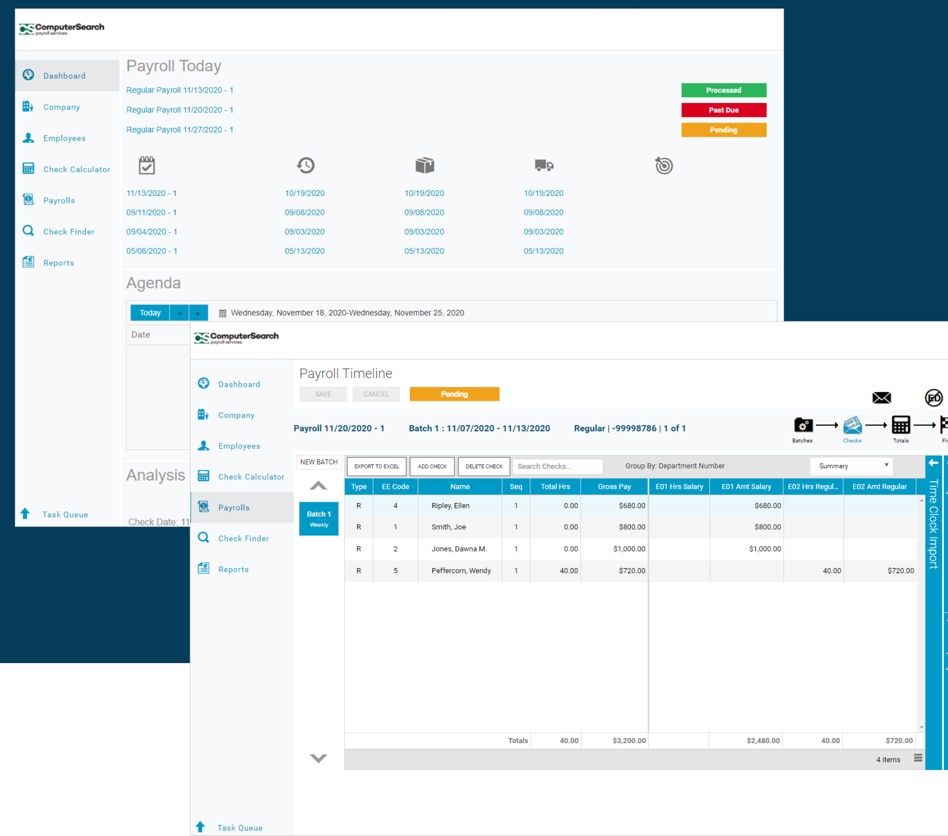
User Guide



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PAYROLL • HR SERVICES

Evolution Payroll

User Guide

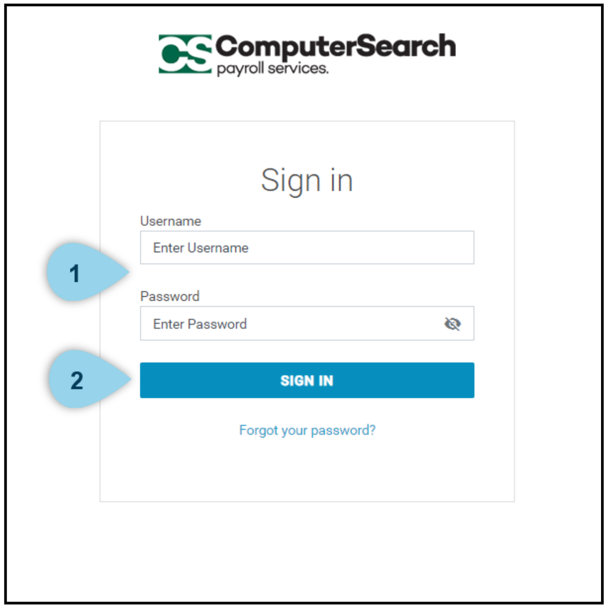
Getting Started

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,

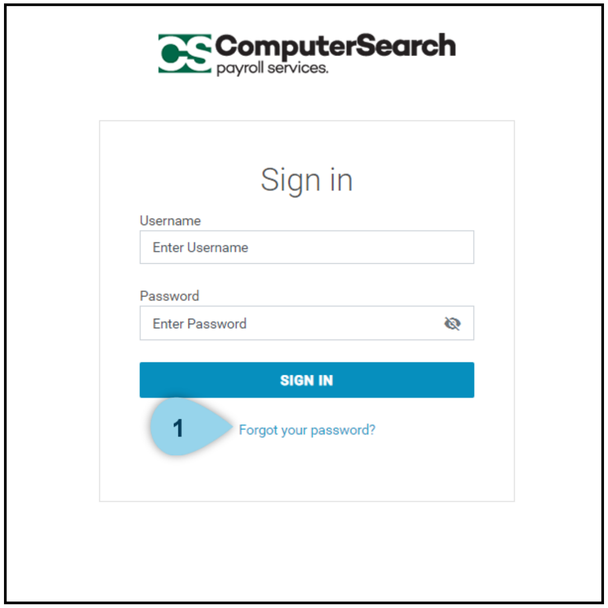
1. Enter the Username and Password assigned to you by your **Payroll Assistant**.
2. Click Sign In.

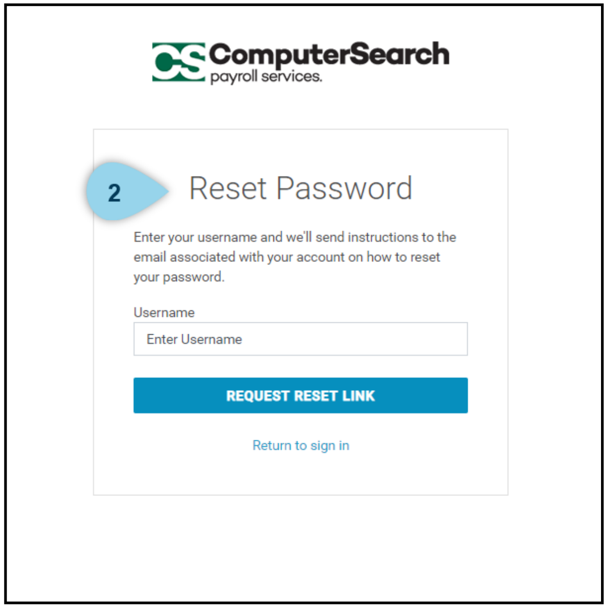


Forgot Password

If you forget your password,

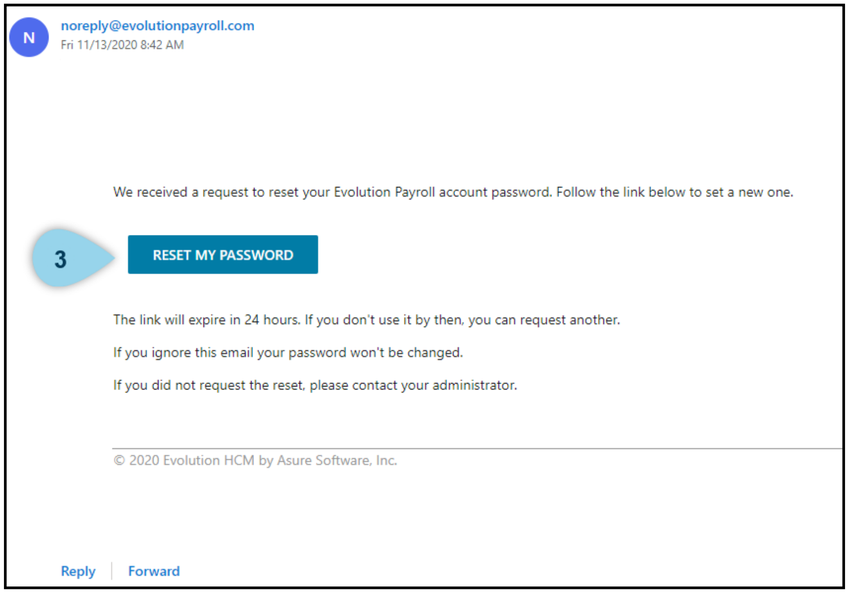
1. Click I Forgot My Password on the login screen.
2. A new screen opens requiring you to enter your username. Click Submit when you are finished.

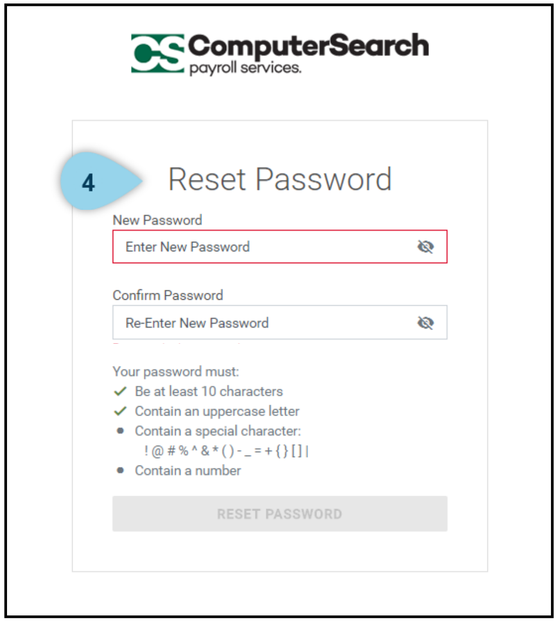




Forgot Password

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.





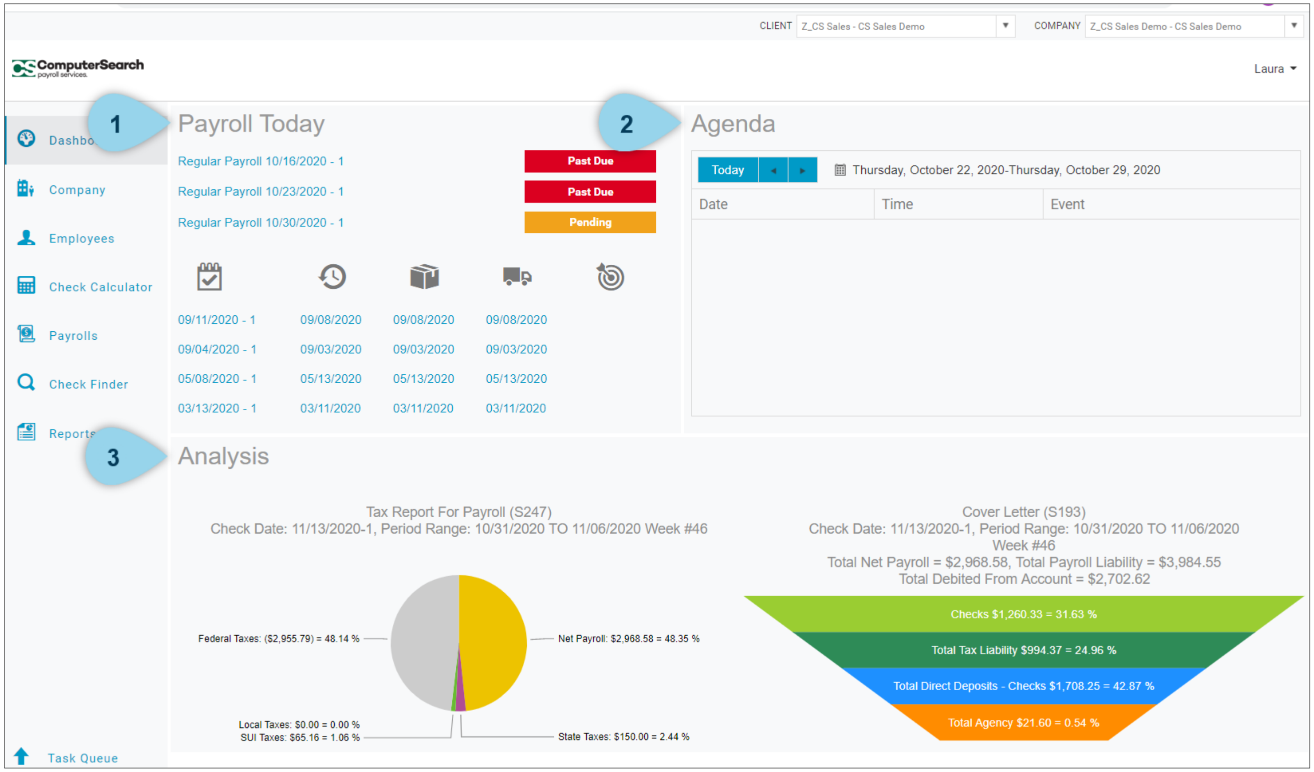
Dashboard

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:

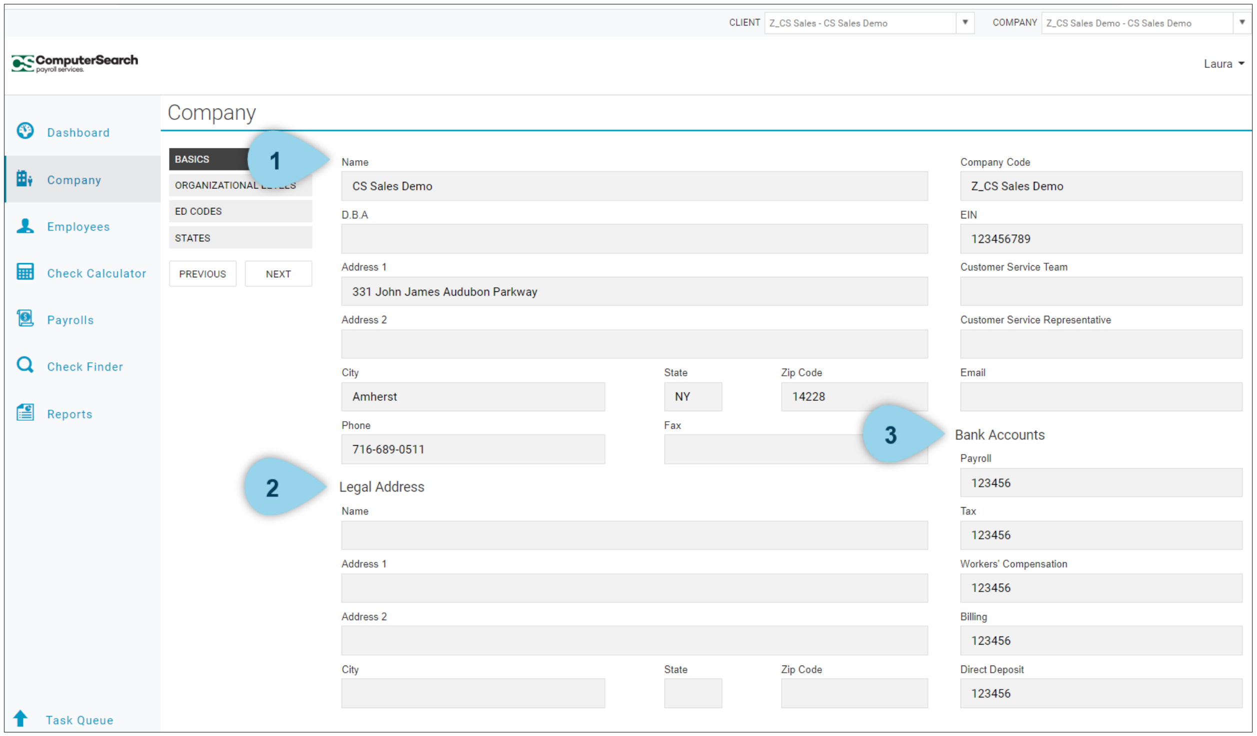
- Review basic information about the company
- Find branching within the organization
- Access a list of ED Codes
- Review state settings

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.

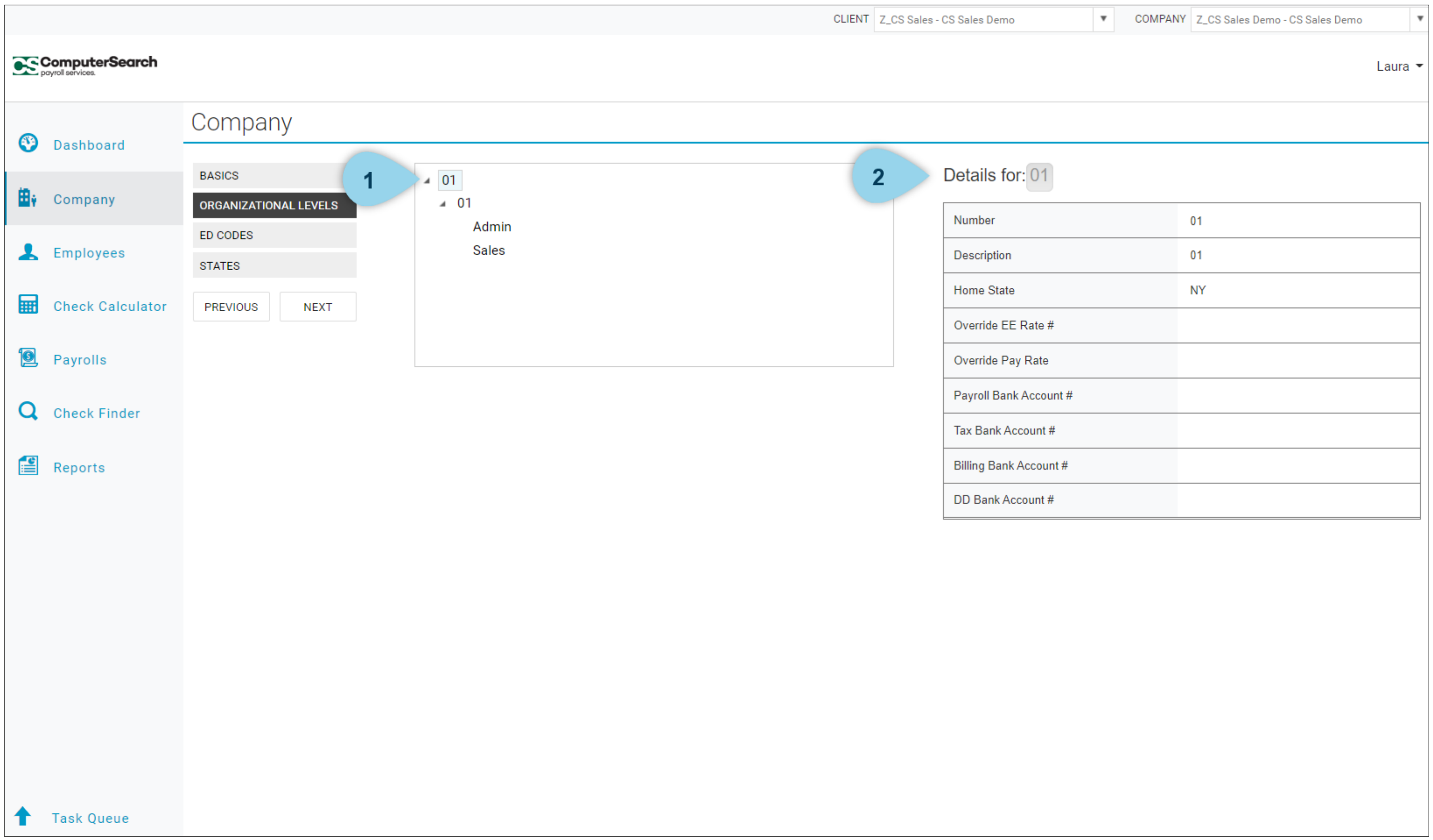


Organizational Levels

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.

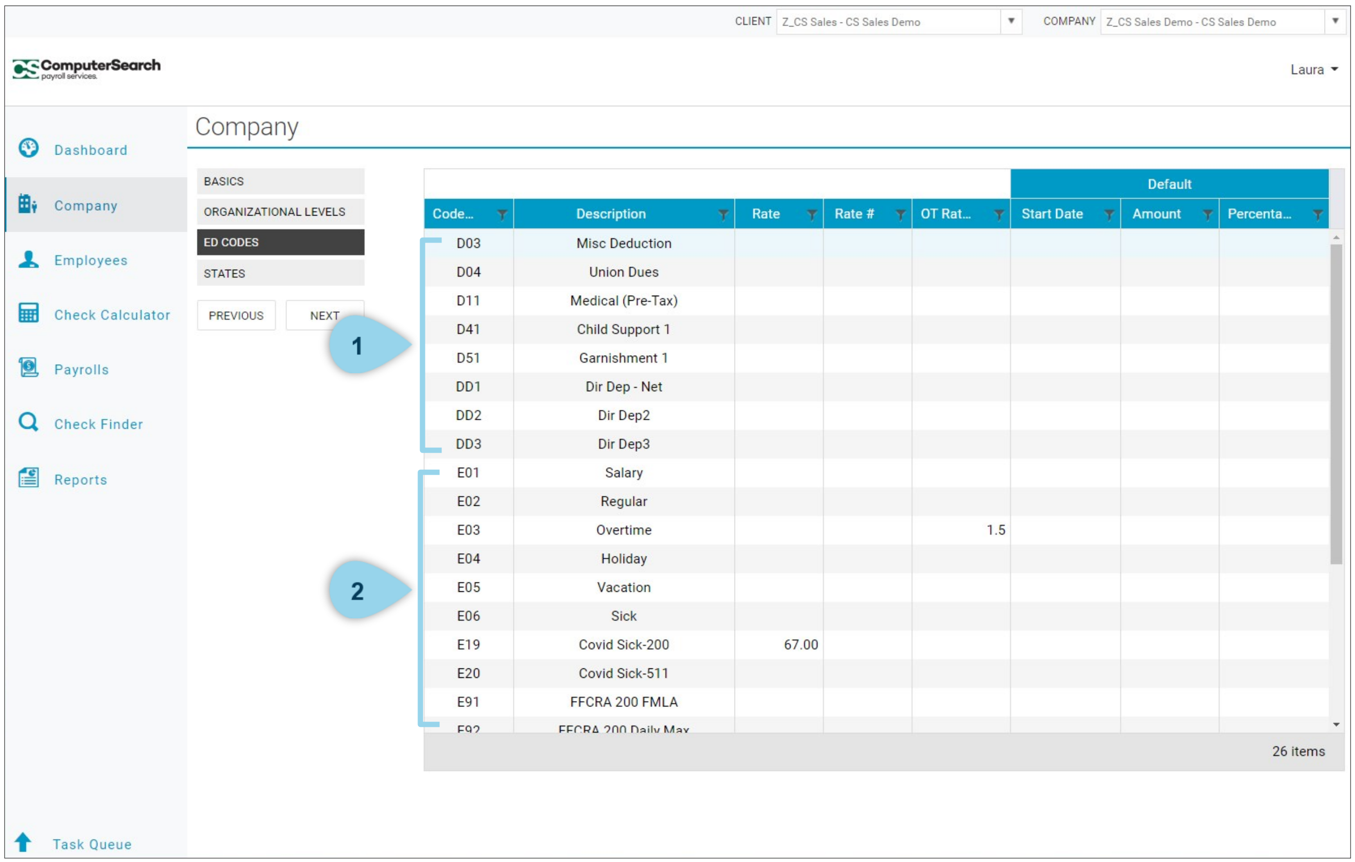


ED Codes

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.

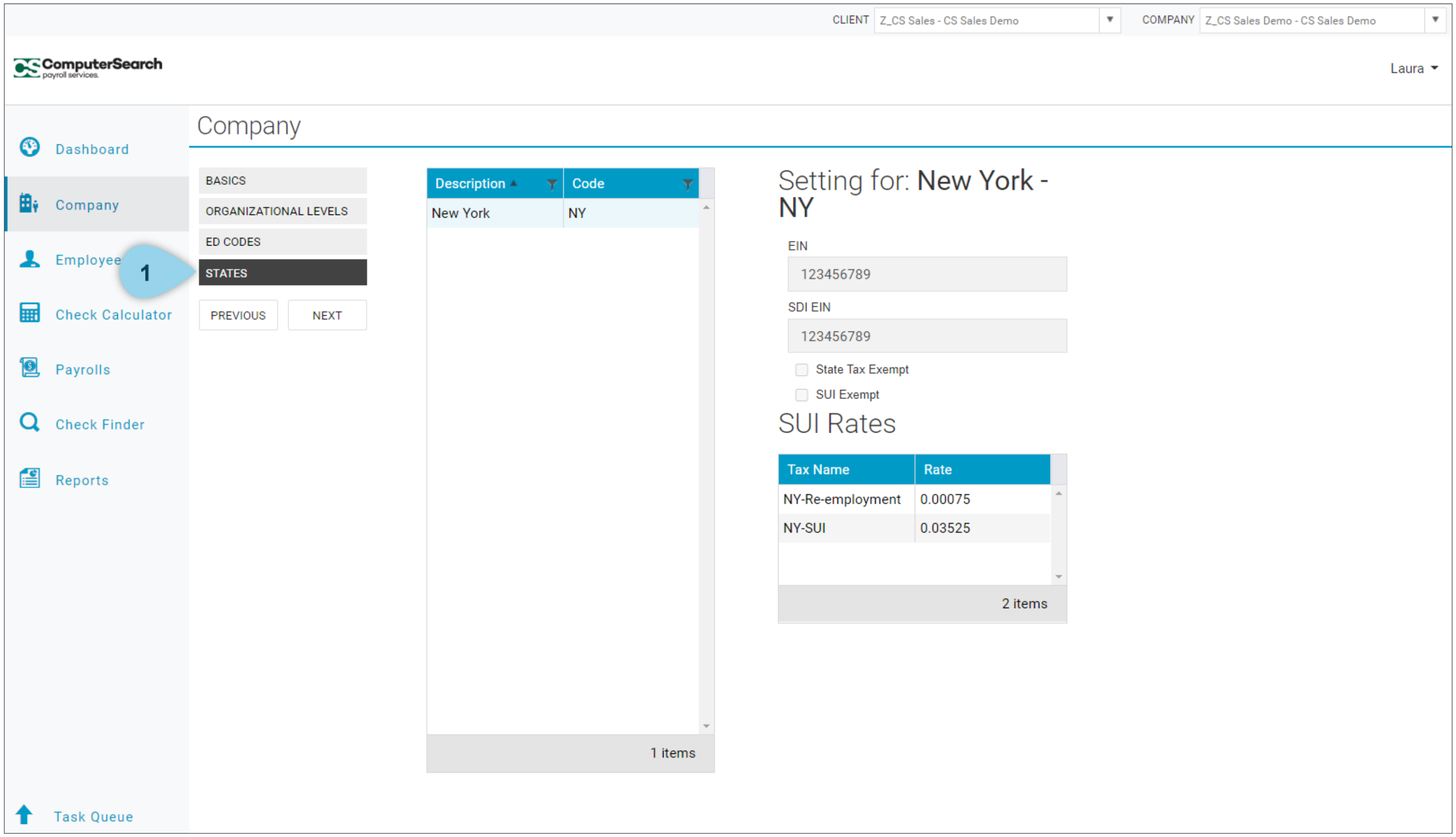
Additional ED Codes can be created or customized to your needs, just call your Payroll Specialist for assistance.



State

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

Changes cannot be made through this page.



Employee

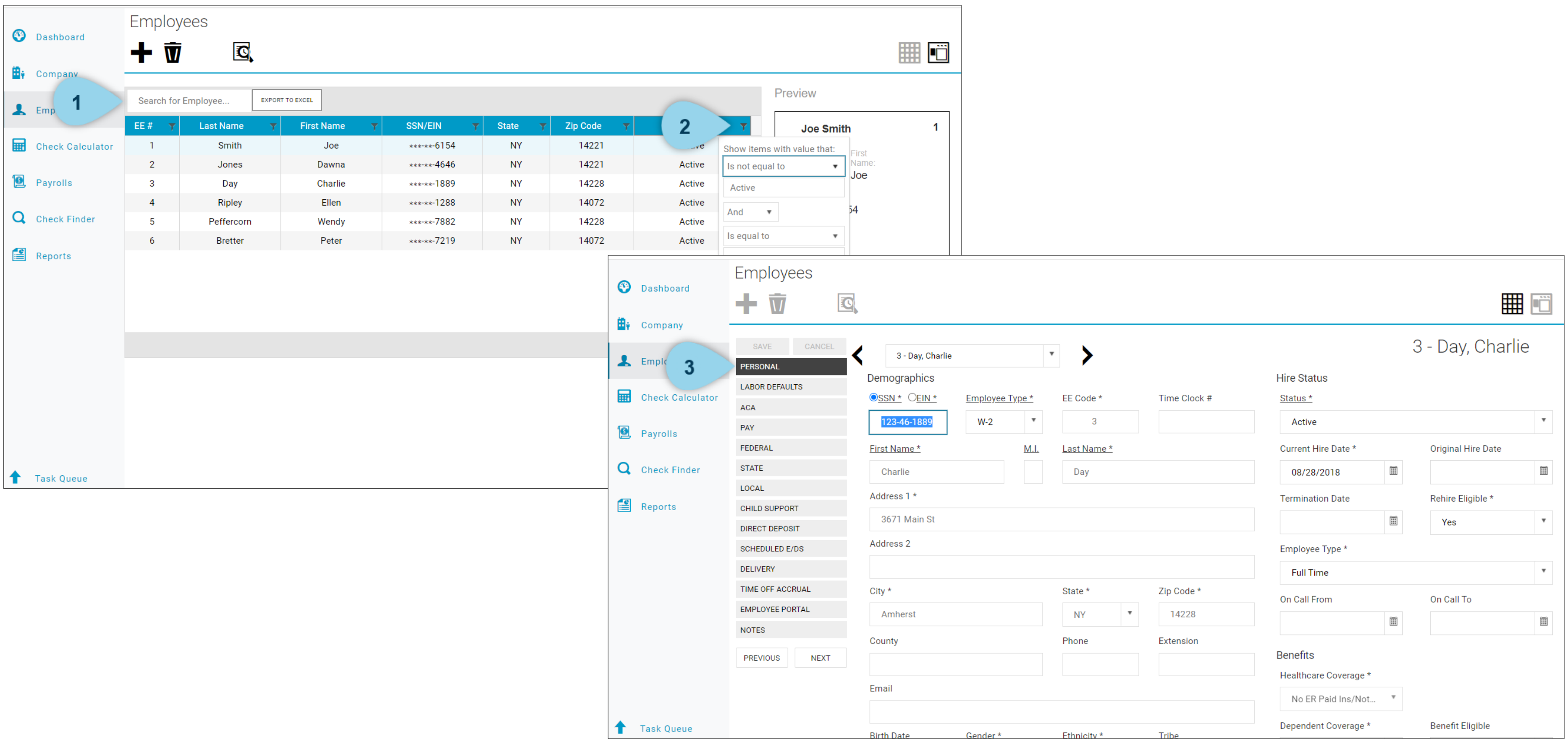
This section will provide a brief overview of the components accessible within the *Employees* page. You will learn how to:

- 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.

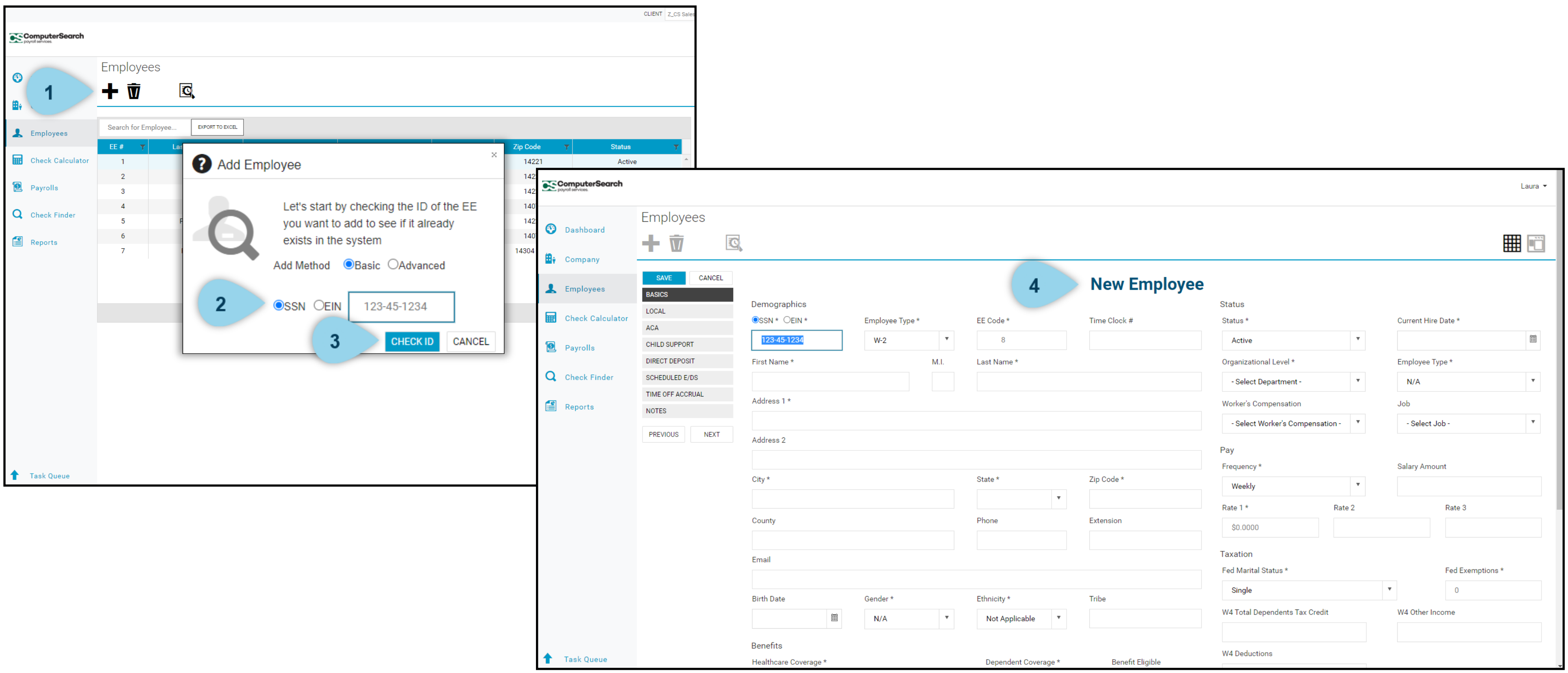
1. **To search for an active employee**, you may click through the list or you may use the search bar to enter an employee name or number.
2. **To search for an inactive employee**, click the filter icon in the status column header and switch the *Is equal to* drop down to the *Is not equal to* option, 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.



Add Employee

To add a new employee,

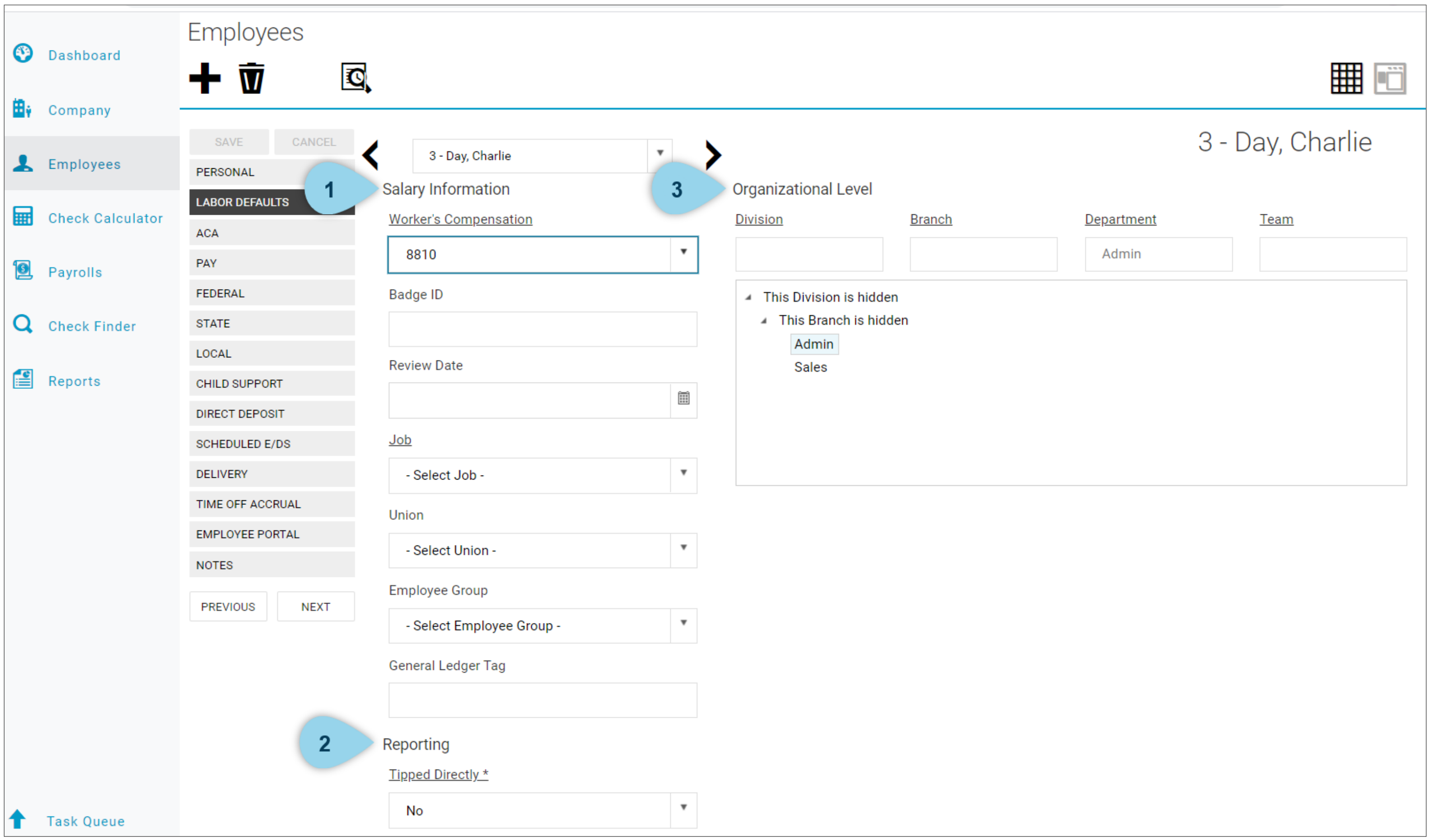
1. Click the large plus sign in the heading to create a new record The Add Employee box will open.
2. Select whether the Tax ID is a SSN or EIN and enter the Social Security Number or Employer Identification Number.
3. Click Check ID.
4. The New Employee screen will display—enter employee demographics, 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.



Labor Defaults

The **Labor Defaults** tab holds

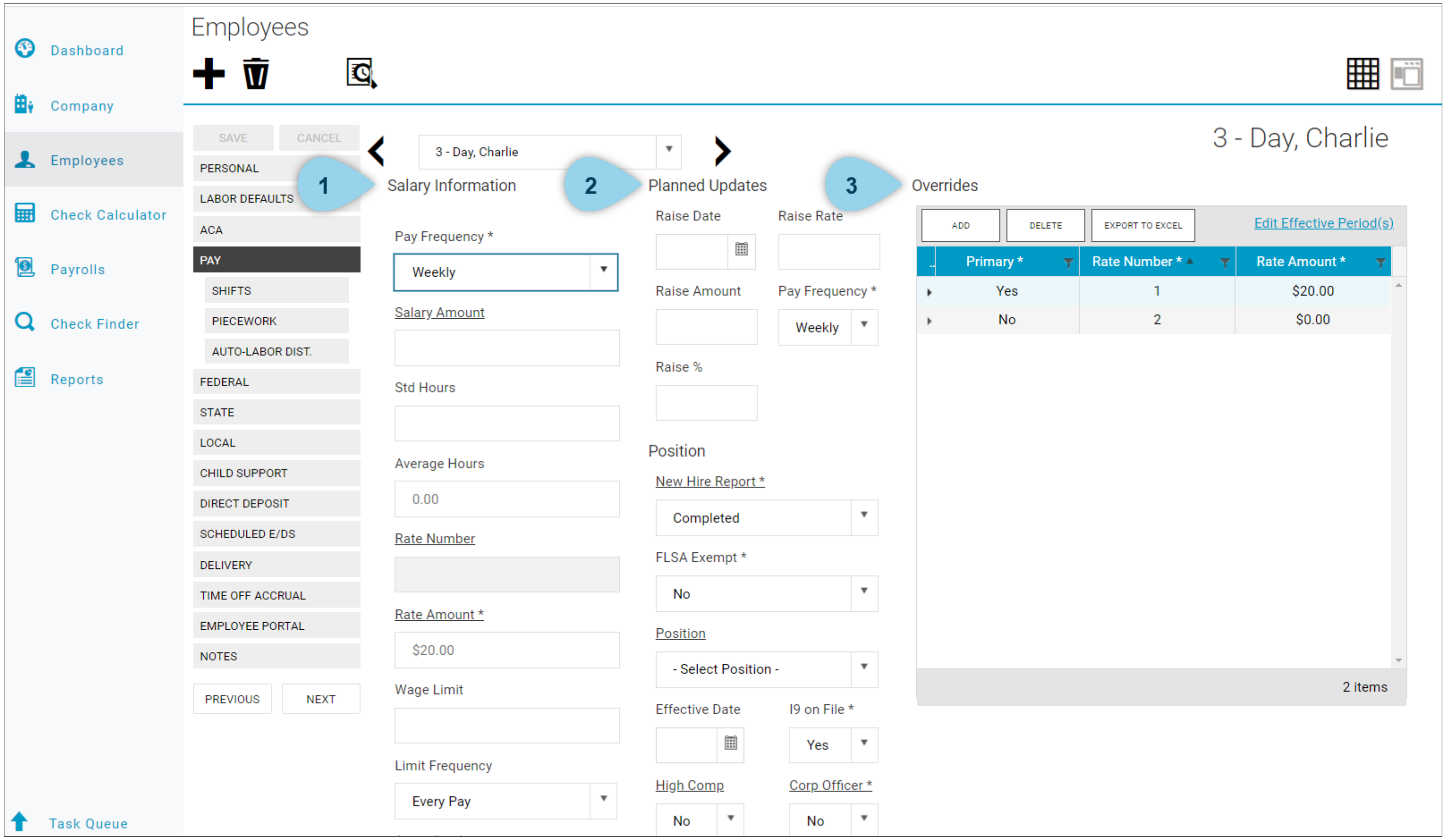
1. **Salary Information**: Use this section to update information for Worker's Compensation (if applicable).
2. **Reporting options**: You may also make selections under the reporting section to be pulled into a generated report.
3. **Organizational level**: If an employee is not yet assigned to a department,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



Pay

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

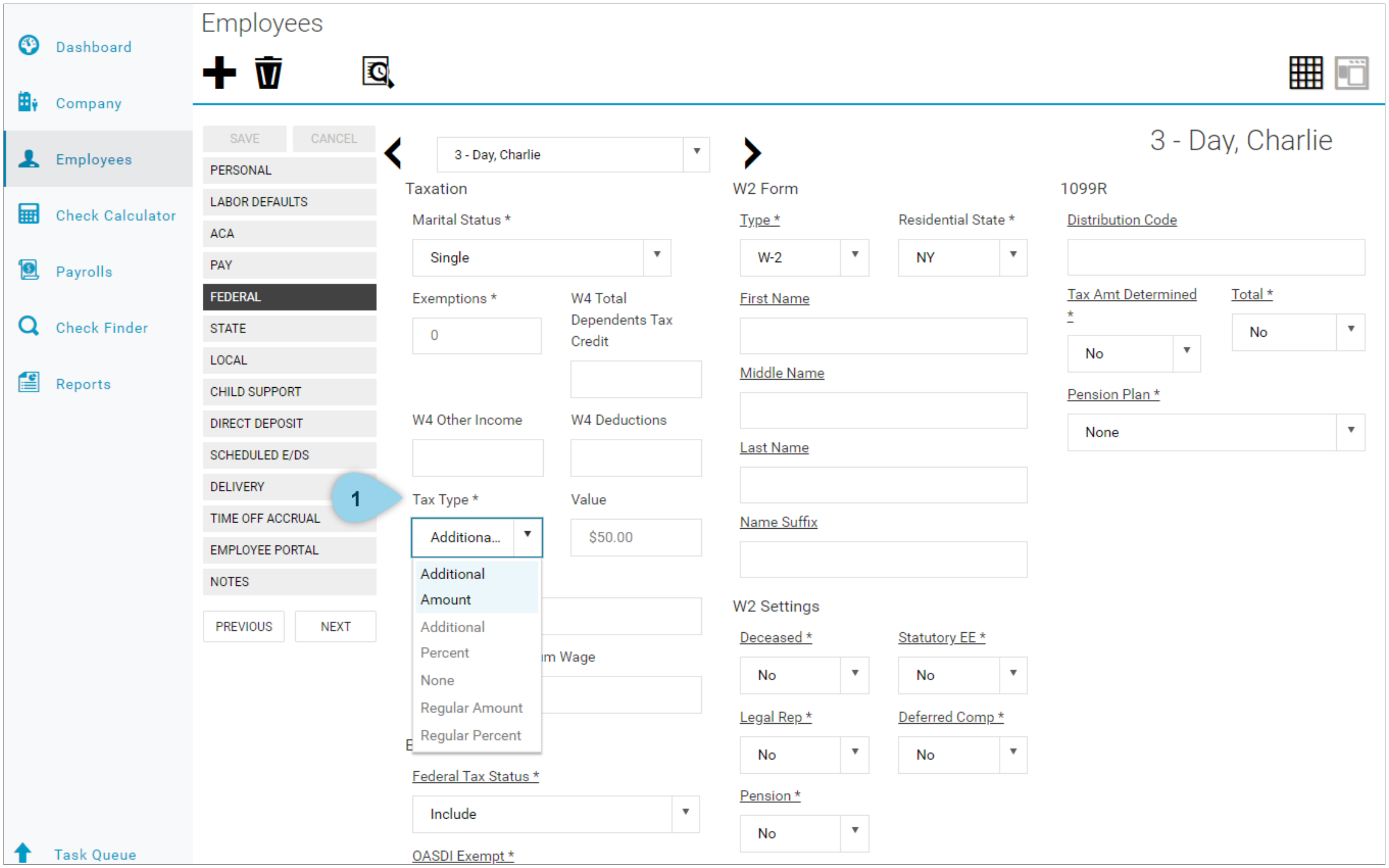
1. **Salary Information**: Review and edit the rate of pay, pay amount, pay frequency, and the employee's current position.
2. **Planned Updates**: Edit pay and/or position for future raise.
3. **Overrides**: This section is for clients who have a second or third rate for their employees. To add a second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



Federal Settings

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

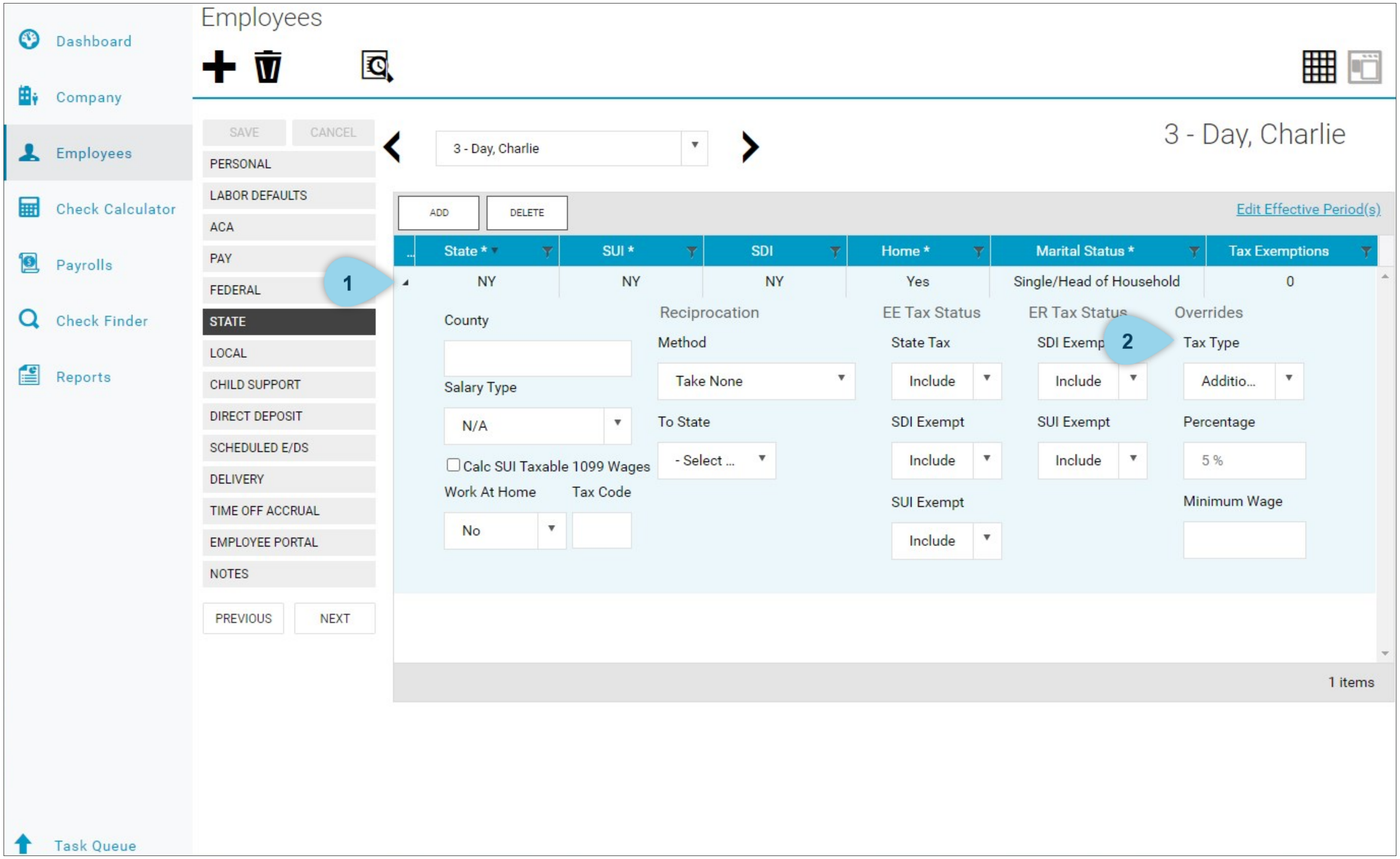
1. If you need to override, change the tax type and type in the additional amount into the value box. This will override the current federal tax amount being paid and pay out the new value entered each pay period.



State Settings

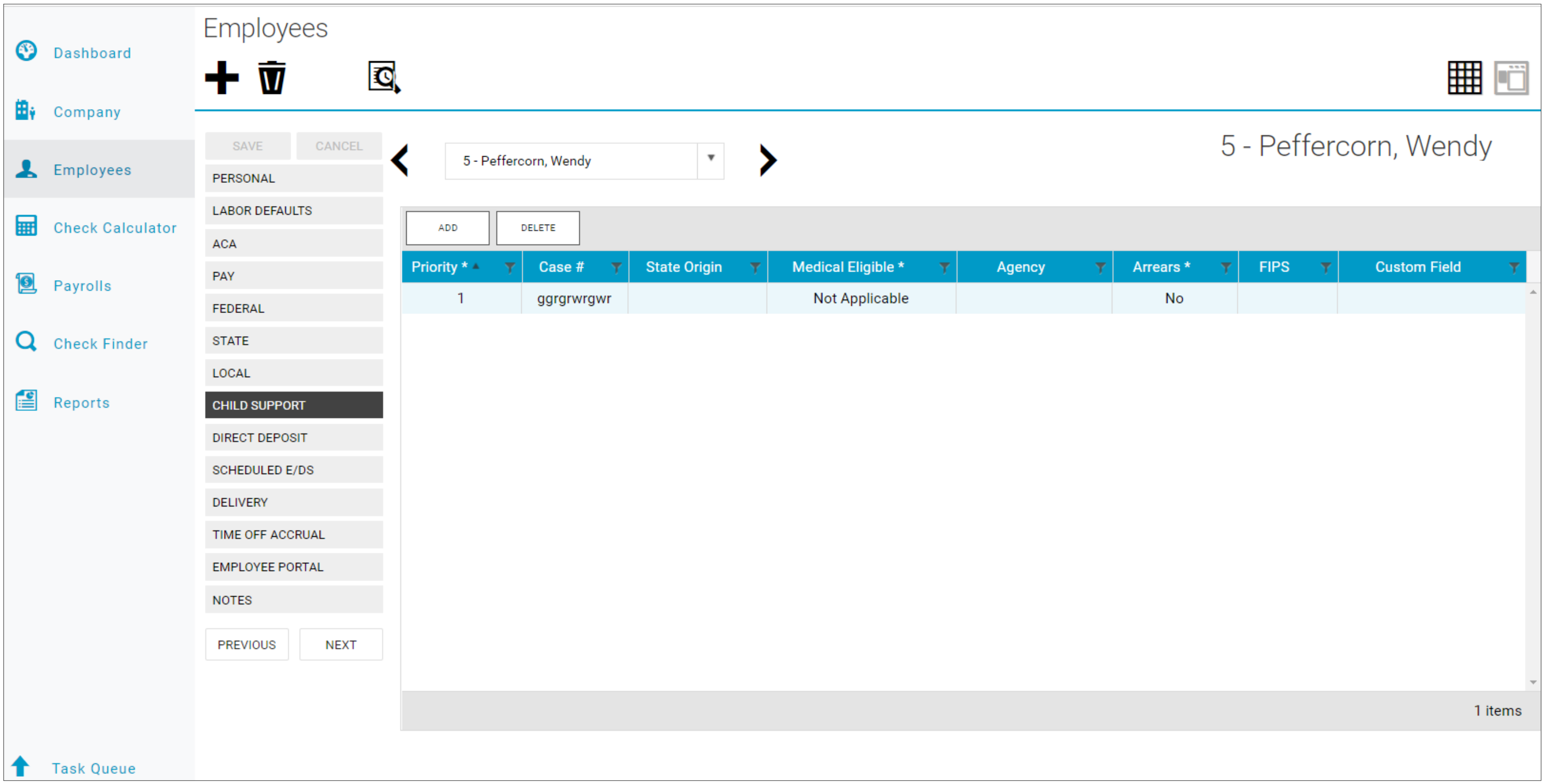
On the **State** tab,

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.



Child Support

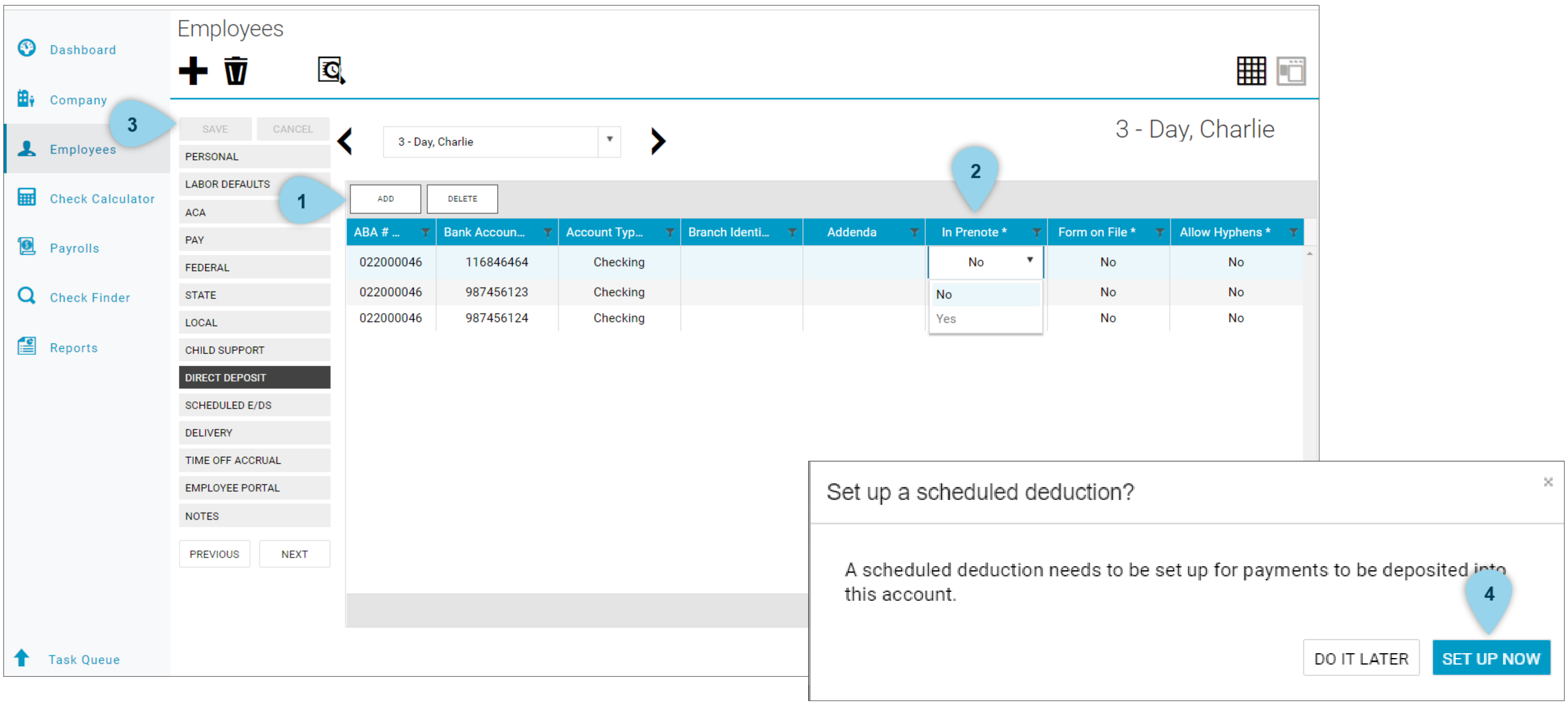
If the selected employee has a child support setup, it will show up on the **Child Support** tab. To have child support information entered into the system or to add a check or direct deposit, please email or fax the paperwork to your Payroll Specialist. Your Payroll Specialist will add it to the system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



Direct Deposit

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

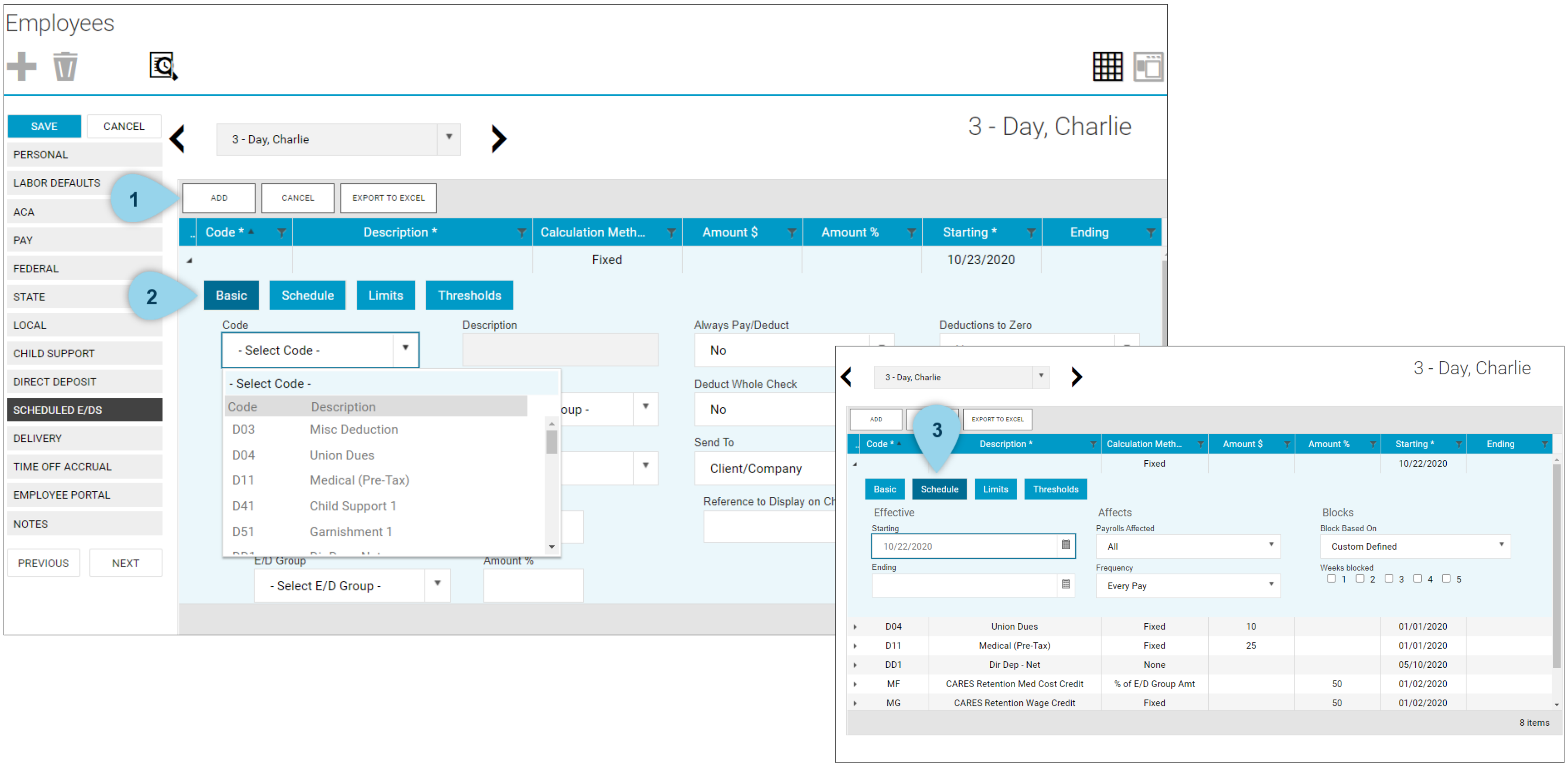
1. To add a direct deposit click Add; a new line will appear. Enter the bank account and routing numbers into the appropriate spaces.
2. Switch the In Prenote drop down to Yes, this notifies the system that this new bank account has not been verified yet which allows the system to verify the account 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.



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.

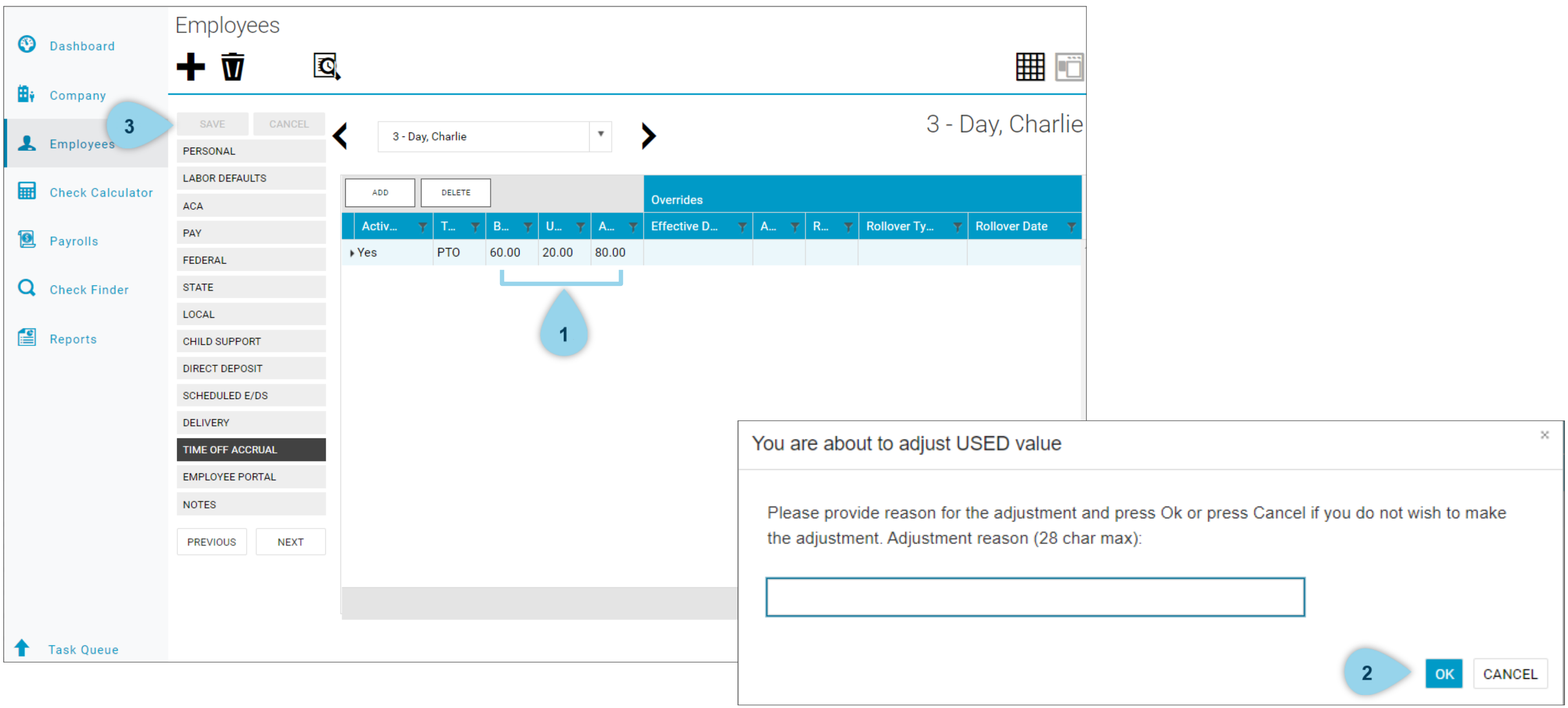
1. To add a new earning/deduction, click Add.
2. Use the Basic option to change the deduction type or amount. Select a code from the list of EDS available for the client. Enter the required information pertaining to the selected code.
3. To stop an existing earning/deduction, use the Schedule option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



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.



Check Calculator

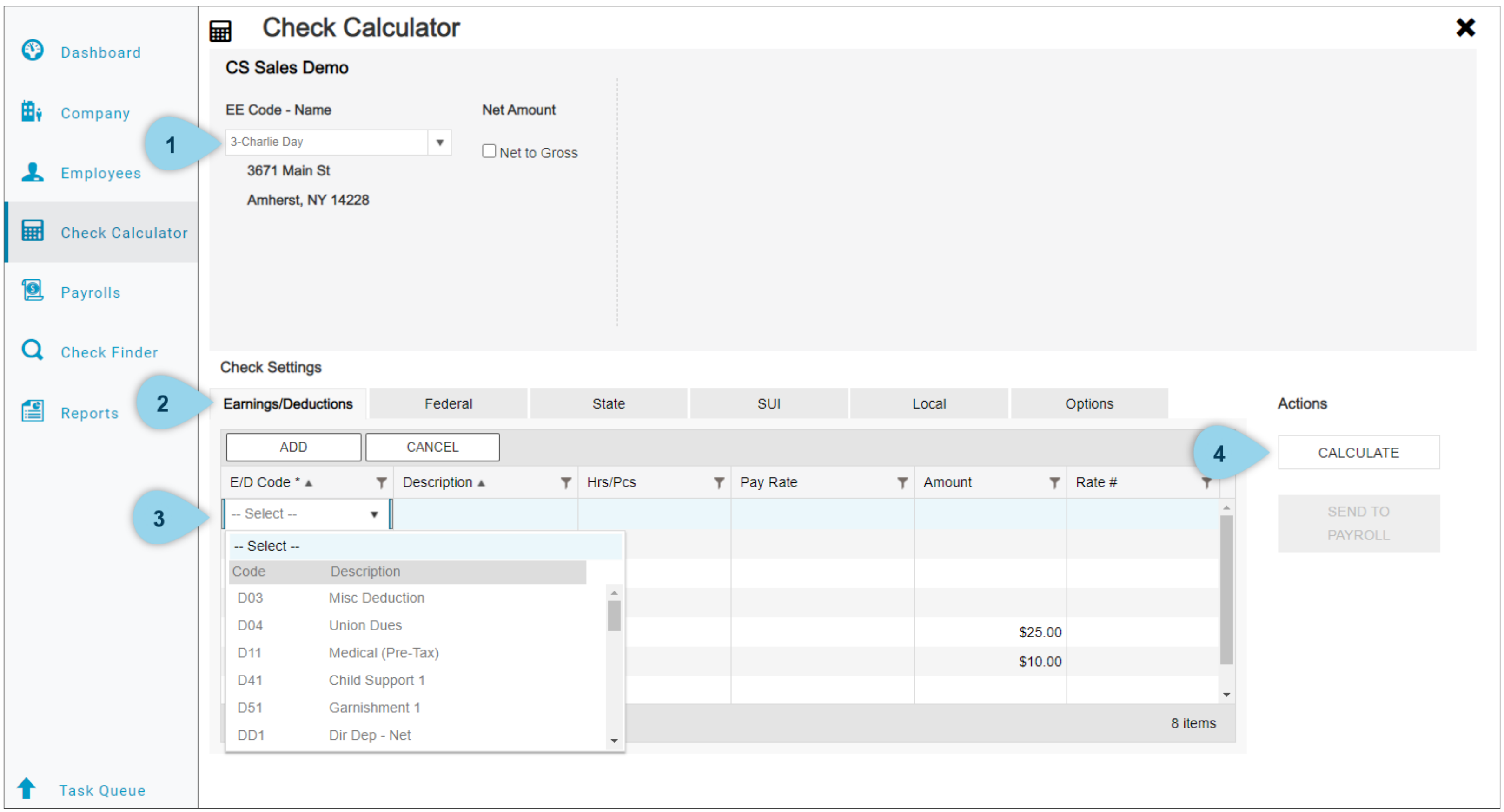
The Check calculator is a feature that can be used when you need to figure out a check amount for an employee to ensure you have it recorded for the next payroll (e.g. bonus check, missed check, misc. deduction). This section will provide instruction for:

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

Create a Check

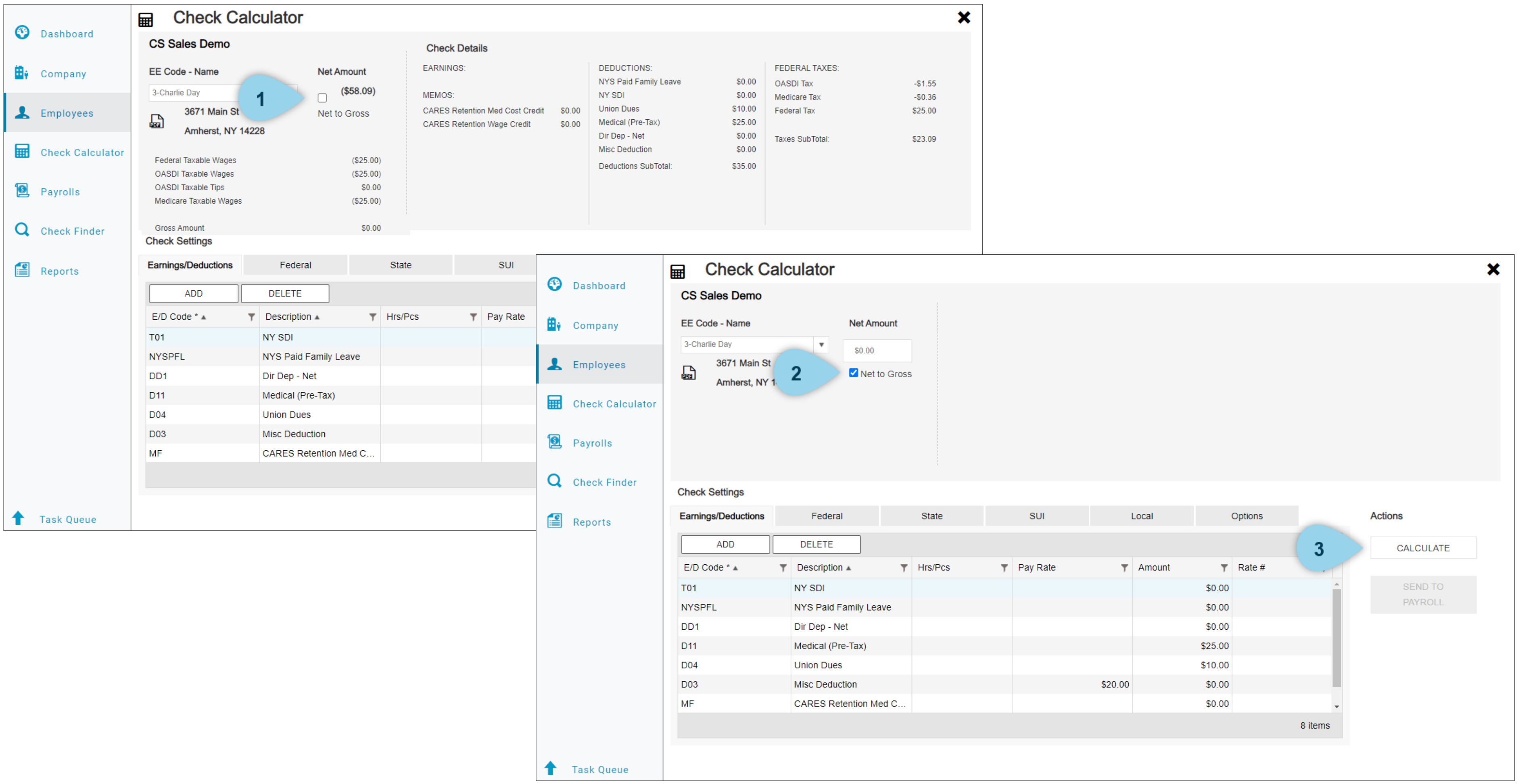
Check calculator is a feature that can be used when you need to figure out a check amount for an employee to ensure you have it recorded for the next payroll (e.g. bonus check, missed check, misc. deduction).

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.



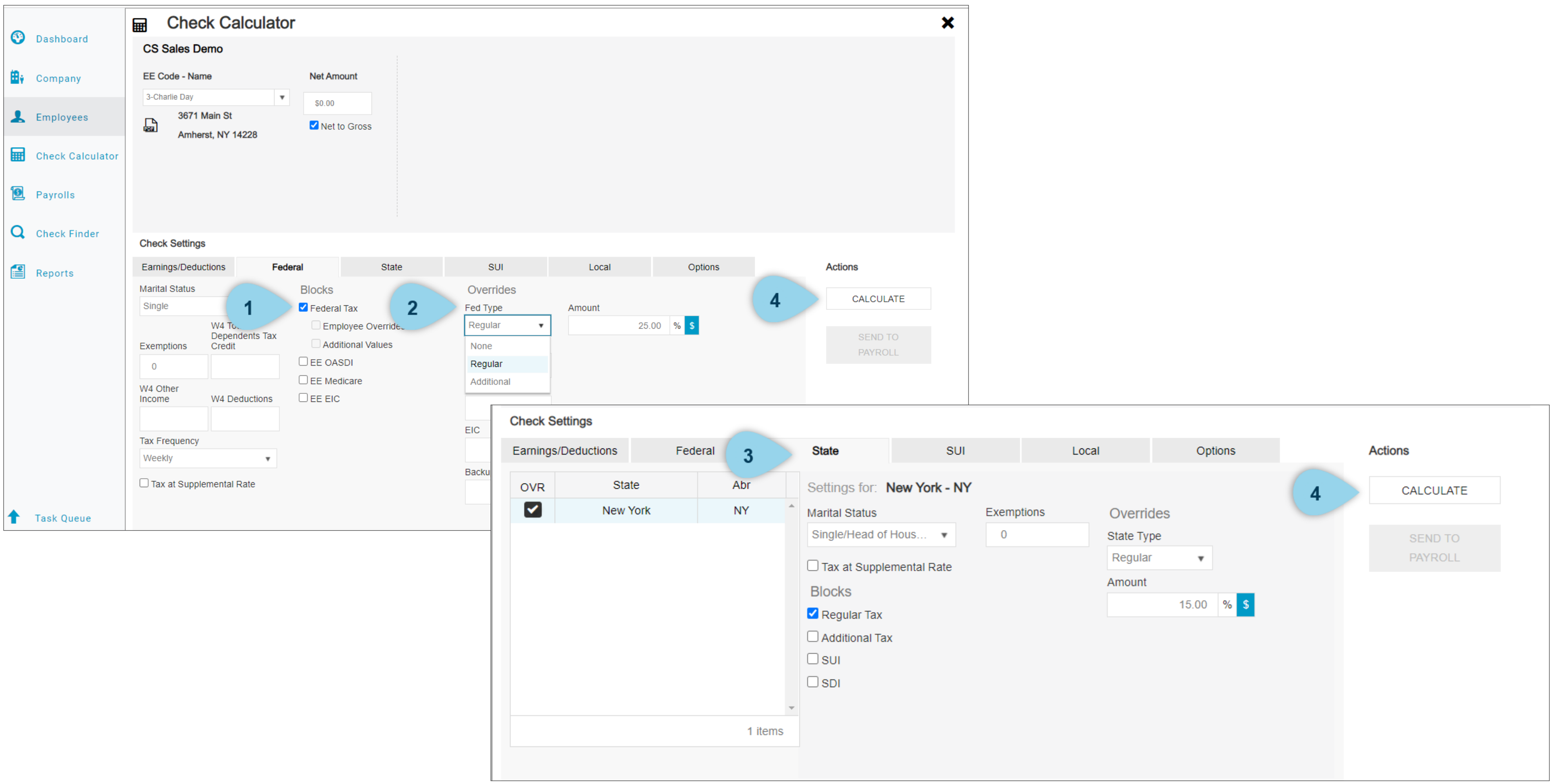
Net and Gross

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.



Tax Blocks

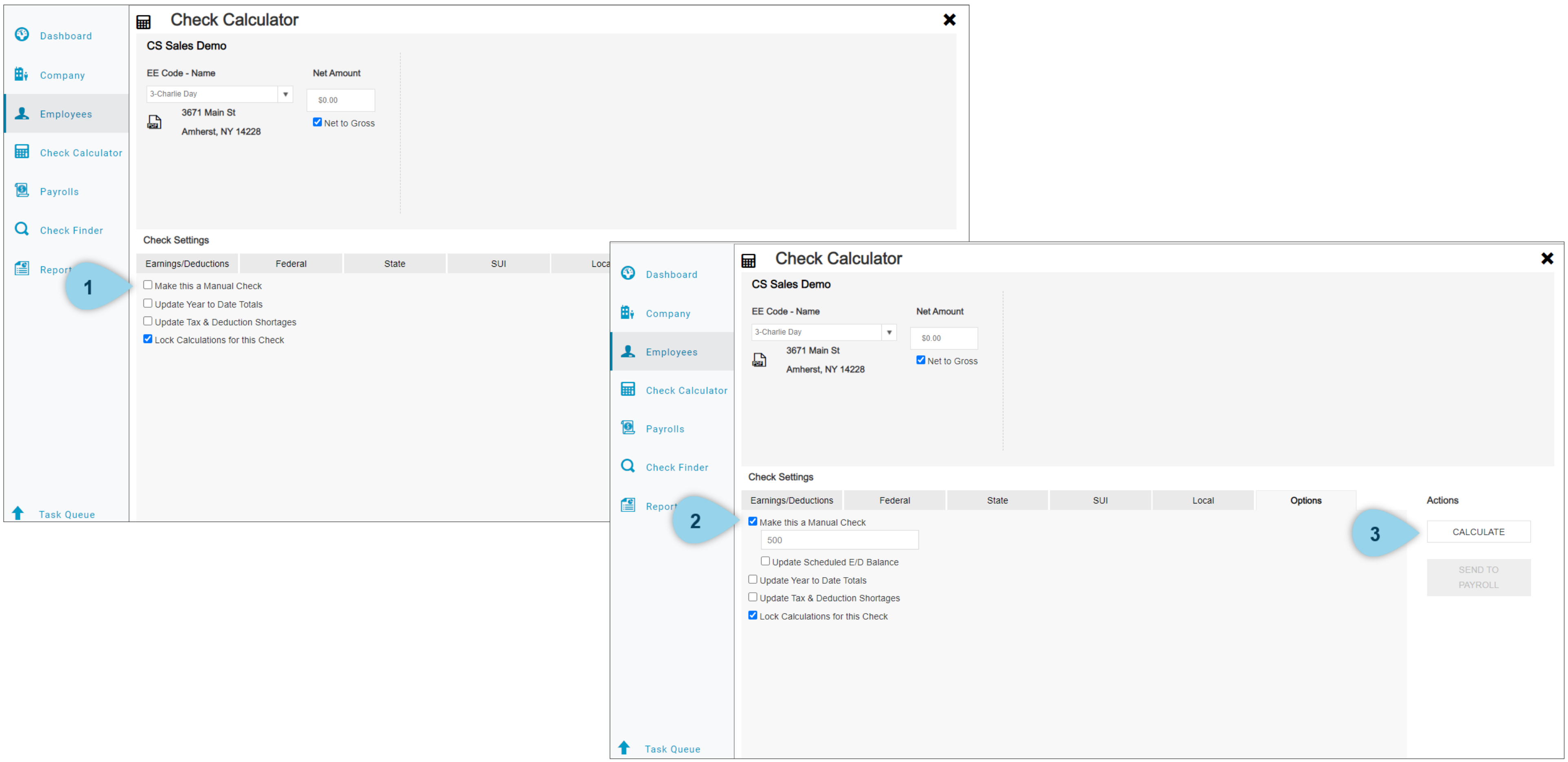
1. If the employee does not want any federal taxes to come out, click the Federal tab then check the federal tax box under the Blocks column.
2. If the employee wants a set amount or percentage to come out, change the Fed Type under the overrides column and enter the dollar amount or percentage.
3. The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



Manual vs Live Check

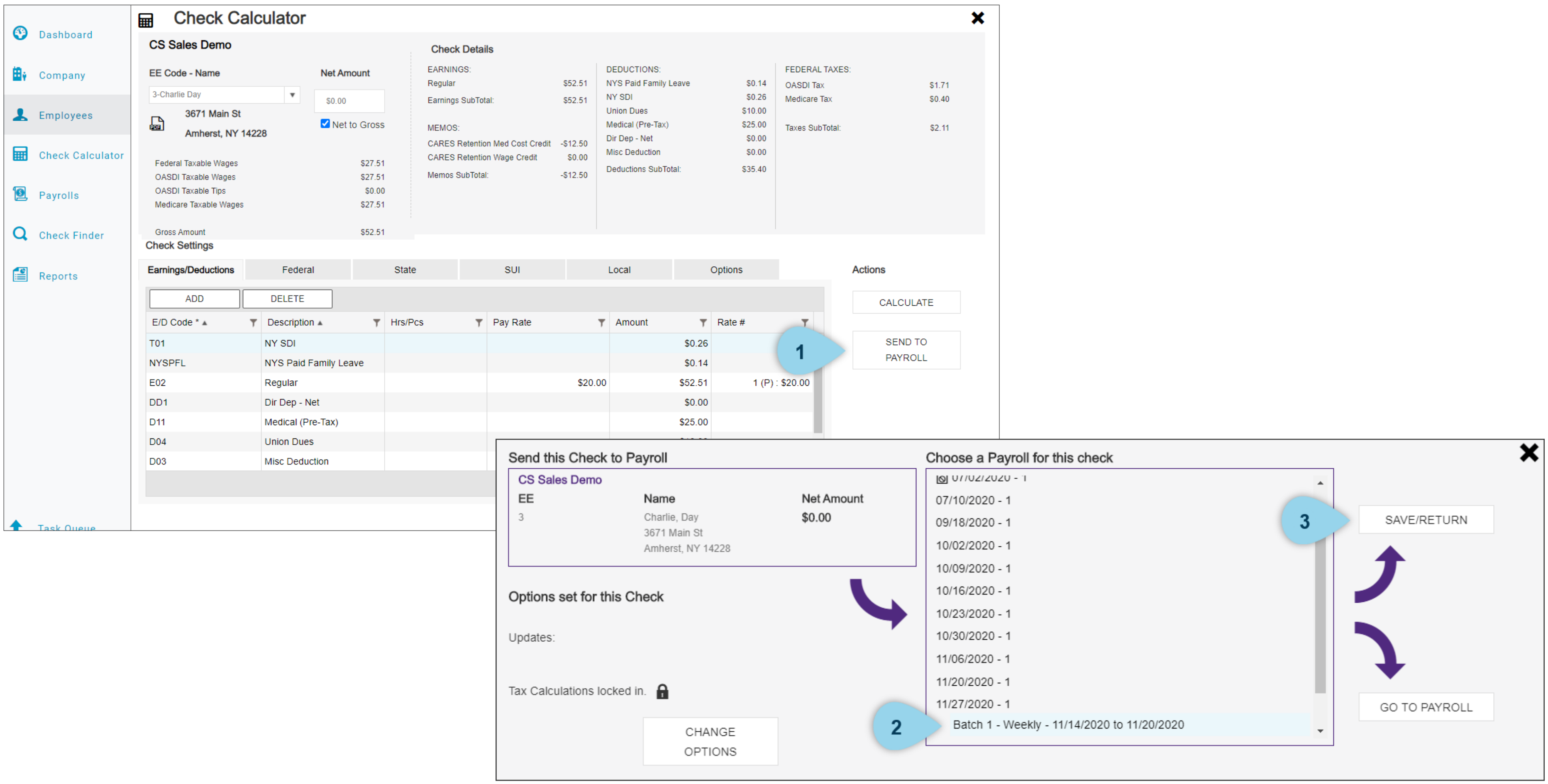
The last thing that you need to do is under the Options tab. The selections made in in this section will tell the system if the check recorded is going to be a manual check that you are recording or if it is going to produce a live check.

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.



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.



Payroll

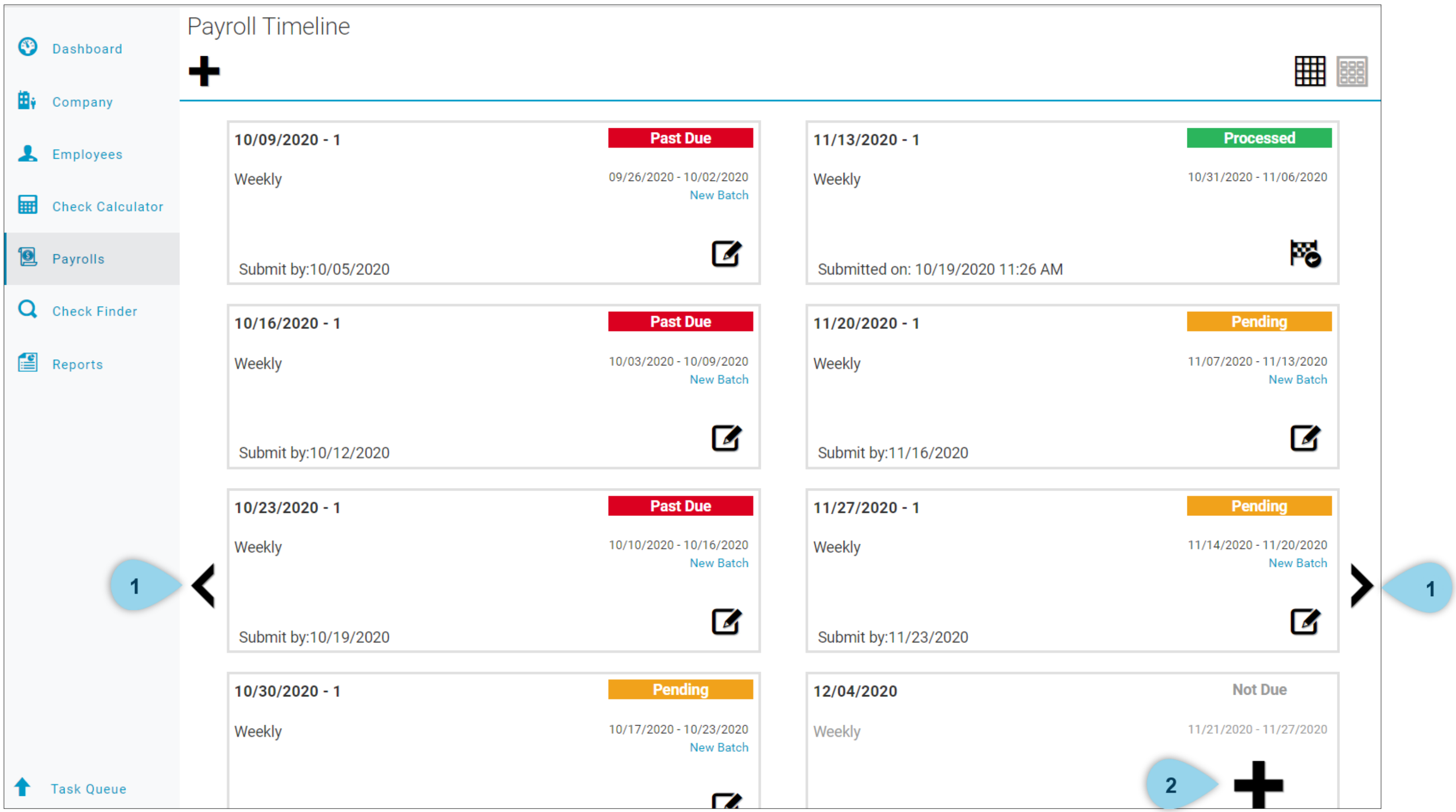
This section will provide an in-depth review of the components accessible within the *Payroll* page needed to process payroll. You will skill up on:

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

Payroll Timeline

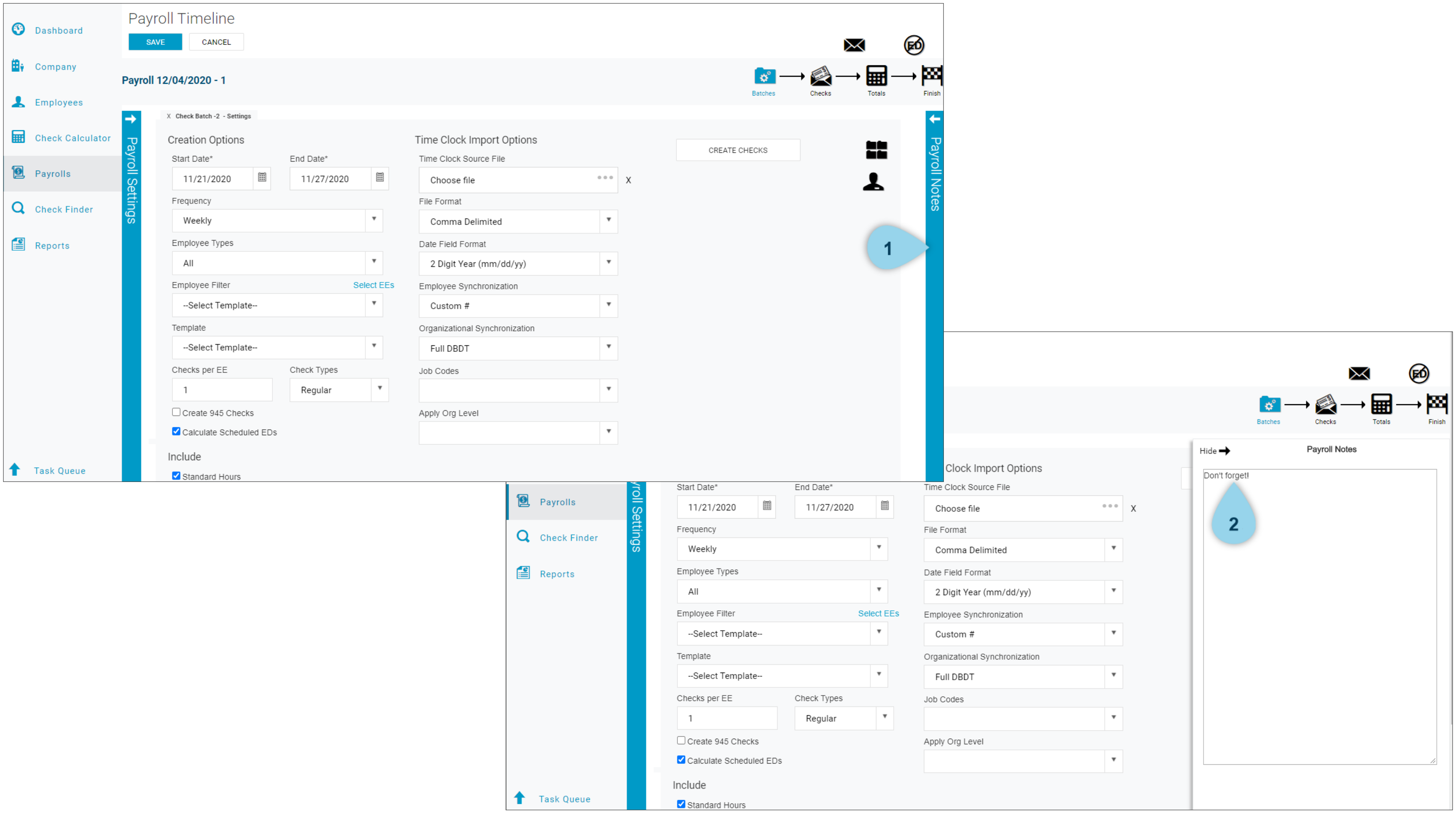
The Payroll page is where you will pre-process and process payroll. When you first enter the Payroll page, you will see your **payroll timeline**. The Evolution software prepares for future payroll periods and stores previously generated payrolls.

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.



Adding Notes

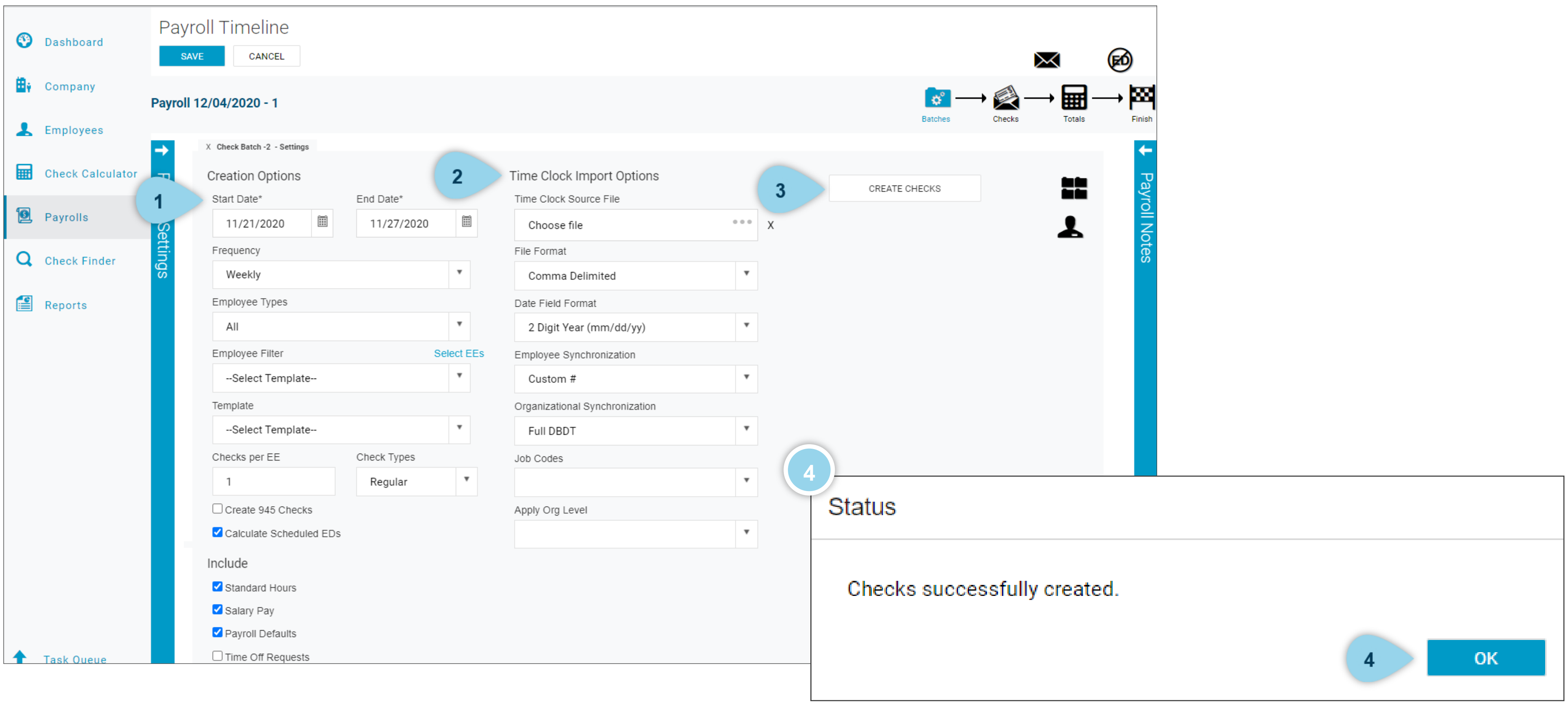
1. To the right of the page is a sidebar labelled Payroll Notes.
2. You can add and edit and notes for that specific payroll week by clicking in the box and entering any reminders you may need.



Creation Options

Creation Options is where you will create your batch.

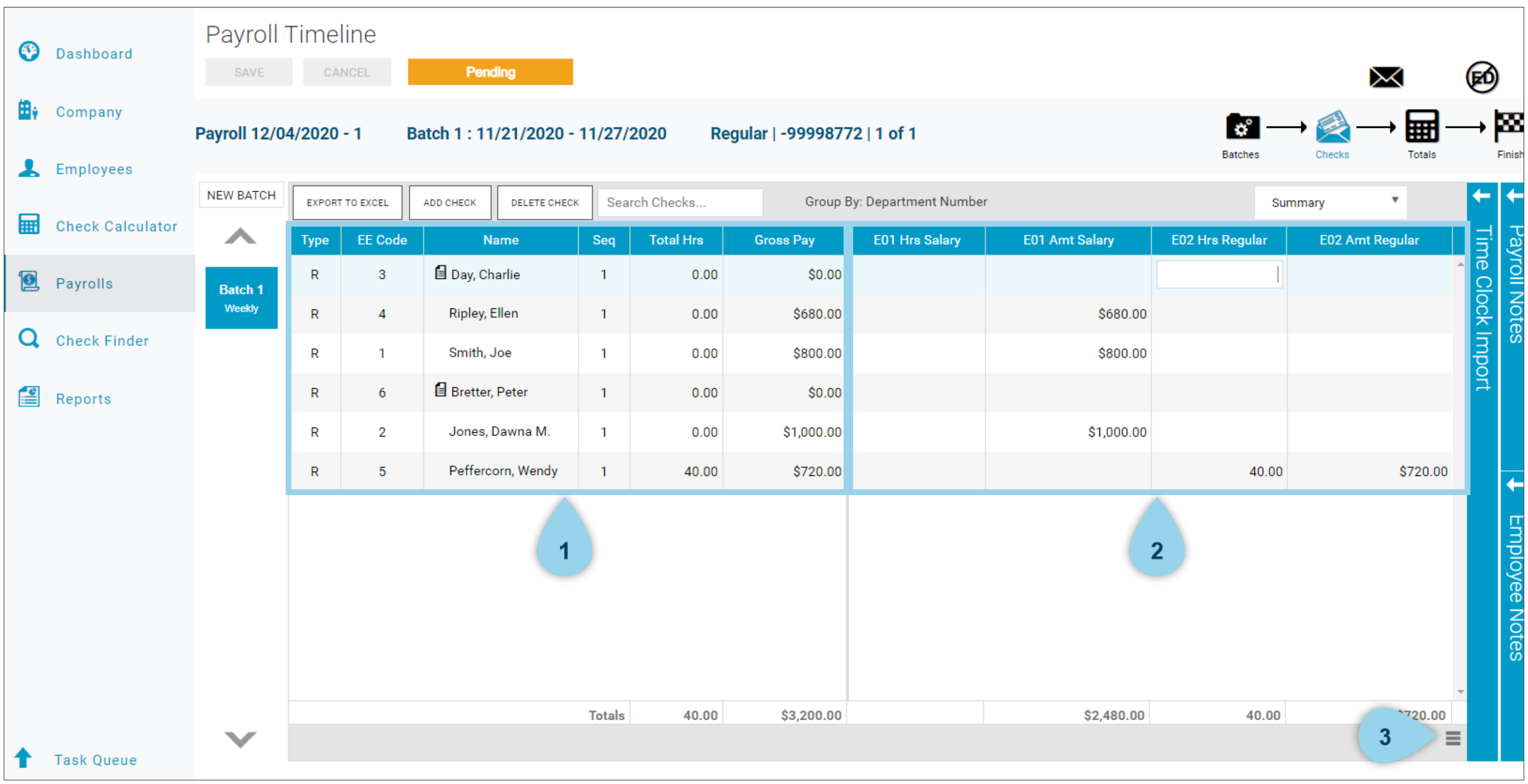
1. The start date and end date are automatically filled out as are the options below.
2. The time clock import can be used if the client has a way to import files for their time clock. If this applies to you, a separate instructional resource will be made available.
3. If everything looks correct, click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



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.

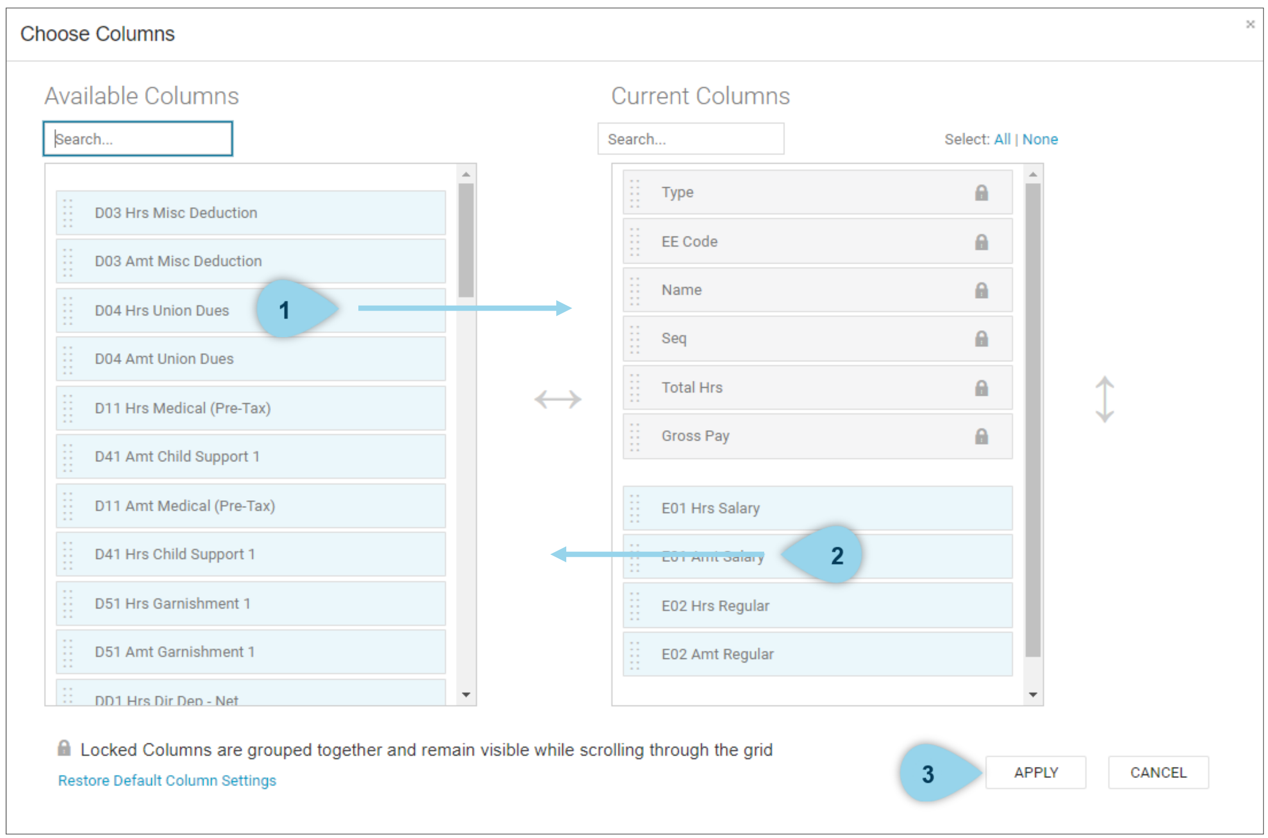
1. The information within columns “Type” – “Gross Pay” are set.
2. The information within the columns to the right of Gross Pay can be edited by clicking into the cell and keying in the data.
3. You may **add any columns** you want to appear in this table. At the bottom right of the table, click on the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



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.

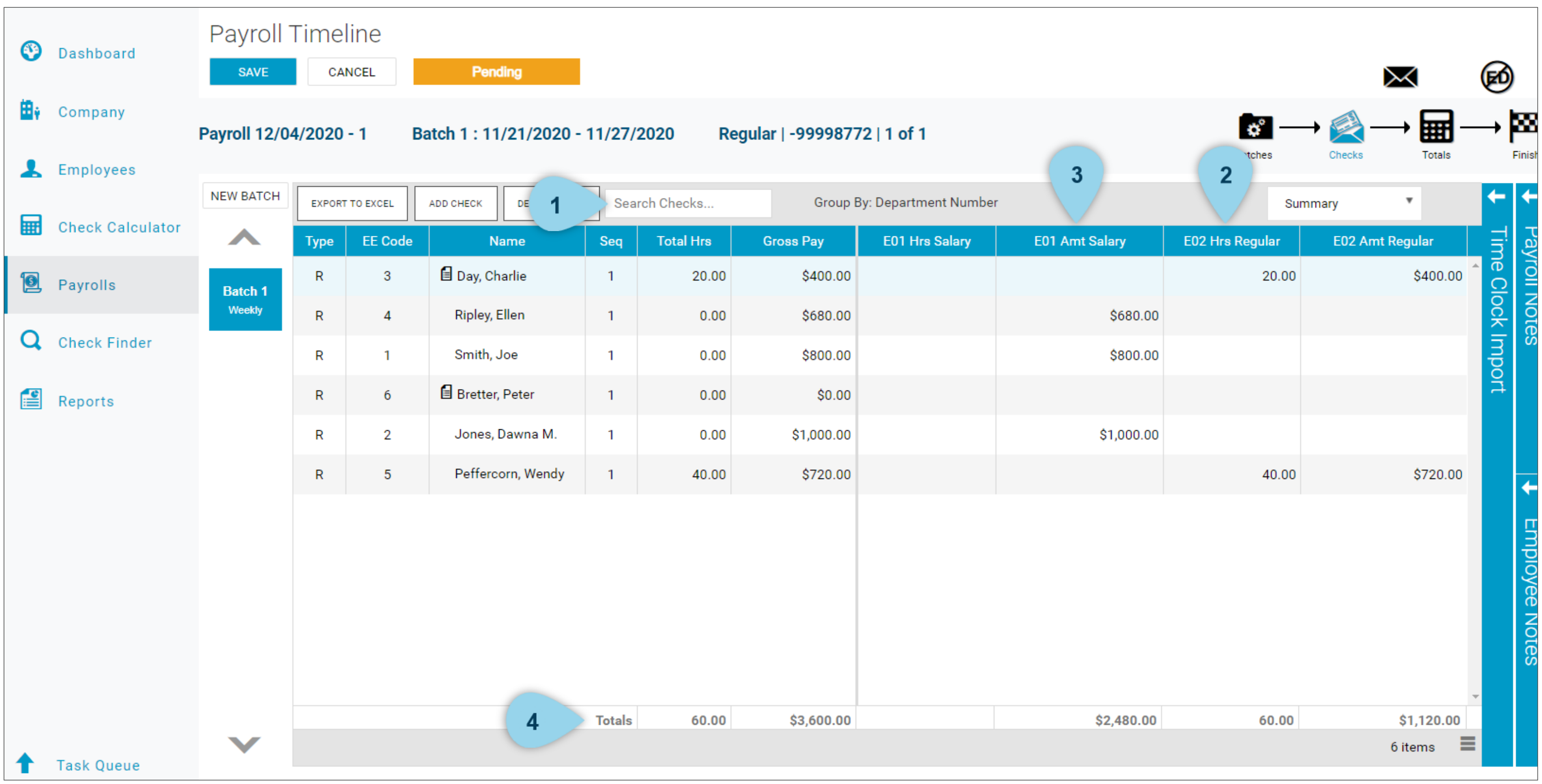
1. To add a column to the current columns list, click and drag it from the available columns list.
2. To remove a column from the current columns list, click and drag it from the current columns list to the available columns list.
3. Click apply to save changes.



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.

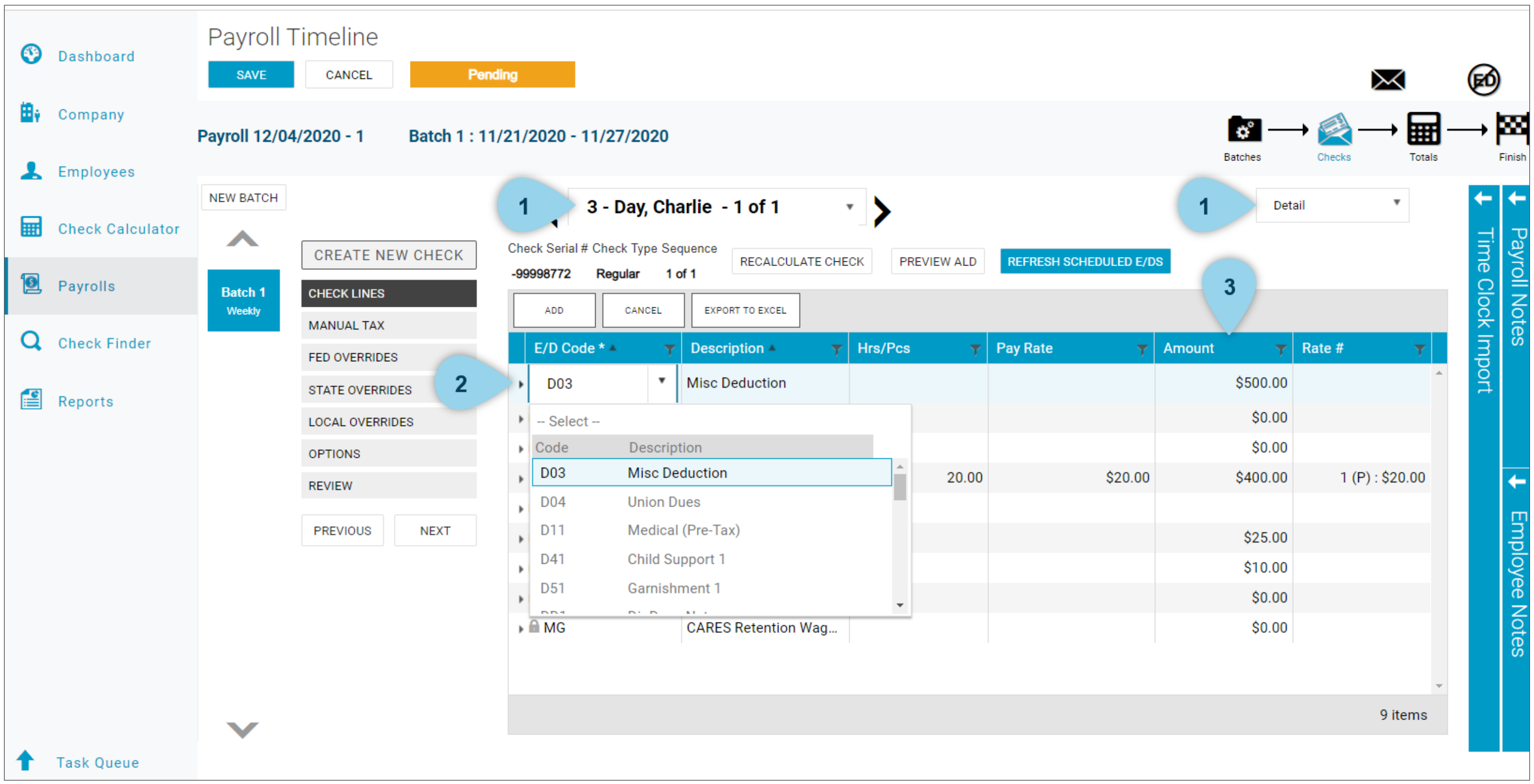
1. Start by searching for the employee; you may do this by entering the employee's name or number into the search bar.
2. If an employee is paid hourly, it will calculate how much they are paid for the hours worked at their hourly rate. To change either amount, click inside the box containing the value 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.



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),

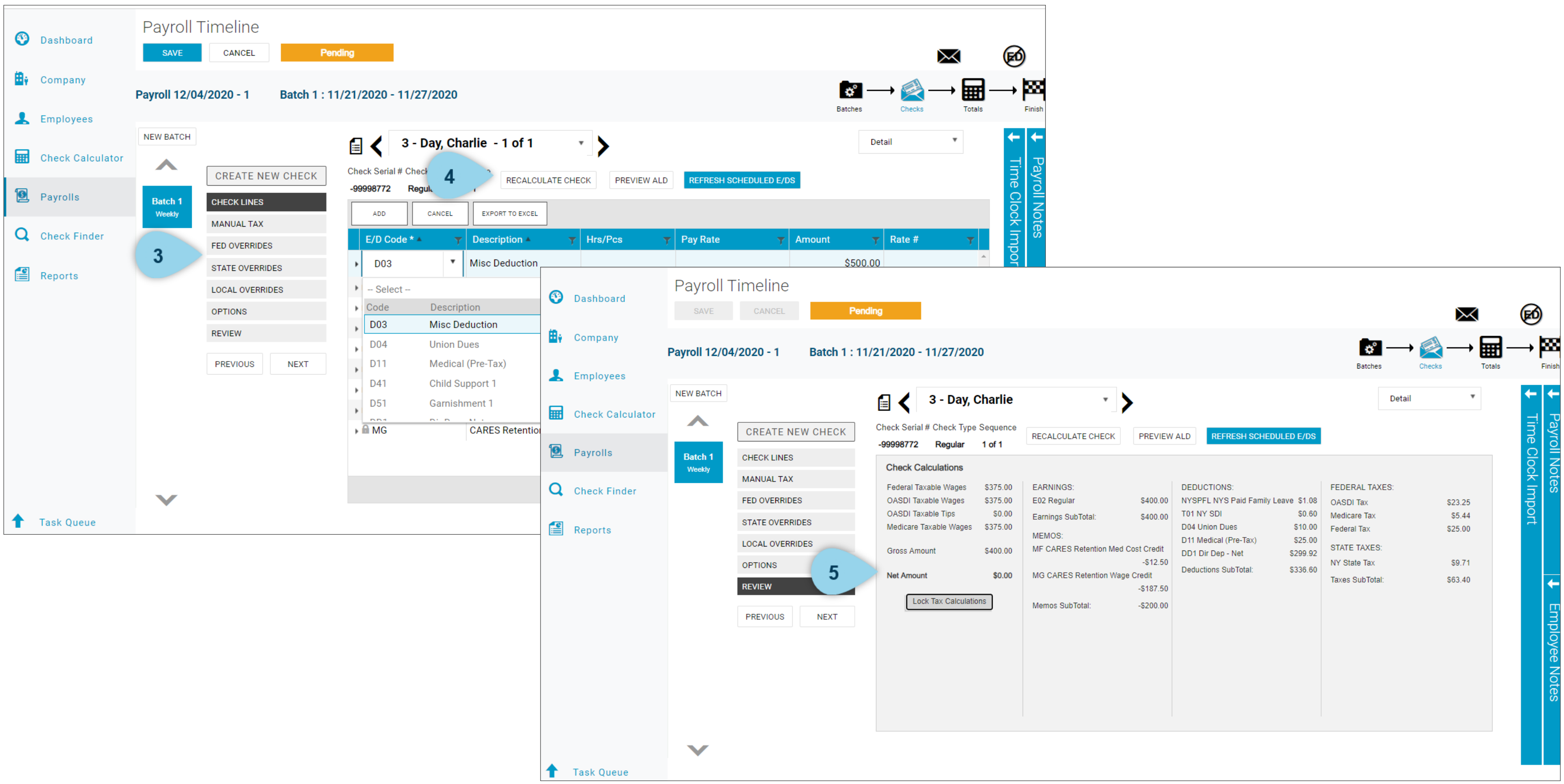
1. Select the employee then switch the Summary dropdown to Detail. The Detail page brings up a list of all the lines for that particular check.
2. To add a one-time deduction click Add then select the E/D code from the dropdown list.
3. Enter in the deduction amount.



One-Time Deduction

To finish up your one-time deduction,

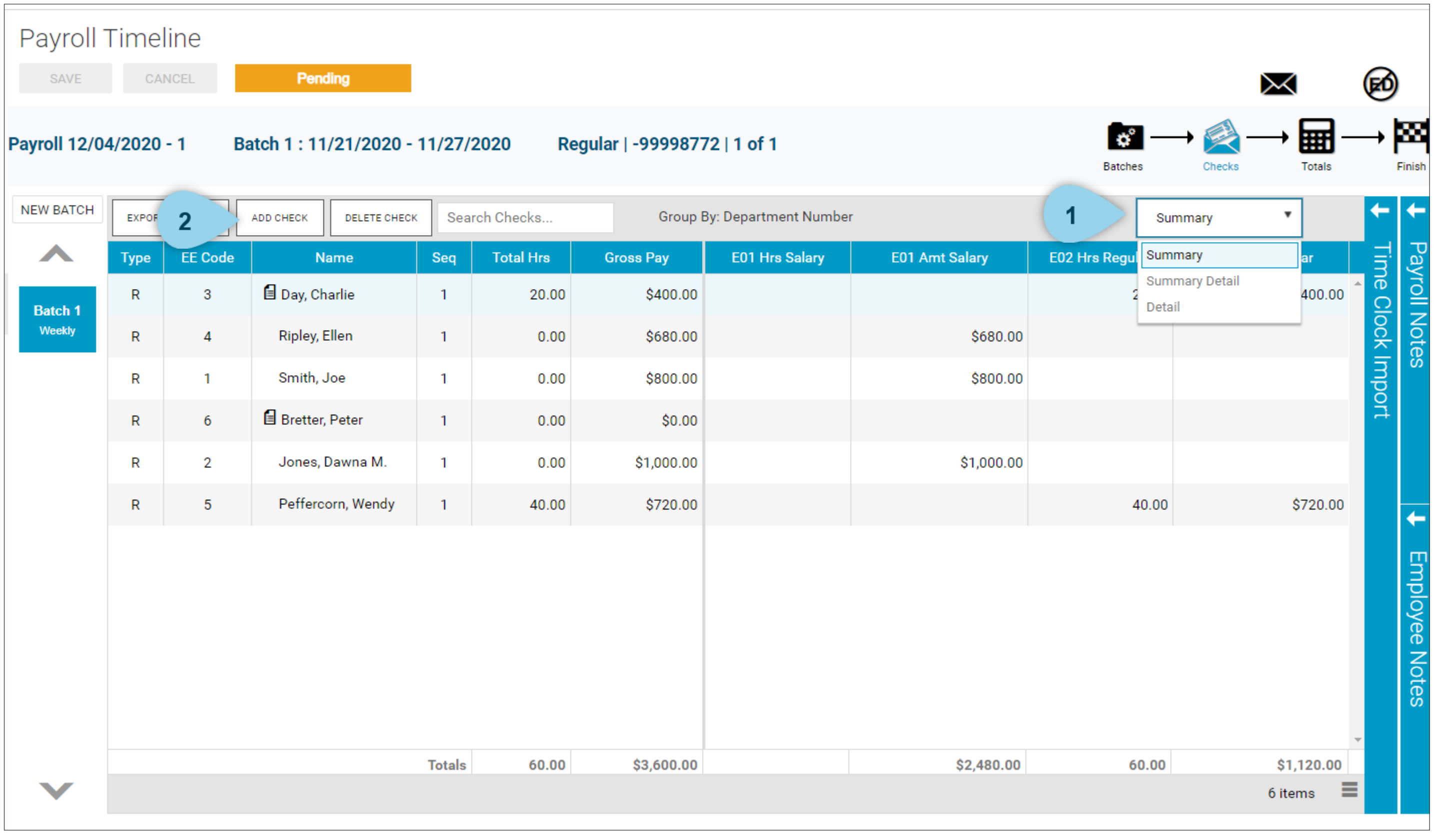
3. If you have an override or need to adjust Federal and State tax blocks, you may do so through the Fed Overrides and State Overrides tab on this page.
4. Click recalculate check, it gives you Check Calculations summary.
5. You may notice the Net Amount is 0, this will occur if the employee is paid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



Add a Check

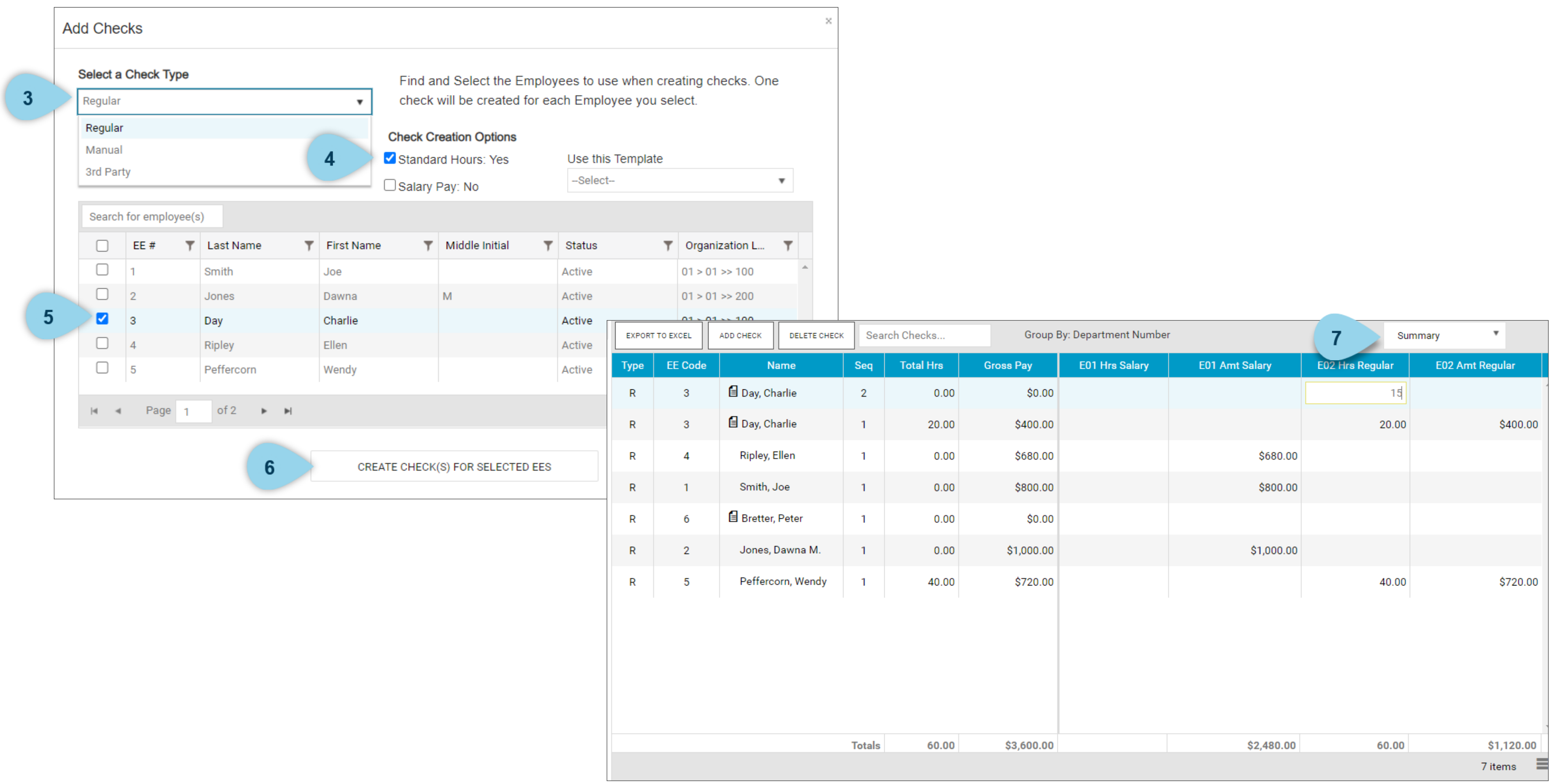
To **add a check** for an employee,

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



Add a Check

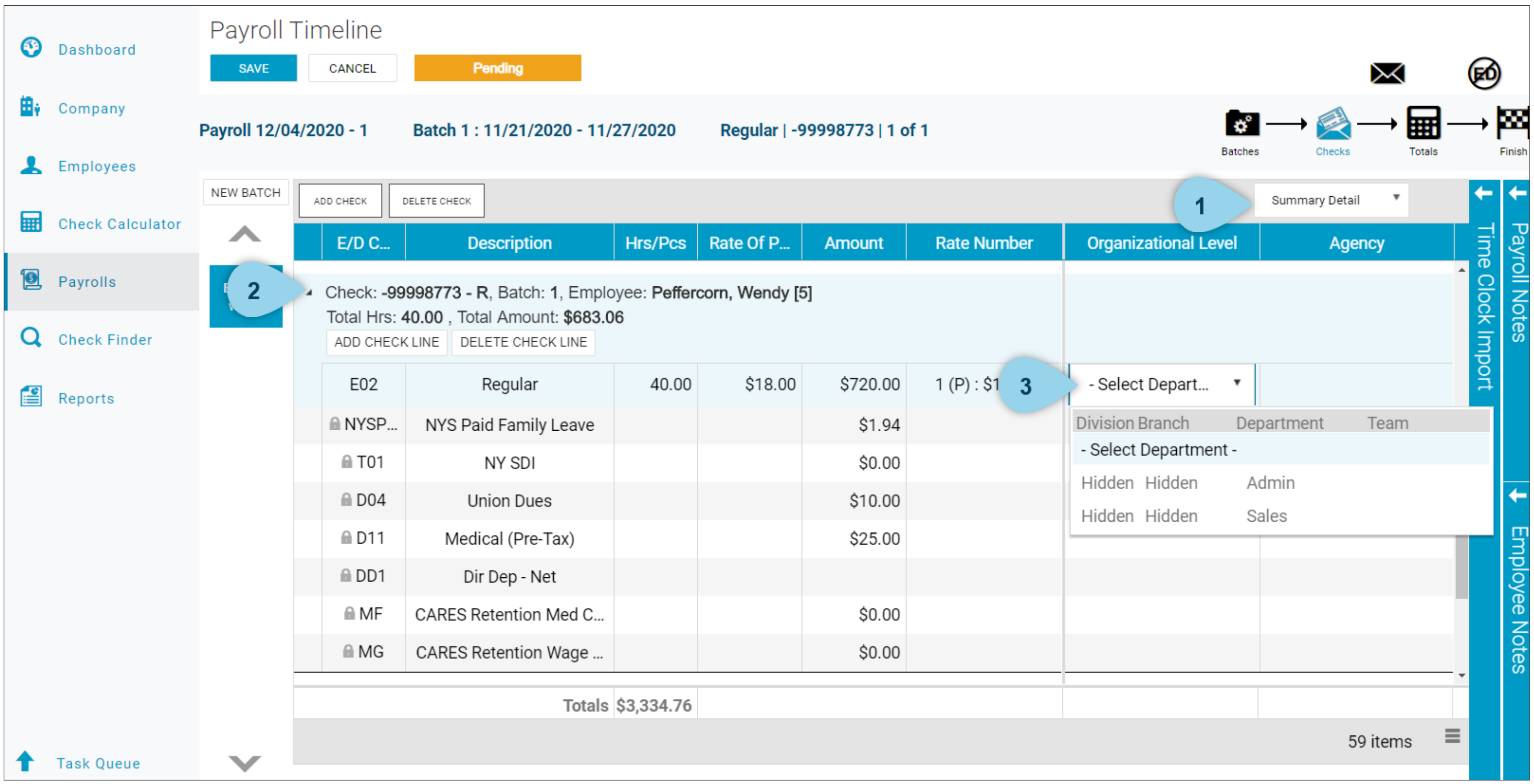
3. Select the type of check from the dropdown list.
4. Check the applicable box for either Standard Hours or Salary Hours.
5. Search for the employee for whom you are creating a check, check the box next to their name.
6. Click CREATE CHECK(S) FOR SELECTED EES.
7. A check line will be created for that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



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.

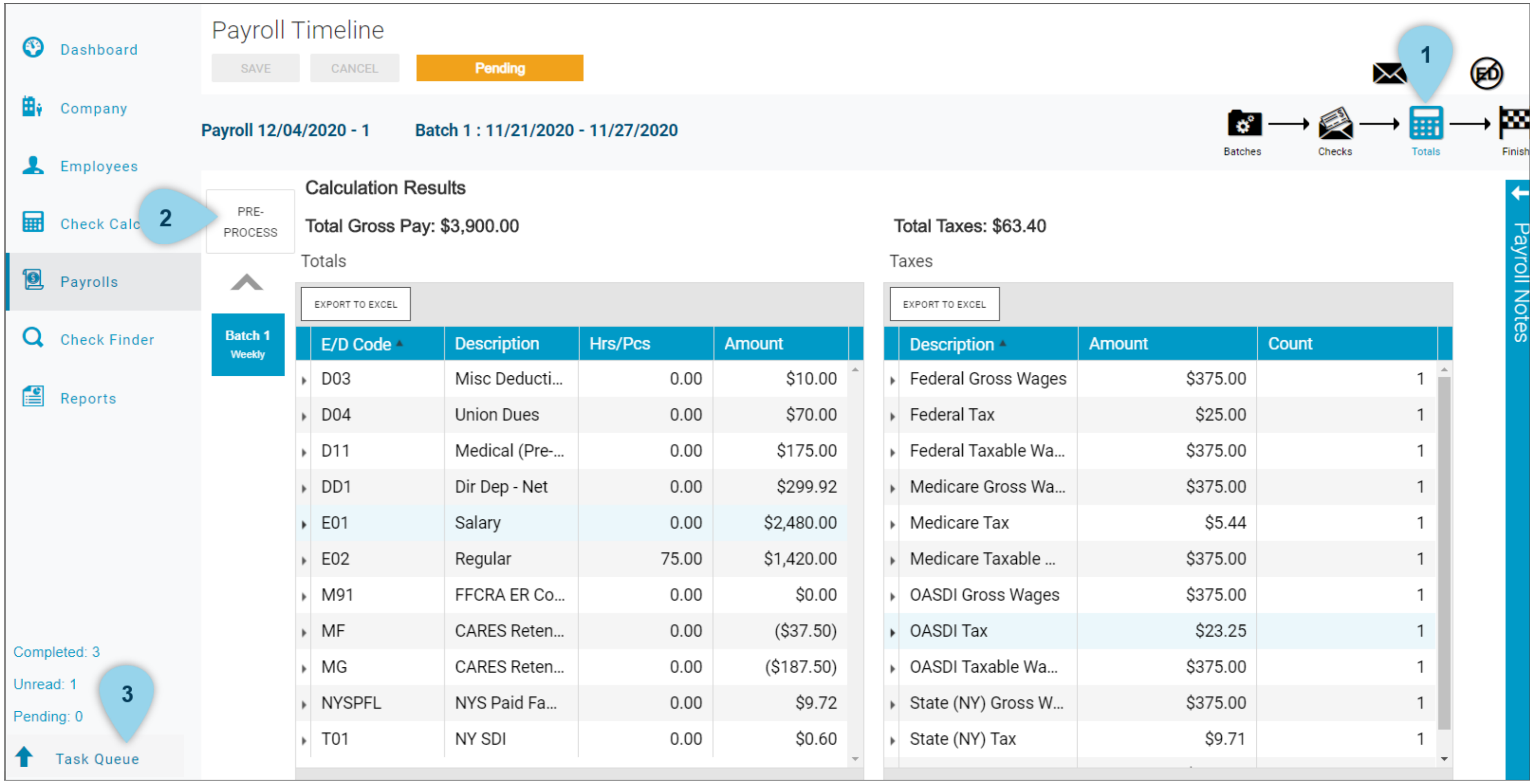
1. Switch the Summary dropdown to Summary Detail,
2. Scroll through to locate the employee you need to review. Click on the arrow to expand the employee information.
3. If you want to add hours over a different department, click inside the Organizational column, select the appropriate department, then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



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*.

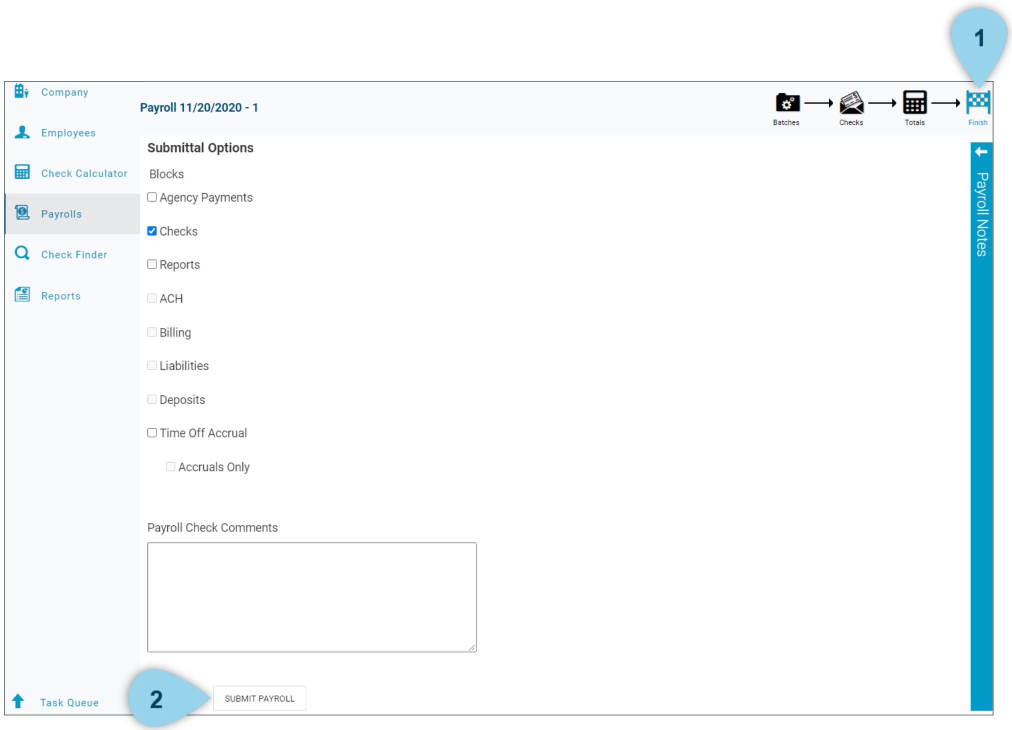


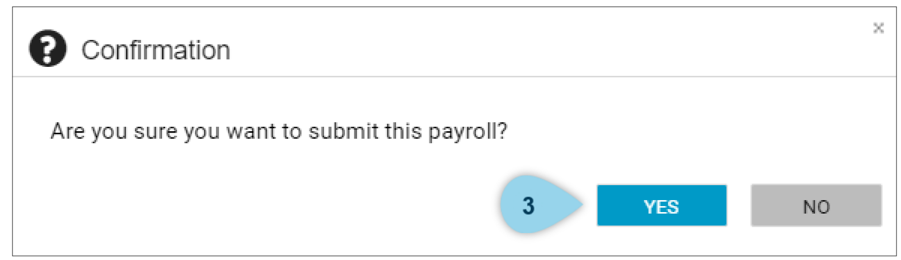
Submit Payroll

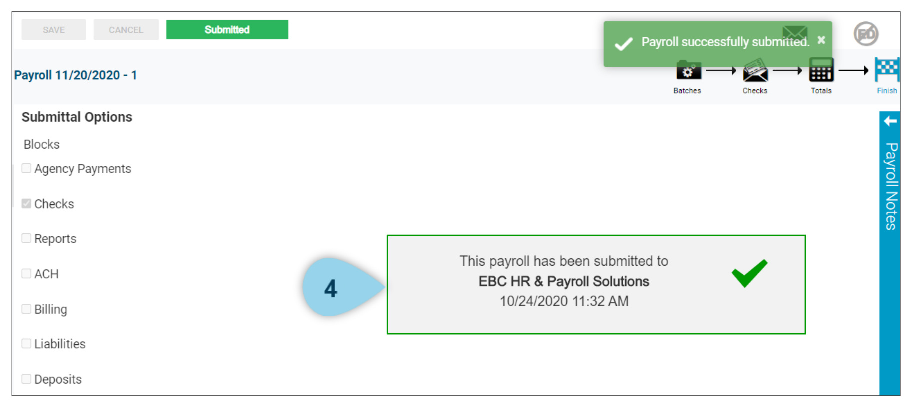
To **submit payroll**,

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.







Reports

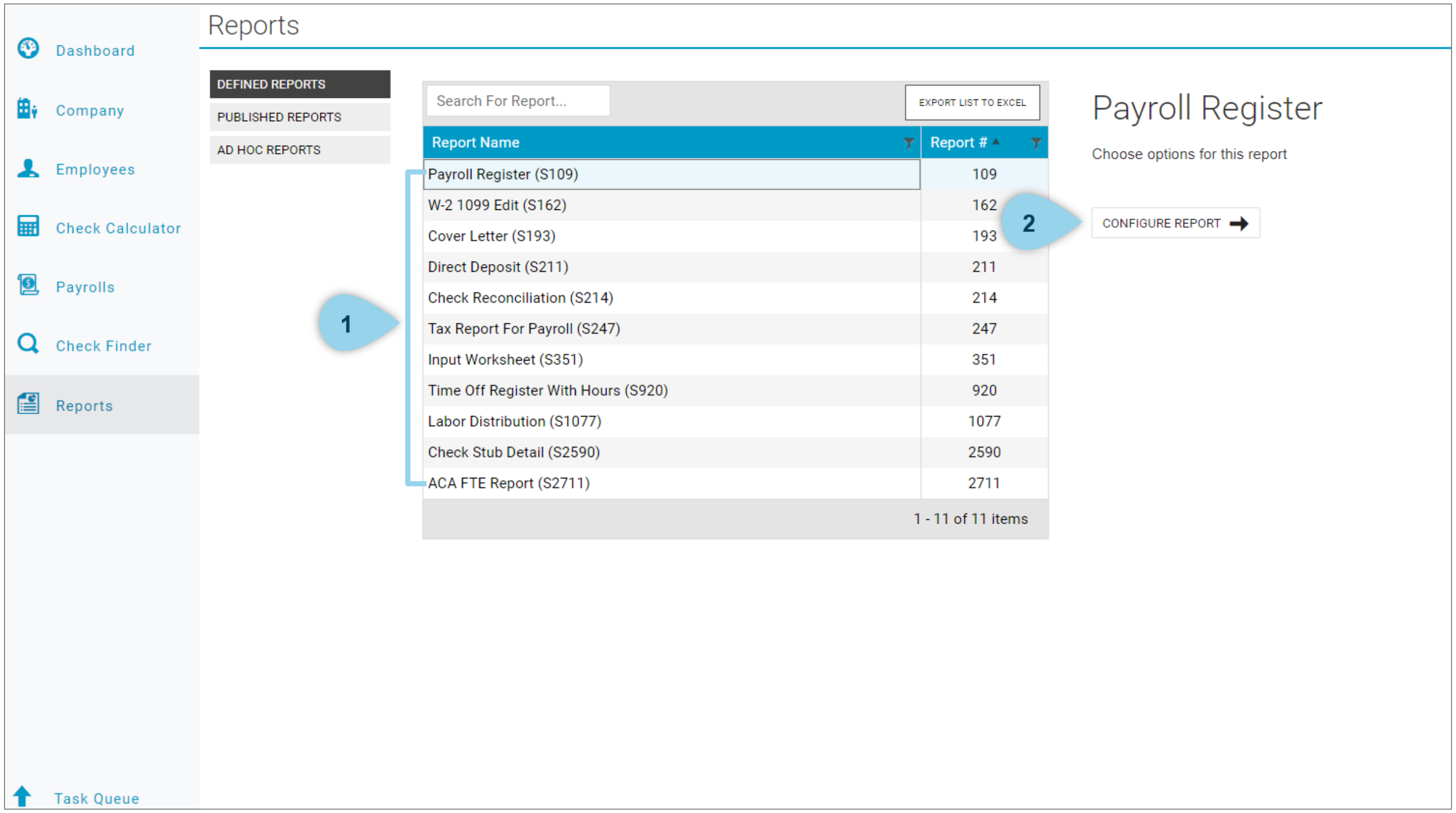
The Reports page offers a list of defined reports as well as the option to create custom reports to make reporting easy and accessible. In this section you will learn how to:

- 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,

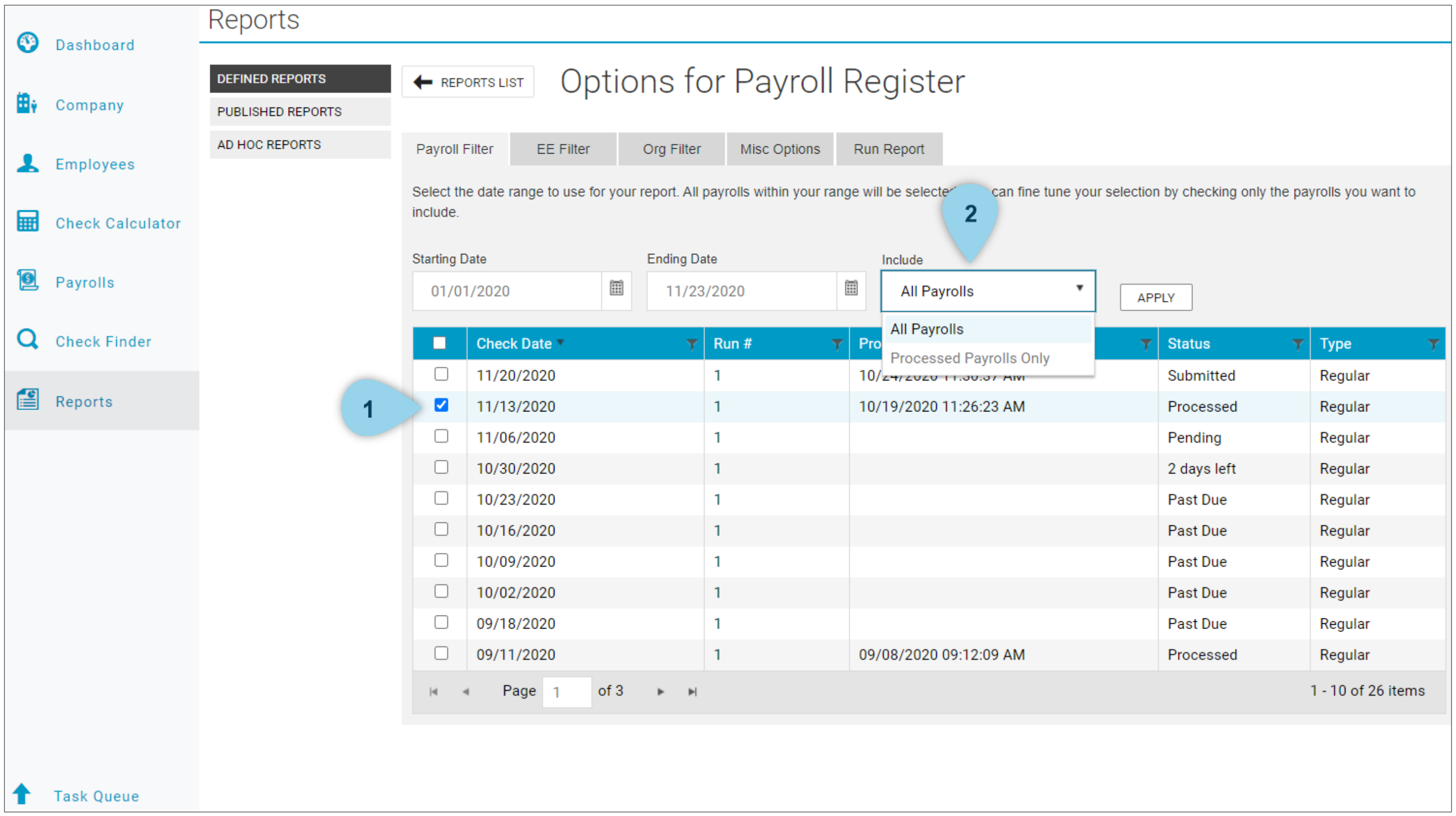
1. Choose a report from the Defined Report list.
2. Click Configure Report to select more detailed options



Report Options

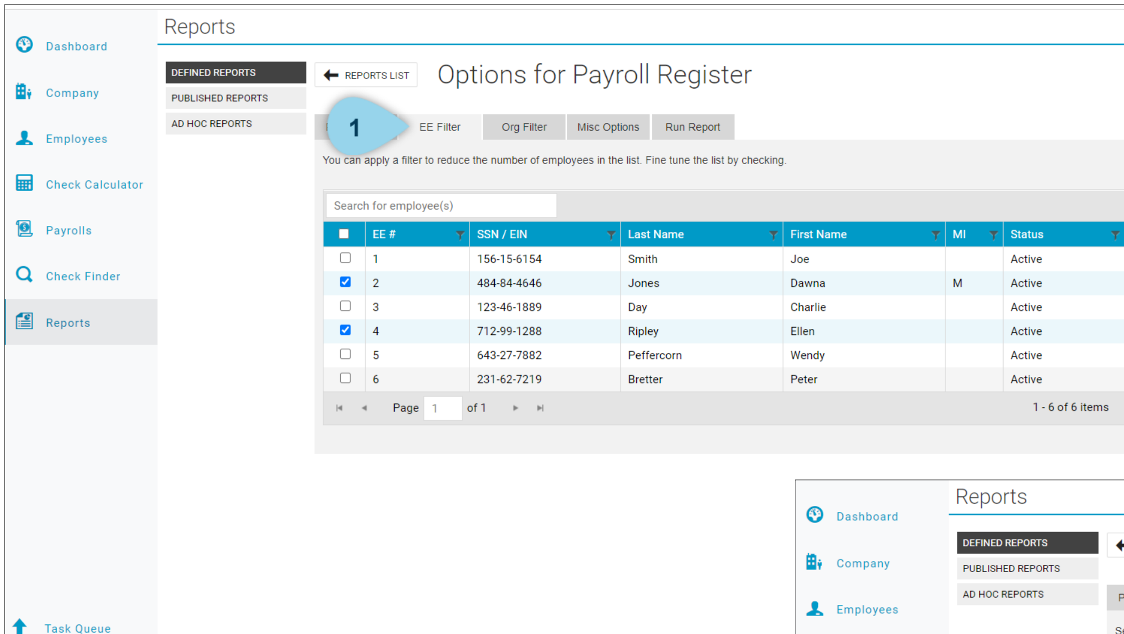
Under Payroll Filter,

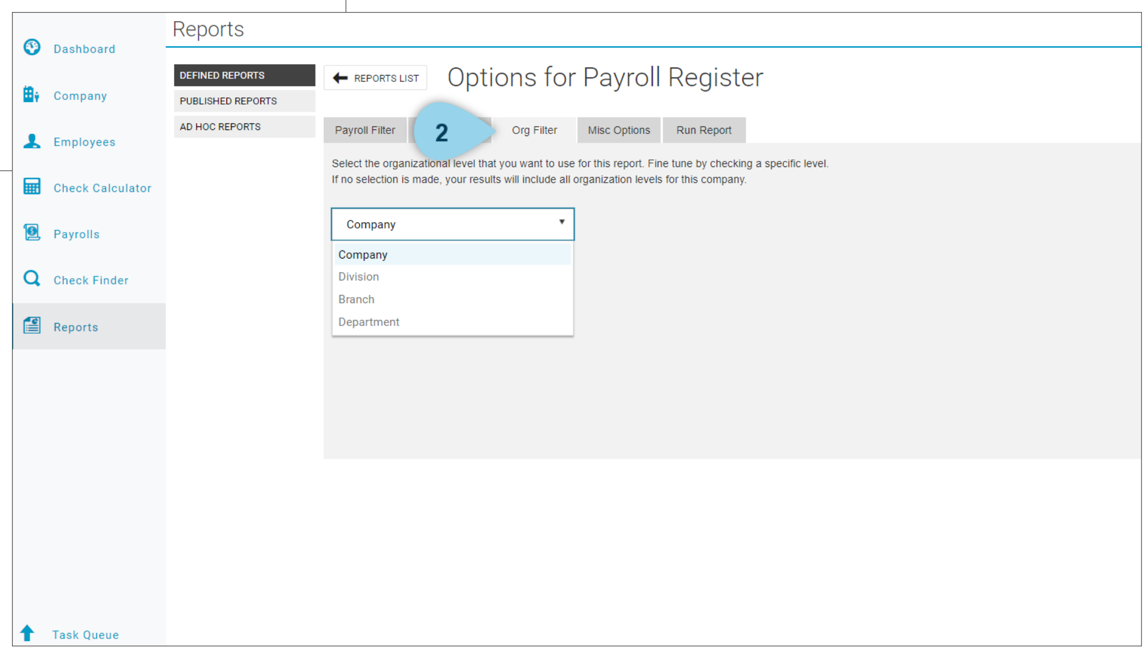
1. Choose your payroll week(s).
2. Choose which Payrolls to include (i.e. All Payrolls, Processed Payrolls Only)



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.

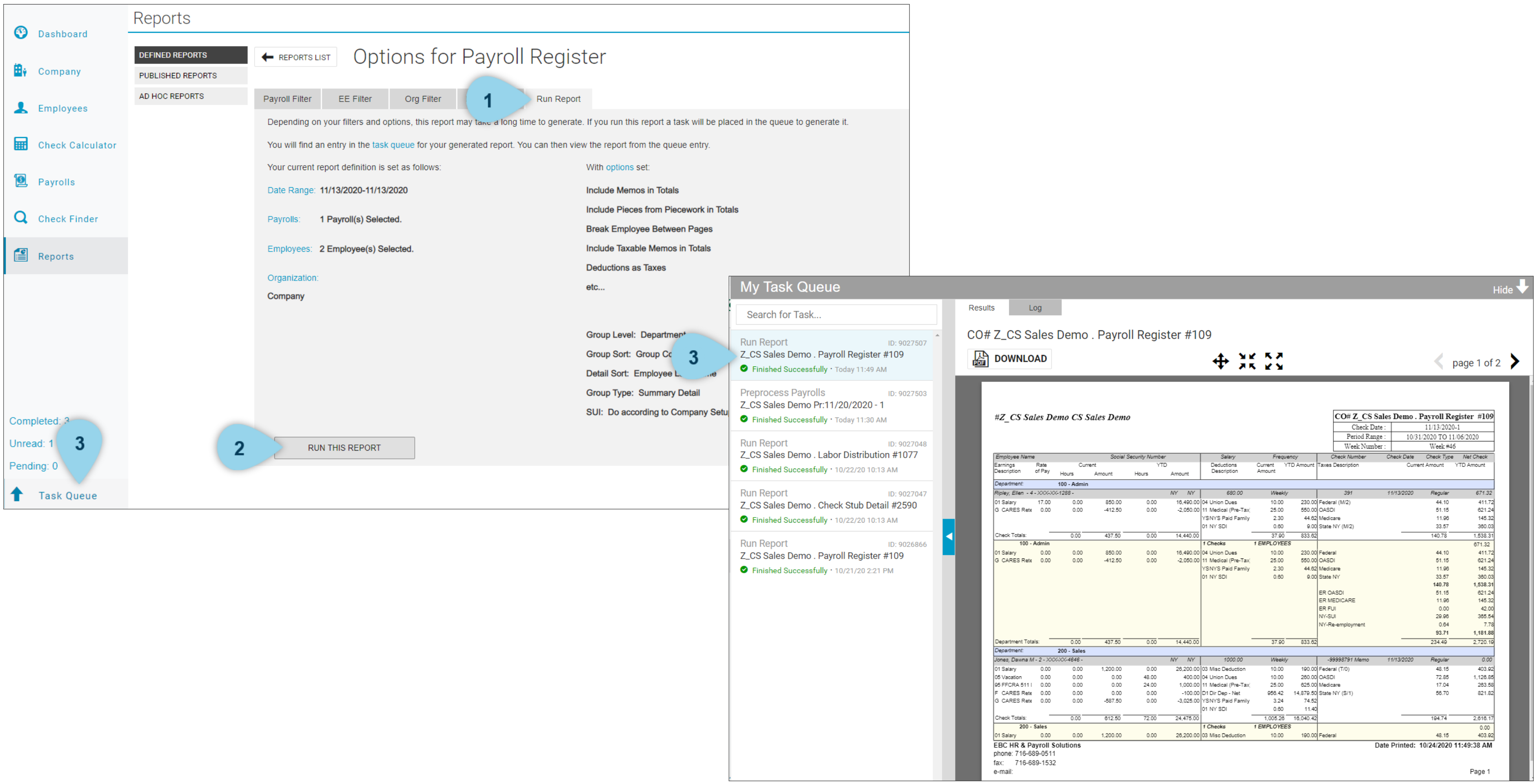




Run Report

To run the report,

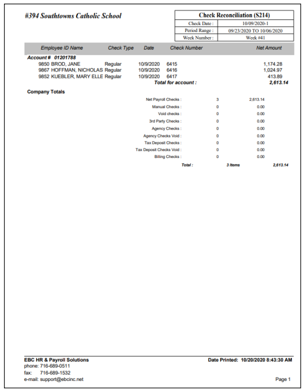
1. Click Run Report.
2. Click Run This Report.
3. Reports that have been run can be viewed by clicking on the Task Queue, then selecting the completed Run Report.



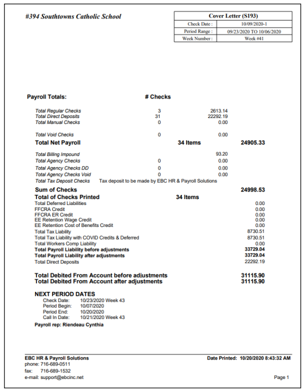
Common Reports

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.

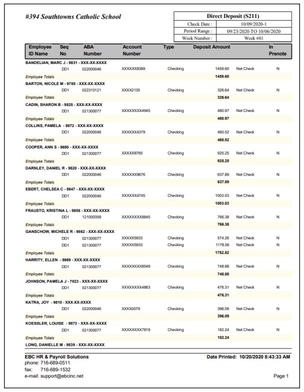
Check Reconciliation



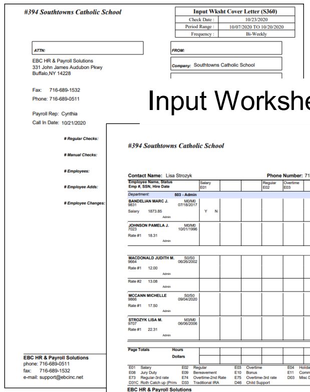
Cover Letter



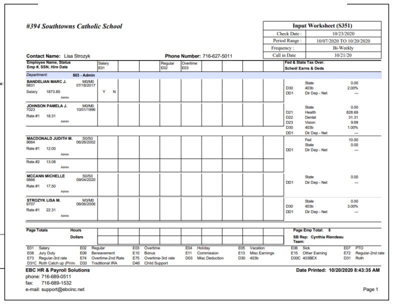
Direct Deposit



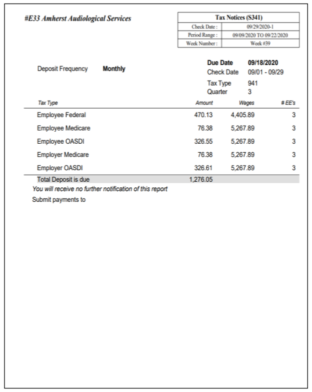
Input Wksht Cover Letter



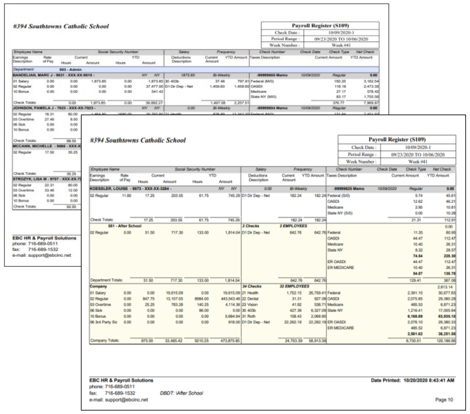
Input Worksheet



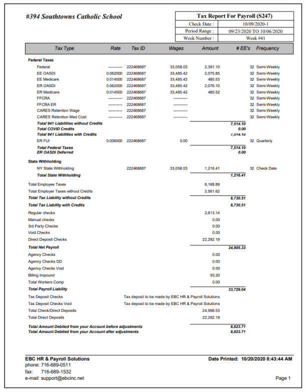
Tax Notices



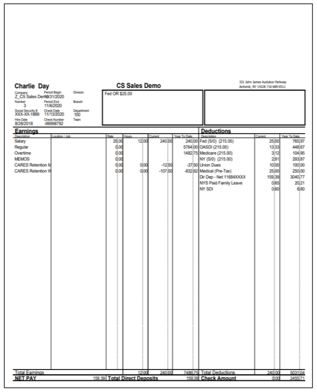
Payroll Register



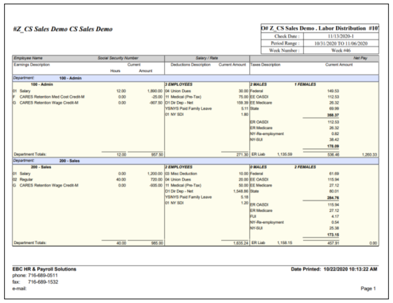
Tax Report for Payroll



Check Stub Detail



Labor Distribution



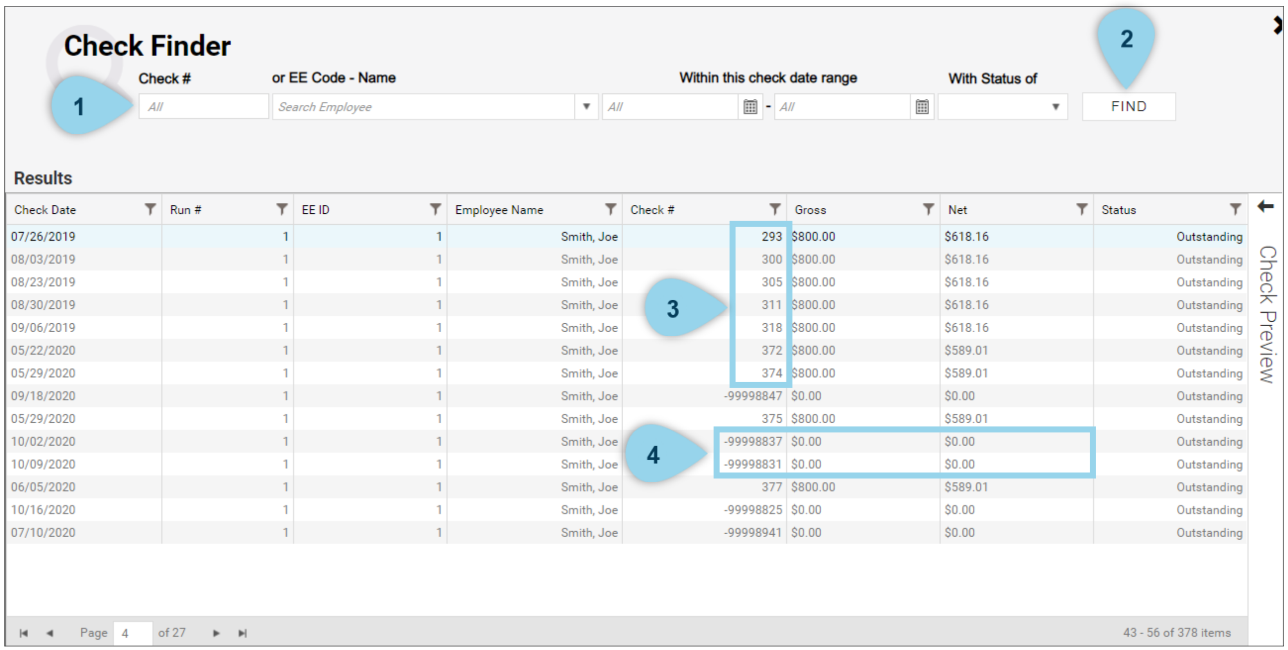
Check Finder

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 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