

User Guide

The screenshot displays the ComputerSearch payroll system interface. The top section, 'Payroll Today', shows a list of payroll runs with status indicators: 'Processed' (green), 'Past Due' (red), and 'Pending' (orange). Below this is an 'Agenda' section with a date range from Wednesday, November 18, 2020, to Wednesday, November 25, 2020. The bottom section, 'Payroll Timeline', shows a table of payroll entries for 'Payroll 11/20/2020 - 1'. The table includes columns for Type, EE Code, Name, Seq, Total Hrs, Gross Pay, and various salary components. The table shows four items in the batch.

Type	EE Code	Name	Seq	Total Hrs	Gross Pay	EST Hrs Salary	EST Amt Salary	EST Hrs Regul.	EST Amt Regular
R	4	Ripley, Ellen	1	0.00	\$680.00		\$680.00		
R	1	Smith, Joe	1	0.00	\$800.00		\$800.00		
R	2	Jones, Danna M.	1	0.00	\$1,000.00		\$1,000.00		
R	5	Pfeffercorn, Wendy	1	40.00	\$720.00			40.00	\$720.00
Totals				40.00	\$3,200.00		\$2,480.00	40.00	\$720.00

User Guide

Getting Started	Log In Screen	Page 5
	Forgot Password	Pages 6-7
Dashboard	Dashboard Overview	Page 9
Company	Basics	Page 11
	Organizational Levels	Page 12
	ED Codes	Page 13
	States	Page 14
Employee	Employee Search	Page 16
	Add Employee	Page 17
	Labor Defaults	Page 18
	Pay	Page 19
	Federal Settings	Page 20
	State Settings	Page 21
	Child Support	Page 22
	Direct Deposit	Page 23
	Scheduled E/DS	Page 24
	Time Off Accrual	Page 25

Check Calculator	Create a Check	Page 27
	Net and Gross	Page 28
	Tax Blocks	Page 29
	Manual vs Live Checks	Page 30
	Send to Payroll	Page 31
Payroll	Payroll Timeline	Page 33
	Adding Notes	Page 34
	Creation Options	Page 35
	Payroll Summary	Pages 36-37
	Key in Hours	Page 38
	One-Time Deductions	Pages 39-40
	Add a Check	Page 41-42
	Department Overrides	Page 43
	Pre-Process Payroll	Page 44
	Submit Payroll	Page 45
Reports	Defined Reports	Page 47
	Report Options	Page 48-49
	Run Report	Page 50
	Common Reports	Page 51
Check Finder	Check Finder	Page 53

Getting Started

In this section, you will learn how to log into Evolution Payroll and reset a forgotten password.

Log In

Each time you log in to Evolution Payroll,

1. Enter the Username and Password assigned to you by your **Payroll Assistant**.
2. Click Sign In.

ComputerSearch
payroll services.

Sign in

Username
Enter Username

Password
Enter Password

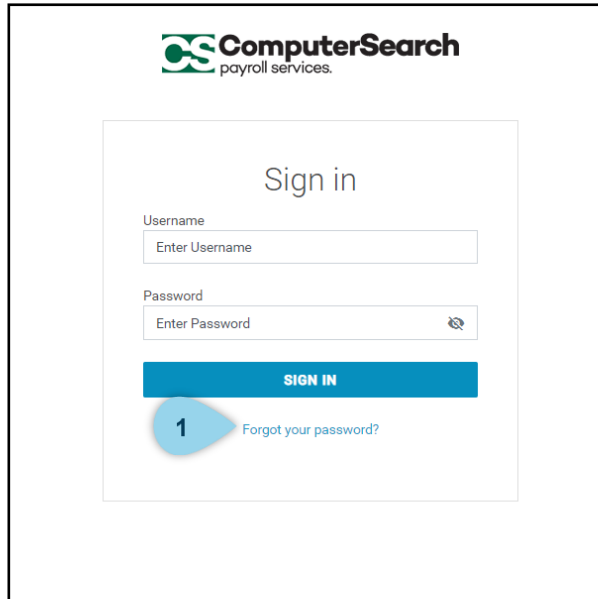
SIGN IN

[Forgot your password?](#)

Forgot Password

If you forget your password,

1. Click I Forgot My Password on the login screen.
2. A new screen opens requiring you to enter your username. Click Submit when you are finished.



ComputerSearch
payroll services.

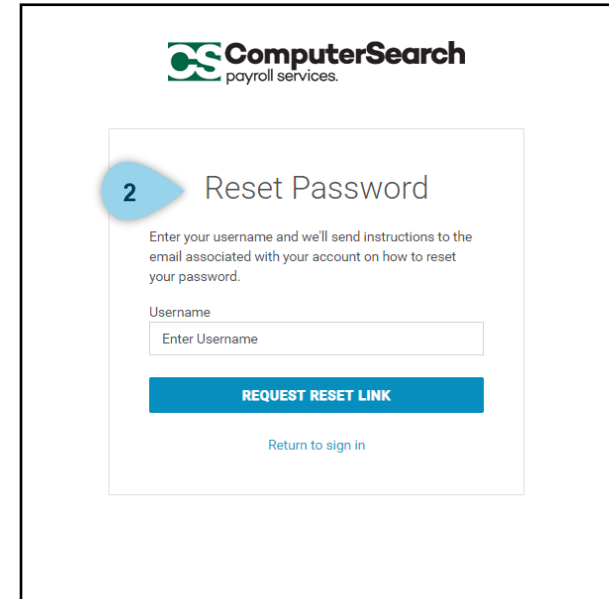
Sign in

Username
Enter Username

Password
Enter Password

SIGN IN

1 Forgot your password?



ComputerSearch
payroll services.

2 Reset Password

Enter your username and we'll send instructions to the email associated with your account on how to reset your password.

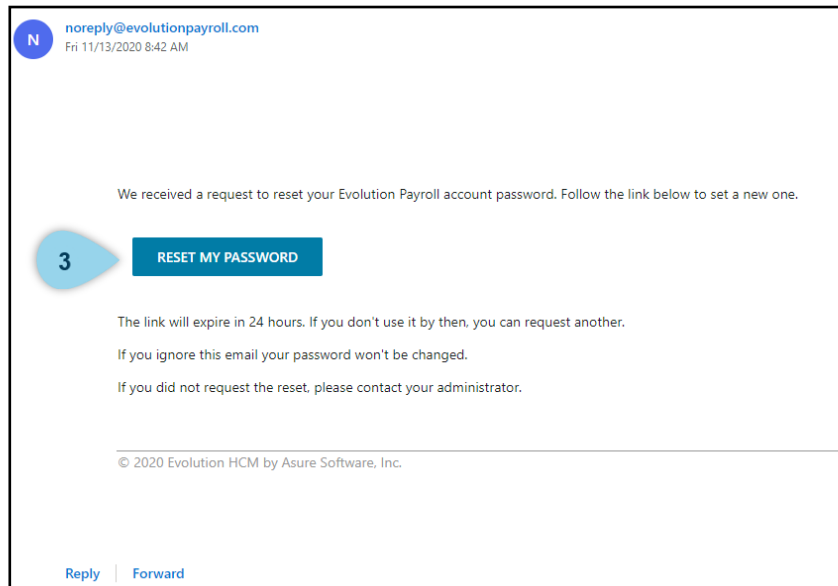
Username
Enter Username

REQUEST RESET LINK

[Return to sign in](#)

Forgot Password

3. Check your email for a link to reset your password. Click the RESET MY PASSWORD button.
4. A new window will open. Enter your new password in the Reset Password box then press Reset Password to submit.



This is a screenshot of the "Reset Password" form on the ComputerSearch payroll services website. A blue callout bubble with the number "4" points to the form. The form has two input fields: "New Password" with the placeholder text "Enter New Password" and "Confirm Password" with the placeholder text "Re-Enter New Password". Both fields have eye icons for toggling password visibility. Below the fields, a list of password requirements is shown: "Your password must:" followed by four criteria: "Be at least 10 characters", "Contain an uppercase letter", "Contain a special character: ! @ # % ^ & * () - _ = + { } | |", and "Contain a number". At the bottom of the form is a grey button labeled "RESET PASSWORD".

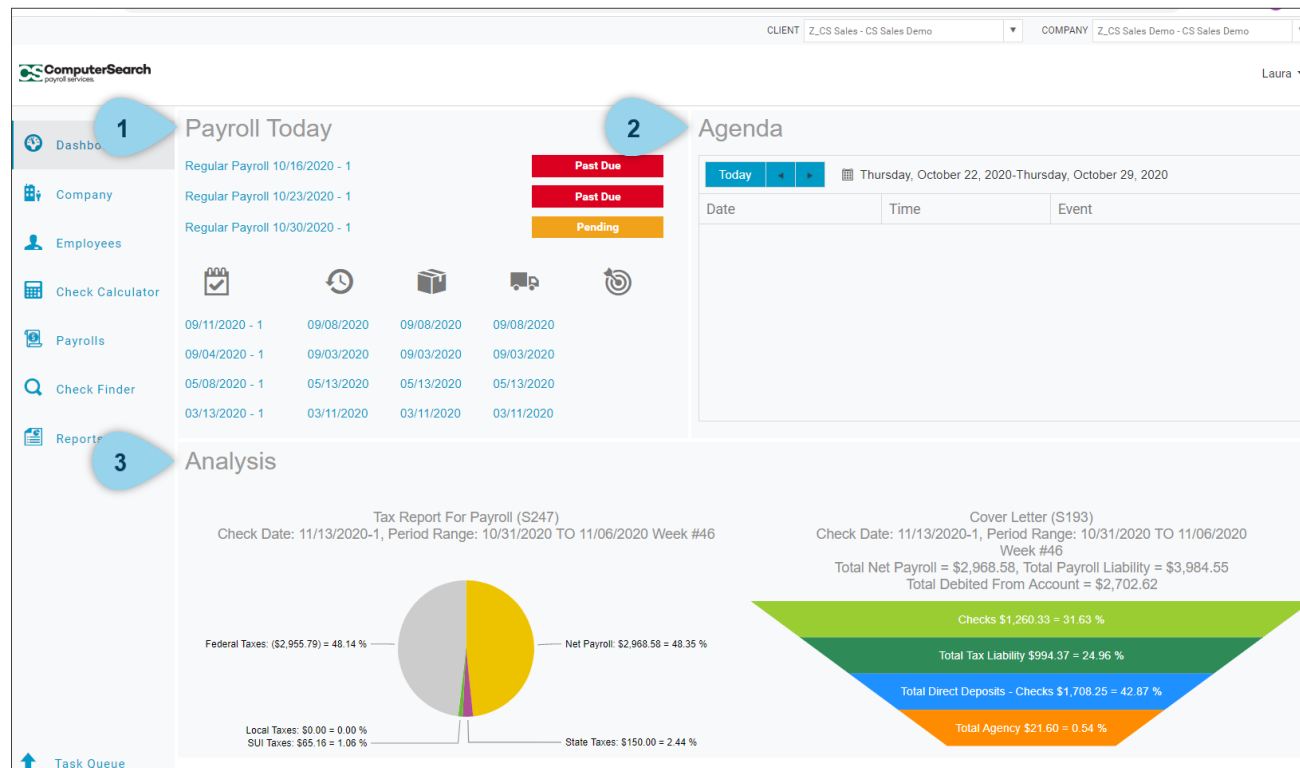
Dashboard

Each time you log into Evolution Payroll, you will be directed to the Dashboard. This section will review the components and quick links accessible through the Dashboard.

Dashboard Overview

When you log into Evolution Payroll, you will be directed to your dashboard. The dashboard is the homepage overview for the payroll system.

1. **Payroll Today** lists any payrolls that either have recently run or need to run. The computer knows exactly when your next payroll date is so it will generate these automatically.
2. The **Agenda** is a great feature to use if you want to add notes or specific reminders.
3. **Analysis** provides a summarized visual of Taxes and the Cover Letter for a specific period.



Company

The Company page is a detailed overview of your company's information. In this section you will learn where to:

- Review basic information about the company
- Find branching within the organization
- Access a list of ED Codes
- Review state settings

Basics

The Company page is a detailed overview of your company's information. The **Basics** tab provides all of your company's basic information including:

1. Name and address
2. Legal address
3. Tax and banking information.

Changes cannot be made through this page.

The screenshot shows the 'Company' page in the ComputerSearch system. The 'Basics' tab is selected, and the page displays various fields for company information. Three callouts are present: Callout 1 points to the 'Name' field (CS Sales Demo); Callout 2 points to the 'Legal Address' section; Callout 3 points to the 'Bank Accounts' section.

CLIENT		COMPANY	
Z_CS Sales - CS Sales Demo		Z_CS Sales Demo - CS Sales Demo	

ComputerSearch payroll services

Dashboard

Company

Employees

Check Calculator

Payrolls

Check Finder

Reports

Task Queue

Company

BASICS

ORGANIZATIONAL CHARTS

ED CODES

STATES

PREVIOUS

NEXT

Name

CS Sales Demo

D.B.A.

Address 1

331 John James Audubon Parkway

Address 2

City

Amherst

State

NY

Zip Code

14228

Phone

716-689-0511

Fax

Company Code

Z_CS Sales Demo

EIN

123456789

Customer Service Team

Customer Service Representative

Email

Bank Accounts

Payroll

123456

Tax

123456

Workers' Compensation

123456

Billing

123456

Direct Deposit

123456

Organizational Levels

The **Organizational** tab displays the company's organizational levels (previously referred to as *departments* with Micropay).

1. Click on each organizational level to expand the view which reveals the specific departments within.
2. Click on a department to review department details.

Changes cannot be made through this page.

The screenshot shows the 'Company' page in the ComputerSearch payroll system. The left sidebar contains navigation links: Dashboard, Company, Employees, Check Calculator, Payrolls, Check Finder, and Reports. The main content area is titled 'Company' and features a 'BASICS' tab with sub-tabs for 'ORGANIZATIONAL LEVELS', 'ED CODES', and 'STATES'. The 'ORGANIZATIONAL LEVELS' sub-tab is active, displaying a tree view with a root node '01' and two child nodes, 'Admin' and 'Sales'. A blue callout bubble with the number '1' points to the '01' node. A second blue callout bubble with the number '2' points to the 'Admin' node. To the right of the tree view, there is a 'Details for: 01' section containing a table with the following data:

Number	01
Description	01
Home State	NY
Override EE Rate #	
Override Pay Rate	
Payroll Bank Account #	
Tax Bank Account #	
Billing Bank Account #	
DD Bank Account #	

ED Codes

The **ED Codes** tab includes a list of codes separated and sorted into *earnings* and *deductions*.

1. Earnings codes begin with an E
2. Deduction codes begin with a D.

Additional ED Codes can be created or customized to your needs, just call your Payroll Specialist for assistance.

CLIENT: Z_CS Sales - CS Sales Demo COMPANY: Z_CS Sales Demo - CS Sales Demo Laura

ComputerSearch payroll services

Company

BASICS
ORGANIZATIONAL LEVELS
ED CODES
STATES
PREVIOUS NEXT

1

2

Code...	Description	Rate	Rate #	OT Rat...	Start Date	Amount	Percenta...
D03	Misc Deduction						
D04	Union Dues						
D11	Medical (Pre-Tax)						
D41	Child Support 1						
D51	Garnishment 1						
DD1	Dir Dep - Net						
DD2	Dir Dep2						
DD3	Dir Dep3						
E01	Salary						
E02	Regular						
E03	Overtime			1.5			
E04	Holiday						
E05	Vacation						
E06	Sick						
E19	Covid Sick-200	67.00					
E20	Covid Sick-511						
E91	FFCRA 200 FMLA						
E92	FFCRA 200 Daily Max						

26 items

Task Queue

State

The **States** tab shows the states for which you are filing taxes.

Changes cannot be made through this page.

CLIENTZ_CS Sales - CS Sales Demo▼COMPANYZ_CS Sales Demo - CS Sales Demo▼

ComputerSearch
payroll services

Laura▼

Dashboard

Company

Employee1

Check Calculator

Payrolls

Check Finder

Reports

Task Queue

Company

BASICS

ORGANIZATIONAL LEVELS

ED CODES

STATES

PREVIOUS

NEXT

Description▲▼	Code▼
New York	NY

1 items

Setting for: New York - NY

EIN

123456789

SDI EIN

123456789

☐ State Tax Exempt

☐ SUI Exempt

SUI Rates

Tax Name	Rate
NY-Re-employment	0.00075
NY-SUI	0.03525

2 items

Employee

This section will provide a brief overview of the components accessible within the *Employees* page. You will learn how to:

- Search for an employee
- Add a new employee
- Set up a direct deposit
- Add E/D codes

Employee Search

The **Employees** page gives you a list of everybody that is currently active.

1. **To search for an active employee**, you may click through the list or you may use the search bar to enter an employee name or number.
2. **To search for an inactive employee**, click the filter icon in the status column header and switch the *Is equal to* drop down to the *Is not equal to* option, then press filter. This will display a list of employees who are no longer active.
3. **To review information for a specific employee**, locate the employee within the employee list then double click on the employee name. This will first display the employee's personal information under the **Personal** tab. Most of the information on this page can be edited including demographics and employment status.

The screenshot displays the 'Employees' page in a web application. The top navigation bar includes 'Dashboard', 'Company', 'Emp', 'Check Calculator', 'Payrolls', 'Check Finder', and 'Reports'. The main content area is titled 'Employees' and features a search bar, an 'EXPORT TO EXCEL' button, and a table of employee records. A blue circle with the number '1' highlights the search bar. The table has columns for 'EE #', 'Last Name', 'First Name', 'SSN/EIN', 'State', 'Zip Code', and 'Status'. A blue circle with the number '2' highlights the 'Status' column header. To the right of the table is a 'Preview' section showing details for 'Joe Smith'. A blue circle with the number '3' highlights the 'Emp' button in the left sidebar. Below the table, there is a detailed view of an employee, '3 - Day, Charlie'. This view includes a 'PERSONAL' tab, a 'Demographics' section with fields for SSN, Employee Type, EE Code, Time Clock #, First Name, M.I., Last Name, Address 1, Address 2, City, State, Zip Code, County, Phone, Extension, Email, Birth Date, Gender, Ethnicity, and Tribe. It also includes a 'Hire Status' section with fields for Status, Current Hire Date, Original Hire Date, Termination Date, Rehired Eligible, Employee Type, On Call From, On Call To, and Benefits (Healthcare Coverage, No ER Paid Ins/Not..., Dependent Coverage, Benefit Eligible).

EE #	Last Name	First Name	SSN/EIN	State	Zip Code	Status
1	Smith	Joe	*****6154	NY	14221	Active
2	Jones	Dawna	*****4646	NY	14221	Active
3	Day	Charlie	*****1889	NY	14228	Active
4	Ripley	Ellen	*****1288	NY	14072	Active
5	Peffercorn	Wendy	*****7882	NY	14228	Active
6	Bretter	Peter	*****7219	NY	14072	Active

Preview: Joe Smith 1

3 - Day, Charlie

PERSONAL

LABOR DEFAULTS

ACA

PAY

FEDERAL

STATE

LOCAL

CHILD SUPPORT

DIRECT DEPOSIT

SCHEDULED E/DS

DELIVERY

TIME OFF ACCRUAL

EMPLOYEE PORTAL

NOTES

PREVIOUS

NEXT

Demographics

SSN * 123-46-1889

Employee Type * W-2

EE Code * 3

Time Clock #

First Name * Charlie

M.I.

Last Name * Day

Address 1 * 3671 Main St

Address 2

City * Amherst

State * NY

Zip Code * 14228

County

Phone

Extension

Email

Birth Date

Gender *

Ethnicity *

Tribe

Hire Status

Status * Active

Current Hire Date * 08/28/2018

Original Hire Date

Termination Date

Rehire Eligible * Yes

Employee Type * Full Time

On Call From

On Call To

Benefits

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

Dependent Coverage *

Benefit Eligible

Add Employee

To add a new employee,

1. Click the large plus sign in the heading to create a new record The Add Employee box will open.
2. Select whether the Tax ID is a SSN or EIN and enter the Social Security Number or Employer Identification Number.
3. Click Check ID.
4. The New Employee screen will display—enter employee demographics, benefits, status, pay, taxation, and VMR. Once the basic information is added and saved, additional Employees Menu items are available on the left-hand side of the screen, these will be reviewed in the following guides. Complete the required and applicable fields.

The screenshots illustrate the steps to add a new employee in the ComputerSearch system. The first screenshot shows the 'Employees' menu with a plus sign highlighted by a blue circle with the number 1. The second screenshot shows the 'Add Employee' dialog box with 'SSN' selected and '123-45-1234' entered, with a blue circle with the number 2 highlighting the selection and a blue circle with the number 3 highlighting the 'CHECK ID' button. The third screenshot shows the 'New Employee' form with a blue circle with the number 4 highlighting the 'SAVE' button.

Step 1: Add Employee

Let's start by checking the ID of the EE you want to add to see if it already exists in the system

Add Method ☒ Basic ☐ Advanced

☒ SSN ☐ OEIN 123-45-1234

Step 2: Check ID

Step 3: New Employee

Demographics

SSN * OEIN * Employee Type * EE Code * Time Clock #

123-45-1234 W-2 8

First Name * M.I. Last Name *

Address 1 * Address 2

City * State * Zip Code *

County Phone Extension

Email

Birth Date Gender * Ethnicity * Tribe

N/A Not Applicable

Status

Status * Current Hire Date *

Active

Organizational Level *

Select Department * N/A

Employee Type *

N/A

Worker's Compensation

Select Worker's Compensation * Select Job *

Pay

Frequency * Salary Amount

Weekly

Rate 1 * Rate 2 Rate 3

\$0.0000

Taxation

Fed Marital Status * Fed Exemptions *

Single 0

W4 Total Dependents Tax Credit

W4 Other Income

W4 Deductions

Benefits

Healthcare Coverage * Dependent Coverage * Benefit Eligible

Labor Defaults

The **Labor Defaults** tab holds

1. **Salary Information:** Use this section to update information for Worker's Compensation (if applicable).
2. **Reporting options:** You may also make selections under the reporting section to be pulled into a generated report.
3. **Organizational level:** If an employee is not yet assigned to a department, you may update that information here.

The screenshot shows the 'Employees' management interface. On the left is a sidebar with navigation links: Dashboard, Company, Employees (selected), Check Calculator, Payrolls, Check Finder, and Reports. At the bottom of the sidebar is a 'Task Queue' link. The main content area is titled 'Employees' and features a header with a '+', a trash icon, and a magnifying glass icon. Below the header is a tabbed interface with 'LABOR DEFAULTS' selected. The 'LABOR DEFAULTS' tab is divided into three sections: 'Salary Information', 'Reporting', and 'Organizational Level'. The 'Salary Information' section includes fields for 'Worker's Compensation' (set to 8810), 'Badge ID', 'Review Date', 'Job' (set to '- Select Job -'), 'Union' (set to '- Select Union -'), 'Employee Group' (set to '- Select Employee Group -'), and 'General Ledger Tag'. The 'Reporting' section includes a 'Tipped Directly_*' dropdown set to 'No'. The 'Organizational Level' section includes dropdowns for 'Division', 'Branch', 'Department' (set to 'Admin'), and 'Team'. A list of organizational levels is shown below, with 'Admin' and 'Sales' listed. The employee's name '3 - Day, Charlie' is displayed in the top right of the form area.

Employees

3 - Day, Charlie

SAVE CANCEL

PERSONAL

LABOR DEFAULTS

ACA

PAY

FEDERAL

STATE

LOCAL

CHILD SUPPORT

DIRECT DEPOSIT

SCHEDULED E/DS

DELIVERY

TIME OFF ACCRUAL

EMPLOYEE PORTAL

NOTES

PREVIOUS NEXT

Salary Information

Worker's Compensation

8810

Badge ID

Review Date

Job

- Select Job -

Union

- Select Union -

Employee Group

- Select Employee Group -

General Ledger Tag

Reporting

Tipped Directly_*

No

Organizational Level

Division

Branch

Department

Team

Admin

This Division is hidden

This Branch is hidden

Admin

Sales

Pay

The **Pay** tab has three main areas of focus:

1. **Salary Information:** Review and edit the rate of pay, pay amount, pay frequency, and the employee's current position.
2. **Planned Updates:** Edit pay and/or position for future raise.
3. **Overrides:** This section is for clients who have a second or third rate for their employees. To add a second rate for an employee, click the Add button and enter the information for each applicable option.

Employees

3 - Day, Charlie

1 Salary Information

2 Planned Updates

3 Overrides

SAVE CANCEL

PERSONAL

LABOR DEFAULTS

ACA

PAY

SHIFTS

PIECEWORK

AUTO-LABOR DIST.

FEDERAL

STATE

LOCAL

CHILD SUPPORT

DIRECT DEPOSIT

SCHEDULED E/DS

DELIVERY

TIME OFF ACCRUAL

EMPLOYEE PORTAL

NOTES

PREVIOUS NEXT

Task Queue

Pay Frequency *

Weekly

Salary Amount

Std Hours

Average Hours

0.00

Rate Number

Rate Amount *

\$20.00

Wage Limit

Limit Frequency

Every Pay

Raise Date

Raise Rate

Raise Amount

Pay Frequency *

Weekly

Raise %

Position

New Hire Report *

Completed

FLSA Exempt *

No

Position

- Select Position -

Effective Date

I9 on File *

Yes

High Comp

No

Corp Officer *

No

ADD DELETE EXPORT TO EXCEL Edit Effective Period(s)

Primary *	Rate Number *	Rate Amount *
Yes	1	\$20.00
No	2	\$0.00

2 items

Federal Settings

The **Federal** tab brings up federal tax information for the selected employee.

1. If you need to override, change the tax type and type in the additional amount into the value box. This will override the current federal tax amount being paid and pay out the new value entered each pay period.

Employees

Dashboard
Company
Employees
Check Calculator
Payrolls
Check Finder
Reports
Task Queue

SAVE CANCEL

3 - Day, Charlie

PERSONAL
LABOR DEFAULTS
ACA
PAY
FEDERAL
STATE
LOCAL
CHILD SUPPORT
DIRECT DEPOSIT
SCHEDULED E/DS
DELIVERY
TIME OFF ACCRUAL
EMPLOYEE PORTAL
NOTES
PREVIOUS NEXT

Taxation

Marital Status *
Single

Exemptions *
0

W4 Total Dependents Tax Credit

W4 Other Income

W4 Deductions

Tax Type *
Additional...
Additional Amount
Additional Percent
None
Regular Amount
Regular Percent

Value
\$50.00

W2 Form

Type *
W-2

Residential State *
NY

First Name

Middle Name

Last Name

Name Suffix

W2 Settings

Deceased *
No

Statutory EE *
No

Legal Rep *
No

Deferred Comp *
No

Pension *
No

1099R

Distribution Code

Tax Amt Determined *
No

Total *
No

Pension Plan *
None

Federal Tax Status *
Include

QASDI Exempt *

State Settings

On the **State** tab,

1. Click the arrow to expand the view and access the information. This page includes the employees tax type.
2. If you need to override, change to additional amount or additional percentage to adjust the amount being paid out each pay period.

Employees

SAVE CANCEL

3 - Day, Charlie

ADD DELETE Edit Effective Period(s)

State *	SUI *	SDI	Home *	Marital Status *	Tax Exemptions
NY	NY	NY	Yes	Single/Head of Household	0

County Reciprocity Method EE Tax Status ER Tax Status Overrides

Salary Type Take None State Tax Include Include Additio...

N/A To State SDI Exempt SUI Exempt Percentage

- Select ... Include Include 5 %

☐ Calc SUI Taxable 1099 Wages Work At Home Tax Code SUI Exempt Minimum Wage

No Include Include

PREVIOUS NEXT

1 items

Task Queue

Child Support

If the selected employee has a child support setup, it will show up on the **Child Support** tab. To have child support information entered into the system or to add a check or direct deposit, please email or fax the paperwork to your Payroll Specialist. Your Payroll Specialist will add it to the system and a check will be generated and sent to you to send to the bank or child support company.

Dashboard

Company

Employees

Check Calculator

Payrolls

Check Finder

Reports

Task Queue

Employees

+

🗑

🔍

SAVE

CANCEL

5 - Peffercorn, Wendy

PERSONAL

LABOR DEFAULTS

ACA

PAY

FEDERAL

STATE

LOCAL

CHILD SUPPORT

DIRECT DEPOSIT

SCHEDULED E/DS

DELIVERY

TIME OFF ACCRUAL

EMPLOYEE PORTAL

NOTES

PREVIOUS

NEXT

5 - Peffercorn, Wendy

ADD

DELETE

Priority * ▲	Case #	State Origin	Medical Eligible *	Agency	Arrears *	FIPS	Custom Field
1	gggrwrgwr		Not Applicable		No		

1 items

Direct Deposit

The **Direct Deposit** tab shows all bank accounts for which the employee has a direct deposit set up.

1. To add a direct deposit click Add; a new line will appear. Enter the bank account and routing numbers into the appropriate spaces.
2. Switch the In Prenote drop down to Yes, this notifies the system that this new bank account has not been verified yet which allows the system to verify the account when the next payroll is run.
3. Save your changes.
4. The banking information has been added to the direct deposit, but an E/D code still needs to be added. Click Set Up Now to complete this step.

The screenshot shows the 'Employees' section of a software interface. The 'DIRECT DEPOSIT' tab is selected in the left sidebar. The main area displays a table of bank accounts for the employee '3 - Day, Charlie'. The table has columns for ABA #, Bank Account, Account Type, Branch Identity, Addenda, In Prenote, Form on File, and Allow Hyphens. The 'In Prenote' dropdown is open, showing 'No' and 'Yes' options. A modal dialog titled 'Set up a scheduled deduction?' is displayed in the bottom right, with the message 'A scheduled deduction needs to be set up for payments to be deposited into this account.' and buttons for 'DO IT LATER' and 'SET UP NOW'.

Employees

3 - Day, Charlie

1

2

3

ABA #	Bank Account	Account Type	Branch Identity	Addenda	In Prenote *	Form on File *	Allow Hyphens *
022000046	116846464	Checking			No	No	No
022000046	987456123	Checking			No	No	No
022000046	987456124	Checking			Yes	No	No

Set up a scheduled deduction?

A scheduled deduction needs to be set up for payments to be deposited into this account.

DO IT LATER SET UP NOW

4

Schedule E/DS

The **Scheduled E/DS** tab shows all the deductions and/or earnings that are fixed in the system for a particular employee. To review specifics or make a change to an E/DS, click on the arrow to expand that row of information.

1. To add a new earning/deduction, click Add.
2. Use the Basic option to change the deduction type or amount. Select a code from the list of EDS available for the client. Enter the required information pertaining to the selected code.
3. To stop an existing earning/deduction, use the Schedule option and enter an end date.

The screenshot displays the 'Employees' interface for employee '3 - Day, Charlie'. The 'SCHEDULED E/DS' tab is active, showing a table of scheduled items. A callout box highlights the 'ADD' button. Another callout box highlights the 'Basic' tab, which is expanded to show a list of codes and descriptions. A third callout box highlights the 'Schedule' tab, which is expanded to show the 'Effective' date and 'Frequency' fields.

Table 1: Scheduled E/DS Items

Code	Description	Calculation Meth...	Amount \$	Amount %	Starting *	Ending
D03	Misc Deduction	Fixed			10/23/2020	
D04	Union Dues	Fixed	10		01/01/2020	
D11	Medical (Pre-Tax)	Fixed	25		01/01/2020	
DD1	Dir Dep - Net	None			05/10/2020	
MF	CARES Retention Med Cost Credit	% of E/D Group Amt		50	01/02/2020	
MG	CARES Retention Wage Credit	Fixed		50	01/02/2020	

Table 2: Basic Tab Details

Code	Description
D03	Misc Deduction
D04	Union Dues
D11	Medical (Pre-Tax)
D41	Child Support 1
D51	Garnishment 1

Table 3: Schedule Tab Details

Effective	Affects	Blocks
Starting: 10/22/2020	Payrolls Affected: All	Block Based On: Custom Defined
Ending:	Frequency: Every Pay	Weeks blocked: 1 2 3 4 5

Time Off Accrual

The **Time Off Accrual** tab allows you to review and adjust earned time for a specific employee. This page will show the total accrued time, the used time, and the remaining balance for each type of accrual (i.e. vacation, sick). To add a new accrual, contact your Payroll Specialist.

1. To edit an accrual amount, click on the current amount and adjust the value.
2. For each adjustment, an alert will appear asking you to provide a reason. Enter the appropriate response, then press OK.
3. Be sure to click Save after changes are made.

The screenshot shows the 'Employees' section of a software interface. On the left is a sidebar with navigation links: Dashboard, Company, Employees (highlighted with a blue circle and the number 3), Check Calculator, Payrolls, Check Finder, and Reports. The main panel is titled 'Employees' and contains a search bar with '3 - Day, Charlie' and a dropdown menu. Below the search bar is a table with columns: Activ..., T..., B..., U..., A..., Effective D..., A..., R..., Rollover Ty..., and Rollover Date. The table has one row with the following values: Yes, PTO, 60.00, 20.00, 80.00. A blue circle with the number 1 is pointing to the 'U...' column (Used) value of 20.00. Below the table is a modal dialog titled 'You are about to adjust USED value'. The dialog contains the text: 'Please provide reason for the adjustment and press Ok or press Cancel if you do not wish to make the adjustment. Adjustment reason (28 char max):'. There is a text input field below the text. At the bottom right of the dialog are 'OK' and 'CANCEL' buttons. A blue circle with the number 2 is pointing to the 'OK' button.

Activ...	T...	B...	U...	A...	Effective D...	A...	R...	Rollover Ty...	Rollover Date
Yes	PTO	60.00	20.00	80.00					

Check Calculator

The Check calculator is a feature that can be used when you need to figure out a check amount for an employee to ensure you have it recorded for the next payroll (e.g. bonus check, missed check, misc. deduction). This section will provide instruction for:

- Calculating checks
- Creating manual and live checks and adding them to the following payroll

Create a Check

Check calculator is a feature that can be used when you need to figure out a check amount for an employee to ensure you have it recorded for the next payroll (e.g. bonus check, missed check, misc. deduction).

1. To **create a check using check calculator**, start by selecting the employee.
2. Review and edit (if needed) the deductions that are fixed to his/her account.
3. Click Add, then chose an E/D Code from the drop down list, enter in the hours and pay rate, or enter a fixed amount to be paid.
4. Click Calculate to review the gross amount, net amount, earnings, and taxes.

The screenshot shows the 'Check Calculator' window. On the left is a sidebar with navigation links: Dashboard, Company, Employees, Check Calculator (highlighted), Payrolls, Check Finder, and Reports. The main area is titled 'Check Calculator' and contains a 'CS Sales Demo' section. Below this is the 'Check Settings' section, which includes a table for 'Earnings/Deductions' with columns for Federal, State, SUI, Local, and Options. The 'Earnings/Deductions' table has an 'ADD' button and a 'CANCEL' button. A dropdown menu is open for the 'E/D Code' column, showing a list of codes and descriptions: D03 Misc Deduction, D04 Union Dues, D11 Medical (Pre-Tax), D41 Child Support 1, D51 Garnishment 1, and DD1 Dir Dep - Net. The 'Amount' column shows values of \$25.00 and \$10.00. The 'Rate #' column is empty. The 'Actions' section on the right has a 'CALCULATE' button and a 'SEND TO PAYROLL' button. Numbered callouts are present: 1 points to the 'Employees' link in the sidebar; 2 points to the 'Reports' link in the sidebar; 3 points to the 'ADD' button; 4 points to the 'CALCULATE' button.

Check Calculator

CS Sales Demo

EE Code - Name: 3-Charlie Day
3671 Main St
Amherst, NY 14228

Net Amount: ☐ Net to Gross

Check Settings

Earnings/Deductions	Federal	State	SUI	Local	Options
<input type="button" value="ADD"/>	<input type="button" value="CANCEL"/>				
E/D Code *	Description	Hrs/Pcs	Pay Rate	Amount	Rate #
-- Select --					
-- Select --					
D03	Misc Deduction				
D04	Union Dues			\$25.00	
D11	Medical (Pre-Tax)			\$10.00	
D41	Child Support 1				
D51	Garnishment 1				
DD1	Dir Dep - Net				

8 Items

Actions

Net and Gross

1. If you are creating a check that for a Gross to Net amount, uncheck the **Net to Gross** box.
2. If you are creating a check that you want a specific net amount to be paid, check the **Net to Gross** box and enter the net amount then continue with the following instructions.
3. Click Calculate Check to review updates.

The screenshot displays the 'Check Calculator' interface with three numbered steps indicating the workflow:

- Step 1:** Selecting the employee (3-Charlie Day) and address (3671 Main St, Amherst, NY 14228).
- Step 2:** Checking the 'Net to Gross' box and entering a net amount of \$0.00.
- Step 3:** Clicking the 'CALCULATE' button to review updates.

The interface includes a sidebar with navigation links: Dashboard, Company, Employees, Check Calculator, Payrolls, Check Finder, and Reports. The main area is divided into sections for Earnings/Deductions, Federal, State, and SUI, and a table for Earnings/Deductions with columns for E/D Code, Description, Hrs/Pcs, Pay Rate, Amount, and Rate #.

E/D Code	Description	Hrs/Pcs	Pay Rate	Amount	Rate #
T01	NY SDI			\$0.00	
NYSPFL	NYS Paid Family Leave			\$0.00	
DD1	Dir Dep - Net			\$0.00	
D11	Medical (Pre-Tax)			\$25.00	
D04	Union Dues			\$10.00	
D03	Misc Deduction			\$20.00	
MF	CARES Retention Med C...			\$0.00	

Tax Blocks

1. If the employee does not want any federal taxes to come out, click the Federal tab then check the federal tax box under the Blocks column.
2. If the employee wants a set amount or percentage to come out, change the Fed Type under the overrides column and enter the dollar amount or percentage.
3. The same can be done under the State tab.
4. Review updates by clicking Calculate.

The screenshot shows the 'Check Calculator' interface for 'CS Sales Demo'. The left sidebar contains navigation links: Dashboard, Company, Employees, Check Calculator, Payrolls, Check Finder, and Reports. The main area is titled 'Check Calculator' and includes a close button (X).

Check Settings

Earnings/Deductions | **Federal** | State | SUI | Local | Options | **Actions**

EE Code - Name: 3-Charlie Day | Net Amount: \$0.00
Address: 3671 Main St, Amherst, NY 14228 | ☒ Net to Gross

Marital Status: Single
Exemptions: 0
W4 Other Income:
W4 Deductions:
Tax Frequency: Weekly
☐ Tax at Supplemental Rate

Blocks
☒ Federal Tax
☐ Employee Overrides
☐ Additional Values
☐ EE OASDI
☐ EE Medicare
☐ EE EIC

Overrides
Fed Type: Regular (dropdown)
Amount: 25.00 % \$

Actions
CALCULATE
SEND TO PAYROLL

Check Settings (Zoomed In)

Earnings/Deductions | **Federal** | **State** | SUI | Local | Options | **Actions**

Settings for: New York - NY

Marital Status: Single/Head of Hous...
Exemptions: 0
☐ Tax at Supplemental Rate

Blocks
☒ Regular Tax
☐ Additional Tax
☐ SUI
☐ SDI

Overrides
State Type: Regular (dropdown)
Amount: 15.00 % \$

Actions
CALCULATE
SEND TO PAYROLL

1 items

Manual vs Live Check

The last thing that you need to do is under the Options tab. The selections made in in this section will tell the system if the check recorded is going to be a manual check that you are recording or if it is going to produce a live check.

1. If you want a **live check generated**, uncheck the Make this a Manual Check box and it will generate the correct check number when you run payroll.
2. If you want a **manual check**, keep the Make this a Manual Check box checked. It asks you to enter a check number, enter in a number that you may want to use for your records (e.g. 500).
3. Click Calculate a final time.

The image displays two screenshots of the 'Check Calculator' interface, illustrating the steps to generate a manual check.

Screenshot 1 (Left): The 'Check Calculator' window is open, showing the 'Check Settings' tab. The 'Make this a Manual Check' checkbox is checked. A blue callout '1' points to the 'Report' icon in the left sidebar.

Screenshot 2 (Right): The 'Check Calculator' window is open, showing the 'Options' tab. The 'Make this a Manual Check' checkbox is checked, and the '500' is entered in the 'Check Number' field. A blue callout '2' points to the 'Report' icon in the left sidebar. A blue callout '3' points to the 'CALCULATE' button in the 'Actions' section.

Send to Payroll

1. Click send to payroll; this will send this calculated check to payroll.
2. A box with more options will display. Click on the last payroll that is listed, select the batch that you want this check to be added to.
3. Click Save/Return. The check you just created will no longer be on the Check Calculator page but can be viewed by going to Payroll.

Check Calculator

CS Sales Demo

EE Code - Name: 3-Charlie Day
Net Amount: \$0.00
3671 Main St
Amherst, NY 14228
☒ Net to Gross

Earnings/Deductions

E/D Code	Description	Hrs/Pcs	Pay Rate	Amount	Rate #
T01	NY SDI			\$0.26	
NYSPFL	NYS Paid Family Leave			\$0.14	
E02	Regular		\$20.00	\$52.51	1 (P) : \$20.00
DD1	Dir Dep - Net			\$0.00	
D11	Medical (Pre-Tax)			\$25.00	
D04	Union Dues				
D03	Misc Deduction				

Check Details

EARNINGS:

Regular	\$52.51
Earnings SubTotal:	\$52.51

DEDUCTIONS:

NYS Paid Family Leave	\$0.14
NY SDI	\$0.26
Union Dues	\$10.00
Medical (Pre-Tax)	\$25.00
Dir Dep - Net	\$0.00
Misc Deduction	\$0.00
Deductions SubTotal:	\$35.40

FEDERAL TAXES:

OASDI Tax	\$1.71
Medicare Tax	\$0.40
Taxes SubTotal:	\$2.11

MEMOS:

CARES Retention Med Cost Credit	-\$12.50
CARES Retention Wage Credit	\$0.00
Memos SubTotal:	-\$12.50

Gross Amount: \$52.51

Check Settings

Actions

1 **SEND TO PAYROLL**

Send this Check to Payroll

CS Sales Demo

EE: 3
Name: Charlie, Day
3671 Main St
Amherst, NY 14228
Net Amount: \$0.00

Options set for this Check

Updates:

Tax Calculations locked in.

2 **CHANGE OPTIONS**

Choose a Payroll for this check

07/10/2020 - 1
07/10/2020 - 1
09/18/2020 - 1
10/02/2020 - 1
10/09/2020 - 1
10/16/2020 - 1
10/23/2020 - 1
10/30/2020 - 1
11/06/2020 - 1
11/20/2020 - 1
11/27/2020 - 1
Batch 1 - Weekly - 11/14/2020 to 11/20/2020

3 **SAVE/RETURN**

GO TO PAYROLL

Payroll

This section will provide an in-depth review of the components accessible within the *Payroll* page needed to process payroll. You will skill up on:

- Basic functionality of the payroll page
- How the system operates
- Override taxes
- Pre-Process payroll

Payroll Timeline

The Payroll page is where you will pre-process and process payroll. When you first enter the Payroll page, you will see your **payroll timeline**. The Evolution software prepares for future payroll periods and stores previously generated payrolls.

1. You will see 9 weeks at a time on your payroll timeline, use the arrows to review past payrolls or add notes to future payrolls if needed.
2. To **create a payroll**, click the big plus sign on the appropriate week.

The screenshot displays the 'Payroll Timeline' interface. On the left is a sidebar with navigation links: Dashboard, Company, Employees, Check Calculator, Payrolls (highlighted), Check Finder, and Reports. At the bottom of the sidebar is a 'Task Queue' link. The main area is titled 'Payroll Timeline' and features a large '+' icon at the top left. Below this is a grid of payroll periods. Each period card shows a date range (e.g., 10/09/2020 - 1), frequency (Weekly), status (Past Due, Processed, Pending, Not Due), and a submit-by date. Navigation arrows are present on the left and right sides of the grid. A blue callout '1' points to the left arrow, and another blue callout '1' points to the right arrow. A third blue callout '2' points to a large '+' icon at the bottom right of the grid.

Date Range	Status	Frequency	Submit By	Batch Info
10/09/2020 - 1	Past Due	Weekly	10/05/2020	09/26/2020 - 10/02/2020 New Batch
10/16/2020 - 1	Past Due	Weekly	10/12/2020	10/03/2020 - 10/09/2020 New Batch
10/23/2020 - 1	Past Due	Weekly	10/19/2020	10/10/2020 - 10/16/2020 New Batch
10/30/2020 - 1	Pending	Weekly		10/17/2020 - 10/23/2020 New Batch
11/13/2020 - 1	Processed	Weekly	10/19/2020 11:26 AM	10/31/2020 - 11/06/2020
11/20/2020 - 1	Pending	Weekly	11/16/2020	11/07/2020 - 11/13/2020 New Batch
11/27/2020 - 1	Pending	Weekly	11/23/2020	11/14/2020 - 11/20/2020 New Batch
12/04/2020	Not Due	Weekly		11/21/2020 - 11/27/2020

Adding Notes

1. To the right of the page is a sidebar labelled Payroll Notes.
2. You can add and edit notes for that specific payroll week by clicking in the box and entering any reminders you may need.

The screenshot displays the 'Payroll Timeline' interface for 'Payroll 12/04/2020 - 1'. The main area contains settings for 'Check Batch - 2 - Settings', including 'Creation Options' (Start Date, End Date, Frequency, Employee Types, Employee Filter, Template, Checks per EE, Check Types) and 'Time Clock Import Options' (Time Clock Source File, File Format, Date Field Format, Employee Synchronization, Organizational Synchronization, Job Codes, Apply Org Level). A 'CREATE CHECKS' button is visible.

On the right side, there is a vertical sidebar labeled 'Payroll Notes'. A blue callout bubble with the number '1' points to this sidebar. Below the main settings area, there is a zoomed-in view of the 'Payroll Notes' sidebar. A blue callout bubble with the number '2' points to a text input area within the sidebar, which contains the text 'Don't forget!'. The sidebar also includes a 'Hide' button and a 'Payroll Notes' header.

Creation Options

Creation Options is where you will create your batch.

1. The start date and end date are automatically filled out as are the options below.
2. The time clock import can be used if the client has a way to import files for their time clock. If this applies to you, a separate instructional resource will be made available.
3. If everything looks correct, click Create Checks.
4. An alert box will appear that states “Status: checks successfully created”, click OK.

The screenshot displays the 'Payroll Timeline' interface for 'Payroll 12/04/2020 - 1'. The left sidebar contains navigation links: Dashboard, Company, Employees, Check Calculator, Payrolls (highlighted), Check Finder, and Reports. The main content area is titled 'X Check Batch -2 - Settings' and is divided into two columns: 'Creation Options' and 'Time Clock Import Options'. The 'Creation Options' column includes fields for 'Start Date*' (11/21/2020), 'End Date*' (11/27/2020), 'Frequency' (Weekly), 'Employee Types' (All), 'Employee Filter' (--Select Template--), 'Template' (--Select Template--), 'Checks per EE' (1), 'Check Types' (Regular), and checkboxes for 'Create 945 Checks' (unchecked), 'Calculate Scheduled EDs' (checked), and 'Include' (Standard Hours, Salary Pay, Payroll Defaults, Time Off Requests). The 'Time Clock Import Options' column includes fields for 'Time Clock Source File' (Choose file), 'File Format' (Comma Delimited), 'Date Field Format' (2 Digit Year (mm/dd/yy)), 'Employee Synchronization' (Custom #), 'Organizational Synchronization' (Full DBDT), 'Job Codes', and 'Apply Org Level'. A 'CREATE CHECKS' button is located to the right of the 'Time Clock Import Options' section. A 'Status' alert box is overlaid on the bottom right, displaying the message 'Checks successfully created.' and an 'OK' button. Numbered callouts 1 through 4 are placed over the interface to correspond with the steps in the text above.

Payroll Timeline

SAVE CANCEL

Payroll 12/04/2020 - 1

Batches Checks Totals Finish

Settings

1

2

3

4

CREATE CHECKS

Payroll Notes

Task Queue

Status

Checks successfully created.

OK

Payroll Summary

You will be directed to the **Payroll Summary** page where you can key in your payroll. You will see a list of all active employees that are in the system. This list may be sorted by clicking on any of the column headers.

1. The information within columns “Type” – “Gross Pay” are set.
2. The information within the columns to the right of Gross Pay can be edited by clicking into the cell and keying in the data.
3. You may **add any columns** you want to appear in this table. At the bottom right of the table, click on the Choose Column icon.

The screenshot shows the Payroll Summary page. The left sidebar contains navigation links: Dashboard, Company, Employees, Check Calculator, Payrolls, Check Finder, Reports, and Task Queue. The main area is titled 'Payroll Timeline' and includes buttons for SAVE, CANCEL, and Pending. Below this, it shows 'Payroll 12/04/2020 - 1' and 'Batch 1 : 11/21/2020 - 11/27/2020 Regular | -99998772 | 1 of 1'. A workflow diagram shows Batches, Checks, Totals, and Finish. The table has columns: Type, EE Code, Name, Seq, Total Hrs, Gross Pay, E01 Hrs Salary, E01 Amt Salary, E02 Hrs Regular, and E02 Amt Regular. The table data is as follows:

Type	EE Code	Name	Seq	Total Hrs	Gross Pay	E01 Hrs Salary	E01 Amt Salary	E02 Hrs Regular	E02 Amt Regular
R	3	Day, Charlie	1	0.00	\$0.00				
R	4	Ripley, Ellen	1	0.00	\$680.00		\$680.00		
R	1	Smith, Joe	1	0.00	\$800.00		\$800.00		
R	6	Bretter, Peter	1	0.00	\$0.00				
R	2	Jones, Dawna M.	1	0.00	\$1,000.00		\$1,000.00		
R	5	Peffercorn, Wendy	1	40.00	\$720.00			40.00	\$720.00
Totals				40.00	\$3,200.00		\$2,480.00	40.00	\$720.00

Annotations: 1 points to the 'Type' column header, 2 points to the 'E01 Amt Salary' column header, and 3 points to the 'Choose Column' icon at the bottom right of the table.

Payroll Summary

After clicking on the Choose Column icon, you will see the options box below. On the left are all the available columns, which mostly correspond with the deduction and earning codes that you have set up with the client. The right side shows the columns that are currently being displayed in the table.

1. To add a column to the current columns list, click and drag it from the available columns list.
2. To remove a column from the current columns list, click and drag it from the current columns list to the available columns list.
3. Click apply to save changes.

The screenshot shows a 'Choose Columns' dialog box with two main sections: 'Available Columns' on the left and 'Current Columns' on the right. The 'Available Columns' section has a search bar and a list of columns including 'D03 Hrs Misc Deduction', 'D03 Amt Misc Deduction', 'D04 Hrs Union Dues', 'D04 Amt Union Dues', 'D11 Hrs Medical (Pre-Tax)', 'D41 Amt Child Support 1', 'D11 Amt Medical (Pre-Tax)', 'D41 Hrs Child Support 1', 'D51 Hrs Garnishment 1', 'D51 Amt Garnishment 1', and 'D01 Hrs Dir Dep - Net'. A blue arrow labeled '1' points from 'D04 Hrs Union Dues' in the available list to the 'Current Columns' list. The 'Current Columns' section also has a search bar and a 'Select: All | None' option. It contains a list of columns including 'Type', 'EE Code', 'Name', 'Seq', 'Total Hrs', 'Gross Pay', 'E01 Hrs Salary', 'E01 Amt Salary', 'E02 Hrs Regular', and 'E02 Amt Regular'. A blue arrow labeled '2' points from 'E01 Amt Salary' in the current list back to the 'Available Columns' list. At the bottom, there is a note about locked columns, a 'Restore Default Column Settings' link, and three buttons: 'APPLY', 'CANCEL', and a button labeled '3'.

Choose Columns

Available Columns

Search...

D03 Hrs Misc Deduction

D03 Amt Misc Deduction

D04 Hrs Union Dues

D04 Amt Union Dues

D11 Hrs Medical (Pre-Tax)

D41 Amt Child Support 1

D11 Amt Medical (Pre-Tax)

D41 Hrs Child Support 1

D51 Hrs Garnishment 1

D51 Amt Garnishment 1

D01 Hrs Dir Dep - Net

Current Columns

Search...

Select: All | None

Type

EE Code

Name

Seq

Total Hrs

Gross Pay

E01 Hrs Salary

E01 Amt Salary

E02 Hrs Regular

E02 Amt Regular

Locked Columns are grouped together and remain visible while scrolling through the grid

[Restore Default Column Settings](#)

APPLY CANCEL

Key in Hours

After you are comfortable with the columns that are displayed in the Payroll Summary table, you will want to key in hours where needed.

1. Start by searching for the employee; you may do this by entering the employee's name or number into the search bar.
2. If an employee is paid hourly, it will calculate how much they are paid for the hours worked at their hourly rate. To change either amount, click inside the box containing the value then type the corrected value.
3. If an employee is salaried, the system automatically carries over that amount to be paid. You can change the salaried amount by clicking into the Amt Salary box, then typing in the corrected value.
4. Any adjustments made within the table are factored into the company totals for each column. Running totals are displayed along the bottom of the table for each column.

The screenshot displays the 'Payroll Timeline' interface. On the left is a sidebar with navigation links: Dashboard, Company, Employees, Check Calculator, Payrolls (selected), Check Finder, and Reports. The main area shows 'Payroll 12/04/2020 - 1' and 'Batch 1 : 11/21/2020 - 11/27/2020'. A status bar indicates 'Regular | -99998772 | 1 of 1'. Below this is a table with columns: Type, EE Code, Name, Seq, Total Hrs, Gross Pay, E01 Hrs Salary, E01 Amt Salary, E02 Hrs Regular, and E02 Amt Regular. The table lists six employees: Day, Charlie; Ripley, Ellen; Smith, Joe; Bretter, Peter; Jones, Dawna M.; and Peffercorn, Wendy. A 'Totals' row at the bottom shows aggregated values. Callouts 1-4 highlight specific features: 1 points to the 'ADD CHECK' button, 2 points to the 'E01 Amt Salary' column, 3 points to the 'E02 Hrs Regular' column, and 4 points to the 'Totals' row. A 'Task Queue' link is at the bottom left.

Type	EE Code	Name	Seq	Total Hrs	Gross Pay	E01 Hrs Salary	E01 Amt Salary	E02 Hrs Regular	E02 Amt Regular
R	3	Day, Charlie	1	20.00	\$400.00			20.00	\$400.00
R	4	Ripley, Ellen	1	0.00	\$680.00		\$680.00		
R	1	Smith, Joe	1	0.00	\$800.00		\$800.00		
R	6	Bretter, Peter	1	0.00	\$0.00				
R	2	Jones, Dawna M.	1	0.00	\$1,000.00		\$1,000.00		
R	5	Peffercorn, Wendy	1	40.00	\$720.00			40.00	\$720.00
				Totals	60.00	\$3,600.00	\$2,480.00	60.00	\$1,120.00

One-Time Deduction

If you need to do an additional one-time deduction (a deduction that will drop off after you run the current payroll),

1. Select the employee then switch the Summary dropdown to Detail. The Detail page brings up a list of all the lines for that particular check.
2. To add a one-time deduction click Add then select the E/D code from the dropdown list.
3. Enter in the deduction amount.

The screenshot displays the 'Payroll Timeline' interface. On the left is a sidebar with navigation links: Dashboard, Company, Employees, Check Calculator, Payrolls (selected), Check Finder, and Reports. The main area shows 'Payroll 12/04/2020 - 1' and 'Batch 1 : 11/21/2020 - 11/27/2020'. A 'NEW BATCH' button is visible. The 'CHECK LINES' section on the left includes options for MANUAL TAX, FED OVERRIDES, STATE OVERRIDES, LOCAL OVERRIDES, OPTIONS, and REVIEW. The main table displays check lines for '3 - Day, Charlie - 1 of 1'. A dropdown menu is open for the 'E/D Code' column, showing a list of codes and descriptions, with 'D03 Misc Deduction' selected. The table columns are E/D Code, Description, Hrs/Pcs, Pay Rate, Amount, and Rate #. The table shows several rows of deductions, including 'D03 Misc Deduction' with an amount of \$500.00 and 'D03 Misc Deduction' with an amount of \$400.00. A 'Task Queue' button is at the bottom left. The right sidebar contains 'Payroll Notes' and 'Employee Notes' sections.

Payroll Timeline

SAVE CANCEL Pending

Payroll 12/04/2020 - 1 Batch 1 : 11/21/2020 - 11/27/2020

NEW BATCH

Batch 1 Weekly

CREATE NEW CHECK

CHECK LINES

MANUAL TAX

FED OVERRIDES

STATE OVERRIDES

LOCAL OVERRIDES

OPTIONS

REVIEW

PREVIOUS NEXT

Check Serial # Check Type Sequence

-99998772 Regular 1 of 1

RECALCULATE CHECK PREVIEW ALD REFRESH SCHEDULED E/DS

ADD CANCEL EXPORT TO EXCEL

E/D Code *	Description	Hrs/Pcs	Pay Rate	Amount	Rate #
D03	Misc Deduction			\$500.00	
-- Select --				\$0.00	
D03	Misc Deduction	20.00	\$20.00	\$400.00	1 (P) : \$20.00
D04	Union Dues				
D11	Medical (Pre-Tax)			\$25.00	
D41	Child Support 1			\$10.00	
D51	Garnishment 1			\$0.00	
MG	CARES Retention Wag...			\$0.00	

9 items

Task Queue

Payroll Notes

Employee Notes

One-Time Deduction

To finish up your one-time deduction,

3. If you have an override or need to adjust Federal and State tax blocks, you may do so through the Fed Overrides and State Overrides tab on this page.
4. Click recalculate check, it gives you Check Calculations summary.
5. You may notice the Net Amount is 0, this will occur if the employee is paid with direct deposit. The amount paid will be listed under the deductions section as direct deposit.

The screenshot displays the payroll system interface for a one-time deduction. The main window shows the 'Check Calculations' summary for a check issued to '3 - Day, Charlie' on 12/04/2020. The summary is divided into several sections: Earnings, Deductions, Federal Taxes, and State Taxes. The 'Net Amount' is \$0.00, indicating direct deposit. The 'Check Calculations' section shows a Gross Amount of \$400.00, with various deductions totaling \$400.00, resulting in a Net Amount of \$0.00. The 'Federal Taxes' section shows OASDI Tax of \$23.25 and Medicare Tax of \$5.44. The 'State Taxes' section shows NY State Tax of \$9.71. The interface includes a sidebar with navigation options like Dashboard, Company, Employees, Check Calculator, Payrolls, Check Finder, and Reports. The top navigation bar shows the Payroll Timeline and Batch information. The bottom of the screen features a 'Task Queue' and a 'Time Clock Import' button.

Payroll Timeline
SAVE CANCEL Pending
Payroll 12/04/2020 - 1 Batch 1 : 11/21/2020 - 11/27/2020

Check Calculations

Category	Item	Amount
EARNINGS:	Federal Taxable Wages	\$375.00
	OASDI Taxable Wages	\$375.00
	OASDI Taxable Tips	\$0.00
	Medicare Taxable Wages	\$375.00
DEDUCTIONS:	E02 Regular	\$400.00
	T01 NY SDI	\$0.60
	D04 Union Dues	\$10.00
	D11 Medical (Pre-Tax)	\$25.00
FEDERAL TAXES:	OASDI Tax	\$23.25
	Medicare Tax	\$5.44
	Federal Tax	\$25.00
	STATE TAXES:	NY State Tax
Taxes SubTotal:		\$63.40

Net Amount: \$0.00

Check Serial # -99998772 **Check Type** Regular **Sequence** 1 of 1

Check Lines:

E/D Code	Description	Hrs/Pcs	Pay Rate	Amount	Rate #
D03	Misc Deduction			\$500.00	

Options:

- MANUAL TAX
- FED OVERRIDES
- STATE OVERRIDES
- LOCAL OVERRIDES
- OPTIONS
- REVIEW

Buttons: CREATE NEW CHECK, RECALCULATE CHECK, PREVIEW ALD, REFRESH SCHEDULED E/D'S, Lock Tax Calculations

Add a Check

To **add a check** for an employee,

1. Switch back to the Summary page.
2. Click Add, the Add Checks box will appear (shown on next page with additional steps).

Payroll Timeline

SAVE CANCEL Pending

Payroll 12/04/2020 - 1 Batch 1 : 11/21/2020 - 11/27/2020 Regular | -99998772 | 1 of 1

Batches Checks Totals Finish

NEW BATCH EXPOR ADD CHECK DELETE CHECK Search Checks... Group By: Department Number

1 Summary

2

Type	EE Code	Name	Seq	Total Hrs	Gross Pay	E01 Hrs Salary	E01 Amt Salary	E02 Hrs Regu	Summary
R	3	Day, Charlie	1	20.00	\$400.00				Summary
R	4	Ripley, Ellen	1	0.00	\$680.00		\$680.00		Summary Detail
R	1	Smith, Joe	1	0.00	\$800.00		\$800.00		Detail
R	6	Bretter, Peter	1	0.00	\$0.00				
R	2	Jones, Dawna M.	1	0.00	\$1,000.00		\$1,000.00		
R	5	Peffercorn, Wendy	1	40.00	\$720.00			40.00	
Totals				60.00	\$3,600.00		\$2,480.00	60.00	\$1,120.00

6 items

Batch 1 Weekly

Payroll Notes Time Clock Import Employee Notes

Add a Check

3. Select the type of check from the dropdown list.
4. Check the applicable box for either Standard Hours or Salary Hours.
5. Search for the employee for whom you are creating a check, check the box next to their name.
6. Click CREATE CHECK(S) FOR SELECTED EES.
7. A check line will be created for that new check, manually enter in the hours and pay rate directly into the table.

3

Select a Check Type

Regular

Regular
Manual
3rd Party

Find and Select the Employees to use when creating checks. One check will be created for each Employee you select.

4

Check Creation Options

☒ Standard Hours: Yes
☐ Salary Pay: No

Use this Template
--Select--

5

Search for employee(s)

<input type="checkbox"/>	EE #	Last Name	First Name	Middle Initial	Status	Organization L...
<input type="checkbox"/>	1	Smith	Joe		Active	01 > 01 >> 100
<input type="checkbox"/>	2	Jones	Dawna	M	Active	01 > 01 >> 200
<input checked="" type="checkbox"/>	3	Day	Charlie		Active	01 > 01 >> 300
<input type="checkbox"/>	4	Ripley	Ellen		Active	
<input type="checkbox"/>	5	Peffercorn	Wendy		Active	

Page 1 of 2

6

CREATE CHECK(S) FOR SELECTED EES

EXPORT TO EXCEL

ADD CHECK

DELETE CHECK

Search Checks...

Group By: Department Number

7

Summary

Type	EE Code	Name	Seq	Total Hrs	Gross Pay	E01 Hrs Salary	E01 Amt Salary	E02 Hrs Regular	E02 Amt Regular
R	3	Day, Charlie	2	0.00	\$0.00			1.00	
R	3	Day, Charlie	1	20.00	\$400.00			20.00	\$400.00
R	4	Ripley, Ellen	1	0.00	\$680.00		\$680.00		
R	1	Smith, Joe	1	0.00	\$800.00		\$800.00		
R	6	Bretter, Peter	1	0.00	\$0.00				
R	2	Jones, Dawna M.	1	0.00	\$1,000.00		\$1,000.00		
R	5	Peffercorn, Wendy	1	40.00	\$720.00			40.00	\$720.00
Totals				60.00	\$3,600.00		\$2,480.00	60.00	\$1,120.00

7 Items

Department Overrides

Some clients have a department override where some hours are paid in one department, and some hours are paid in another department. Use the **Summary Detail** page to review this type of override.

1. Switch the Summary dropdown to Summary Detail,
2. Scroll through to locate the employee you need to review. Click on the arrow to expand the employee information.
3. If you want to add hours over a different department, click inside the Organizational column, select the appropriate department, then key in the amount earned in that department.

Payroll Timeline

SAVE CANCEL Pending

Payroll 12/04/2020 - 1 Batch 1 : 11/21/2020 - 11/27/2020 Regular | -99998773 | 1 of 1

NEW BATCH ADD CHECK DELETE CHECK

Summary Detail

E/D C...	Description	Hrs/Pcs	Rate Of P...	Amount	Rate Number	Organizational Level	Agency
Check: -99998773 - R, Batch: 1, Employee: Pfeffercorn, Wendy [5] Total Hrs: 40.00 , Total Amount: \$683.06 ADD CHECK LINE DELETE CHECK LINE							
E02	Regular	40.00	\$18.00	\$720.00	1 (P) : \$1	- Select Depart...	
NYSP...	NYS Paid Family Leave			\$1.94		Division Branch Department Team	
T01	NY SDI			\$0.00		- Select Department -	
D04	Union Dues			\$10.00		Hidden Hidden Admin	
D11	Medical (Pre-Tax)			\$25.00		Hidden Hidden Sales	
DD1	Dir Dep - Net						
MF	CARES Retention Med C...			\$0.00			
MG	CARES Retention Wage ...			\$0.00			
Totals				\$3,334.76			

59 items

Pre-Process Payroll

Once you are done keying in payroll,

1. Click the Totals icon at the top.
2. To ensure everything is recorded properly, click **Pre-Process**.
3. Hover over the Task Queue at the bottom left of the page, wait for the task to move from *Pending* to *Completed*.

The screenshot displays the 'Payroll Timeline' interface. At the top, there are buttons for 'SAVE', 'CANCEL', and 'Pending'. Below this, the timeline shows 'Payroll 12/04/2020 - 1' and 'Batch 1 : 11/21/2020 - 11/27/2020'. A progress bar at the top right indicates the current step: 'Batches' (gear icon) → 'Checks' (envelope icon) → 'Totals' (calculator icon, highlighted with a blue circle and number 1) → 'Finish' (checkered flag icon). A 'PRE-PROCESS' button is highlighted with a blue circle and number 2. The 'Task Queue' at the bottom left shows 'Completed: 3', 'Unread: 1', and 'Pending: 0', with a blue circle and number 3 highlighting the 'Pending' status. The main content area is divided into 'Calculation Results' and 'Taxes'.

Calculation Results

Total Gross Pay: \$3,900.00

Totals

EXPORT TO EXCEL

E/D Code	Description	Hrs/Pcs	Amount
D03	Misc Deducti...	0.00	\$10.00
D04	Union Dues	0.00	\$70.00
D11	Medical (Pre-...	0.00	\$175.00
DD1	Dir Dep - Net	0.00	\$299.92
E01	Salary	0.00	\$2,480.00
E02	Regular	75.00	\$1,420.00
M91	FFCRA ER Co...	0.00	\$0.00
MF	CARES Reten...	0.00	(\$37.50)
MG	CARES Reten...	0.00	(\$187.50)
NYSPFL	NYS Paid Fa...	0.00	\$9.72
T01	NY SDI	0.00	\$0.60

Taxes

Total Taxes: \$63.40

EXPORT TO EXCEL

Description	Amount	Count
Federal Gross Wages	\$375.00	1
Federal Tax	\$25.00	1
Federal Taxable Wa...	\$375.00	1
Medicare Gross Wa...	\$375.00	1
Medicare Tax	\$5.44	1
Medicare Taxable ...	\$375.00	1
OASDI Gross Wages	\$375.00	1
OASDI Tax	\$23.25	1
OASDI Taxable Wa...	\$375.00	1
State (NY) Gross W...	\$375.00	1
State (NY) Tax	\$9.71	1

Payroll Notes

Submit Payroll

To **submit payroll**,

1. Click the Finish icon
2. Scroll down to the bottom of the page and click on Submit Payroll.
3. Click YES to confirm submission.
4. You will see several success messages indicating you have successfully completed your payroll submission.

If you have any problems after payroll has been submitted, call your Payroll Specialist for assistance.

1

Company
Employees
Check Calculator
Payroll
Check Finder
Reports

Payroll 11/20/2020 - 1

Submittal Options

- Blocks
- ☐ Agency Payments
- ☒ Checks
- ☐ Reports
- ☐ ACH
- ☐ Billing
- ☐ Liabilities
- ☐ Deposits
- ☐ Time Off Accrual
 - ☐ Accruals Only

Payroll Check Comments

Task Queue

SUBMIT PAYROLL

Batches Checks Totals Finish

Payroll Notes

Confirmation

Are you sure you want to submit this payroll?

3

YES NO

SAVE CANCEL Submitted

Payroll 11/20/2020 - 1

Submittal Options

- Blocks
- ☐ Agency Payments
- ☒ Checks
- ☐ Reports
- ☐ ACH
- ☐ Billing
- ☐ Liabilities
- ☐ Deposits

4

Payroll successfully submitted. ✓

This payroll has been submitted to
EBC HR & Payroll Solutions
10/24/2020 11:32 AM

Batches Checks Totals Finish

Payroll Notes

Reports

The Reports page offers a list of defined reports as well as the option to create custom reports to make reporting easy and accessible. In this section you will learn how to:

- Access and use built-in reports
- Create customized reports
- Review common reports

Defined Report

Reports offers a list of defined reports to make reporting easy and accessible. To create a report,

1. Choose a report from the Defined Report list.
2. Click Configure Report to select more detailed options

The screenshot displays the 'Reports' section of a software application. On the left is a sidebar with navigation links: Dashboard, Company, Employees, Check Calculator, Payrolls, Check Finder, Reports (highlighted), and Task Queue. The main content area is titled 'Reports' and features a tabbed interface with 'DEFINED REPORTS' selected. Below the tabs is a search bar labeled 'Search For Report...' and an 'EXPORT LIST TO EXCEL' button. A table lists 11 reports, with the first one, 'Payroll Register (S109)', highlighted. A blue callout '1' points to the table. To the right of the table, a panel titled 'Payroll Register' shows the text 'Choose options for this report' and a 'CONFIGURE REPORT' button with a right arrow. A blue callout '2' points to this button. The bottom of the table shows '1 - 11 of 11 items'.

Report Name	Report #
Payroll Register (S109)	109
W-2 1099 Edit (S162)	162
Cover Letter (S193)	193
Direct Deposit (S211)	211
Check Reconciliation (S214)	214
Tax Report For Payroll (S247)	247
Input Worksheet (S351)	351
Time Off Register With Hours (S920)	920
Labor Distribution (S1077)	1077
Check Stub Detail (S2590)	2590
ACA FTE Report (S2711)	2711

1 - 11 of 11 items

Report Options

Under Payroll Filter,

1. Choose your payroll week(s).
2. Choose which Payrolls to include (i.e. All Payrolls, Processed Payrolls Only)

Reports

DEFINED REPORTS
PUBLISHED REPORTS
AD HOC REPORTS

← REPORTS LIST Options for Payroll Register

Payroll Filter EE Filter Org Filter Misc Options Run Report

Select the date range to use for your report. All payrolls within your range will be selected. You can fine tune your selection by checking only the payrolls you want to include.

Starting Date 01/01/2020 Ending Date 11/23/2020 Include All Payrolls APPLY

	Check Date	Run #	Pro	Status	Type
<input type="checkbox"/>	11/20/2020	1	10/20/2020 11:09:07 AM	Submitted	Regular
<input checked="" type="checkbox"/>	11/13/2020	1	10/19/2020 11:26:23 AM	Processed	Regular
<input type="checkbox"/>	11/06/2020	1		Pending	Regular
<input type="checkbox"/>	10/30/2020	1		2 days left	Regular
<input type="checkbox"/>	10/23/2020	1		Past Due	Regular
<input type="checkbox"/>	10/16/2020	1		Past Due	Regular
<input type="checkbox"/>	10/09/2020	1		Past Due	Regular
<input type="checkbox"/>	10/02/2020	1		Past Due	Regular
<input type="checkbox"/>	09/18/2020	1		Past Due	Regular
<input type="checkbox"/>	09/11/2020	1	09/08/2020 09:12:09 AM	Processed	Regular

Page 1 of 3 1 - 10 of 26 items

Task Queue

Report Options

1. Use the EE filter to run a report on the selected payroll week(s) for one specific employee.
2. Use the Org Filter to run a report for a specific organizational level.

The screenshot shows the 'Options for Payroll Register' report interface. On the left is a navigation menu with links to Dashboard, Company, Employees, Check Calculator, Payrolls, Check Finder, and Reports. The 'Reports' section is active. The main area has tabs for DEFINED REPORTS, PUBLISHED REPORTS, and AD HOC REPORTS. Below these is a 'REPORTS LIST' button and a blue callout bubble with the number '1' pointing to the 'EE Filter' button. Other buttons include 'Org Filter', 'Misc Options', and 'Run Report'. A text prompt says: 'You can apply a filter to reduce the number of employees in the list. Fine tune the list by checking.' Below this is a search bar 'Search for employee(s)' and a table of employees.

	EE #	SSN / EIN	Last Name	First Name	MI	Status
<input type="checkbox"/>	1	156-15-6154	Smith	Joe		Active
<input checked="" type="checkbox"/>	2	484-84-4646	Jones	Dawna	M	Active
<input type="checkbox"/>	3	123-46-1889	Day	Charlie		Active
<input checked="" type="checkbox"/>	4	712-99-1288	Ripley	Ellen		Active
<input type="checkbox"/>	5	643-27-7882	Peffercorn	Wendy		Active
<input type="checkbox"/>	6	231-62-7219	Bretter	Peter		Active

Page 1 of 1 1 - 6 of 6 items

The screenshot shows the 'Options for Payroll Register' report interface. The 'Payroll Filter' button is highlighted with a blue callout bubble containing the number '2'. The 'Org Filter' button is also visible. Below the buttons, a text prompt says: 'Select the organizational level that you want to use for this report. Fine tune by checking a specific level. If no selection is made, your results will include all organization levels for this company.' Below this is a dropdown menu showing the following options: Company, Company, Division, Branch, and Department.

Run Report

To run the report,

1. Click Run Report.
2. Click Run This Report.
3. Reports that have been run can be viewed by clicking on the Task Queue, then selecting the completed Run Report.

Reports

DEFINED REPORTS | PUBLISHED REPORTS | AD HOC REPORTS

← REPORTS LIST Options for Payroll Register

Payroll Filter EE Filter Org Filter **1** Run Report

Depending on your filters and options, this report may take a long time to generate. If you run this report a task will be placed in the queue to generate it.

You will find an entry in the **task queue** for your generated report. You can then view the report from the queue entry.

Your current report definition is set as follows:

Date Range: 11/13/2020-11/13/2020

Payrolls: 1 Payroll(s) Selected.

Employees: 2 Employee(s) Selected.

Organization:

Company:

With options set:

Include Memos in Totals

Include Pieces from Piecework in Totals

Break Employee Between Pages

Include Taxable Memos in Totals

Deductions as Taxes

etc...

Group Level: Department

Group Sort: Group Code **3**

Detail Sort: Employee Last Name

Group Type: Summary Detail

SUI: Do according to Company Setup

2 RUN THIS REPORT

Completed: 2

Unread: 1 **3**

Pending: 0

Task Queue

My Task Queue

Search for Task...

Run Report ID: 9027507
Z_CS Sales Demo - Payroll Register #109
Finished Successfully - Today 11:49 AM

Preprocess Payrolls ID: 9027503
Z_CS Sales Demo Pr:11/20/2020 - 1
Finished Successfully - Today 11:30 AM

Run Report ID: 9027048
Z_CS Sales Demo - Labor Distribution #1077
Finished Successfully - 10/22/20 10:13 AM

Run Report ID: 9027047
Z_CS Sales Demo - Check Stub Detail #2590
Finished Successfully - 10/22/20 10:13 AM

Run Report ID: 9026866
Z_CS Sales Demo - Payroll Register #109
Finished Successfully - 10/21/20 2:21 PM

Results Log

CO# Z_CS Sales Demo - Payroll Register #109

DOWNLOAD

page 1 of 2

#Z_CS Sales Demo CS Sales Demo

CO# Z_CS Sales Demo - Payroll Register #109

Check Date: 11/13/2020-1

Period Range: 10/31/2020 TO 11/06/2020

Week Number: Week #46

Employee Name	Rate of Pay	Current Hours	Current Amount	YTD Hours	YTD Amount	Salary Description	Frequency	Current Amount	YTD Amount	Taxes Description	Check Date	Check Type	Net Check
100 - Admin													
D1 Salary	17.00	0.00	850.00	0.00	15,460.00	04 Union Dues	10.00	230.00	Federal (M2)	44.10	411.72		
G CARES Pk	0.00	0.00	-412.80	0.00	-2,050.00	11 Medical (Pre-Tax)	25.00	550.00	CASDI	51.15	621.24		
						12NHS Paid Family	2.30	44.00	Medicare	11.95	145.32		
						01 NY SDI	0.80	9.00	State NY (M2)	33.87	390.03		
Check Totals		0.00	437.20	0.00	14,440.00			37.90	833.82		140.76	1,538.31	
100 - Admin													
D1 Salary	0.00	0.00	850.00	0.00	15,460.00	04 Union Dues	10.00	230.00	Federal	44.10	411.72		
G CARES Pk	0.00	0.00	-412.80	0.00	-2,050.00	11 Medical (Pre-Tax)	25.00	550.00	CASDI	51.15	621.24		
						12NHS Paid Family	2.30	44.00	Medicare	11.95	145.32		
						01 NY SDI	0.80	9.00	State NY	33.87	390.03		
Check Totals		0.00	437.20	0.00	14,440.00			37.90	833.82		140.76	1,538.31	
200 - Sales													
D1 Salary	0.00	0.00	1,200.00	0.00	25,200.00	03 Misc Deduction	10.00	190.00	Federal (T0)	48.15	403.82		
05 Vacation	0.00	0.00	0.00	48.00	400.00	04 Union Dues	10.00	250.00	CASDI	72.85	1,128.95		
05 PPOPA 911	0.00	0.00	0.00	24.00	1,000.00	11 Medical (Pre-Tax)	25.00	625.00	Medicare	17.04	250.55		
G CARES Pk	0.00	0.00	0.00	0.00	-100.00	01 Div Cap - Nae	655.42	14,879.50	State NY (S1)	55.70	621.82		
G CARES Pk	0.00	0.00	-587.50	0.00	-3,025.00	12NHS Paid Family	3.24	74.52					
						01 NY SDI	0.80	11.40					
Check Totals		0.00	612.50	72.00	24,475.00			1,305.35	15,540.42		194.74	2,615.17	
200 - Sales													
D1 Salary	0.00	0.00	1,200.00	0.00	25,200.00	03 Misc Deduction	10.00	190.00	Federal	48.15	403.82		
05 Vacation	0.00	0.00	0.00	48.00	400.00	04 Union Dues	10.00	250.00	CASDI	72.85	1,128.95		
05 PPOPA 911	0.00	0.00	0.00	24.00	1,000.00	11 Medical (Pre-Tax)	25.00	625.00	Medicare	17.04	250.55		
G CARES Pk	0.00	0.00	0.00	0.00	-100.00	01 Div Cap - Nae	655.42	14,879.50	State NY (S1)	55.70	621.82		
G CARES Pk	0.00	0.00	-587.50	0.00	-3,025.00	12NHS Paid Family	3.24	74.52					
						01 NY SDI	0.80	11.40					
Check Totals		0.00	612.50	72.00	24,475.00			1,305.35	15,540.42		194.74	2,615.17	

EBC HR & Payroll Solutions
phone: 716-689-0511
fax: 716-689-1532
e-mail: info@ebchrsolutions.com

Date Printed: 10/24/2020 11:49:38 AM

Page 1

Below are reports that you will commonly use. Some are included in your payroll packet while others are generated through the Defined Reports list. For a complete overview of each report, review the ***Reports from Evolution*** guide.

[illegible]

RE33 Amherst Audiology Services

Tax Notes (SM)		
Check Date	4/6/2020	
Period Range	01/01/2020 TO 03/31/2020	
Work Number	200478	

Deposit Frequency Monthly

Due Date 08/18/2020

Check Date 08/01 - 09/09

Tax Type 941

Quarter 3

Tax Type	Amount	Wages	# EETs
Employee Federal	4,701.13	4,405.89	3
Employee Medicare	79.38	5,267.89	3
Employee OASDI	326.61	5,267.89	3
Employee Social	79.38	5,267.89	3
Employee OASDI	326.61	5,267.89	3
Total Deposit is due	1,276.00		

You will receive no further notification of this report

Submit payments to:

[illegible]

Type		Rate	Tax ID	Tax Report For Period (N242)		
				Month	Amount	QTR's Frequency
				01/2015	1,234.56	1
				02/2015	1,234.56	1
				03/2015	1,234.56	1
				04/2015	1,234.56	1
				05/2015	1,234.56	1
				06/2015	1,234.56	1
				07/2015	1,234.56	1
				08/2015	1,234.56	1
				09/2015	1,234.56	1
				10/2015	1,234.56	1
				11/2015	1,234.56	1
				12/2015	1,234.56	1
				01/2016	1,234.56	1
				02/2016	1,234.56	1
				03/2016	1,234.56	1
				04/2016	1,234.56	1
				05/2016	1,234.56	1
				06/2016	1,234.56	1
				07/2016	1,234.56	1
				08/2016	1,234.56	1
				09/2016	1,234.56	1
				10/2016	1,234.56	1
				11/2016	1,234.56	1
				12/2016	1,234.56	1
				01/2017	1,234.56	1
				02/2017	1,234.56	1
				03/2017	1,234.56	1
				04/2017	1,234.56	1
				05/2017	1,234.56	1
				06/2017	1,234.56	1
				07/2017	1,234.56	1
				08/2017	1,234.56	1
				09/2017	1,234.56	1
				10/2017	1,234.56	1
				11/2017	1,234.56	1
				12/2017	1,234.56	1
				01/2018	1,234.56	1
				02/2018	1,234.56	1
				03/2018	1,234.56	1
				04/2018	1,234.56	1
				05/2018	1,234.56	1
				06/2018	1,234.56	1
				07/2018	1,234.56	1
				08/2018	1,234.56	1
				09/2018	1,234.56	1
				10/2018	1,234.56	1
				11/2018	1,234.56	1
				12/2018	1,234.56	1
				01/2019	1,234.56	1
				02/2019	1,234.56	1
				03/2019	1,234.56	1
				04/2019	1,234.56	1
				05/2019	1,234.56	1
				06/2019	1,234.56	1
				07/2019	1,234.56	1
				08/2019	1,234.56	1
				09/2019	1,234.56	1
				10/2019	1,234.56	1
				11/2019	1,234.56	1
				12/2019	1,234.56	1
				01/2020	1,234.56	1
				02/2020	1,234.56	1
				03/2020	1,234.56	1
				04/2020	1,234.56	1
				05/2020	1,234.56	1
				06/2020	1,234.56	1
				07/2020	1,234.56	1
				08/2020	1,234.56	1
				09/2020	1,234.56	1
				10/2020	1,234.56	1
				11/2020	1,234.56	1
				12/2020	1,234.56	1
				01/2021	1,234.56	1
				02/2021	1,234.56	1
				03/2021	1,234.56	1
				04/2021	1,234.56	1
				05/2021	1,234.56	1
				06/2021	1,234.56	1
				07/2021	1,234.56	1
				08/2021	1,234.56	1
				09/2021	1,234.56	1
				10/2021		

[illegible][illegible]

Check Finder

Check Finder is a helpful tool to view all checks issued for a specific employee. This section will provide a brief overview on where and how to view and employee's check history.

Check Finder

Check Finder is a helpful tool to view all checks issued for a specific employee. To search for a check,

1. Enter the check number, employee number, or employee name into the appropriate search box.
2. Click Find.
3. If a check number is listed in the Check # column, this means a live check was issued.
4. If there is a negative number listed in this column, that means the amount was direct deposited. Net amount will always display a 0 amount for direct deposits.

Check Finder

1

Check #
All

or EE Code - Name
Search Employee

Within this check date range
All - All

With Status of

2
FIND

Results

Check Date	Run #	EE ID	Employee Name	Check #	Gross	Net	Status
07/26/2019	1	1	Smith, Joe	293	\$800.00	\$618.16	Outstanding
08/03/2019	1	1	Smith, Joe	300	\$800.00	\$618.16	Outstanding
08/23/2019	1	1	Smith, Joe	305	\$800.00	\$618.16	Outstanding
08/30/2019	1	1	Smith, Joe	311	\$800.00	\$618.16	Outstanding
09/06/2019	1	1	Smith, Joe	318	\$800.00	\$618.16	Outstanding
05/22/2020	1	1	Smith, Joe	372	\$800.00	\$589.01	Outstanding
05/29/2020	1	1	Smith, Joe	374	\$800.00	\$589.01	Outstanding
09/18/2020	1	1	Smith, Joe	-99998847	\$0.00	\$0.00	Outstanding
05/29/2020	1	1	Smith, Joe	375	\$800.00	\$589.01	Outstanding
10/02/2020	1	1	Smith, Joe	-99998837	\$0.00	\$0.00	Outstanding
10/09/2020	1	1	Smith, Joe	-99998831	\$0.00	\$0.00	Outstanding
06/05/2020	1	1	Smith, Joe	377	\$800.00	\$589.01	Outstanding
10/16/2020	1	1	Smith, Joe	-99998825	\$0.00	\$0.00	Outstanding
07/10/2020	1	1	Smith, Joe	-99998941	\$0.00	\$0.00	Outstanding

43 - 56 of 378 items

Check Preview