

PayPLUS

CLIENT TRAINING GUIDE

Overview

Introduction

This training guide is provided as a resource for our Home Instead Senior Care franchises for processing payroll. This training guide will cover basic information when using Evolution.

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Contact Information

If this training guide does not answer your specific question(s), please contact us at the resources below.

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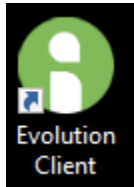
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Logging into Evolution/Changing Password

To open Evolution, double click on the Evolution icon that was placed on your desktop when Evolution was installed. If you do not have Evolution installed on your computer, please contact a Payroll Specialist and they will be able to install it on your computer.



When the Evolution login screen appears enter the following information:

Login Id: This is assigned to you by PayPLUS.

Password: Your initial password assigned to you by PayPLUS.

Server: Enter **payplus.evolutionsaas.com** if missing.

Compression: Use the dropdown box and select T1.

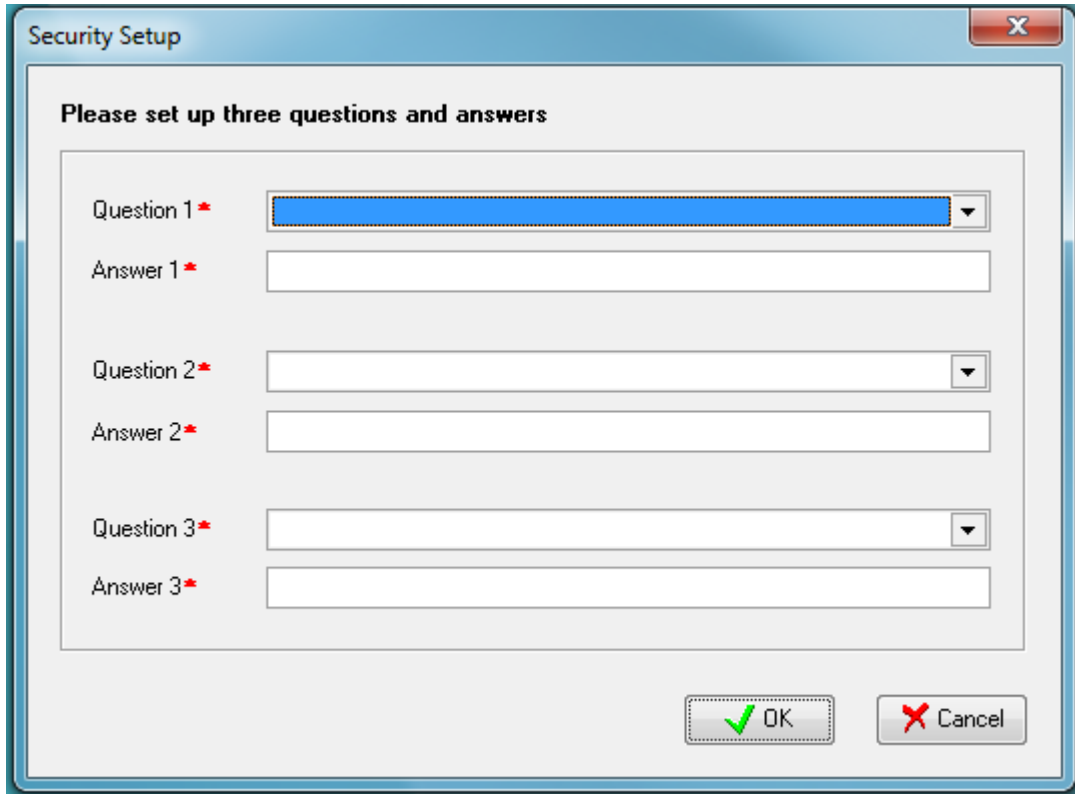
Click on the OK button.

A screenshot of the Evolution Login window. The window title is 'Evolution Login (v 17.19.00.22)'. The logo 'Evolution HCM Technology' is displayed. Below the logo are four input fields: 'Login Id' (empty), 'Password' (empty), 'Server' (containing 'payplus.evolutionsaas.c'), and 'Compression' (a dropdown menu with 'T1' selected). At the bottom, there are two checkboxes: 'Change Password' and 'Forgot Password', both unchecked. At the very bottom are three buttons: 'OK' (with a checkmark icon), 'Cancel' (with a red X icon), and 'Settings...' (with a wrench icon).

Note: Once you have logged in for the first time, the Login ID, Server, and Compression fields will be populated each time you open the Evolution Login screen. You will only have to enter your password going forward.

Logging into Evolution/Changing Password continued

If you are using your user ID for the first time or your account was unlocked due it being blocked, you will be required to answer three security questions. After answering these questions, you will be logged into Evolution. This only needs to be done the first time you log into Evolution.

A screenshot of a 'Security Setup' dialog box. The title bar is blue with a red 'X' button. The main area is light gray and contains the text 'Please set up three questions and answers'. Below this, there are three sets of input fields. Each set consists of a question label (e.g., 'Question 1 *') and a dropdown menu, followed by an answer label (e.g., 'Answer 1 *') and a text input field. The first question's dropdown menu is highlighted with a blue selection. At the bottom right, there are two buttons: 'OK' with a green checkmark icon and 'Cancel' with a red 'X' icon.

Security Setup

Please set up three questions and answers

Question 1 *

Answer 1 *

Question 2 *

Answer 2 *

Question 3 *

Answer 3 *

OK Cancel

Logging into Evolution/Changing Password continued

If you need to change or can't remember your password, this can be done by checking the box in the lower left or right corner.



The image shows the 'Evolution Login (v 17.19.00.22)' dialog box. It features the 'Evolution HCM Technology' logo at the top. Below the logo are four input fields: 'Login Id', 'Password', 'Server' (with 'payplus.evolutionsaas.c' pre-filled), and 'Compression' (with 'T1' selected in a dropdown). At the bottom, there are two checkboxes: 'Change Password' and 'Forgot Password', both of which are circled in red. Below the checkboxes are three buttons: 'OK' (with a checkmark icon), 'Cancel' (with a red X icon), and 'Settings...' (with a wrench icon).


After checking the change password box and logging in, you will be prompted to enter a new password.



The image shows the 'Change Password' dialog box. It has a light blue title bar and a close button (X) in the top right corner. The main area contains the text: 'It is time to change your password. Please, fill in the screen and press Ok.' Below this text are two input fields: 'New Password' and 'Confirm New Password'. At the bottom, there are two buttons: 'OK' (with a green checkmark icon) and 'Cancel' (with a red X icon).

Logging into Evolution/Changing Password continued

If you check forgot password, you will be prompted to enter the security question answers that were established when you first used your User ID. You will be also required to establish a new password.

A screenshot of a 'Password Reset' dialog box. The title bar is light blue with the text 'Password Reset' and a close button (X). The main area has a light gray background. At the top, it says 'Please answer these questions and set up a new password'. Below this, there are three text input fields for security questions: 'What is your father's middle name?', 'What was your high school mascot?', and 'What was your first car (make and model)?'. Below these, there are two text input fields for 'New Password' and 'Confirm New Password'. At the bottom right, there are two buttons: 'OK' with a green checkmark icon and 'Cancel' with a red X icon.

Password Reset

Please answer these questions and set up a new password

What is your father's middle name?

What was your high school mascot?

What was your first car (make and model)?

New Password

Confirm New Password

OK Cancel

Evolution Toolbar

Below is an explanation of the icons found across the top of your screen on the Evolution toolbar:



Navigates you back to the previously viewed window.



Navigates you forward to the next viewed window.



Navigates you to the First record in the employee list.



Navigates you to the Previous record in the employee list.



Navigates you to the Next record in the employee list.



Navigates you to the Last record in the employee list.



Create a New Record



Delete a Record (contact your payroll specialist prior to use)



View Audit History. This allows you to see the history of any selected field in Evolution.



Refresh Data



Post changes



Cancel changes




Commit data changes to the database on the server.



Abort all changes since last time data was committed on the server.

Evolution Toolbar continued

Anytime you add a new record in Evolution, you will start with the  button. This includes adding a new hire, adding new E/D's, and direct deposits.


Click on the  and the  to save a change in Evolution.

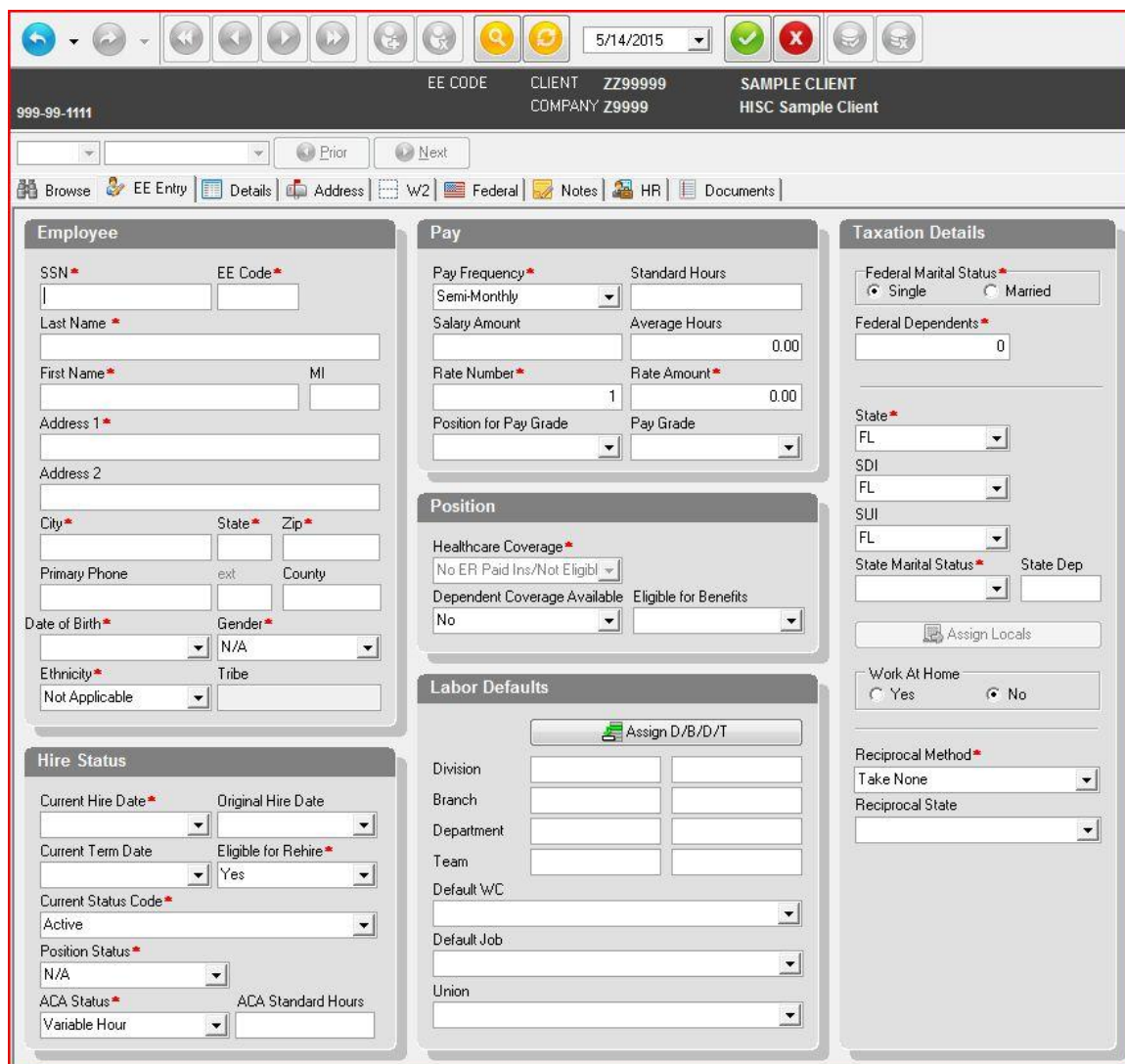
When populating Evolution screens, any fields that are labeled with a red asterisk (*) are required fields and must be populated. Many of these fields will pre-populate when adding a new record into the system.

Entering a New Hire

Go to Employee -> Employee. This will take you to your franchise name, you will either need to click on open company or double click your franchise name and this will open your list of active employees. You are now ready to enter a new hire. The following steps will provide a guideline on how to enter new employees.



1. Select the green plus sign  in the top menu bar. This will open an empty screen to start adding the new employee.



The screenshot displays the 'Enter New Hire' form in the Evolution software. The form is organized into several sections, each with its own header and a collection of input fields. The top of the screen features a navigation bar with various icons and a date of 5/14/2015. The form is pre-populated with sample data for a client named 'HISC Sample Client'.

- Employee Section:** Includes fields for SSN*, EE Code*, Last Name*, First Name*, MI, Address 1*, Address 2, City*, State*, Zip*, Primary Phone, ext, County, Date of Birth*, Gender*, Ethnicity*, and Tribe. The 'Hire Status' section includes Current Hire Date*, Original Hire Date, Current Term Date, Eligible for Rehire*, Current Status Code*, Position Status*, ACA Status*, and ACA Standard Hours.
- Pay Section:** Includes Pay Frequency*, Standard Hours, Salary Amount, Average Hours, Rate Number*, Rate Amount*, Position for Pay Grade, and Pay Grade.
- Position Section:** Includes Healthcare Coverage*, Dependent Coverage Available, and Eligible for Benefits.
- Labor Defaults Section:** Includes a button for 'Assign D/B/D/T' and fields for Division, Branch, Department, Team, Default W/C, Default Job, and Union.
- Taxation Details Section:** Includes Federal Marital Status*, Federal Dependents*, State*, SDI, SUI, State Marital Status*, State Dep, Assign Locals, Work At Home, Reciprocal Method*, and Reciprocal State.

2. You will need to begin by entering the employee's Social Security number. The fields that are labeled with a red asterisk (*) are required fields and must be populated before Evolution will allow you to save the employee's data. Many of these fields are already pre-populated by Evolution.

Entering a New Hire continued

3. Next, you will need to populate an EE code. This code will need to match the External ID in ClearCare.

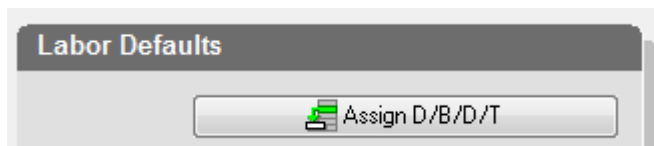
Note: If they are an Admin or an Executive employee, you need to assign a number that won't cause issues with your caregiver numbers. This number is usually higher or lower than your caregiver numbers. Also, the last name must be entered in ALL CAPS for Admin and Executive employees.

4. Continue adding employee information i.e. Address, Date of Birth, Gender (if you choose) & Ethnicity (if you choose)
5. Next, enter the employee's hire date in the **Current Hire Date** field as well as the **Original Hire Date field**. (**Note:** If the hire dates falls after the current payroll's period end date, that employee will not be included in the current payroll.)
6. You may bypass the Position Status & ACA Status fields.
7. In the middle column, Pay frequency will automatically default based on your pay schedule.
8. If entering an Executive or Admin employee – enter the salary information into the **Salary Amount** field. This is the amount they are to receive each pay period, not the yearly salary. If they are an hourly employee, leave the Rate Number as 1 and then enter the hourly rate in the **Rate Amount** field.

Note: If this is a full-time employee who works a standard number of hours (86.67 is the default for semi-monthly), you can enter hours into the **Standard Hours** field. This will ensure their status will show up as full-time on the Affordable Care Act reports.

Note: Caregivers do not need a rate since pay information comes from ClearCare.

9. The position area can be left blank.
10. In the Labor Defaults area, there is a button labeled Assign D/B/D/T. This button allows you to assign a division to the new hire. Divisions are Exec – 1, Admin – 10, and Caregiver – 20.



Entering a New Hire continued

After clicking on the button, select the appropriate **Division** and click the **Select** button. The rest of the fields in this area can be left as the system defaults.

11. The W-4 information can be entered in the last column for both Federal and State. If the employee is claiming Exempt, enter '999' in the number of dependents.

12. If the employee has any local taxes withheld, please select the Assign Locals button and add the appropriate local taxes. Please see the next page for further instructions on adding or removing local taxes.



You will need to set-up an employee's local taxes when entering a new employee. After clicking on the Assign Locals button on the previous page, this box below will open and you will be able to edit the employee's local taxes.

Assign Locals

Company Local Tax

Local	State	County	Local Type	Tax Rate	Tax Amount	Misc Amount
Dubois-Resident	IN	Dubois County	Income Residential			
Gibson-Resident	IN	Gibson County	Income Residential			
Madison County Tax	IN	Madison County	Income Residential			
Posey County Res	IN	Posey County	Income Residential			
Spencer County Tax	IN	Spencer County	Income Residential			
Vanderburgh County N...	IN	Vanderburgh County	Income Non-Residential			
Vanderburgh County Tax	IN	Vanderburgh County	Income Residential			
Warrick County Tax	IN	Warrick County	Income Residential			

Employee Locals

☐ Sort by County/Local

County	Local	Exempt Exclude	Deduct	Misc Amount
Vanderburgh County	Vanderburgh County Tax	I	Y	
Vanderburgh County	Vanderburgh County Non-Res. Tax	I	N	

County: % Of Taxable Wages:

Deduct* ☒ Always ☐ No Overrides ☐ Never

Based upon your client set-up, the employee may already have locals set-up. The company local taxes that are set-up will show at the top of the screen. If you do not see a local tax that needs to be used, please contact your payroll specialist.

When are you ready to add a local tax, highlight the tax on the top part of the screen, and click on the down arrow to add it to this employee.

It will automatically default to Always deduct. If you need to remove or change a local tax for an employee, email your payroll specialist.

Entering a New Hire continued

13. The final step after all information has been entered is to save it. You can do that by selecting the green check mark to post the changes and then the “green hamburger” to the right to commit the changes.



Additional Federal/State Withholding

1. If the employee chooses to have additional amounts withheld from their paycheck, this information can be entered in two places. For Federal, it is located in Employee – Employee under the Federal tab.

A screenshot of a form titled 'Federal Taxation'. It contains two fields: 'Override Fed Tax Type' with a dropdown menu currently showing 'None', and 'Override Fed Tax Value' with an empty text input field.

In the **Override Fed Tax Type** field, you have the following options to choose from in the drop down:

- None: The employee is taxed at the regular rate.
- Regular Amount: The employee's regular tax amount is overridden with the amount in the **Override Fed Tax Value** field.
- Regular Percent: The employee's regular tax amount is overridden with the percentage in the **Override Fed Tax Value Field**.
- Additional Amount: Adds the amount in the **Override Fed Tax Value** field to the federal taxes normally withheld.
- Additional Percent: Adds an additional percentage, loaded in the **Override Fed Tax Value** field, to the federal taxes normally withheld.

In the Override Fed Tax Value field, enter a numeric value for the federal tax amount to be withheld. Do not enter a \$ (dollar sign) or % (percent symbol).

IMPORTANT NOTE: Do not change any of the other fields on this tab.

2. For Additional State taxes, go to **Employee -> States** and then the **Tax Overrides** tab.



In the **Override State Tax Type** field, you have the following options to choose from in the drop down:

- None: The employee is taxed at the regular rate.
- Regular Amount: The employee's regular tax amount is overridden with the amount in the **Override State Tax Value** field.
- Regular Percent: The employee's regular tax amount is overridden with the percentage in the **Override State Tax Value Field**.
- Additional Amount: Adds the amount in the **Override State Tax Value** field to the state taxes normally withheld.
- Additional Percent: Adds an additional percentage, loaded in the **Override State Tax Value** field, to the state taxes normally withheld.

In the **Override State Tax Value** field, enter a numeric value for the federal tax amount to be withheld. Do not enter a \$ (dollar sign) or % (percent symbol).

Additional Employee Screens

The following tabs offer more functionality, but are not required:

Details Tab – In the upper right hand corner of this screen, there is a YTD (F3) button. By

clicking on the  button, you can display the year to date wage information for the employee selected.

Address Tab – You can add an alternate address to the employee record if the employee's check and W-2 need to be mailed to different addresses. There are also fields to track additional phone numbers for the employee. The additional fields on this tab are directly tied to our Virtual Mail Room (VMR) offering. (See p. 42 for paperless options)

Federal Tax Tab – This tab should only be used when entering a Federal tax override amount for the employee's tax withholding. All other fields on this tab **MUST** be left as system defaults.

Notes Tab – There are two types of notes that can be entered for an employee, Payroll notes and General notes.



* Payroll Notes: Any notes entered in this area will be visible while entering the payroll.

Type any notes regarding this employee that a payroll processor should be aware of while keying the payroll. Anything typed in the Payroll Notes field will be highlighted in bright yellow while in the **Payroll -> Batch** on the *Quick Entry* tab.

*General Notes: This is where you can enter notes pertaining to the Employee. These are not displayed anywhere else. They can only be seen if you are on this notes tab

Terminating an Employee

1. Go to Employee -> Employee and display the employee that is to be termed.
2. Go to the EE Entry tab.
3. In the first column under Hire Status, there are two fields that must be populated to terminate an employee and remove them from being created in payroll.
4. Populate the **Current Term Date** field with the employee's termination date.
5. In the **Current Status Code** field, select the reason for termination from the list available in the drop down.

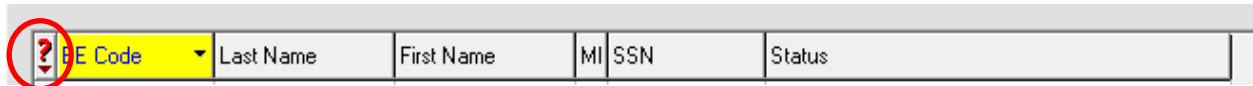
6. Click on the green check  and the commit button  to save your changes.
7. If an employee has direct deposit or other deductions, these deductions can be termed under the Scheduled E/D's. Go to Employee -> Scheduled E/D's. This may be beneficial in case the employee comes back to work and these deductions and/or information has changed or no longer active.

Note: If you have your filter set to display only ACTIVE employees, this employee will drop out of view and Evolution will move to the next ACTIVE employee. See next page for description of removing the filter to include all employees if needed (including terminated).

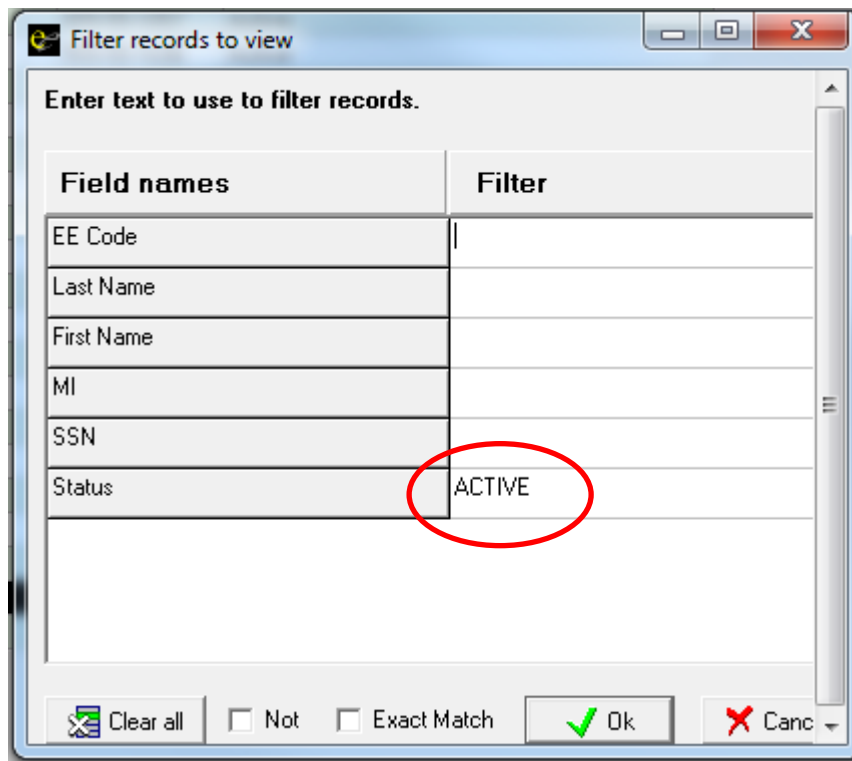
Reactivating a Termed Employee

If you are unable to find an employee on your list, more than likely they have been termed. After logging into Evolution, only active employees will be displayed. In order to show all of your employees you will need to remove the active filter.

1. First thing you will need to do is click on the red question mark next to the EE Code header.



2. This will bring up the filter box. You will need to remove ACTIVE from the status category. You can do this by removing ACTIVE from the status category or by clicking on Clear All. Click Ok and this will now show all employees for your franchise.



3. Locate the employee to be rehired. Go the **EE Entry** tab for this employee.
4. Update the Current Hire date field with the most recent hire date.

5. Delete the date this is populated in the **Current Term Date** field.

Reactivating a Termed Employee continued

6. Change the **Current Status Code** field to ACTIVE.
7. A box will pop up asking if this is a rehire, click yes.
8. After clicking yes, a box will pop up asking if you want to see a report of which Employee details are set up that should be reviewed, click no. You may want to review exemptions, addresses, direct deposit information, and other deductions to make sure there are no other changes.



Note: If the question mark is already green in color that means there is no filter in place on that data set.

Entering a Direct Deposit

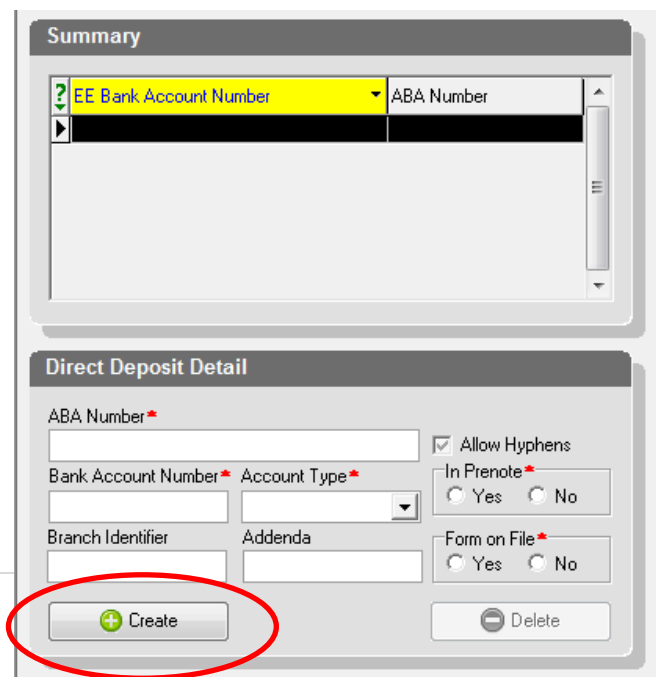
Note: This is a two-step process and both steps must be completed – setting up the Direct Deposit account information and then setting up the Scheduled E/D. Failure to do so will cause the employee to receive a live check.

Go to Employee -> Scheduled E/D's. This will take you to your franchise name, you will either need to click on open company or double click your franchise name and this will open your list of active employees. You are now ready to enter direct deposit information. The following steps will provide a guideline on how to enter a new direct deposit.

1. Select the employee you need to add direct deposit for by double clicking their name or searching their name in the white search bar. The employee's name will show up in large letters in the black bar at the top for you to verify you are on the correct employee.
2. Click on the direct deposits tab.
3. First enter the ABA number (also known as banking routing number - 9 digits). Then add the bank account number – include all zeros and if there is a hyphen in the account number – mark the box “ALLOW HYPHENS”
4. Choose the account type.

5. In Prenote should be marked “NO”. Click on the green check  and the commit button  to save your changes.

Note: If more than one account number is to be added – hit the create button located below the branch identifier.



Entering a Direct Deposit continued

6. The next step in setting up a direct deposit is to set-up a direct deposit code. You will now need to select the Details tab. You will need to hit the green plus sign at the top to add a new E/D code.



7. Under the E/D Code section – select the type of direct deposit account:

Z01 – Net Pay to Checking – full amount of check to be deposited

Z02 – Fixed Amount to Checking – fixed amount to be deposited

Z11 – Net Pay to Savings – full amount of check to be deposited

Z12 – Fixed Amount to Savings – fixed amount to be deposited

8. If the E/D code is a fixed amount – you will need to enter the amount in the Amount field just below the fixed calculation method.

9. All other fields should be left as the system defaults, the last step is to select the account information from the EE Direct Deposit drop down (in the Destination Details box). After

selecting the correct account, click on the green check



and the commit button



to save your changes.

10. If the employee is requesting multiple accounts to be set-up, follow the same process by setting up an additional account on the Direct Deposits tab and then going back to the Details tab and hitting the green plus sign



at the top to set-up a second E/D code.

EE Direct Deposit

Making Changes to an Existing Direct Deposit

Any changes need to be completed before a payroll is started to ensure they will be effective for the payroll that is being submitted.

1. To cancel a direct deposit, you will need to enter an effective end date. Select the employee's record then on the Browse Scheduled E/D's tab double click the E/D you want to discontinue. This will take you to that E/Ds details tab.

E/D Code	Description	Calculation Type	Amount	Percentage	Frequency	Eff Start Date	Eff End Date
401_Roth	Roth 401k	F	25.00		D	9/29/2011	
Z01	Net Pay to Checking	Z			D	6/7/2010	
Z12	Fixed Amount to Savings	F	100.00		D	6/7/2010	

2. On the Details tab, you will need to put an effective end date to cancel the direct deposit.

Earning / Deduction Code

E/D Code: Z01 Net Pay to Checking

Calculation

Calculation Method: None E/D Group: [Dropdown]
Amount: [Text] % Percentage: [Text]
Always Pay/Deduct: No Deductions to zero: Yes [Radio] No [Radio]
Priority: [Text] Multiple Scheduled E/D Group: [Text]
Company Benefit: [Text] Company Benefit Rate: [Text]
Employee Benefit: [Text] Create

Frequency

Frequency: Every Pay
Month #: None Which Payrolls: All
Effective Start Date: 6/7/2010 **Effective End Date: [Text]**
Block Week 1: Yes [Radio] No [Radio]
Block Week 2: Yes [Radio] No [Radio]
Block Week 3: Yes [Radio] No [Radio]
Block Week 4: Yes [Radio] No [Radio]
Block Week 5: Yes [Radio] No [Radio]

Destination Details

Agency: [Text]
Child Support Case: [Text]
Garnishment/Loan ID: [Text]
EE Direct Deposit: 12345678
Deduct Whole Check: Yes [Radio] No [Radio]
Take Home Pay: [Text]


Navigation

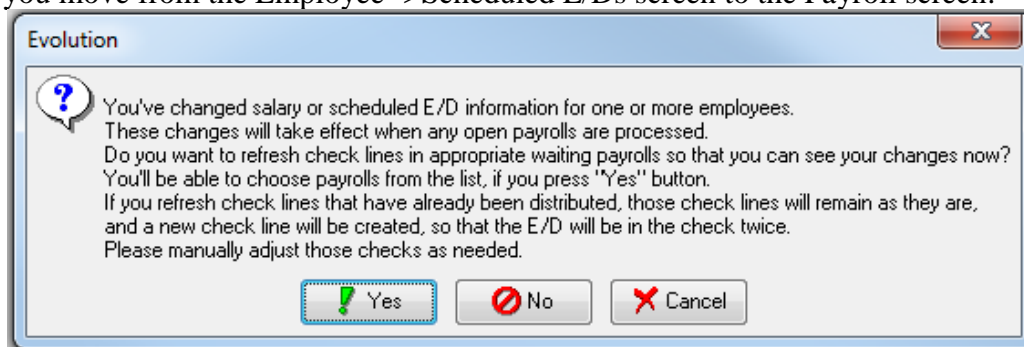
Employee [Button]
HR Employee Benefits [Button]

3. If you wish to reactivate a termed direct deposit, just highlight the effective end date and hit delete on your keyboard. This will reactivate the E/D code for the next payroll. Make sure the account information is still correct (by going to the direct deposits tab) before doing so.

Setting up Scheduled E/D's

Note: If you receive any type of garnishment please forward the information to PayPLUS. A payroll specialist will set this up for you. All other types of scheduled earnings or deductions may be set-up using the information below. All deductions should be set-up prior to running payroll.

1. Go to **Employee -> Scheduled E/Ds**.
2. Click on the **Browse Scheduled E/Ds** tab and verify that the reoccurring earning or deduction that you are going to setup is not already in the employee's listing.
3. Click on the green plus sign  at the top of Evolution to create a new record. Evolution will take you to the **Details** tab.
4. In the **E/D Code** field, select the earning or deduction code that you are setting up from the drop down menu. If you do not see the E/D code in the drop down, please contact your Payroll Specialist to have it setup for you. (Many of the required fields will automatically populate based on the E/D code selected.)
5. The **Calculation Method** field will automatically populate. This tells Evolution how to calculate the earning or deduction. (i.e. – Fixed, Percentage of Net, Percentage of E/D group...)
6. Enter the dollar amount of the deduction in the **Amount** field or the percentage amount in the % field.
7. The Frequency field will automatically populate. This tells Evolution how often to make the deduction.
8. The Agency field must be populated if Evolution is making your third party payments. Depending on the E/D code, this field may automatically populate with the agency.
9. The Effective Start Date can be today's date.
10. If you have created your payroll and batch, you will receive the following pop up when you move from the Employee ->Scheduled E/Ds screen to the Payroll screen:



Setting up Scheduled E/D's continued

Answer “No”, if you do not want this amount to update in the waiting payroll.

Answer “Yes”, if you would like this new amount to update in the payroll that has been created.

A box will appear that displays all employees that have had changes made to their scheduled E/D's since the payroll was created. Click on the button labeled “Refresh All Except Manual” to update all amounts in the waiting payroll.

Processing Payroll

To start your payroll, you should first export from ClearCare.

Steps for Exporting out of ClearCare:

1. Open up your ClearCare and go to **Accounting – Payroll**.
2. You will want to make sure your pay period selected is correct and that all Caregivers are showing up. (Do not click on anything else while ClearCare is loading)
3. Select all Caregivers and scroll to the bottom of the page. You will want to make note of the grand total in the bottom right hand corner so you can verify your totals after importing into Evolution.
4. If you have not already, you will want to “Finalize”.
5. Click “Export to PayPLUS”. This will create a csv file that will (on most search engines) automatically save the file to your downloads. (**Note:** It is important that you DO NOT open this csv file or even right click and save as. Doing either of these can corrupt some of the data in the file.)
6. After completing the export, you can proceed to Evolution.
7. Go to **Payroll – Payroll**. If you haven’t already, you will need to click “Open Company”.
8. Once your company is open, click the **Quick Payroll** button at the bottom of the screen, this will pull over all active employees, salaries, and any scheduled e/d's. See diagram on the following page.

Note: You should only click Quick Payroll one time each payroll. By clicking on it multiple times it will start a payroll for each scheduled calendar date. If you come back to this screen and need to go back into the payroll, Highlight the check date you were working on, Click on the Batch button on the bottom, and that will take you back into the payroll you were working on.

Client ZZ99999 SAMPLE CLIENT
Company Z9999 HISC Sample Client

Company Notes Payroll Company Contacts

Summary

Display Payrolls As Of 12/14/2012

Open Payroll

Run	Check Date	Check Date Status	Scheduled	Type	Status	Status Date

Payroll Detail

Payroll Check Comments

Block Agencies*

☐ Yes

☐ No

Block TO Accrual*

☐ All ☐ No

☐ Accrual

Block Checks/Reports*

☐ Reports ☐ Both

☐ Checks ☐ None

Run Number*

Type*

Check Date*

Actual Call-In Date

Controls

Create Payroll

SB Review

Submit Payroll

Pre-Process

Delete Payroll

Copy Payroll

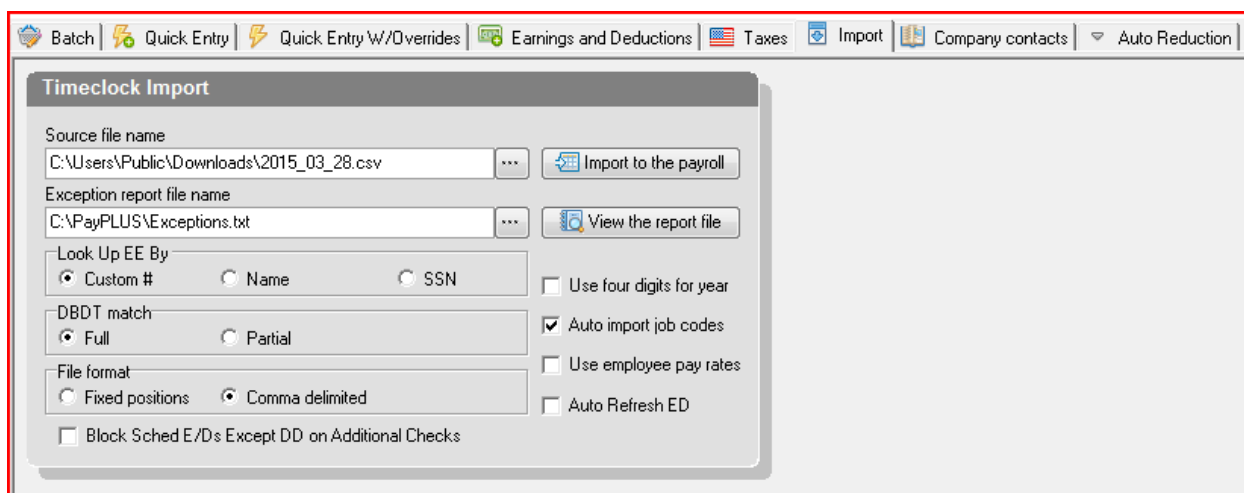
New Payroll Expert

Batch

Quick Payroll

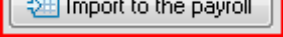
Processing Payroll (Continued)

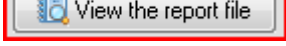
9. Once Evolution has completed creating the payroll, you will want to verify your pay date located in the black bar at the top of the screen. If the date needs to be changed, contact your payroll specialist.
10. Proceed to the “Import” tab.

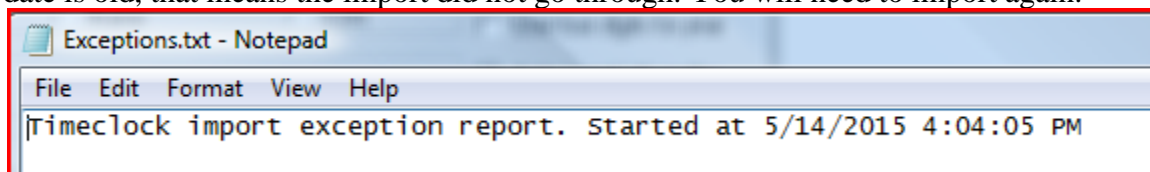


The screenshot shows the 'Timeclock Import' dialog box within a software application. The dialog has a title bar and a menu bar with options: Batch, Quick Entry, Quick Entry w/ Overrides, Earnings and Deductions, Taxes, Import, Company contacts, and Auto Reduction. The main area contains several fields and options: 'Source file name' with a text box showing 'C:\Users\Public\Downloads\2015_03_28.csv' and a button 'Import to the payroll'; 'Exception report file name' with a text box showing 'C:\PayPLUS\Exceptions.txt' and a button 'View the report file'; 'Look Up EE By' with radio buttons for 'Custom #', 'Name', and 'SSN'; 'DBDT match' with radio buttons for 'Full' and 'Partial'; 'File format' with radio buttons for 'Fixed positions' and 'Comma delimited'; and a checkbox 'Block Sched E/Ds Except DD on Additional Checks'. There are also checkboxes for 'Use four digits for year', 'Auto import job codes', 'Use employee pay rates', and 'Auto Refresh ED'.

11. Each time you log in to do your payroll, you will need to make sure you select the most recent file you exported out of ClearCare. ClearCare exports will always be dated for the date they are exported. Click on the 3 dots next to **Source File Name** field to select the correct file.

12. Once you have the correct file selected, Click on the  button one time. This will import all of the information that was exported from ClearCare. Make sure you only click this button one time. If you happen to click on it more than one time, it will bring over the information twice and cause the employees to be double paid.

13. After the information has been imported, click on the  button. At the top of the notepad you will be able to see the date and time that you imported. If that date is old, that means the import did not go through. You will need to import again.



If there is any type of error, abort the import (by clicking the red hamburger) and correct the errors. You may get back into the payroll by going to Payroll, highlighting the check date and clicking on the “Batch” button. **See page ** for a listing of common errors & how to correct them.**

Processing Payroll (Continued)

3. If there are no errors, you may proceed to the Earnings and Deductions tab. This tab will allow you to total the caregiver earnings & verify the numbers from the import are correct. You will need to add up the totals any services or caregiver wages that were entered into ClearCare.

4. After your numbers have been verified you may commit the import by clicking on the



green check



and the commit button to save your changes. You may now proceed to the Quick Entry to make your manual adjustments.

Earnings and Deductions					
<input type="checkbox"/> Display User Entries Separately <input type="checkbox"/> Display Totals By Check Type					
Code					
?	E/D Code	Description	Hours/Pie...	Amount	Count
▶	CS3921	Child Support		103.85	1
	D01	CG Advance		94.35	1
	E01	SALARY		2,692.30	2
	E03	ADM Regular	108.00	1,262.80	2
	E05	ADM On Call		105.00	1
	E11	ADM Mileage		42.50	1
	E13	CSR		888.00	1
	E23	CG Overtime	75.75	351.94	28
	E27	CG Adjust		211.92	4
	E35	CG Mileage		111.25	6
	E36	CG Reimburse		75.00	3
	GN0151	Garnishment		22.50	1
	S01	Home Helper	536.85	4,333.65	72
	S02	Personal Care	844.17	7,880.93	93
	S03	Special	647.67	5,919.82	60
	S06	Rise N Shine	2.00	31.00	2
	Z01	Net Pay to Checking		15,231.76	33
	Z03	Direct Deposit - Che		214.82	1
	Z11	Net Pay to Savings		607.12	1
	Z13	Direct Deposit - Sav		114.16	1

Quick Entry

The Quick Entry can be used for any ad hoc changes that are not imported from ClearCare and also to enter any Admin/Exec pay information. The Quick Entry can be used to enter any earnings or deductions.

* To move from one field to the next in the Quick Entry grid, use your mouse or use the arrow keys on keyboard.

* The following columns are shown by default:

1. Amt E01 Salary
2. Hrs E02 Salary Hours
3. Amount E02 Salary Hours

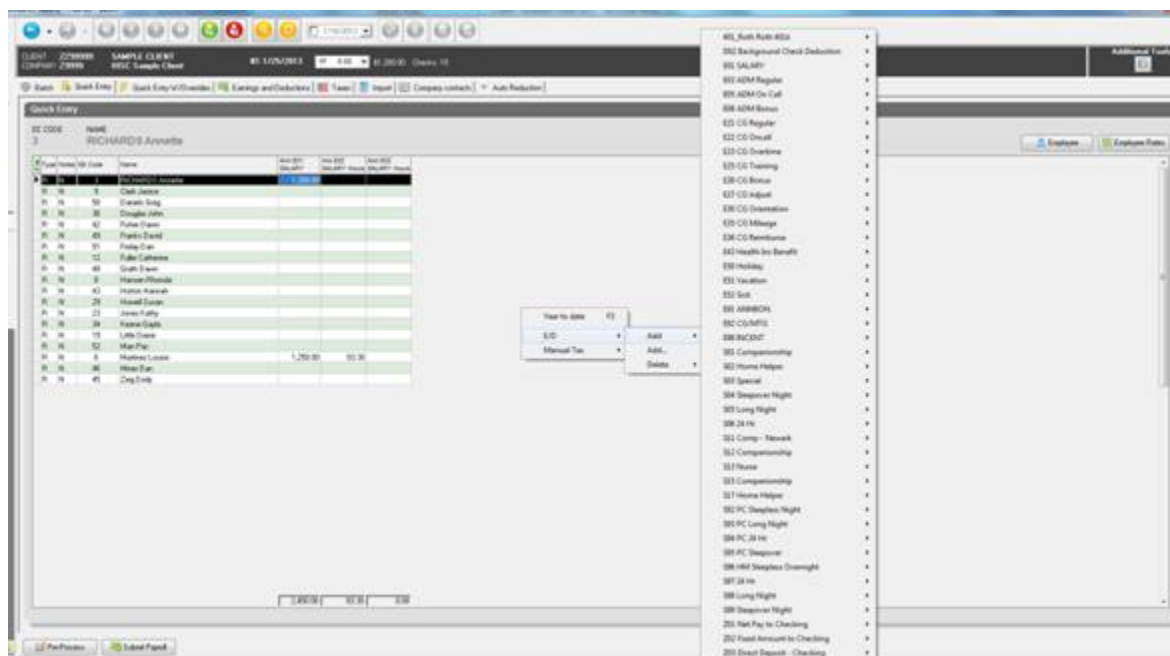
Because Evolution defaults to the three E/D codes listed above, you will need to customize your view for the grid for the first time you run payroll. The grid layout is both log in & PC specific. Therefore, if Evolution is installed and used on a different computer, you will need to setup your columns on that computer.

How to Add Columns to the Quick Entry Grid

While on the Quick Entry tab, right click in the grid area.

Select E/D, Add, the Earning or Deduction to be added, and click either Hrs or Amt.

Any of the columns you've added can be rearranged. Click and hold the column description. Drag the column to the left or right to place the columns in your preferred order.



Quick Entry continued

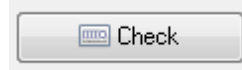
Deleting Columns from the Quick Entry Grid

While on the Quick Entry tab, right click in the grid area.

Select E/D, Delete, select the Earning or Deduction to be removed, and click either Hrs or Amt.

Payroll -> Check

To see more detail information for an employee's check, double click on the employee or select the employee and click on the



button found at the bottom of your screen.

This will take you to Payroll->Check and show you all of the check line detail for the selected employee. You can also enter payroll items from this screen.

The screenshot shows the "Check Lines" screen in a payroll system. At the top, there are navigation buttons and a date selector set to 1/18/2013. Below this, client information is displayed: Client ZZ99999, Company Z9999, and Sample Client HISC Sample Client. The date range is #1 1/25/2013 to 7/30/2010. A summary table is shown with columns for E/D Code, E/D Description, Hours/Pieces, Rate of Pay, and Amount. The table contains four rows: E01 (SALARY), Z01 (Net Pay to Checking), E05 (ADM On Call), and E08 (ADM Bonus). The E08 row is highlighted. The total amount for the check is \$1,200.00, and the batch is 7/16/2010-7/30/2010, Check 1 of 1.

E/D Code	E/D Description	Hours/Pieces	Rate of Pay	Amount
E01	SALARY		0.00	1,200.00
Z01	Net Pay to Checking			
E05	ADM On Call		0.00	500.00
E08	ADM Bonus		0.00	200.00


Any items that are displayed with a lock icon in the E/D Code column are items that automatically populated in payroll because they are scheduled E/D's. The items with no lock icon are items that were manually keyed or imported into Evolution.

You cannot make a change to an item with a lock icon unless you are on the Quick Entry tab. If you would like to delete an item, click on the item to be deleted, and click Ctrl + Delete. This will ask if you want to delete this check line, click yes if you are sure.

You may also add an extra line of data to this screen. Click on the very last line of the check, click the down arrow on your keyboard and this will create a blank line. You may now select the E/D code from the drop down and proceed to enter the amount in the far right column.

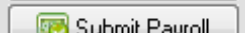
To return to the Quick Entry grid, click the blue back arrow in the upper left corner.

Creating a Second Check

1. While in the Quick Entry tab, double click on the employee you wish to create a second check for.
2. This will take you to the employee's pay check. Click on the  button found at the top of your screen on the tool bar to add a new record. This will start the Payroll Expert.
3. Select the type of check, usually 'Regular', and then click Next.
4. The employee information will default to the employee you had selected while on the Quick Entry tab. Confirm the employee selected by verifying the EE code or the EE name. Change if necessary. Click Next.
5. Check template should be blank.
6. You will be prompted with the following questions: 'Do you want to pay salary?' and 'Do you want to pay regular hours?' - Answer accordingly.
7. Evolution will create the second check and bring in all of the appropriate scheduled E/D's. Review the check lines for accuracy. Make changes if necessary.
8. The Scheduled E/D's will display with a lock icon. You are not able to make changes to any items displayed with a lock icon. If the amount needs to be edited, remove the scheduled E/D (by selecting the E/D & pressing Ctrl + Delete) and enter a new line for the amount you need for that E/D code.
9. To Remove a Scheduled E/D from the check, click on the check line to be removed. Press Ctrl + Delete on your keyboard. It will ask you if you want to delete this check line. Click ok to remove that check line of data.

Submit the Payroll

This is the final step in completing your payroll. Once you have verified your payroll information and you are satisfied with your payroll data, you must submit your payroll for processing. Once you submit your payroll, you will not be able to make any additional changes. Submitting the payroll places your payroll in the queue for processing. This will produce your checks and reports.

1. To submit your payroll for processing, you may do it in two places.
2. If you are working on the Quick Entry grid and ready to submit, click on the  button found on the bottom of your screen.

The other option to submit payroll is located on the main payroll screen. See screenshot below for example.

3. After clicking on submit payroll, you will be asked: "Are you sure you want to submit this payroll?". Click on the OK button.
4. You will receive a pop up notifying you that, "Your payroll has been successfully submitted to PayPLUS, LLC for processing". Click on the OK button.

Once your payroll has been submitted, Evolution locks the Employee windows until the processing has been completed. You will not be able to make any Employee maintenance changes or add any new employees to the system at this time. This is to protect the data in the payroll.

You can verify the status of your payroll by going to **Payroll -> Payroll** and viewing the Payroll tab. Look at the status column for the Payroll Check Date that is in question. The status codes are as follows:

- | | | |
|---|---|---|
| * | W | Payroll is working and HAS NOT been submitted or your PayPLUS agent is currently reviewing the payroll. |
| * | C | Payroll is completed and is on the queue waiting to be processed. |
| * | H | Payroll has been submitted and is on hold in our queue for processing. |
| * | I | Payroll has been submitted and is currently being processed. |
| * | P | Payroll processing has been completed. |

Client ZZ99999 SAMPLE CLIENT Company Z9999 HISC Sample Client	
Company Notes Payroll Block E/Ds Checks Earnings and Deductions Tax Time Off Com	

Summary

Display Payrolls As Of: 12/14/2012 Open Payroll

?	Run	Check Date	Check Date Status	Scheduled	Type	Status	Status Date
▶	1	1/25/2013	N	Y	R	W	1/18/2013 1:56:58 PM

Payroll Detail

Payroll Check Comments

Block Agencies*

☐ Yes

☒ No

Block TO Accrual*

☐ All ☒ No

☐ Accrual

Block Checks/Reports*

☐ Reports ☐ Both

☐ Checks ☒ None

Controls

Run Number* 1

Type* Regular

Check Date* 1/25/2013

Actual Call-In Date

Create Payroll

SB Review

Submit Payroll

Pre-Process

Delete Payroll

Copy Payroll

New Payroll Expert
 Batch
 Quick Payroll

Common Import Errors:

1. Could Not Find EE # - This means there is an employee who does not have an external ID in ClearCare. First, you will want to abort your import in Evolution by hitting the red “hamburger”



- a. You can open up the export file and this employee will be listed at the top of the file.
- b. Open up the employee’s profile in ClearCare & enter the external ID. Save your change.
- c. Re-export all of your payroll information.
- d. It’s a good idea to also double check that the employee was entered into Evolution before re-attempting your import. Add the employee to Evolution if necessary.
- e. Once you’ve verified that employee is in Evolution, Go back to **Payroll – Payroll** & hit the batch button. Go to the import tab, select the new export file & follow the rest of the import steps.

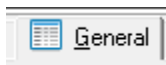
Note: You will get the “EE does not have any checks...” error if you had to add the employee into Evolution.

2. Could Not Find EE# 1234 – This means there is an employee in the export file with this external ID & there isn’t an employee with that as their EE code.
 - a. You can run a report from ClearCare to find who is under this external ID.
 - b. You can then go to **Employee – Employee** and search for the employee by name.
 - c. If the employee isn’t in Evolution, you will want to add them in. If the employee is under the wrong EE code, you can change the code in Evolution.
 - d. Once the employee is added/corrected, you can go back to **Payroll – Payroll**, hit batch & import the original file.

Note: You will get the “EE does not have any checks...” error if you had to add the employee into Evolution.

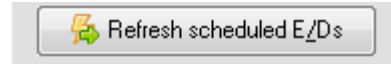
3. EE does not have any checks. One has been created. – This means that when you started the payroll, this employee either has a status that is something other than Active, the employee was added into the system after the payroll had been started or the hire date was entered as after the current pay period. Evolution created a payroll check for this employee and they will be paid.

Note: If you receive the message above, any Scheduled E/D's set up for this employee will not pull through. You will need to add these to the paycheck. You can do this by going to the Quick Entry and double clicking on the employee's name. This will take you to the employee's individual paycheck. You will then need to click on the General tab.



You will then click on the button Refresh Scheduled E/D's.

This will add any Scheduled E/D such as Salary or Direct Deposit to the paycheck.



4. Unknown E/D Code: S0. This means there is a new service code set-up in ClearCare that is not set-up in Evolution. Please contact PayPLUS for further assistance.

Paperless Option

Please Note: These features must be setup by PayPLUS prior to use. Contact PayPLUS if you are interested in our paperless options.

Virtual Mail Room (VMR)

Virtual Mail Room allows Evolution to email an employee's direct deposit stub to them. This will be sent to the email address that has been populated in Evolution and it will be password protected. This requires the employee to receive their net pay through direct deposit. If an employee receives a physical check, they cannot be setup on VMR.

To setup an employee to receive their pay check stub through Virtual Mail Room, go to **Employee -> Employee** and click on the **Address** tab.

In the lower left hand corn of this screen, enter the following information.

1. E-mail = Employee's email address where they wish to receive their pay stub.
2. VMR Password = Last four digits of the employee's social security number.
3. Print Voucher = Print voucher should remain as **YES**.

52

Man Pac

⏮ Prior

Next ⏭



Browse



EE Entry



Details



Address



W2



Federal



Notes



HR



Documents

Standard Address for Mailing W2's

Address 1 *

123 Independent Living Drive

Address 2

City *

Omaha

State *

NE

Zip *

68128

County

Country

Primary Phone

extension

Secondary Phone

extension

Tertiary Phone

extension

Alternate Address for Payroll Checks

Address 1

Address 2

City

State

Zip

County

Primary Phone

extension

Secondary Phone

extension

Tertiary Phone

extension

Additional Options

Print Voucher *

☒ Yes

☐ No

E-mail

pman@yahoo.com

VMR Password

xxxxx

W-4 Form

For a printable copy [click here](#). This link will direct you to the IRS website.

Direct Deposit Form

For a printable copy click here. This link will direct you to the PayPLUS website.

Check Finder Option

The check finder option allows you to find, view and research an employee's processed check (s) without running a report.

Go to **Employee -> Employee**.

Once you have selected your employee, click on the Check Finder button or F12. This button is located in the upper right corner of the Employee screen under Additional Tools. (See below.)

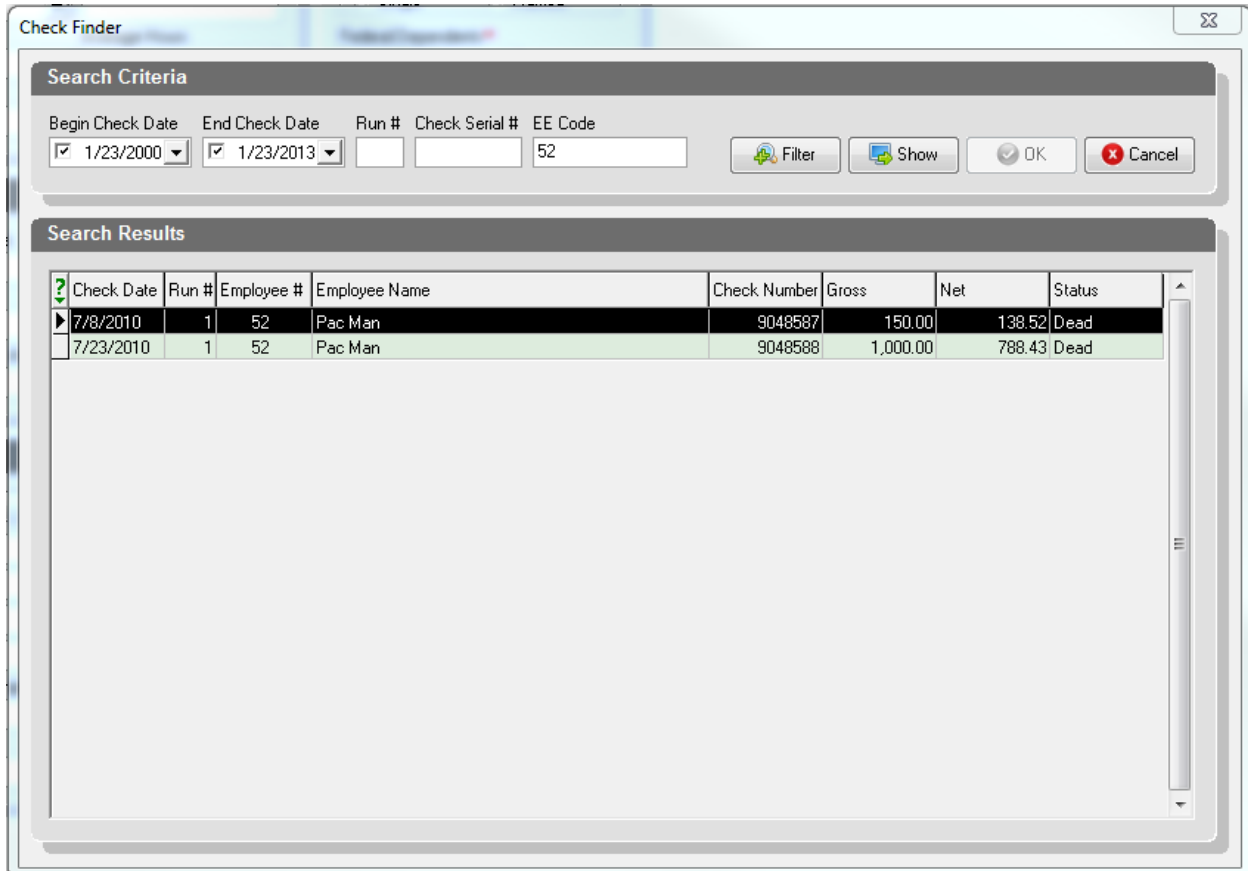


When the Check Finder opens, the following screen will appear.

A screenshot of a 'Check Finder' dialog box. It has a title bar with the text 'Check Finder' and a close button. The dialog is divided into two main sections. The first section, 'Search Criteria', contains fields for 'Begin Check Date' (set to 1/18/2013), 'End Check Date' (set to 1/18/2013), 'Run #' (empty), 'Check Serial #' (empty), and 'EE Code' (set to 52). To the right of these fields are buttons for 'Filter', 'Show', 'OK', and 'Cancel'. The second section, 'Search Results', contains a table with a header row and several empty data rows. The table has 8 columns. The first column of the table contains a green question mark icon.

Check Finder Option continued

Click on the Filter button and the current year's check will display. If you are looking for checks for a previous year, change your dates in the **Begin Check Date** and **End Check Date** fields. After entering your date range, click on the Filter button and the list of checks will display.



The screenshot shows a 'Check Finder' dialog box with two main sections: 'Search Criteria' and 'Search Results'.

Search Criteria:

- Begin Check Date:** 1/23/2000
- End Check Date:** 1/23/2013
- Run #:** (empty)
- Check Serial #:** (empty)
- EE Code:** 52

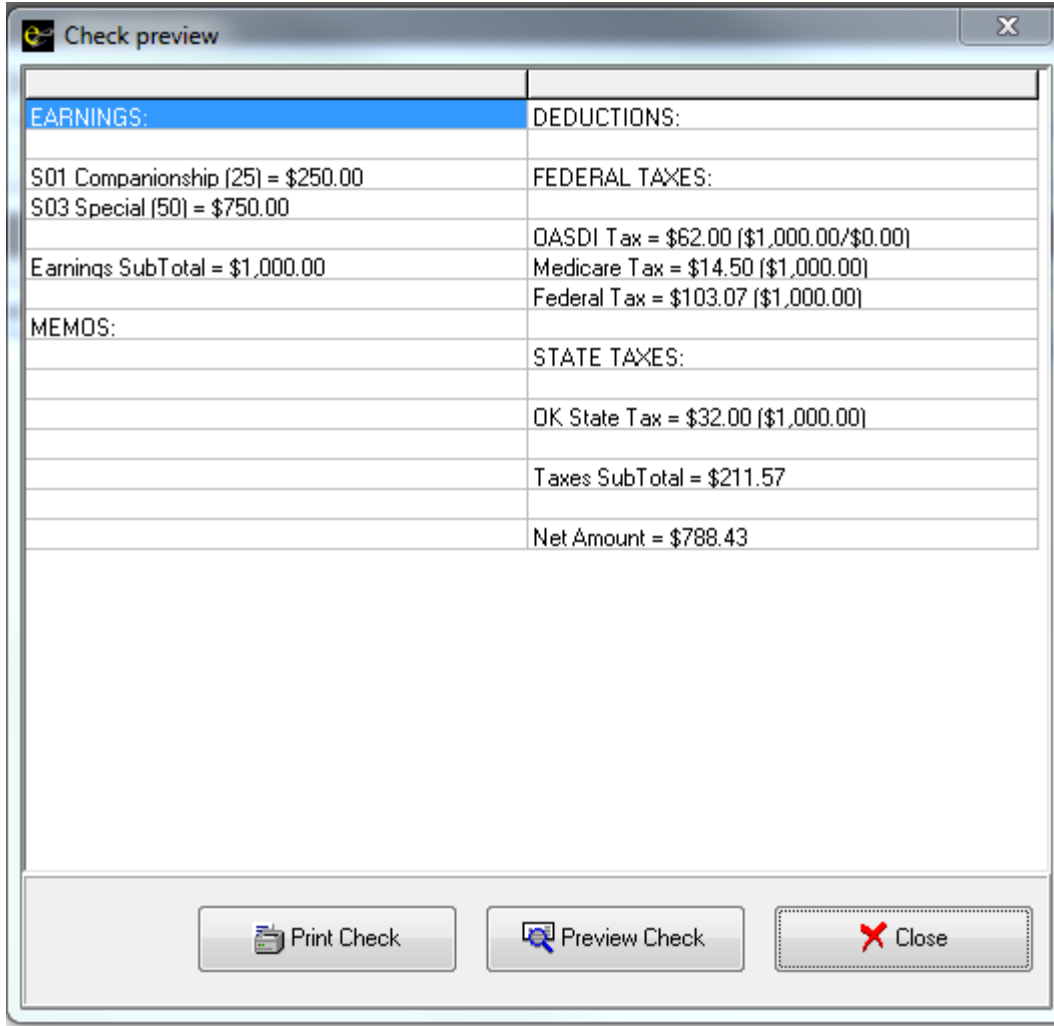
Buttons: Filter, Show, OK, Cancel.

Search Results:

Check Date	Run #	Employee #	Employee Name	Check Number	Gross	Net	Status
7/8/2010	1	52	Pac Man	9048587	150.00	138.52	Dead
7/23/2010	1	52	Pac Man	9048588	1,000.00	788.43	Dead

Check Finder Option continued

To view the check detail for a particular check, place your cursor on the check to be viewed and click on the Show button. The detail will appear as follows.



The 'Check preview' window displays a table with two columns: EARNINGS and DEDUCTIONS. The EARNINGS column lists S01 Companionship (25) = \$250.00, S03 Special (50) = \$750.00, and Earnings SubTotal = \$1,000.00. The DEDUCTIONS column lists FEDERAL TAXES: OASDI Tax = \$62.00 (\$1,000.00/\$0.00), Medicare Tax = \$14.50 (\$1,000.00), Federal Tax = \$103.07 (\$1,000.00), STATE TAXES: OK State Tax = \$32.00 (\$1,000.00), Taxes SubTotal = \$211.57, and Net Amount = \$788.43. Below the table are three buttons: Print Check, Preview Check, and Close.

EARNINGS:	DEDUCTIONS:
S01 Companionship (25) = \$250.00	FEDERAL TAXES:
S03 Special (50) = \$750.00	OASDI Tax = \$62.00 (\$1,000.00/\$0.00)
Earnings SubTotal = \$1,000.00	Medicare Tax = \$14.50 (\$1,000.00)
	Federal Tax = \$103.07 (\$1,000.00)
MEMOS:	STATE TAXES:
	OK State Tax = \$32.00 (\$1,000.00)
	Taxes SubTotal = \$211.57
	Net Amount = \$788.43

Print Check Preview Check Close

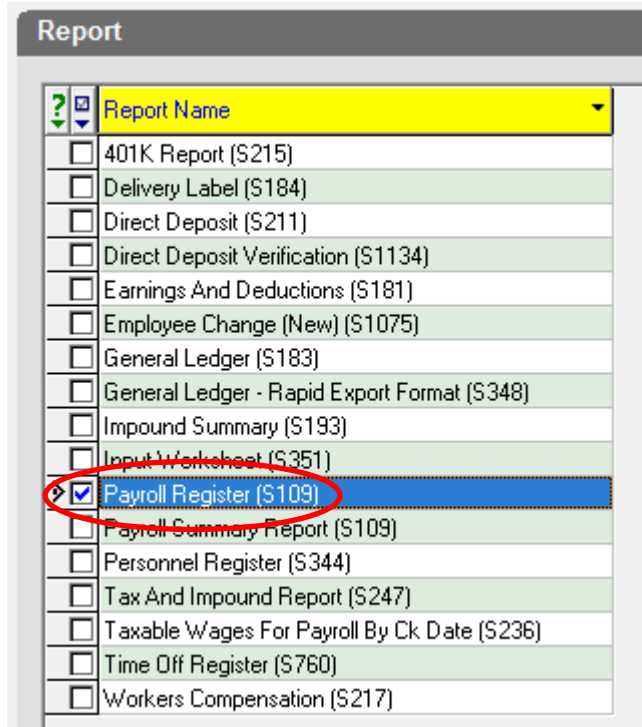
You may choose to preview the check or print the check. If you decide to print the check you will be required to put in a reason. You will also need to make sure your printer is set-up under **Admin -> Workstation Settings** under the **Checks Printer** field prior to printing your first check.

Running Reports

Go to **Reports -> Run Reports**.

All reports that are setup for your company will appear on the right side of the screen.

Place a check mark in the front of the report(s) that you would like to run from the report menu on the right side of the screen. The Payroll Register has been selected in the example below.



Once you have selected your report(s), click on the Report Parameters tab near the top of your screen.

Click on the box in front the check date(s) that you would like to include in the report. This will place a check mark in the box(es) of your selected check date(s). If you would like to run the report over a date range, select all payrolls in that range.

If you need to display more dates than are currently showing, you can change the date range by using the From and To fields directly above the Check Date.

Running Reports continued

CLIENT ZZ99999 SAMPLE CLIENT
COMPANY Z9999 HISC Sample Client

Browse **Report Parameters**

Override default parameters as
Payroll Register (S109) [Restore Defaults](#)

Payrolls Misc **Employee Filter** DBDT Filter

Check Date Period
Year 2013 ☒ 1st Quarter ☒ 3rd Quarter
☒ 2nd Quarter ☒ 4th Quarter
From 1/1/2013 To 12/31/2013

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

☐ Show Processed Only ☐ Consolidation

Check Date	Run #	Processed	Status	Type
1/25/2013	1		W	R

Click on the Misc tab.

This screen offers many options on the way this report can be displayed. The following options are available:

- * Group Level: Sort by Company or Division
- * Group Type: View report in Detail, Summary, or Summary Detail.
- * Detail Sort: Option for sorting by Employee Last Name, Employee SSN, or Employee Code.
- * Mark Sensitive Information: This will display all XX's in place of the employee's SSN.
- * Show only Summary for Multiple check dates: When selecting multiple check dates, this option will combine into one total record.

This tab will default to the settings that are used when this report generates with your payroll run. The setting can be changed using the drop downs or adding or removing the check marks.

Depending on the report that you select, the Misc tab will display different options.

Running Reports continued

CLIENT **ZZ99999** **SAMPLE CLIENT**
COMPANY **Z9999** **HISC Sample Client**

Browse

Report Parameters

Override default parameters as

Payroll Register (S109)

Restore Defaults

Payrolls

Misc

Employee Filter

DBDT Filter

Grouping and Sorting

Group Level

Division

Group Type

Summary Detail

Group Sort

Group Code

Detail Sort

Employee Last Name

Do according to Company Setup

☐ Page Break after each Group

☒ Show Terminated Employees

☒ Mask Sensitive Information

☐ Show only Summary for Multiple check dates

☐ Show Home DBDT for each Employee

☒ Include Memos in Totals

☒ Include Taxable Memos in Totals

☒ Include Pieces from Piecework in Totals

☒ Break Employee between Pages

☒ Deductions as Taxes

☐ Show Shift Differentials

☐ Hide SSN, State, Frequency, and Salary

☐ Swap Check Date and Net Check

☒ Bold EE Name, Check Number, and Net Check

☐ Show Employees With YTD Earnings

☐ Show Cobra Credit

☐ Display Company subtotal for PA EIT taxes

Running Reports continued

Click on the Employee Filter tab.

This panel gives you the ability to select the employee(s) that you would like to run the report on. Click on the box in front of the employee(s) that you would like to include on the report. The report will only include the employee(s) that have been selected and paid the check run(s) that have been selected.

If no employees are selected, the report will show all employees that receive pay on the check date(s) that have been selected on the Payrolls tab.

CLIENT **ZZ99999** **SAMPLE CLIENT**
COMPANY **Z9999** **HISC Sample Client**

Browse Report Parameters

Override default parameters as
Payroll Register (S109) Restore Defaults

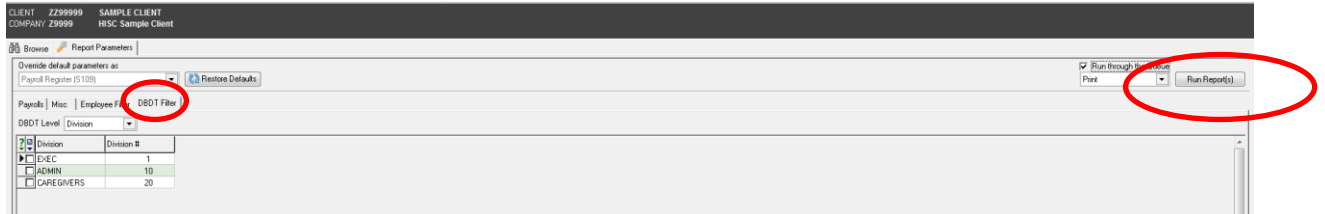
Payrolls | Miss | **Employee Filter** | DBDT Filter

	EE Code	SSN	First Name	Last Name
<input type="checkbox"/>	1	555-55-1004	Rita	PORTER
<input type="checkbox"/>	2	555-55-1062	Mark	JETTER
<input type="checkbox"/>	3	555-55-1047	Annette	RICHARDS
<input type="checkbox"/>	4	888-88-8888	Marion	CARTER
<input type="checkbox"/>	6	555-55-1057	Louise	Martinez
<input type="checkbox"/>	7	555-55-1076	Lynn	Wilson
<input type="checkbox"/>	8	555-55-1036	Rhonda	Hansen
<input type="checkbox"/>	9	555-55-1053	Janice	Clark
<input type="checkbox"/>	10	555-55-1058	Brenda	Hendricks
<input type="checkbox"/>	11	555-55-1027	Denise	EDWARDS
<input type="checkbox"/>	12	555-55-1051	Catherine	Fuller
<input type="checkbox"/>	14	508-04-4855	Julie	MORRISON
<input type="checkbox"/>	15	555-55-1059	Denise	Moore
<input type="checkbox"/>	16	555-55-1066	Lisa	Harper
<input type="checkbox"/>	17	555-55-1060	Marsha	Lund
<input type="checkbox"/>	19	555-55-1055	Diane	Little
<input type="checkbox"/>	20	555-55-1063	Debbie	Jones
<input type="checkbox"/>	21	555-55-1026	Mary	JONES
<input type="checkbox"/>	22	555-55-1023	Ron	Freeman
<input type="checkbox"/>	23	555-55-1043	Kathy	Jones
<input type="checkbox"/>	24	555-55-1079	Charlie	French
<input type="checkbox"/>	25	555-55-1073	Ted	Pluge

Running Reports continued

Click on the DBDT Filter tab.

You can select the DBDT Level using the drop down. Once you have made your DBDT Level selection, you will then be able to select the level(s) that you wish to run the selected report for. If no divisions are selected, the report will run for the entire company.

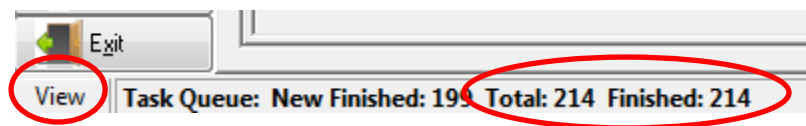


Run Report - To run the report, you can select Print or Preview from the drop down in the upper right hand corner. Click on the  button.

Using the Queue

If the Run through the Queue check box is not checked, Evolution processes the report locally. You will not be able to perform other tasks in Evolution while it is being processed. When completed, it is displayed immediately on your workstation.

If the Run through the Queue box is checked, Evolution submits the report request to the server to be processed. You can perform other tasks in Evolution while it is being processed. When completed, it displays it in your queue tasks windows. Watch the queue found in the lower left hand corner of your screen. When Total: # = Finished: #, your report is ready to view.



You can access the queue by selecting the View button found at the bottom left hand corner of your screen. You will have options to save and print within the queue.

Within the Queue you will have options to print.

Running Reports continued

The screenshot displays a software interface for running payroll reports. At the top, a 'Your queue tasks' window lists several tasks, including 'Task Run Report' and 'Task Process Payroll', with their respective statuses and completion times. Below this, a 'Personal' section shows details for a specific task run, including the caption 'C08-2999 Payroll Register' and the status 'Finished Successfully'. The main area of the interface displays a 'Payroll Register (S109)' report for a client named '#Z9999 HISC Sample Client'. The report includes a table with columns for Employee Name, Social Security Number, Salary, Frequency, Check Number, Check Date, Check Type, and Net Check. The table lists employees under two divisions: '10 - ADMIN' and '20 - CAREGIVERS', with their respective earnings, deductions, and net pay amounts. The report is dated 01/21/2013 and covers the period from 07/16/2010 to 07/30/2010.

Report Preview toolbar



The first button highlighted is the Quick Print button. This will print the report using the current settings for printer properties.


The second highlighted button displays the Print dialog. Once you have set printer properties, print the document by clicking the Print button.

Tax and Check Line Calculator

The Tax and Check Line Calculator gives you the ability to calculate an employee's check amount without having to create a payroll. You are able to perform gross-to-net or net-to-gross calculations for an employee check. You may include scheduled E/D's and implement tax overrides. Any calculations or changes that you make in this screen will not affect the employee's permanent record.

You can access the Tax and Check Line Calculator by going to Employee -> Employee.



Click on the  button found in the upper right hand corner of the employee screen under Additional Tools and the following screen will appear.

Tax and Check Line Calculator

Tax | Check Preview | Payrolls

Employee

Employee: 52, Man Pac

E/D Code	Amount	State	SUI State	Ho
401_Roth	25.00			
Z01				
Z12				

Refresh Scheduled E/Ds (F3)

Block Federal | Block Additional Federal | Tax at Supplemental Rate | Block EE QASDI | Block EE Medicare | Block EIC

Federal Marital Status: Single (selected), Married
Fed Number of Dependents: 0 | Net To Gross

Taxes

Federal Tax Wages:	Federal Tax:
QASDI Taxable Wages:	QASDI Tax:
QASDI Taxable Tips:	Medicare Tax:
Medicare Taxable Wages:	EIC Tax:
Gross:	Net:

States

? State	Marital St	With Allow	State Tax Wages	State Tax	SC
OK	S				

SUI

? SUI	SUI Tax Wages	SUI Tax	SUI Gro

Locals

? Local Name	Local Tax Wages	Local Tax	OR An

Controls

Disable YTDs | Disable Shortfalls | Check Preview | Plug Taxes (checked) | Check Type: Manual (selected), Regular | Calculate check (F5) | Copy to payroll (F8) | Close (F2)


Tax and Check Line Calculator continued

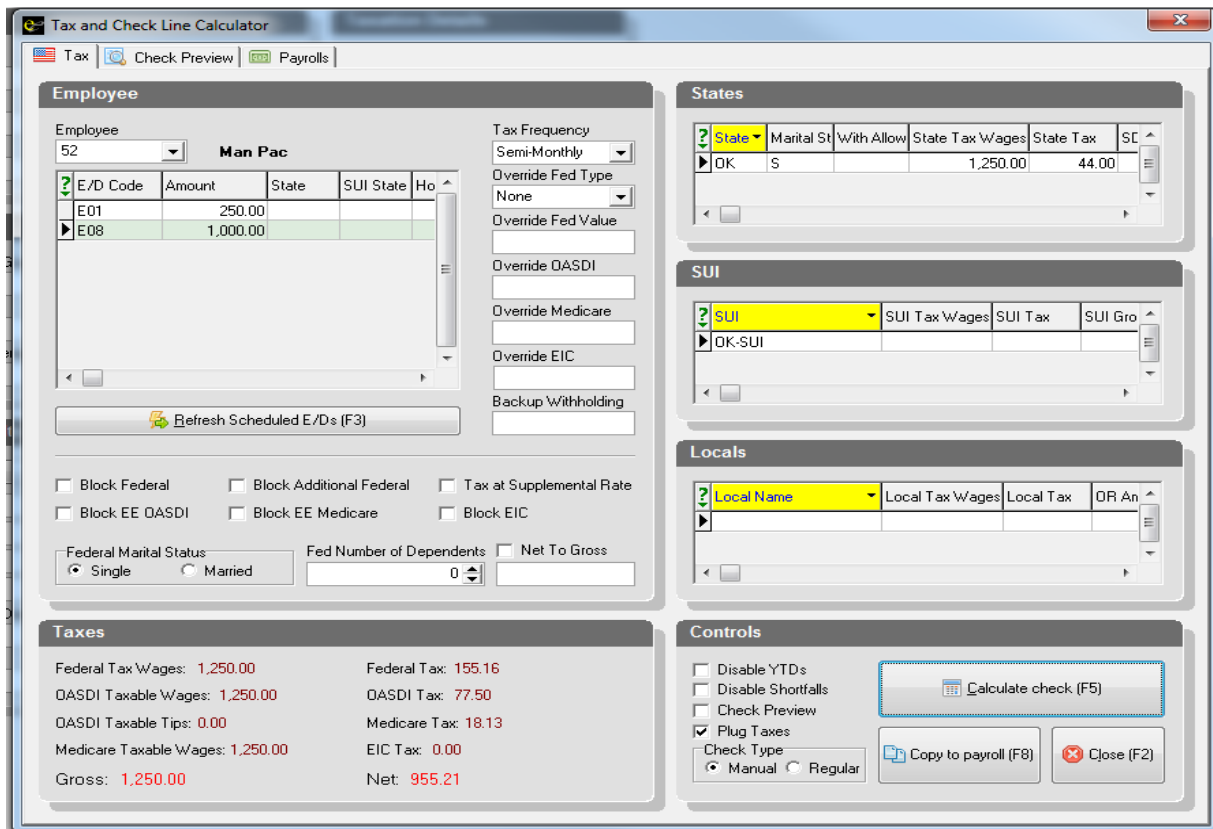
Tax Tab

On the left side of the screen, any active scheduled E/D's that are setup on the employee will automatically populate here. If you do not want an item(s) for the check calculation, click on the E/D code you would like to remove, and press Ctrl + Delete at the same time. A pop up box will appear asking if you want to delete the record. Click OK and the item will be removed.

To add an E/D that is not already listed, place cursor on the bottom E/D listed, press your arrow down key on your keyboard. This will add a new line to this screen. In the E/D code column of the new line, enter the E/D code that you would like to add to this calculation. This may include earnings codes as well as deduction codes. When you add an earning code, make sure to also enter the gross amount to be paid. If you are calculating pay for an hourly employee, enter the hours to be paid and Evolution will pull in the hourly rate of pay assigned to the individual on the EE Entry and then calculate the gross pay for that earning code. This calculation will happen when you calculate the check.

 Calculate check (F5)

Once all E/D amounts have been entered, click on the  button found near the lower right hand corner of your screen. Evolution will calculate the net check.



Tax and Check Line Calculator continued

In the lower left hand corner of the screen, you will find the following items in red:

Gross pay, Federal Tax amount, OASDI Tax amount, Medicare Tax amount and the Net Check amount. State and local withholding amounts can be found on the upper-right side of the screen.

Below is the *Check Preview* tab showing the details of the check calculation:

The screenshot shows a software window titled "Tax and Check Line Calculator" with three tabs: "Tax", "Check Preview" (selected), and "Payrolls". The main content area is titled "52 Man Pac" and displays a table with two columns: "EARNINGS:" and "DEDUCTIONS:". The "EARNINGS:" column lists "E01 SALARY = \$250.00", "E08 ADM Bonus = \$1,000.00", and "Earnings SubTotal = \$1,250.00". The "DEDUCTIONS:" column lists "FEDERAL TAXES:" (including "OASDI Tax = \$77.50 (\$1,250.00/\$0.00)", "Medicare Tax = \$18.13 (\$1,250.00)", and "Federal Tax = \$155.16 (\$1,250.00)"), "STATE TAXES:" (including "OK State Tax = \$44.00 (\$1,250.00)"), "Taxes SubTotal = \$294.79", and "Net Amount = \$955.21". There is also a "MEMOS:" section on the left side of the table.

EARNINGS:	DEDUCTIONS:
E01 SALARY = \$250.00	FEDERAL TAXES:
E08 ADM Bonus = \$1,000.00	OASDI Tax = \$77.50 (\$1,250.00/\$0.00)
Earnings SubTotal = \$1,250.00	Medicare Tax = \$18.13 (\$1,250.00)
MEMOS:	Federal Tax = \$155.16 (\$1,250.00)
	STATE TAXES:
	OK State Tax = \$44.00 (\$1,250.00)
	Taxes SubTotal = \$294.79
	Net Amount = \$955.21

To print the details on the check calculation, press **F7** on your keyboard.

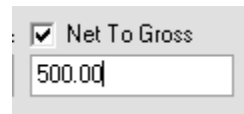
We recommend that you print a copy of the check. The copy should be placed in your payroll pending folder and must be entered as a manual check in the next payroll run. This will update the employee's history information and also collect and pay in the taxes. See instructions on page 71 to enter a manual check into the payroll.

Tax and Check Line Calculator continued

Net to Gross Calculation

To gross up a pay amount for an employee, you will be using the **Net to Gross** function found on the **Tax** tab. Place a ☒ in front of the box labeled Net to Gross. Enter the dollar amount that you would like the check to be made payable for in the box directly below the check marked field.

In the example to the right, the employee will receive a check in the amount of \$500.00.



☒ Net To Gross
500.00


Copy to Payroll and Payroll tab

Evolution does offer a function that will populate your calculated check into a waiting payroll. We do not recommend this procedure as many times a manual check calculation is being made because of missed hours in the payroll. Since many times these calculations are being made on payday, it is not advisable to create your next payroll this far in advance. Remember, when you create your payroll, employees and their scheduled E/D's are brought into the payroll as they are setup at the time of the payroll creation. Any new hires will not be a part of the payroll if it is created too far in advance.

Entering a Manual Check into the Payroll

If you would like to have PayPLUS enter your manual checks, please fax or e-mail the information prior to running payroll and we will enter it for you.

1. After a payroll and batch have been created, go to **Payroll -> Batch**. While in the **Quick Entry** tab, double click on the employee you wish to enter the manual check for.


2. This will take you to the **Check Lines** tab in **Payroll -> Check**. Click on the  button found at the top of your screen on the tool bar to add a new record. This will start the “Payroll Expert”.



3. Select ‘**Manual**’ from the drop down when asked to choose a check type. Click **Next**.

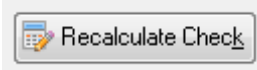
4. The employee information will default to the employee you had selected while on the **Quick Entry** tab. Confirm the employee selected by verifying the EE Code or the EE Name. Change if necessary. Click **Next**.



5. You will be prompted to enter the check number. Click **Next**.


6. Evolution will create the manual check and take you to the **Check Lines** tab. Make sure to enter all earnings and deductions that were a part of the check that was issued to the employee. (Note: Evolution will not automatically calculate the amount as it does on a regular check.)

7. Click on the **Manual Tax** tab and enter the amounts for all tax types. Click on the  button to show the State tax pieces.

8. Click on the green check  and the commit button  to save your changes.

9. Click on the  button found at the bottom of your screen. Once the check is calculated, you will be on the **Preview** tab. Verify that the check amount matches what the employee received on the check that was given to the employee. If it does not, go back to the **Check Lines** tab and make any adjustments necessary.

10. Once the check matches, Click on the green check  and the commit button  to save your changes.

11. Click on the  button to return to the **Quick Entry** tab. When you return to the **Quick Entry** tab, this check will appear with the letter “M” in the Type column to designate it as a manual check.