick Entry Tab.
  - f. Enter your corrections
  - g. Re-run your Pre Process and Payroll Register Report.
34. Once you are sure that your payroll is correct and ready to be submitted. Select the Payroll Button, then Payroll Tab
35. Select the check date you are working on.
36. Select the SB Review Button
37. The System will ask:



- a. This will make everything in the system go gray so that you will not be able to enter or do anything until your payroll has been processed.
  - b. Select OK

Notes: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_







- [illegible]

# Entering Your Payroll Net Clock (Web Clock)

1. Do all Employee Maintenance first. (Ex: new employee's, terminations, address changes, pay rate changes, deduction changes or additions)
  - a. Note: most employee maintenance can be done throughout the pay period so that when it is time to do payroll all maintenance will already be done.
2. You will want to make sure that employee's code in Web Clock matches the Employee number in Evolution
3. To view employee information in Web Clock Select Employee Setup, select the Employee you want to see.

**Employee Setup**

You can select the employee you want to see by clicking on the employee.

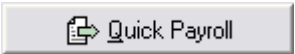
Once in the employee setup screen you can verify that the employee's information is correct (employee number)

Employee Setup	
<a href="#">(add new)</a>	
<input type="checkbox"/>	<a href="#">Abbott, Cassandra</a>
<input type="checkbox"/>	<a href="#">Arnot, Josh</a>
<input type="checkbox"/>	<a href="#">Ashby, Erin</a>
<input type="checkbox"/>	<a href="#">Bailis, Janet</a>
<input type="checkbox"/>	<a href="#">Behrend, Steven</a>
<input type="checkbox"/>	<a href="#">Blanton, Roberts</a>
<input type="checkbox"/>	<a href="#">Blaser, Mark</a>
<input type="checkbox"/>	<a href="#">Brown, Bryce</a>
<input type="checkbox"/>	<a href="#">Manning, Daniel</a>
<input type="checkbox"/>	<a href="#">Bailey, Donald</a>
10 employees shown.	
<a href="#">Check All</a>   <a href="#">Clear All</a>   <input type="button" value=""/>	

**Employee Setup**

\* denotes required fields.

First Name*	Cassandra	Middle Name	
Last Name*	Abbott	Designation	
Title		Department	server
Location		Supervisor	
Home 1	hostess	Home 2	bar
Home 3		SSN	
Web Password		Auto Lunch	30 minutes, after 6 hours.
Start Date		End Date	
Employee Code	1234	Default Payrate	2.13
Pay Rate 1	7.25	Pay Rate 2	8.5
Pay Rate 3	0	Card Number 1	5555555
Card Number 2		Card Number 3	
Schedule		Additional Options	
<input type="checkbox"/> Export Block (if checked, employee's payroll data won't be downloaded)			
<input type="button" value="Save"/> <input type="button" value="Cancel"/>			

4. Once you have done all maintenance in Evolution and Net Clock
5. Select the Payroll Button.
6. Read Company Notes, if any.
7. Select the Payroll Tab
8. Select the Quick Payroll Button. 
9. The Quick Entry Tab holds a grid that looks like a spreadsheet. You can customize this Tab to allow you to enter your payroll quickly and easily. Please reference the Quick Entry Tab in previous pages on how to customize this area.
10. Go to Net Clock (all time in the clock should be correct at this time.)
11. Go to Reports (located in Main Menu)

Notes: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



12. Select Summary Report
13. Select the pay period that you are paying your employee's for. Usually this is the second option.
14. Standard payrolls will select the Show Wages & Dollar Amounts in the Report Options.
15. The Show Which Employee Fields can be left blank in most standard Payrolls.
16. The Sorting and Filtering can be Sorted by Employee Name and No Filtering.
17. Select Run Report.

**Online Timekeeping**

Date: 3/10/2009

Login: online

**Report Menu**  
Online Demo

[Daily Auto Email Report](#)

[Detail Report](#)

[Download Activity Files](#)

[Employee Export](#)

[Labor Code Reporting](#)

[Payroll Settings](#)

[Single-Day Report](#)

[Summary Report](#)

[Summary Report \(Unformatted\)](#)

[Time Cards](#)

This is a demo account.  
None of the names or data in  
this account are real.

[Back To Main Menu](#)

### Payroll Summary Report

Company-wide summary for a single pay period. Shows total hours and earnings for each employee, broken down by category.

**Beginning and Ending Date**

**Report Options**

**Show Which Employee Fields?**

**Sorting and Filtering**

☒ 3/8/2009 thru 3/21/2009  
☐ 2/22/2009 thru 3/7/2009  
☐ 2/8/2009 thru 2/21/2009  
[Click here for more pay periods](#)

☒ Show Wages & Dollar Amounts  
☐ Show Week Breakdown  
☐ Show Approval Signature Line

Employee Name ☐ Employee Code  
☐ Home Department ☐ Home Location  
☐ Card Number 1 ☐ SSN

Sort By:

Filter By:

[Run Report](#)

Payroll Summary							Online Demo
							2/22/2009 through 3/7/2009
<div>  This symbol means employee is missing one or more punches.         </div>							
#	Name	Total Hrs	Category	Pay Rate	Pay	Job Code	
1	Abbott, Cassandra	79.41	Regular	2.13	169.14	0	
		1.14	Overtime	3.20	3.64		
2	Arnot, Josh	56.98	Regular		0.00	0	
3	Ashby, Erin	56.98	Regular	2.00	113.96	0	
4	Bailey, Donald	79.45	Regular		0.00	1280	
		0.51	Overtime		0.00		
5	Bailis, Janet	73.47	Regular	11.00	808.17	0	
		3.01	Overtime	16.50	49.67		
6	Behrend, Steven	40.00	Regular	0.18	7.20	0	
		40.00	Regular	0.30	12.00		
		3.00	Overtime	0.27	0.81		
		1.96	Overtime	0.45	0.88		
7	Blanton, Roberts	80.00	Regular	5.15	412.00	0	
		4.96	Overtime	7.73	38.32		
8	Brown, Bryce	22.47	Regular	8.50	191.00	0	
9	Manning, Daniel	51.40	Regular		0.00	0	
<b>Totals</b>		<b>594.74</b>			<b>\$1,806.79</b>	<b>1280</b>	

Category	Total Hours	Total Pay
Regular	580.16	\$1,713.47
Overtime	14.58	\$93.32
<b>TOTALS</b>	<b>594.74</b>	<b>\$1,806.79</b>

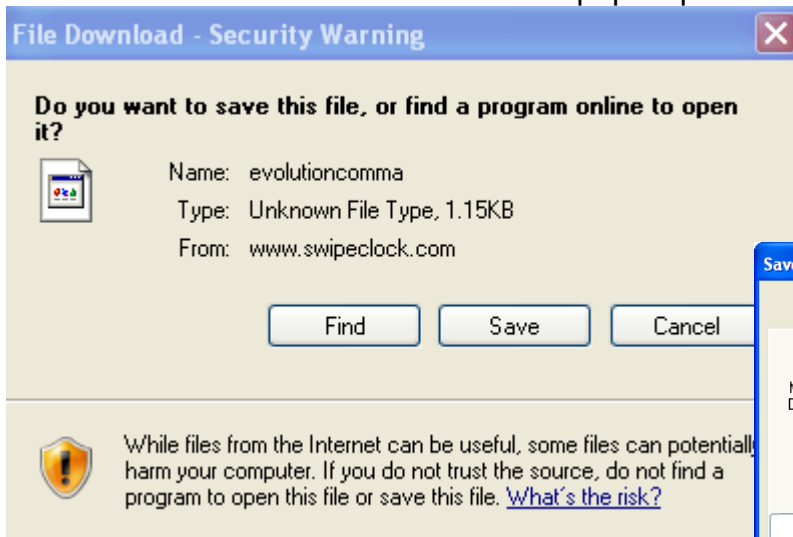


18. Your report will come up.
  - a. You should not have any missing punches.
    - i. If you do have missing punches you must fix these before you can go on with your payroll.
  - b. The report will show you the totals for each E/D
19. Print this report so check totals once you have done your import.
20. [Download Activity Files](#) Select Download Activity Files from the list of reports.
21. Select Custom at the bottom of the page and type in evolutioncomma in the box available.
22. Select Continue

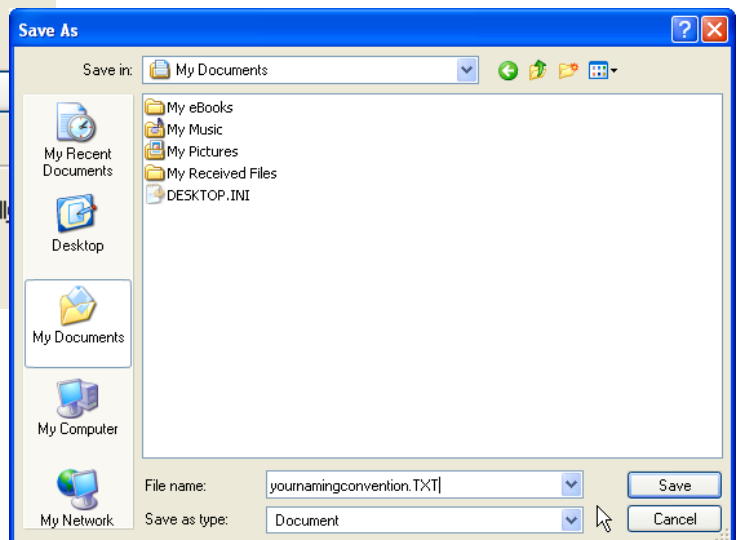
<b>File Format Code:</b>	
<b>Select A Pay Period:</b>	Select the pay period you are paying your employee's for
<b>File Processing:</b>	Select Download It
<b>Employee Filtering:</b>	No Filtering
<b>Options:</b>	Do not select anything here.
<b>Labor Mapping:</b>	All options should say Nothing.

Notes: \_\_\_\_\_

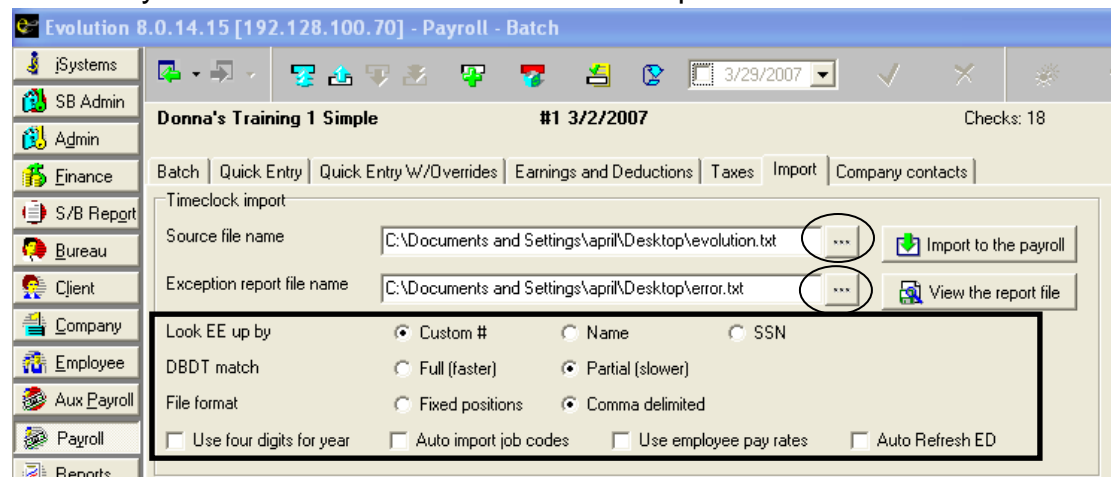
23. Make your selections as shown above.
24. Select Run Report
25. Select Save from the box that pop's up.



26. You will now select where you will save your file. It is important that whatever you name your file it has **.txt** after the name. Once the file exists, you can double-click the existing file to overwrite it.



## 27. Go to Payroll Batch in Evolution. Select the Import Tab



28. Click on the three little dots on the Source file name line to select where your file was saved.
29. Click on the three little dots on the Exception report file name. This should be a notepad saved with an ending of **.txt**
30. The area below these lines should look as they do above.
31. Now you can select the Import to the payroll button. A task bar will pop up until this is finished.
32. The yellow Sun shows that data did come in during your import. Do not hit the yellow sun until you are sure you are ready to save.
33. Click on the View the report file button.
  - a. This will bring up an error log. If there is anything on this log you may need to correct the problem and then recreate your file and re-import.
  - b. The hours and earnings for anyone rejected on the report will not have been imported. (If you must make corrections do not save what you have done in Evolution. If you have saved you may need to delete the batch and recreate it.)
34. Check your totals by selecting the Earnings and Deductions Tab.
  - a. Any Codes that require the check to be calculated for the amount to show will not show accurately until you do your pre process.
  - b. Make sure that the totals look correct from the report you ran out of the Net Clock and then you can save your import.
35. Select the Quick Entry Tab
36. Select the Pre Process Payroll Button at the bottom of the page.



37. This calculated all of your checks.
  - a. Any checks that did not have any earnings will fall out of the payroll.
38. At the bottom of the page the status of the pre process can be seen.
 

**Task Queue: New Finished: 1 Total: 6 Finished: 6**

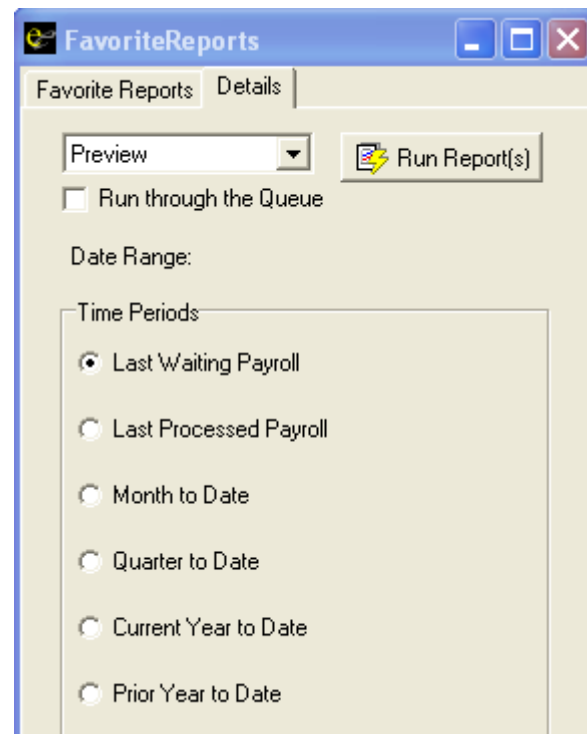
 When the total amount and the finished amount match the pre process is done running.
39. Select the small View button located below the Exit to enter the Queue.
 

Exit  
View Task Queue

  - a. This is where you can see if your pre process ran successfully.
  - b. If your pre process ran with any errors call your CSR.



40. Once your pre process has run successfully you can run reports to check your payroll before submitting it.
41. Select the Favorite Reports Button at the top of the screen.
42. The Favorite Reports will pop up.
43. Select the Payroll Register Report by clicking in the box beside the name.
44. Select the Details Tab
45. Select Preview
46. Select Last Waiting Payroll
47. Uncheck the Run through the Queue box.
48. Select the Run Reports Button.
49. The report will run and come up on your screen.
50. You can either print or save your report from here.
51. Review the report for any errors in the payroll.
52. If you need to make any corrections in your payroll before you submit

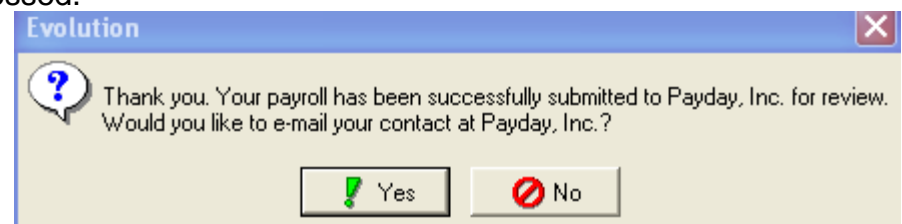
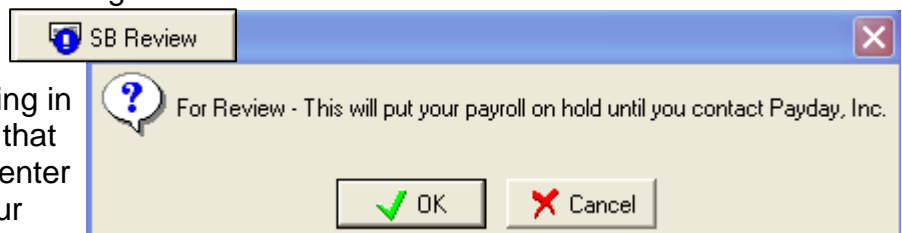


- a. Select the Payroll Button, then Payroll Tab
  - b. Select the Check Date that you are working in.
  - c. Select the **Batch Button** at the bottom of the page.
  - d. If you only have one Batch open it will take you straight into the Quick Entry tab for your Batch
  - e. If you have more than one Batch in your payroll select the batch that you need to enter from the Batch Tab, and then the Quick Entry Tab.
  - f. Enter your corrections
  - g. Re-run your Pre Process and Payroll Register Report.
53. Once you are sure that your payroll is correct and ready to be submitted. Select the Payroll Button, then Payroll Tab
54. Select the check date you are working on.

55. Select the SB Review Button

56. The System will ask:

- a. This will make everything in the system go gray so that you will not be able to enter or do anything until your payroll has been processed.
- b. Select OK



57. The system will pop up:

- a. This will allow you to email your payroll contact to let them know that your payroll is done and note anything that you would like them to look over for you.
- b. It is very important that you contact your CSR to let them know you are done, and to note anything that you want them to check. If you do not want to email them then call.
- c. Your payroll will be on Hold until the payroll has been processed. Once the Status changes to P you will be able to make changes in the system.

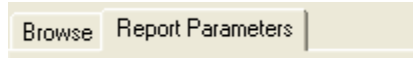


# Reports



# Running Reports

1. Select the Reports Button
2. Select the Run Reports Subfolder
3. Select the report that you would like to run from the list of reports on the right side of the page.
  - a. Select in the box next to the report to put a check mark in the box
4. Select the Report Parameters Tab at the top of the page.
5. The parameters will be different depending on the report that you are running.
6. The Payroll Register Report is a standard report for what is available in the parameters tab.



Client **AB201M Donna's Training Company**  
 Company **AB201M Donna's Training Company**

Browse Report Parameters

Override default parameters as  
 05 - Payroll Register (\$109)

Payrolls Misc Employee Filter DBDT Filter

Check Date Period  
 Year **2009** ☒ 1st Quarter ☒ 3rd Quarter  
☒ 2nd Quarter ☒ 4th Quarter  
 From **1/ 1/2009** To **12/31/2009** ☐ Show Processed Only ☐ Consolidation

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

Check Date	Run #	Processed	Status	Type
<input checked="" type="checkbox"/> 4/17/2009	1		W	R
<input type="checkbox"/> 4/3/2009	1	3/18/2009 10:17:28 ...	W	R
<input type="checkbox"/> 3/20/2009	1	3/4/2009 9:57:49 AM	W	R
<input type="checkbox"/> 3/6/2009	1	2/24/2009 11:46:34 ...	W	R
<input type="checkbox"/> 1/23/2009	1		W	R
<input type="checkbox"/> 1/9/2009	1		W	R

- a. Select the check date or dates in the Payrolls Tab.
  - i. The Select Payrolls for box will allow you to select check dates for 1<sup>st</sup>, 2<sup>nd</sup> 3<sup>rd</sup>, and/or 4<sup>th</sup> quarter. It also allows you to select check dates for the entire year.
  - ii. You can change the year under the check date period.
  - iii. If you are looking for payrolls in a specific time frame you can enter the time from in the From and To boxes under the check date period.
1. You can then select all of the date in the period by selecting the box next to the filter.



- b. Select the Misc Tab

Payrolls Misc Employee Filter DBDT Filter

Grouping and Sorting  
 Group Level **Department**  
 Group Type **Summary Detail**  
 Group Sort **Group Code**  
 Detail Sort **Employee Last Name**  
 Do according to Company Setup





- ☐ Page Break after each Group
- ☒ Show Terminated Employees
- ☒ Mask Sensitive Information
- ☐ Show only Summary for Multiple check dates
- ☒ Show Home DBDT for each Employee
- ☒ Include Memos in Totals
- ☒ Include Taxable Memos in Totals
- ☒ Include Pieces from Piecework in Totals
- ☒ Break Employee between Pages
- ☒ Deductions as Taxes
- ☐ Show Shift Differentials
- ☐ Hide SSN, State, Frequency, and Salary
- ☐ Swap Check Date and Net Check
- ☐ Bold EE Name, Check Number, and Net Check
- ☐ Show Employees With YTD Earnings

#### Under the Grouping and Sorting Box

1. The Group Level allows you to select how you want the grouping to be (Company or Department)
  2. The Group Type allows you to select
    - a. Summary Detail – This is totals and the detail of each check.
    - b. Summary – just the totals
    - c. Detail – just the detail of each check
  3. The Group Sort allows you to show your first Group Level either by Department Code or Name
  4. The Detail Sort affects the detail of information within the group
    - a. Your employee's can be in order by
      - i. EE Last Name
      - ii. EE SSN
      - iii. EE Code
    - ii. The Check Boxes at the right of the page allow you to customize the report even further.
1. Page break after each group - allows a break to the next page after each department.
  2. Show terminated employee's – employee's that are terminated in the system, but were paid during the time frame that you are looking at will show on the report.
  3. Mask Sensitive Information – Social Security Numbers will be shown as X's
  4. Show only Summary for Multiple Check Dates – if you do not need the detail of every check for each employee... this will allow you to see a summary for multiple check dates.
  5. Show Home DBDT for each Employee – will show the employee's home DBDT on the report.
  6. Include Memo's in totals – if you have memo's they will show in the total's
  7. Include Taxable Memo's in the total's – if you have taxable memo's they will show in the total's
  8. Include Pieces from Piecework in Totals – if you have Piecework you can have pieces show in the totals
  9. Break Employee between pages – will print part of employee's information on one page and break when runs out of room and finish on next page (can be hard to read report with this function)
  10. Deductions as Taxed – deductions are showing in order as they are taxed.
  11. Show Shift Differentials – if you have shift differentials you can have it show.
  12. Hide SSN, State, Frequency, and Salary- gray line on this report normally will show the EE's SSN, State, Freq., and Salary. If you select this it will be just a gray line.
  13. Swap Check Date and Net Check – switches location of these items
  14. Bold EE Name, Check Number, and Net Check – will make these items bolded
  15. Show Employee's with YTD Earnings – will show employee's with YTD Earnings.



iii. Select Employee Filter Tab

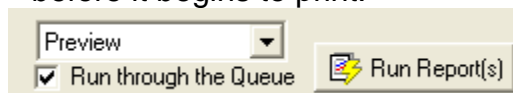
1. This Tab will allow you to run this report for just one or a select group of employee's.
  - a. An example of how this report could be used:
    - i. An employee comes to you needing check information for the last 3 check dates. (Employee is refinancing home, and shredded check stubs already.)
      1. Select Payroll Register report
      2. Select check dates employee needs
      3. Select Employee from list
      4. Run and Print Out for Employee
2. If no employee's are selected in this tab the report will run for all employee's.

iv. Select DBDT Filter Tab

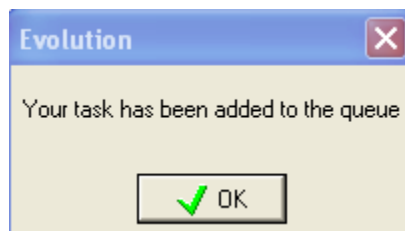
1. This Tab will allow you to run this report for just one or a select few Division's, Branches, Departments, and/or Teams.
2. If no specific DBDT's are selected the report will run for all.

v. From the Drop Box at the Right Select Preview

1. You can select to print, but this does not allow you to preview the report before it begins to print.



- vi. Make sure the Run through the Queue has a check mark in the box. This will send your report to the Queue (your report will be available in the Queue for 10 days)



vii. Select Run Report(s) Button

- viii. You will get a pop up message to let you know that the report has been added to the Queue.

- ix. Close out of the Report area with the red  at the top of the page.

7. At the bottom of the page you will see the Task Queue

**Task Queue: New Finished: 7 Total: 18 Finished: 18**

- a. You will want to wait until the Total number and Finished numbers are the same.
- b. When the report is finished running select the View Button located under the Exit at the lower left corner of the screen.




## Quick Guide Running a Report

1. Select Report Button
2. Select Run Reports Subfolder
3. Select Report that you would like to run.
4. Select Report Parameters Tab
5. Select Parameters (If Applicable)
6. Select to Preview the Report
7. Select Run through the Queue box
8. Select Run Report Button
9. Wait until Report shows it has run in the Task Queue at the bottom of the page.
10. Select the View Button under the Exit Button
11. You can now see and do what you need with the Report that you have run.

Notes: \_\_\_\_\_

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.






## Navigating in the Queue

- The Queue is the area of Evolution that hold all of your previous preprocess and reports that you have run and asked to have run through the Queue. The information in the Queue is available for 10 days.
- Note: Depending on each user's rights the Queue may have some differences in functionality. Usually User's will only see a difference in if the Queued area is available.
- The top portion of the Queue has these buttons: 
  - The double up arrow allows you to go to the first page or the report that you are looking at.
  - The single up arrow will scroll up.
  - The single down arrow will scroll down.
  - The double down arrow will take you to the last page of the report you are looking at.
  - The arrow going in a circle is the refresh button. You may have to refresh if you come into the Queue and your report is not done running.
- Below the arrow buttons is the list of reports that you have run for the past ten days, and the Queued list.
  - The list of reports shows the date, status, description, and other information about the report.
  - The Queued list show the status on the reports that you have run.







User	Finished	Priority	Id	Updated	Status	Description	Caption	Queued	Finished
Aw152	<input checked="" type="checkbox"/>	800	60014	3/19/2009 11:02:27 ...	Finished Successfully	Task Run Report	Scheduling Rep	Waiting for Res.	8
Aw152	<input checked="" type="checkbox"/>	800	59829	3/19/2009 8:26:54 AM	Finished Successfully	Task Run Report	CO# AB201M. C	Finished succ.	8
Aw152	<input checked="" type="checkbox"/>	795	59542	3/18/2009 3:19:29 PM	Finished Successfully	Task Preprocess Payrolls	Co:N092+ Pr:3/	Executing	
Aw152	<input checked="" type="checkbox"/>	795	59463	3/18/2009 2:39:23 PM	Finished Successfully	Task Preprocess Payrolls	Co:N040+ Pr:3/	Failed	Finished w/warn.
Aw152	<input checked="" type="checkbox"/>	795	58058	3/17/2009 9:18:28 AM	Finished Successfully	Task Preprocess Payrolls	Co:D221+ Pr:3/	Priority()	
Total tasks								8	

- Below the lists is the description of the report that you are viewing.

Description: Task Run Report  
 Caption: CO# AB201M. 05 - Payroll Register  
 Status: **Finished Successfully** Changed: 3/19/2009 8:26:54 AM  
 Message:  
☐ Send Updates to April@Paydayinc.Com NI

- The icons below the description allow you to affect the report you are viewing.
  -  Allows you to save the report outside of Evolution. Make sure if you are saving so that you can email or make available to someone who does not have Evolution on their computer that you change the type of the report to Adobe PDF Format
  -  Allows you to save your report outside of Evolution. See above... Allows you to save reports that you ran at the same time as separate files.
  -  Allows you to password protect your report before saving it outside of Evolution. Allows one or two passwords.
  -  Prints the report to your default printer
  -  Allows you to select the printer and parameters for the printer you selected to print to.



- f.  Allows you to zoom in and out to see more or less of your report.
- g.  Allows you to search through the report.
- h.  Allows you to create circles that you can attach text to.
- i.  Allows you to scroll through the report.
- j.  Shows what page of the report you are viewing
- k.  If you ran more than one report at the same time this allows you to select which report you want to view.

- Below the icons you will see your report.
- On the right top part of the Queue there are 4 Tabs available. These will change the view.



List View   Split View   Detail View   Full Screen

- The List View allows you to see just the list of report you have run in the past 10 days.
- The Split View is the default view it allows you to see the list, description of report and all the icons.
- The Detail View will eliminate the list and leave all other functions
- The Full Screen takes away the list and detail leaving you with just the report and icon buttons that will affect the list above and the icon buttons that affect the report.

9. These steps walk you through running the payroll register report. This is a good example of the different parameters that are available when running reports. If you ever find that you have a question about a parameter that is available with a specific report call your CSR for further guidance.

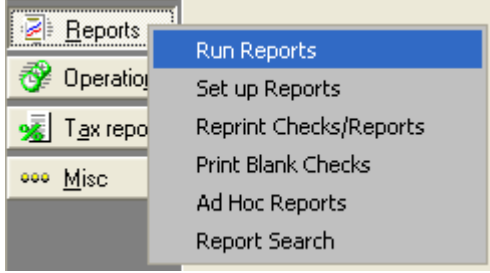
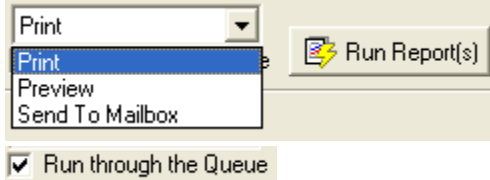
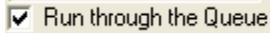
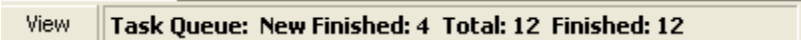

Notes: \_\_\_\_\_

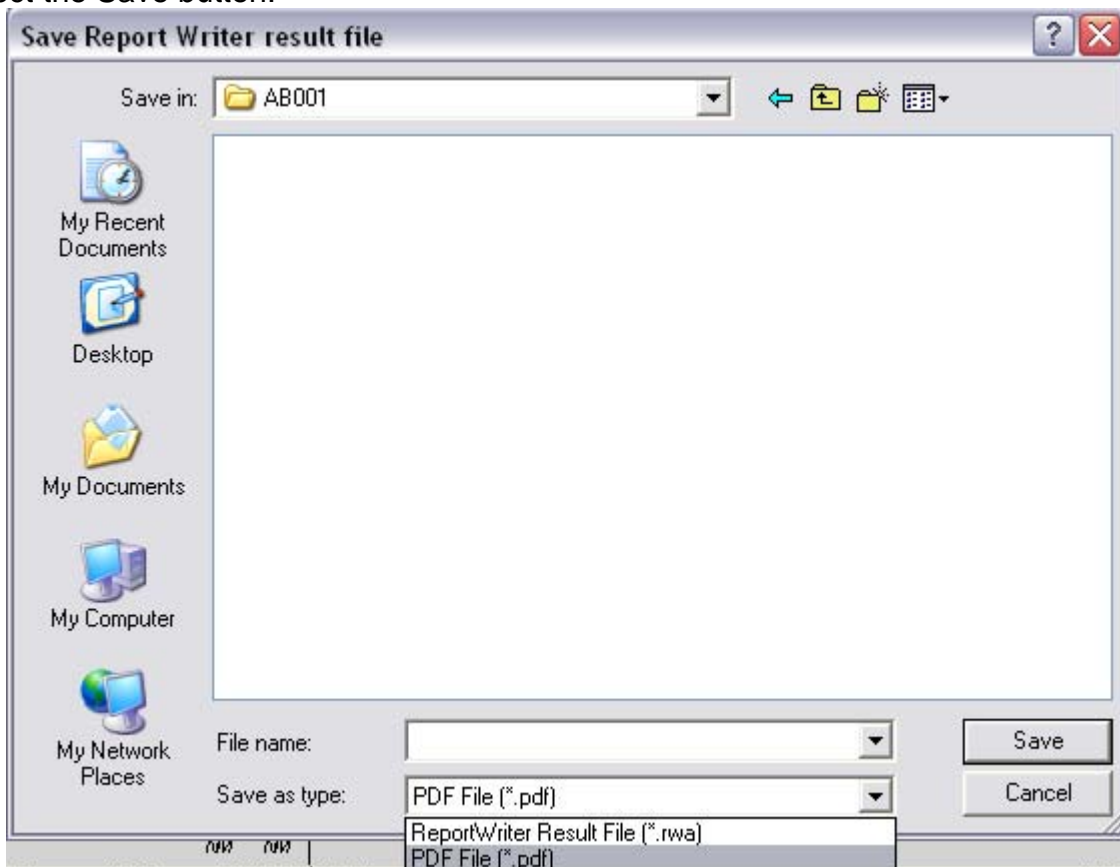
## Running Reports from Favorite Reports Button

1. Select the Favorite Reports Button 
2. Select the Report(s) you would like to run
3. Select the Detail's Tab
4. Select if you would like to Print or Preview the report.
  - a. If you select Print it will print as soon as the report is done running
  - b. If you select Preview it will allow you to preview the report.
5. Select if you would like the report to run through the Queue.
  - a. If you select to run through the Queue you will need to go into the Queue to view your preview.
  - b. If you do not select to run through the Queue if you selected preview it will come up on your screen.
  - c. Reports run through the Queue are available for the next 14 days.
6. Select the Date Range that you would like to use to run the report(s)
7. Select the Run Report(s) Button 
8. Your report(s) will run.




## Saving a Report as a PDF

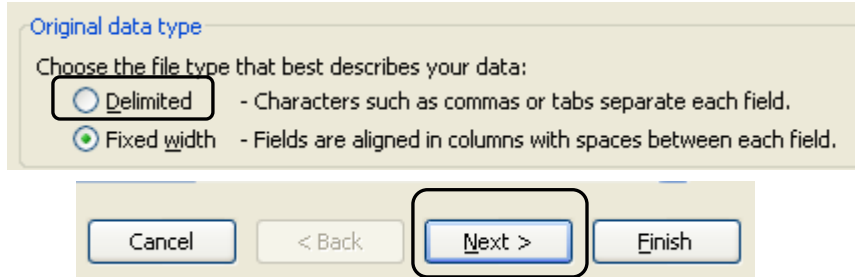
1. Select the Reports Button/ Run Reports Subfolder
2. Select the report that you want to run from the list of reports. Put a check mark in the box beside the report.
3. Select the Report Parameters from the top of the page. 
  - Browse
  - Report Parameters
4. Select the Parameters for the report that you are running.
5. Select Preview from the drop box at the top right part of the page. 
6. Make sure that the run through the Queue has a check mark in the box beside it. 
7. Select Run Report
8. A pop up box will let you know that the report has been added to the Queue.
9. When the report has finished running. (You can see the status of the report at the bottom of the page. 
10. To enter the Queue Select the small View button below the Exit button.
  - Select the save button
11. The Save Report Writer  ult file will pop up.
12. Select where you would like to save the report and what you would like to name the report.
13. Select the Save as type and select PDF File
14. Select the Save button.



## Ascii File Open in Excel

1. Once you have run your Ascii report in Evolution go to the Queue to save outside of Evolution.
2. From the Queue select the Save Icon. 
3. This will bring up your Save Box.
  - a. Save to the location that you would like the file to go to.
  - b. Name the file
  - c. The file will be a text file.
4. Open Excel
5. Select your open file
6. In the Open Pop up Box select where All Files so that you will be able to see your text file where you saved it.
7. Double Click on the text file you created.

8. This will open the Text Import Wizard
9. Select Delimited then Next



Original data type

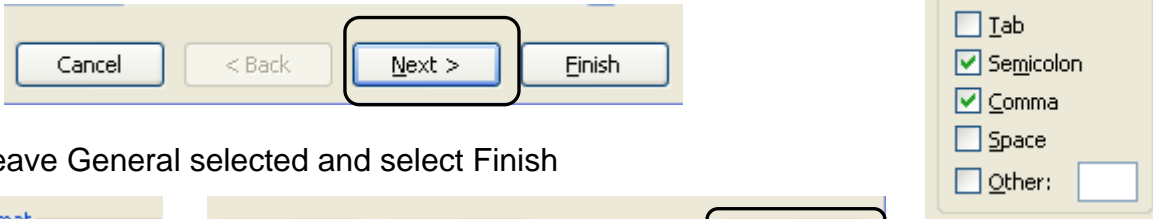
Choose the file type that best describes your data:

☐ Delimited - Characters such as commas or tabs separate each field.

☒ Fixed width - Fields are aligned in columns with spaces between each field.

Buttons: Cancel, < Back, Next >, Finish

10. Select Semicolon and Comma. Uncheck Tab then select Next.



Delimiters

☐ Tab

☒ Semicolon

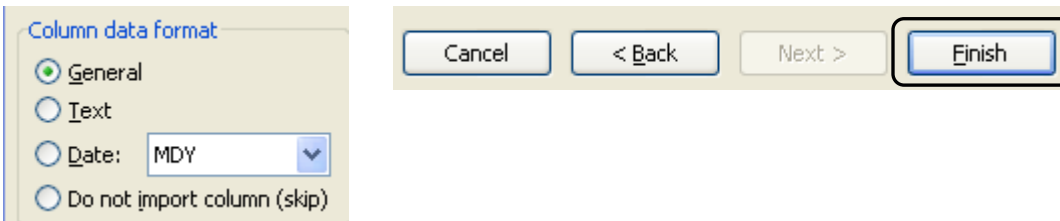
☒ Comma

☐ Space

☐ Other:

Buttons: Cancel, < Back, Next >, Finish

11. Leave General selected and select Finish



Column data format

☒ General

☐ Text

☐ Date: MDY

☐ Do not import column (skip)

Buttons: Cancel, < Back, Next >, Finish

12. This will bring the information into Excel.

Notes: \_\_\_\_\_

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# Re-Printing Check Stubs

## 1. Go to Reports – Reprint Checks/Reports

Client **AB002** **AB Test Company II**  
 Company **AB002** **AB Test Company II** Payroll **1** **12/16/2009**

Browse Details Payroll Checks Misc Checks

Open company

**Check Form**  
 Check Letter Stub Only (New)

**Misc Check Form**  
 Check Letter Stub Only (New)

**Reprint TO Balances**  
 Current

Destination  
 Print

Reprint for Payroll

☐ Don't Print Banking Info on Checks  
☐ Don't Print Background on Checks  
☒ Do Not Use VMR Settings

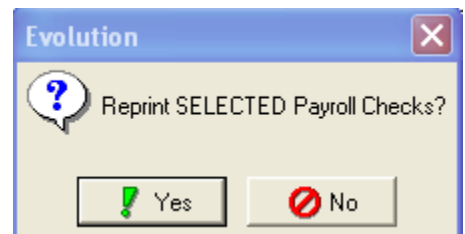
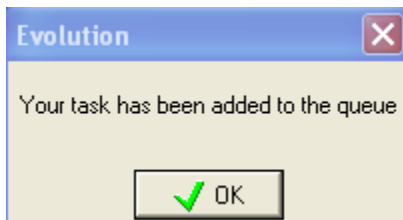
- From the Browse Tab change the Check Form and Misc Check Form to show Check Letter Stub Only (New)
- The Destination needs to be Print
- Select the check date that you need to reprint the check stub for in the list below
- In the Payroll Check Tab Select the check (if you need more than one check hold your CTRL Key on your keyboard) needed. Hit your Plus Sign at the top of the page.

Client **AB200S#** **Donna's Training 1 Simple**  
 Company **AB200S#** **Donna's Training 1 Simple** Payroll **1** **11/23/2007**

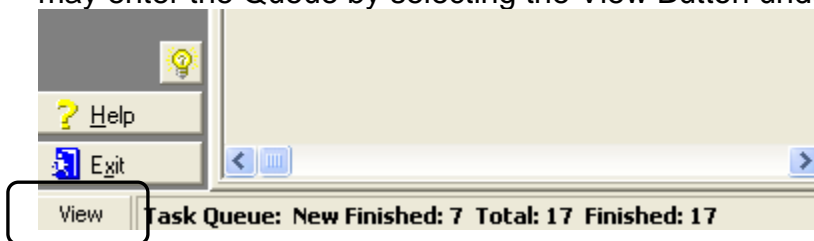
Browse Details Payroll Checks Misc Checks

Serial Number	Net Wages	EE Code	Employee Name	SSN
-99996638	0.00	10003	Bird, Tweety	777-77-7777
-99996637	0.00	1023	Brazzi, Luca	111-25-4567
10139	826.77	1012	Chavez, Josh	888-77-9999
10140	853.13	1046	Clark, Marla	123-45-6789
10141	908.93	1003	Clark, Mary	100-00-0003
10143	911.33	1049	Collins, Robin	454-25-1515
10146	453.17	10000	Collinsd, Robin	525-15-1258

- This box will pop up Select Yes
- You will be notified that it has been sent to the Queue select OK



- Once it has finished running in the task Queue (status seen at the bottom of your page) you may enter the Queue by selecting the View Button under the Exit button

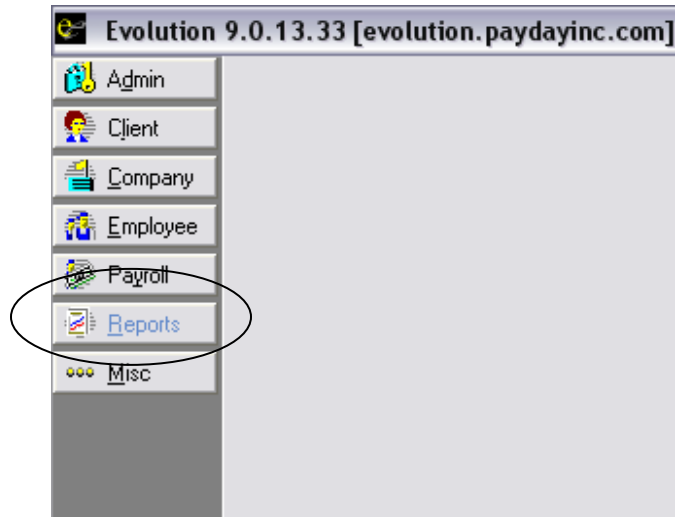
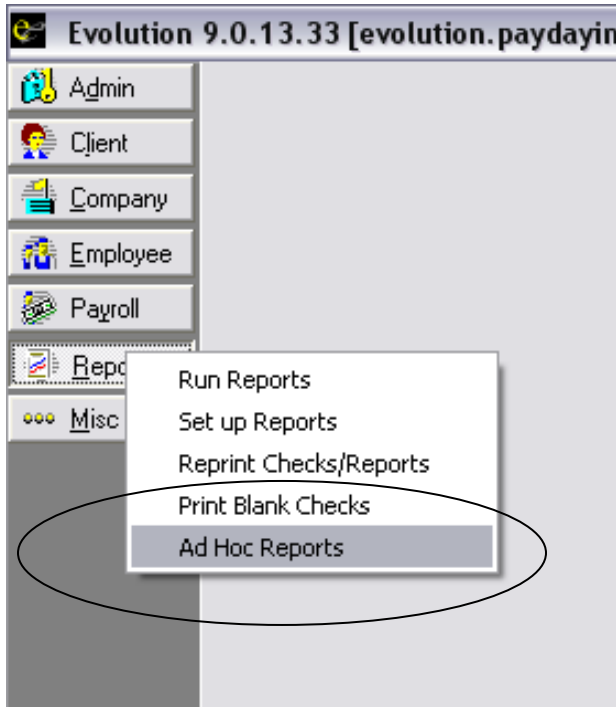


- You can reprint the check stubs by select the reprint checks button at the bottom of the Queue

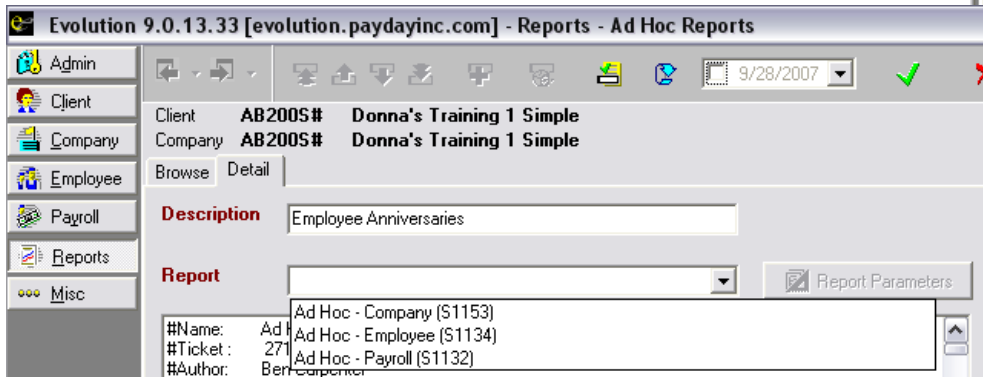


# Ad Hoc Reports

1. When using Ad Hoc Reports you will be manipulating information that is specific to your company. There are many areas in Ad Hoc where you will need to spend time becoming familiar with what is available to you based on how your company is set up in the Evolution system.
2. To navigate to the Ad Hoc Reports you will select the Reports side button.
3. You will then select the Ad Hoc Reports sub folder



4. Now while in your company you will select the green plus sign at the top of your Navigational Bar. If not automatically directed to the details tab select the details tab.
5. Enter in the title of your report in the Description box
6. You will select the type of report that you are creating from the report drop box, and this will allow you different information to pull from. If you are creating a report that will just have employee information and not need any payroll dates or information you can select Employee. If you are creating a report that is going to need any Payroll information you will need to select Payroll.



7. Select the Reports Parameters button

8. If creating a report using the Employee information you will have Columns, Select EE's, and Misc. as tabs where you can manipulate and pull information for your report.

9. If creating a report using Payroll Information you will have Misc., Employee Filter, DBDT Filter, Columns, and ASCII Report available as tabs where you can manipulate and pull information for your report.

10. At this point you will have information available depending on how your company is set up in Evolution. Below you will find some navigating information to help you in creating your report.

11. **The Columns Tab** you can add and delete columns that will show up on your report. You are also able to move the columns to put them in the order you want them to be.

12. With the Column Type you will be selecting what kind of information you will be pulling from Evolution. By selecting Employee you are shown information about the Employee in the Columns Values.

13. With the Column Title you are naming the Column what you want it to be called on your report.

14. You are able to make the columns you create visible or invisible (if you need information for a calculation, but you do not need it to be visible on the report). If you are doing a calculation you will have to select Calculation from the Column Type (when calculating a column enter the Column number then the calculation method and then the other Column. For instance col1+col3)



Column ID	Column Title	Invisible	Size
COL1	Custom Employee Code	False	
COL2	First Name	False	
COL3	Block Week 1	False	
COL4	E/D Code	False	

**Column Property**

Column Type: Employee  
Column Title: Custom Employee Code  
Column Size: 1  
☐ Invisible Column ☒ Print text instead of abbreviation

Column Values (1 column value per non-calculated column)

- ☒ FIELD\_DISPLAY\_NAME
- ☐ 1099R Distribution Code
- ☐ Address1
- ☐ Address2
- ☐ Auto Labor Cl Ed Group
- ☐ Auto Pay Shift
- ☐ Auto Update Rates
- ☐ Autopay Cl Pieces Nbr
- ☐ Badge ID
- ☐ Base Returns On This EE
- ☐ Branch
- ☐ Calculated Salary
- ☐ City
- ☐ Co Hr Salary Grades Nbr

Buttons: Add Column, Delete Column, Move Up, Move Down, Apply Changes, Cancel Changes, OK, Cancel

15. You are able to select the size of the column.

16. The Column Values area is where you select what is show in the column you are creating.



17. Once you have created and manipulated all of the columns to where you want them select the Apply Button.

18. In the **Select EE's Tab** or the **Employee Filter Tab** allows you to select specific employees for the report. Note: this will be available when you tell Evolution to run the report it does not need to be set while building the report.

EE Code	SSN	First Name	Last Name
<input type="checkbox"/>	1001	100-00-0001	Jake Simpson
<input type="checkbox"/>	1002	100-00-0002	Roberto Ortega
<input type="checkbox"/>	1003	100-00-0003	Mary Clark
<input type="checkbox"/>	1004	100-00-0004	Alberta Franklin
<input type="checkbox"/>	1005	100-00-0005	Alonso Rodriguez
<input type="checkbox"/>	1006	100-00-0006	Lonnie Smith
<input type="checkbox"/>	1007	100-00-0007	Thomas Hayworth
<input type="checkbox"/>	1008	100-00-0008	Teresa Wallace
<input type="checkbox"/>	1009	333-44-5555	Jane Lopez
<input type="checkbox"/>	1010	123-22-3333	Dan Stuart
<input type="checkbox"/>	1011	555-55-6666	Michael Henderson
<input type="checkbox"/>	1012	888-77-9999	Josh Chavez
<input type="checkbox"/>	1013	555-55-5555	James Jones
<input type="checkbox"/>	1014	354-17-1351	Jennifer Fun Lady
<input type="checkbox"/>	1015	500-00-0001	Scratch Pad Yellow

19. In the **Misc. Tab** you are given the option to pick what kind of employees will show on the report. Active, Terminated, Inactive, etc. You are also able to select depending on if the report is being created through Employee, or Payroll more information

Current Status Code
<input type="checkbox"/> Active
<input type="checkbox"/> Involuntary Layoff
<input type="checkbox"/> Leave of Absence
<input type="checkbox"/> Military Leave
<input type="checkbox"/> Release Without Prejudice
<input type="checkbox"/> Seasonal
<input type="checkbox"/> Suspended
<input type="checkbox"/> Terminated
<input type="checkbox"/> Termination Due to Death
<input type="checkbox"/> Termination Due to Layoff
<input type="checkbox"/> Termination Due to Retirement
<input type="checkbox"/> Termination Due to Transfer
<input type="checkbox"/> Voluntary Resignation

Sort By: To sort the results of the report, enter the column numbers of the columns on which you wish to sort in the order in which they are to be sorted, separated by commas. For example, to sort on columns 3, 4 and 1 in that order, the text to enter in the Sort By box would be as follows: 3,4,1

☒ Print ASCII Result  
☒ Print Column Headers

File Type:  
☐ Fixed Length  
☒ Delimited

If Delimited...  
Delimiter:   
Qualifier:

Grouping and Sorting:  
Group Level:   
Group Type:   
Group Sort:   
Detail Sort:

Detail Item:  
☒ Payroll  
☐ Check

20. The **DBDT Filter Tab** allows you to select specific departments that will show on the report. You will select how you want to specify (Company, Division, Branch, Department, Team)

21. The **ASCII Report Tab** allows you to set your print parameters and report specifics.

☐ Print ASCII Result  
☐ Print Column Headers

File Type:  
☒ Fixed Length  
☐ Delimited

Amounts:  
Decimal Point Visibility:   
# of Decimal Positions:

22. Once you have created your report you will want to save by hitting the green check mark on the top navigational bar, then the yellow sun.

23. Now you can run your report. In the browse area of the Ad Hoc Reports you will now see your report. Select the report and make sure there is a check mark in the run through the queue, then select run report.

Number	Name	Status
AB001	ABC Test Company	Inactive
AB002	AB Test Company II	Seasonal A
AB003	Sample Client	Inactive
AB003	Basic Copy	Seasonal A
AB1005#	Original Simple Client	Seasonal A
AB101M#	Original Moderate Client	Seasonal A

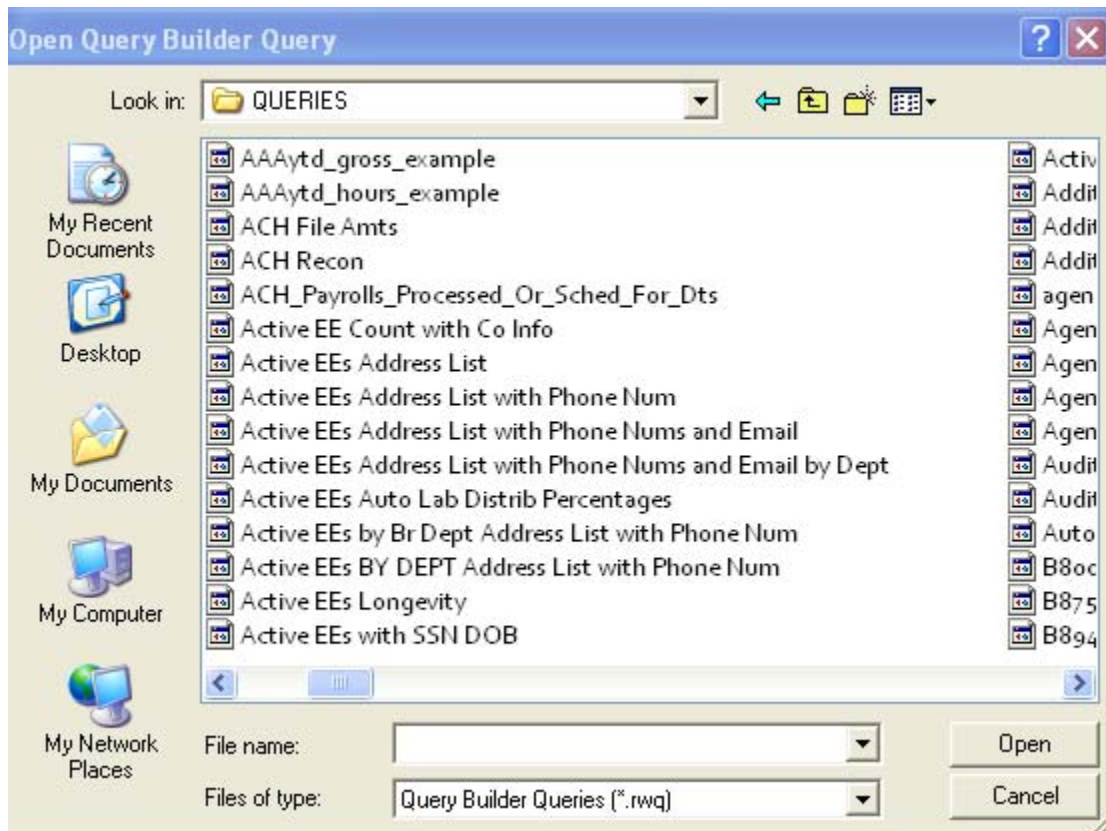
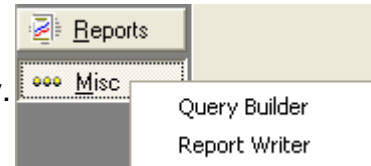
Report Name:

24. Choose the reports parameters. You can make any changes you want to the report. Save, and then select ok. A box will pop up notifying you that your report has been added to the Queue. You can go to the Queue to view and print your report.

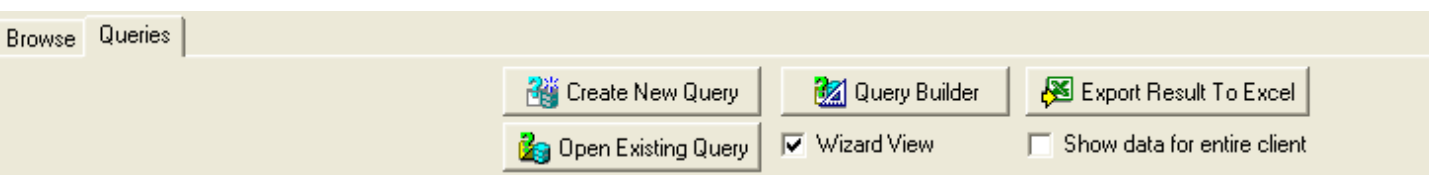


## Running a Query

1. Queries are a type of report that can be exported to Excel.
2. Clients can have a Query emailed to them so that they can run the Query.
3. To run a Query select the Misc. button, then the Query Builder Subfolder.
4. Select Open Existing Query.
5. Select where you have the Query Saved.




6. Double Click on the Query you want to run.
7. The report will run and show the results in Evolution.
8. To Export the results to Excel select the Export Result To Excel Button.

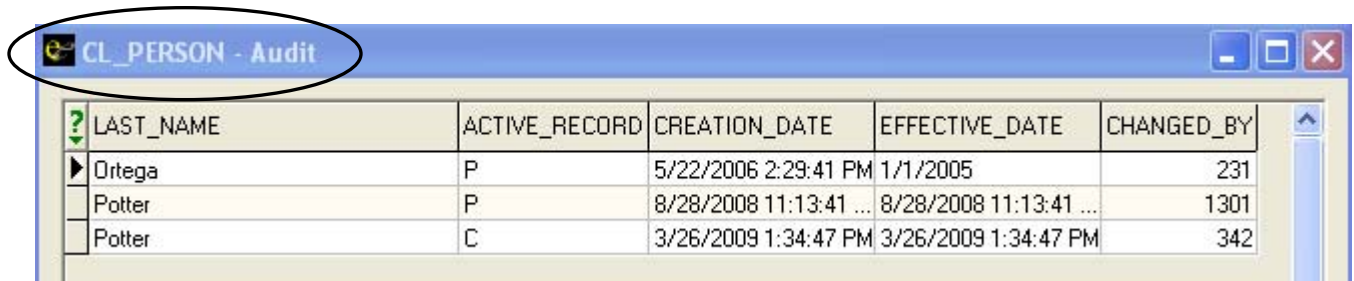


9. Select where you would like the report to be saved to.
10. Go to where you saved the file and double click on the file to open. The file will be a SYLK file, but you can save as an excel file once you have gone into the file by selecting file/ save as.



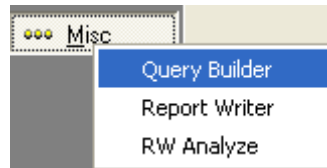
# Creating a Basic Query

1. The Query area of Evolution allows you to pull information out of the system.
  - a. The Query area pulls the information based on where it is located in Evolution and where that information is link to in the tables that are in the Query area.
  - b. The best way to locate the information you are looking for in the Query Building is by knowing what fields you are going to want to pull and going to those specific areas in Evolution.
    - i. Select the field of information that you are going to be pulling into the Query and select the Field Audit History Button from the top navigational bar.  This will show you where in the Query Tables the information will be found.

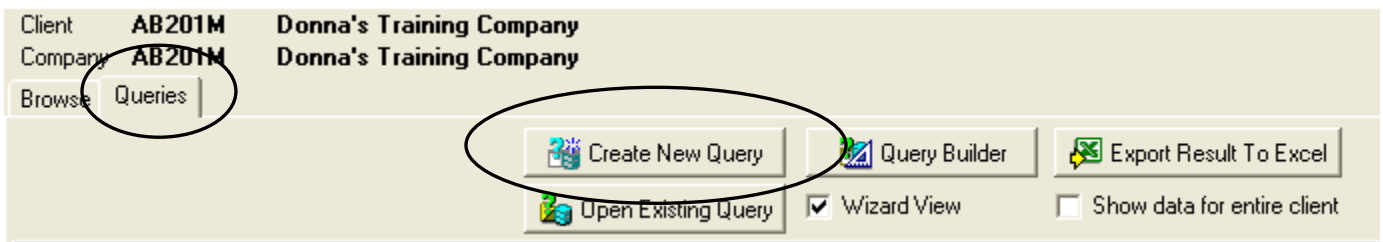


LAST_NAME	ACTIVE_RECORD	CREATION_DATE	EFFECTIVE_DATE	CHANGED_BY
Ortega	P	5/22/2006 2:29:41 PM	1/1/2005	231
Potter	P	8/28/2008 11:13:41 ...	8/28/2008 11:13:41 ...	1301
Potter	C	3/26/2009 1:34:47 PM	3/26/2009 1:34:47 PM	342

- c. Once you have noted all of the information that you want to pull and where in the tables that information will be found you can go to the Query Building area.
2. Go to Misc Button Query Builder Subfolder.

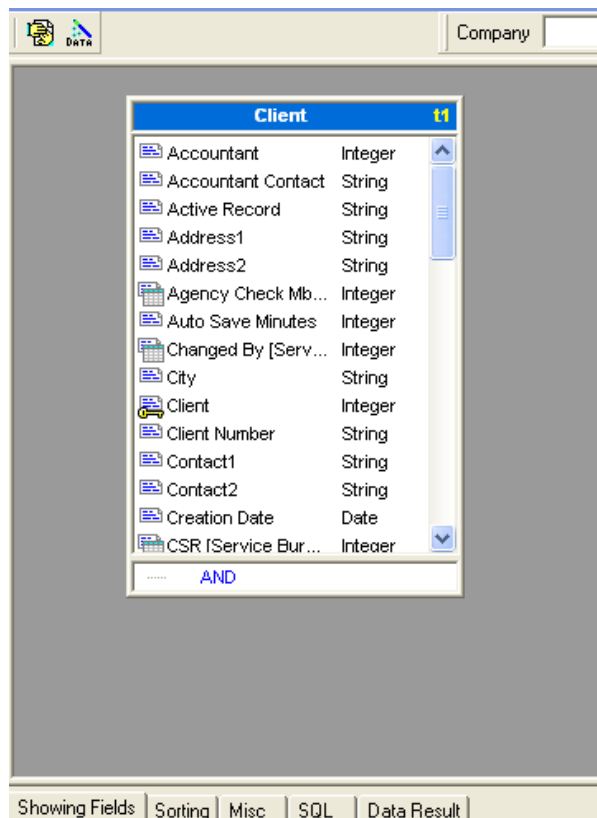
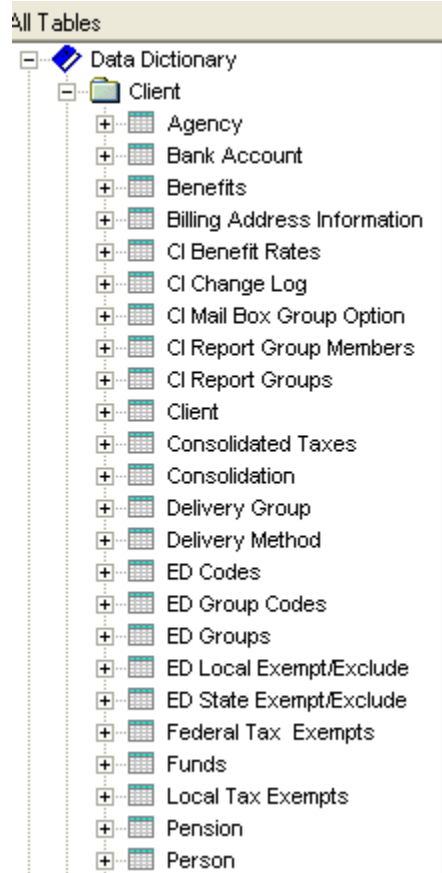


3. Select the Create New Query Button from the Queries Tab.



4. From the list of Tables grab the table where the field of information that you need is located and drag it into the top gray area of the screen.





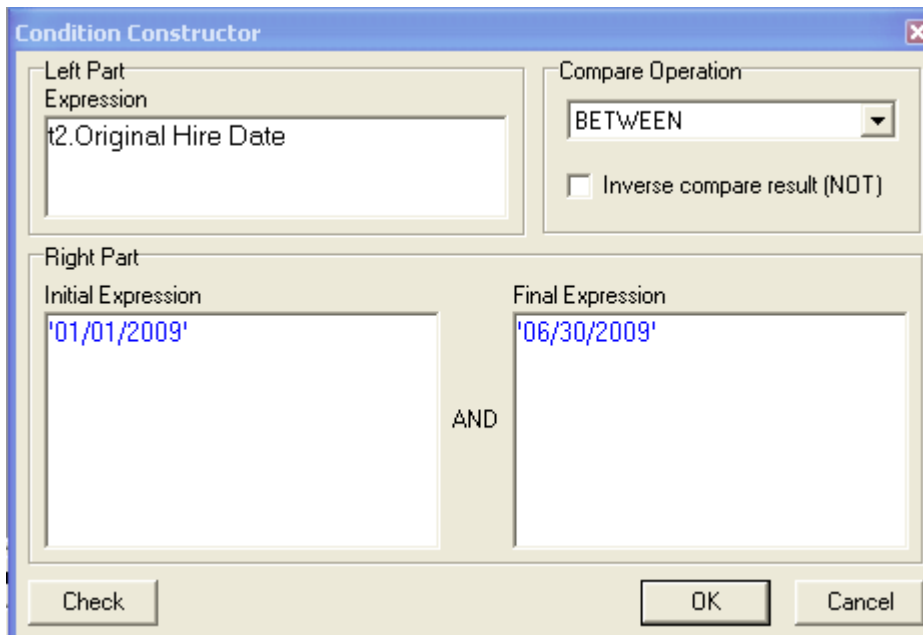
5. As you drag different tables to the middle the Query Builder will create links between the tables.

Showing Fields | Sorting | Misc | SQL | Data Result


Field	Type	Field Alias	Table
Last Name	String		t1
First Name	String		t1
Original Hire Date	Date		t2



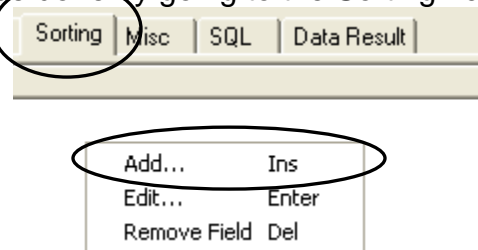
6. By selecting a field and dragging it down to the bottom of the table where it say's and you will get a condition constructor box. You can select the compare operation, and then enter information based on what you are comparing.



The 'Condition Constructor' dialog box is shown. It has a 'Left Part Expression' field containing 't2.Original Hire Date'. The 'Compare Operation' dropdown is set to 'BETWEEN'. There is an unchecked checkbox for 'Inverse compare result (NOT)'. The 'Right Part' section contains an 'Initial Expression' field with '01/01/2009' and a 'Final Expression' field with '06/30/2009'. The word 'AND' is positioned between these two fields. At the bottom are 'Check', 'OK', and 'Cancel' buttons.

7. Once you have entered all the fields and conditions that you want in your Query select the run button. 

8. Sorting can be done by going to the Sorting Tab at the bottom of the page. Right Click and select Add.




The 'Sorting' tab is selected in the bottom navigation bar. A right-click context menu is open, showing options: 'Add...', 'Ins', 'Edit...', 'Enter', 'Remove Field', and 'Del'. The 'Add...' option is circled.



The 'Sort Field Editor' dialog box is shown. It has a 'Showing Field' dropdown set to 'Last Name'. The 'Sort Direction' section has 'Ascend' selected with a radio button, and 'Descend' is unselected. At the bottom are 'OK' and 'Cancel' buttons.

9. By selecting the add in the sorting you will see a sort field editor pop up. Select the field that you would like to sort by first and then the order to sort by. You can continue to add sorting until you are satisfied with the results.

a. You will need to re run the Query results to see the changes

10. You can save your Query to a file by selecting the floppy disk icon. 






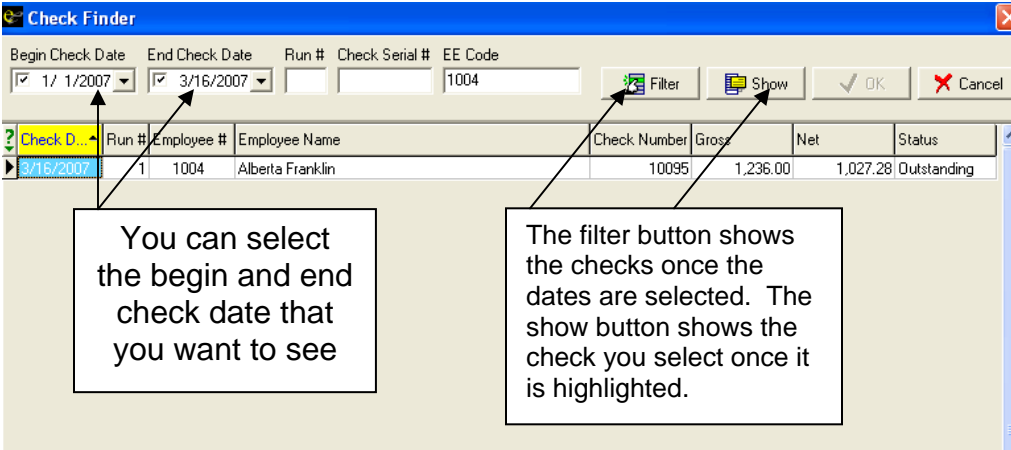
# Other



# Buttons Within Evolution

## 1. Located in the Employee/Employee screen

- Check Finder**  When you select this button it takes you to the check finder. The check finder will show you checks for the dates you select for the employee that you are on when you select the check finder.



The screenshot shows the 'Check Finder' window with the following fields and buttons:


- Begin Check Date:** 1/ 1/2007
- End Check Date:** 3/16/2007
- Run #:** (empty)
- Check Serial #:** (empty)
- EE Code:** 1004
- Buttons:** Filter, Show, OK, Cancel

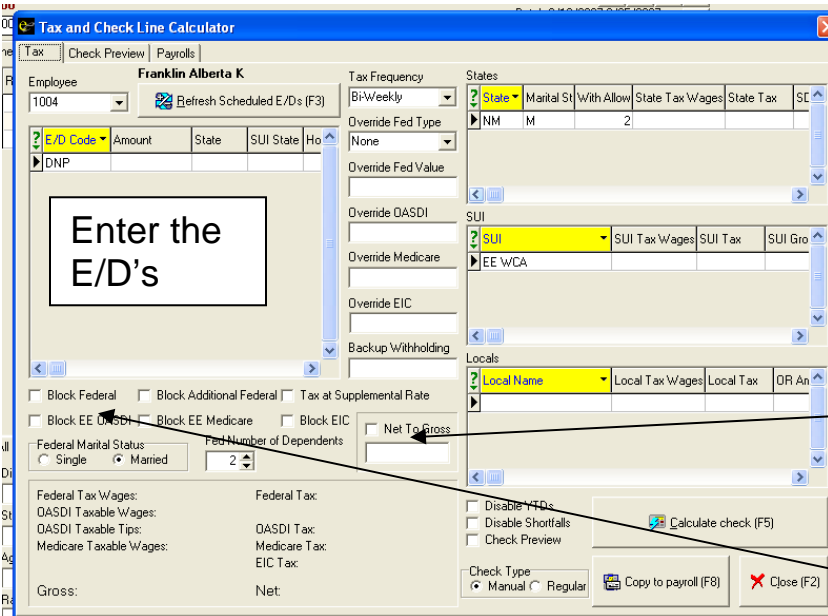
The table below shows the results of the search:

Run #	Employee #	Employee Name	Check Number	Gross	Net	Status
1	1004	Alberta Franklin	10095	1,236.00	1,027.28	Outstanding

**Annotations:**

- You can select the begin and end check date that you want to see** (points to the date fields)
- The filter button shows the checks once the dates are selected. The show button shows the check you select once it is highlighted.** (points to the Filter and Show buttons)

- Tax & Check line Calculator**  When the Tax & Check line Calculator is selected it taken you to a calculator for the employee that you are currently in.



The screenshot shows the 'Tax and Check Line Calculator' window with the following fields and buttons:

- Employee:** Franklin Alberta K
- Refresh Scheduled E/D's (F3):** (button)
- E/D Code:** DNP
- Amount:** (empty)
- State:** (empty)
- SUI State:** (empty)
- Ho:** (empty)
- Buttons:** Calculate check (F5), Copy to payroll (F8), Close (F2)

**Annotations:**

- Enter the E/D's** (points to the E/D Code field)
- Select the net to Gross box and enter the Net** (points to the Net To Gross checkbox)
- Control the taxes here.** (points to the Federal Tax, QASDI Tax, Medicare Tax, and EIC Tax fields)



2. Located within Payroll/ Quick Entry area in Evolution.



- a. Employee Evolution. The Employee Button takes you to the Employee/Employee area of Evolution.



- b. Employee Rates Evolution. The Employee Rates Button takes you to Employee/ Pay rate info screen.

3. Located within Payroll/ Check-line area in Evolution.



- a. Employee Button Evolution. The Employee Button takes you to the Employee/Employee area of Evolution.



- b. Employee Rates Evolution. The Employee Rates Button takes you to Employee/ Pay rate info screen.



- c. Scheduled E/D's Evolution. The Scheduled E/D's button takes you to the Employee/ Scheduled E/D's area.



- d. Check Finder Evolution. When you select this button it takes you to the check finder.






- e. Tax & Check line Calculator Evolution. When the Tax & Check line Calculator is selected it taken you to a calculator for the employee that you are currently in.



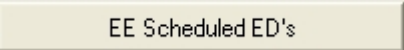
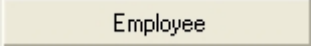


# Evolution Shortcut Keys

## General

Action	Button	Shortcut Key
Check Finder		F12
Moves the insertion point from tab to tab on a window	N/A	CTRL+TAB
Show contents of drop-down menu	N/A	ALT+DOWN ARROW
Tax Calculator		F9
Field Value Locator	N/A	CTRL+ F
Field Filter		CTRL+ R
Change to menu item	N/A	ALT+ _
Export "Grid" within Evolution	N/A	CTRL+E

## Employee & Payroll

Action	Button	Shortcut Key
Select employee by name	N/A	CTRL+ F12
Select employee by number	N/A	CTRL+ F11
Move to next employee and save changes to current employee		PLUS SIGN (+)
Move to previous employee and save current employee changes		Asterisk (*)
Get Employee YTDs	N/A	F3
Move insertion point to the first employee	N/A	ALT+HOME
Move insertion point to the last employee	N/A	ALT+ END
Create a new employee/check	N/A	ALT+ INSERT
Move from employee details tab to the browse tab of that employee's scheduled E/D/s window.		N/A
Move from the employee's scheduled E/D window to the browse tab of the Employee window.		N/A



## Payroll

Action	Shortcut Key
Move from Payroll- Batch window	CTRL+ ALT+ LEFT ARROW
Move from Payroll-Checks window	CTRL+ ALT+ RIGHT ARROW
Create a Payroll or Batch	ALT+ INSERT then F10

### Payroll- Payroll-Batch/Checks


Action	Shortcut Key
Delete a check	CTRL+DELETE
Add a check	INSERT or DOWN ARROW
Move to check lines	CTRL+ ENTER
Move back to check	CTRL+ ALT + LEFT ARROW

### Payroll- Payroll- Check lines

Action	Shortcut Key
Add a check- line	INSERT
Add a check	<ul style="list-style-type: none"> <li>DOWN ARROW</li> <li>ALT+ INSERT</li> </ul>
Delete a check	ALT+ DELETE
	PLUS SIGN (+) DOWN ARROW
Move to Quick Entry	CTRL+ ALT+ LEFT ARROW
Add Copy of check line	CTRL+D



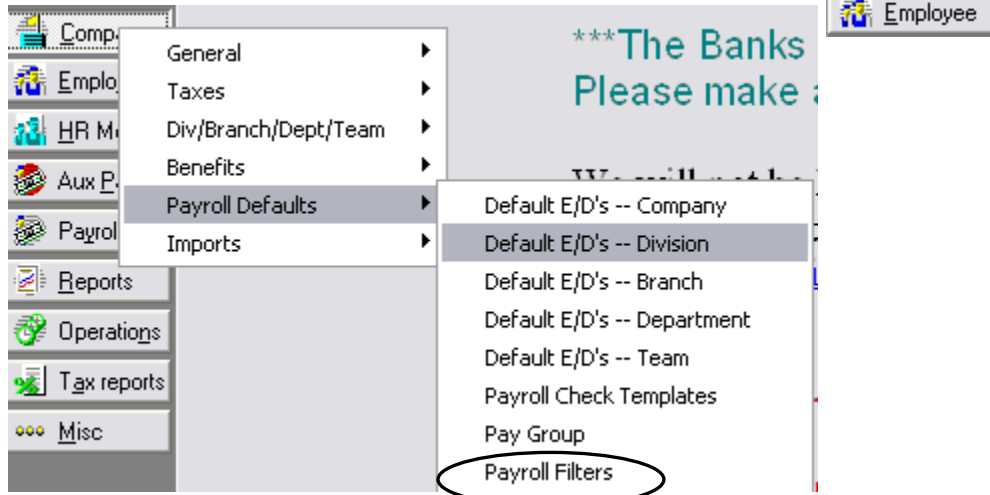
## Toolbar


Action	Button	Shortcut Key
Back to previously viewed window		SHIFT+ALT+ LEFT ARROW
Forward to next viewed window		SHIFT+ALT+ RIGHT ARROW
First record		ALT+ HOME
Prior record		CTRL+ ALT+ LEFT ARROW
Next record		CTRL+ ALT + RIGHT ARROW
Last record		ALT+ END
Create a record		ALT+ INSERT
Delete a record		ALT+ DEL
View field audit history		CTRL+ H
Refresh data		F5
Post changes		F10
Cancel changes		F2
Commit data changes to database on server		CTRL+ S
Abort changes		SHIFT+ ALT+ BACKSPACE



# Payroll Filters

1. You may want to add a Payroll Filter to your company for instances when you have more than one batch in your payroll. Creating a Payroll Filter will allow you to identify the batch's in your payroll. For instance you may want to create a batch with manual checks in it. You could use a filter called manual checks to identify that Batch.
2. To add a Payroll Filter to your Company go to the Company side Button
3. Now you will want to select the Payroll Defaults Subfolder. Then select Payroll Filters.



4. Select the Detail Tab at the top of the page.
5. Select the green plus sign 
6. Enter the name of the Filter that you are creating on the Name line at the bottom of the page.

Browse Details

Name	Division	Branch	Department	Team	Pay Group
Pay Filter 2	APS	1	2		EES With Green Eyes
Payroll Filter	APS	1	1		EES With Blue Eyes

**Name**



Division

Branch

Department

Team

PayGroup

7. Select the green check mark and then the Yellow Sun to save your work.  
8. If you want to specify only a specific Division/Branch/Department/Team or Pay Group to come into the payroll you can do so by selecting from the drop boxes below the Filter Name.
9. If you have any questions while creating a Filter contact your CSR for further guidance.
10. You can continue to select the green plus sign to add filters for the Batches that you create.



# Creating a Template in Evolution

1. Go to **Company - Payroll Defaults - Payroll Check Templates**
2. Fill out the information in the Details Tab

Browse Details Blocks Taxes States Locals

**Name**

**Tax Supplemental Rate**

☐ Yes ☐ No

**Federal Override Type**

Federal Override Value

**Override Frequency**

**Prorate Scheduled E/Ds**

☐ Yes ☐ No

- Enter the Name of the Template
- If the checks should be taxed at a supplemental (higher) rate select yes (if they are not to be taxed supplemental select no)
- The Federal Override Type has the following: Usually you will select None as the type in this area. If you select one of the other options you will fill out an amount or percent in the Federal Override Value.
 

None	Daily
Regular Amount	Weekly
Regular Percent	Bi-Weekly
Additional Amount	Semi-Monthly
Additional Percent	Monthly
	Quarterly
	Semi-Annual
	Annual
- You will select the Override Frequency:
- You will select the Prorate Scheduled E/D's (Yes or No)

4. Select Block DD if you want no Direct Deposit to come in.
5. Select Block DD Except Net if you want all DD accounts except the Net to be Blocked.
6. Select All under Block Time Off Accrual if you want both Accruals and Used to be Blocked. Select Accrual if all that you want blocked is the Accrual.
7. Select Block Auto Distribution if you do not want any Auto Labor Distributions that have been set up to run.

Browse Details Blocks Taxes States Locals

**Block DD**

☐ Yes ☐ No

**Block DD Except Net**

☐ Yes ☐ No

**Block Time Off Accrual**

☐ All ☐ No

☐ Accrual

**Block Auto Distribution**

☐ Yes ☐ No

**Block Sched E/Ds Except DD**

☐ Yes ☐ No

**Block Scheduled E/Ds From Agency**

☐ Yes ☐ No

**Block Sched E/D Except Pension**

☐ Yes ☐ No

E/Ds to Block

E/D Code	Description

E/D Code





8. Select Block Scheduled E/D's Except DD if you want all Scheduled E/D's except DD to be blocked
9. Block Scheduled E/S From Agency if you do not want any Agency Checks to be created
10. Block Scheduled E/D Except Pension if you want all Scheduled E/D's except for any Pensions to be Blocked.
11. The box to the right allows you to block certain codes.
12. Select the green plus sign in the box to add another line to add codes to be blocked.
13. Fill in the information in the Taxes Tab:

Browse Details **Blocks** Taxes States Locals

**Block Federal**  
☒ Yes ☐ No

**Block ER FUI**  
☐ Yes ☒ No

**Exclude Additional Federal**

**Block ER OASDI**  
☐ Yes ☒ No

**Block EE OASDI**  
☐ Yes ☒ No

**Block ER Medicare**  
☐ Yes ☒ No

**Block EE Medicare**  
☐ Yes ☒ No

**Block EE EIC**  
☐ Yes ☒ No

Notes:

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14. Fill out the States Tab:

Browse Details Blocks Taxes **States** Locals

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

**State**

**State Override Type**

State Override Value

**Tax at Supplemental Rate**  
☐ Yes ☐ No

**Block State**  
☐ Yes ☐ No

**Block SDI**  
☐ Yes ☐ No

**Block SUI**  
☐ Yes ☐ No

**Exclude Additional State**



[illegible]

[illegible]

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

[illegible]