

Evolution Software  
User Guide

EVOLUTION PAYROLL SERVICES

# Evolution Software User Guide

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# Payroll Processing

## Creating a Payroll

### Using the Quick Entry Button

Most payrolls will be created using the Quick Payroll button. This button creates a payroll and batch based on the next scheduled payroll date in the company calendar.

***Note:*** **DO NOT USE** the Quick Entry button if you already have a payroll created for your current pay cycle or the system will create the next scheduled payroll according to the company calendar. If your payroll is already created, or you are not sure if your payroll is already created, see the next section for “Accessing an Existing Payroll.”

1. Go to the [Payroll - Payroll screen](#).
2. Select and open the company
3. View any notes prior to processing the payroll.
4. Click the **Payroll** tab.
5. Verify that the current payroll has not already been created by checking the payroll check dates shown. If the current payroll already exists with a status of “W,” **DO NOT** use the Quick payroll button.
5. If the current payroll date is not shown, click the **Quick Payroll** button at the bottom of the screen to create and enter your payroll.

After pressing Quick Payroll, a payroll and batch are created and the screen will refresh directly to the Quick Entry tab. You can now start entering your payroll data.

## Accessing an Existing Payroll

If you or your payroll specialist have already created your payroll for the current pay cycle, you will see the current check date in your payroll list with a status of “W” for “waiting.” To open this existing payroll, click on that line and then press the “Batch” button at the bottom of the Evolution window. This will bring you to the Quick Entry tab where you can complete the entry of your payroll data.

## Entering Payroll Data

Payroll data can be keyed into the Quick Entry grid much like an Excel spreadsheet. You can click with your mouse on the cell into which you want to enter data, use the arrow keys on your keyboard to move the cursor from cell to cell, or press the [Enter] key to move from one cell to the next one to the right. Pressing [Enter] on the last cell in a row will take you to the next line.

**Note:** Pay close attention to the column heading for the cell into which you are entering numbers. Make sure that you are entering Hours into the “Hrs” columns and Amounts in the “Amt” columns.



Hrs E01 Regular	Amt E01 Regular
63.00	1,890.00

It is recommended to SAVE your entries often to prevent data loss in the case of your computer crashing, freezing or losing power in the middle of your entry. To save the information you have entered, press [Ctrl] + S on your keyboard or click the green “commit changes” button on the right side of the tool bar at the top of your Evolution window.



Totals for each column in the Quick Entry grid are kept at the very bottom of the grid and are updated each time you save.

## **Customizing the Quick Entry Grid**

**Changing the Sort Order.** You can sort the employee list in ascending or descending order by any of the columns by clicking on that column heading. One click will sort the list in ascending order, a second click will sort the list in descending order, and a third click will bring the order back to the default.

**Adding or Removing Columns:** You can add and remove columns by right-clicking anywhere in the grid and choosing “E/D,” then “Add” or “Delete.” Pay close attention to whether you wish to add a column for entering “Hrs” or an “Amt.”

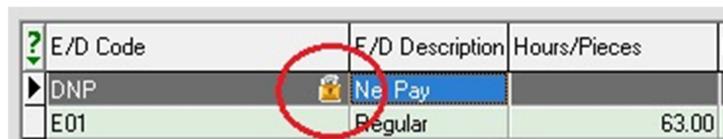
**Re-ordering and Moving Columns:** You can change the order of the columns on your Quick Entry grid at any time by clicking and holding on the column heading and dragging it to the right or left.

## Entering Check Details

From time to time it may be necessary to enter pay information with more detail, such as the use of multiple hourly rates, stopping direct deposit on an individual employee or one-time deductions using codes that you do not keep on your Quick Entry Screen. To access an employee's check summary screen, you can either double-click on the employee's line on the Quick Entry tab, OR click on their line to highlight them and press the "Check" button at the bottom of the screen.

The "**Payroll -> Check**" screen can be customized in the same way as the Quick Entry grid for sorting and adding or removing columns. (see above)

**Scheduled E/D's:** Automatic earnings or deductions setup in the Employee -> Scheduled E/D's screen will each show up as a check line with a LOCK symbol in the E/D Code column. These lines **cannot** be edited on the Payroll -> Check screen but they can be deleted.



E/D Code	E/D Description	Hours/Pieces	F
DNP	Net Pay		
E01	Regular	63.00	

**Adding a Check Line or E/D:** To add a check line to the Payroll -> Check screen, press the [Insert] key on your keyboard and a blank line will appear. Click on the cell in the "E/D Code" column to select the Earnings or Deduction code that you want to use, then press [Enter] to move the cursor to the column you want to enter data.

**Deleting a Check Line or E/D:** To delete a check line, click on the line to be deleted and press the [Ctrl] + [Del] keys on your keyboard.

**Entering Hours/Pieces:** Enter a number into the "Hours/Pieces" column and press [Enter] to move to the "Rate of Pay" column. If you want to override the employee's regular hourly rate, you can key it into this column and press [Enter] **twice** to have the system calculate the Amount based on the Hours and keyed in Rate. If you do not want to override the employee's regular rate, press [Enter] **twice** to complete the line and have the system calculate the Amount based on the Hours and Regular Rate.

**Entering Amounts:** Enter a number in the "Amount" column and press [Enter] to complete the line. **Note:** If you attempt to enter an amount for a check line that has Hours/Pieces and a Rate of Pay enter on it, the system will always re-calculate the amount based on the Hours/Pieces \* Rate of Pay.

**Stopping Direct Deposit:** To temporarily stop direct deposit for an individual employee on the current pay, click on the direct deposit and/or net pay check line and press the [Ctrl] + [Del] keys on your keyboard.

**Overriding Taxes:** To temporarily override taxes for an individual employee check, click on the Tax Overrides tab. You have options to change the tax frequency for this check, block taxes, or override tax amounts.

**Returning to the Quick Entry Grid:** To return to the Quick Entry grid from the Payroll -> Check screen, press the “Batch” button at the bottom of the Evolution window.

## Calculating & Previewing an Employee Check

You may calculate and preview an employee’s check by going to the Payroll -> Check screen and pressing the “Recalculate Check” button at the bottom of the Evolution window. After a few seconds, the screen will refresh to the “Preview” tab of the Payroll -> Check screen and display the calculation of Earnings, Deductions, Taxes and Net pay for the employee based on the information keyed and saved in the system for the current payroll check. After calculating the check, commit the changes before leaving the preview screen by pressing the green commit changes button.



## Adding a New Regular Check

There may be an occasional need to create an additional regular check for an employee, or create a check for a new hire that was added after the current Payroll was created. To do so, go to the Payroll -> Check screen for any employee and press the green “Create New Record” button in the middle section of the tool bar at the top of your Evolution window. This will open the “Payroll Expert” wizard to guide you through creating the check.



**Note:** To be able to add a check for an employee, the employee’s hire date must be on or before the last day of the current payroll period.

**Check Type:** You will always choose “Regular” as the check type if you want to create an actual pay for the employee. Other options for check type are Void, Manual, 3<sup>rd</sup> party, etc and they are all special circumstances.

**Employee Selection:** Choose the employee you want to create a check for. The top dropdown box on this screen is to choose the sorting of the employees, and the bottom dropdown box is to select the employee based on the sort you choose. The default sort is EE Code.

**Check Template:** If you have check templates setup for your company that you wish to apply to this new check, select them from the dropdown box. If you are not sure or do not have any templates setup, skip this and press the “Next” button.

**Pay Salary:** If you choose “Yes”, the new check will include the salary amount setup for the employee. If you choose “No”, the salary will not be automatically added to the new check. If the employee is not salaried, choose “No.”

**Pay Regular Hours:** If you choose “Yes”, the new check will include a check line for the “Regular” earnings code. If you choose “No” the check will not automatically include the “Regular” earnings code check line.

## Adding a Manual Check

There may be an occasional need to write an employee a check outside of the regular payroll processing. To calculate the net pay and then record this information in the payroll system, you can create a manual check type in Evolution. To do so, take the following steps:

1. Create your next payroll in Evolution as normal (see page 1).
2. Go to the Payroll – Check screen by clicking on the Check button at the bottom of the Quick Entry tab, or by double clicking on an employee
3. Click the Create New Record button at the top of the screen 
4. When the “Payroll Expert” box appears, choose “Manual” as the check type and press “Next”
5. Choose “Yes” to update the balance of scheduled E/Ds and press “Next”
6. Choose the Employee and press “Next”
7. Enter the check number for the manual check you are writing
8. If you want the employee’s regular Scheduled E/Ds to be included on the check, click on the General Tab at the top of the screen, then click the “Refresh Scheduled E/Ds” button.
9. Return to the Check Lines tab and use the check lines to add the appropriate E/D codes, hours, rate and amount to pay the employee. **Note:** You must calculate and enter earnings manually – Evolution will not automatically calculate the Hours x Rate in manual check entry.
10. Make sure no Direct Deposit E/Ds are being shown for the employee. Delete those check lines if they appear by clicking on the line and pressing [Ctrl] + [Del] on your keyboard.
11. When finished entering information, review all earnings and deduction information for accuracy and press the Post Changes button 
12. Click the “Recalculate Check” button at the bottom of the screen to calculate the check.
13. You are taken to the Preview Tab that shows you the breakdown and Net Pay of the check.
14. Click on the Commit Changes button to save the manual check. 

## Deleting a Check

There are two ways to delete a check from the payroll:

- (1) From the quick entry grid, click on the employee's line and press [Ctrl] + [Del] on your keyboard. You will be prompted to confirm that you want to delete the check.
- (2) From the Payroll -> Check screen, click the red Delete Current Record button



## Checking Control Totals for the Batch

It is recommended that you verify the system totals that were keyed in against your own totals to determine if any data entry mistakes were made and need to be corrected. You can view the totals for each Earnings and Deduction shown at the bottom of the Quick Entry tab.

Alternatively, you can click on the “Earnings and Deductions” tab in the “Payroll -> Batch” screen. The “Earnings and Deductions” tab will display all of the E/D's in the current payroll, and by clicking on them individually it will show you a list on the right side of the screen of any employees in the current batch that have values entered for that E/D. If you find an error that needs to be corrected, you can either double-click the employee on the right side of this screen to go to their Payroll -> Check screen, or click back on the “Quick Entry” tab near the top of the Evolution window.

## Pre-processing a Payroll

Pre-processing lets you check the calculation of all of the payroll checks without actually processing. Pre-processing does not, however, show or update Time Off Accruals. To verify payroll calculations prior to processing, pre-process the payroll and then run the Payroll Register Report against the waiting payroll. This is the only report that will reflect accurate information after pre-processing.

**Note:** Any employees that do not have earnings entered for them at the time of pre-processing will have their checks removed from the batch, so it is important to pay all employees before pre-processing.

**Note:** If you make changes after pre-processing, you will have to pre-process again for the changes to be reflected when running the Payroll Register Report. Pre-processing can be done as many times as necessary.

1. If you are in the Quick Entry grid, press the “Pre-Process” button at the bottom of the Evolution window, otherwise go to the **Payroll - Payroll - Payroll** tab, select the waiting payroll and click the **Pre-Process** button
3. Click **OK** in the pop-up screen that opens asking if you want to pre-process this payroll.
4. Go to the processing queue by clicking on the “View” button in the very lower left corner of the Evolution window. (See page 27 for instructions on accessing and viewing the queue)
5. Refresh the queue until you see your pre-processing task is finished successfully.



6. Close the processing queue and go to Reports -> Run Reports to run the Payroll Register and view the calculated information.

**Note:** If you run the Payroll Register Report before the “Pre-Process” task is finished, the report will not show any calculated deductions, taxes or net pay. If your report looks like this, refresh the Queue until the “Pre-processing” task is completed, and then run the Payroll Register again.

## Submitting a Payroll

There are two methods for submitting the payroll:

- On the [Payroll - Payroll - Payroll tab](#), select the proper payroll with a “**W**” status and click the “**Submit Payroll**” button. The payroll is then processed normally.
- If assistance is needed to review the payroll, click the “**SB Review**” button on the Payroll tab.
  - The payroll is put on hold and prompts the user to email the Payroll Specialist.
  - The Payroll Specialist reviews the payroll, addresses any issues, and processes the payroll.

Once the payroll is submitted and waiting to be processed, the Employee screens are locked until it is processed to protect the integrity of the data in the payroll. Payrolls cannot be deleted when the payroll is in a “**C**” or “**I**” Status (see table below). When the job is completed, the payroll has a “**P**” status on the [Payroll – Payroll - Payroll tab](#).

### **Payroll Status Descriptions**

Status	Description
C	Completed and on the queue waiting to be processed (either Operations – Process Payrolls or Operations – Approve Payrolls)
P	Processed
V	Void
W	Waiting to be processed
H	On hold waiting to be approved by the service bureau
Y	Preprocessing
I	In the task queue verifying numbers
B	Waiting for service bureau review

# Employees

## Creating an Employee

To begin:

1. Go to the [Employee - Employee screen](#).
2. Select and open the company from the list on the left-hand side of the screen.
3. Click the green “Create New Record” button in the middle section of the tool bar at top of the Evolution window. 
4. The screen will refresh and the cursor will be placed in the first field (SSN). Beginning with this field, enter values in **at least** all of the fields that have a red \* asterisk. These fields are required and must be filled in prior to saving the new employee.
5. Even though there is no red \* next to it, you must assign a Department by clicking on the “**D/B/D/T**” button before saving the employee.
6. Any other fields that do not have a red \* asterisk are not required and should be ignored unless you know what values you need to store for the employee.
7. Click the Post Changes button  and then click Commit Changes .
8. Now if you need to enter a Local Tax for the employee, click on the Assign Locals button.



9. AFTER saving the employee’s initial information, this button will become active and offers a view of local taxes available and setup for the company in under “Company Local Tax”, and local taxes automatically setup for the employee under “Employee Locals”. To add a local tax to the employee, click on it in the list at the top of the screen and then click the Down Arrow on the right side of the screen to bring it down to the “Employee Locals” section. When you are finished press the “OK” button.

***Important***– If you are a **Pennsylvania** employer, Act 32 requires that you withhold the higher of the local earned income tax rates for each employee, between their home township and the township in which they are working. For Evolution to properly calculate and report

the correct local tax information, you MUST have BOTH the employee's **residential** local taxing jurisdiction as well as the **non-residential** local taxing jurisdiction setup for each employee. Evolution has been setup to automatically add the non-resident (working) township to each new hire, but you must add the employee's residential code. If the employee's residential township is not shown in the list of available townships, please contact Evolution Payroll Services and request to have it added to your company. **DO NOT** delete Non-Resident taxes that are setup automatically for the employee.

**Act 32 local tax information** can be found by looking up an address from the link on our website on the "Client Resources" page and then on the right menu under "Act 32 Tools."

Web Link: <http://munstatspa.dced.state.pa.us/Registers.aspx>

**Out of State Resident Employees:** If you have an employee working in PA but living in another state, you still must enter a residential local tax in Evolution. The proper code for these employees is **Out of State Res.**

## **EE Entry Tab**

The EE Entry tab contains most of the basic employee information. Below you will find pertinent information about the employee information fields.

### **Employee Section**

**SSN** - required before any other information is entered, this is the employee's social security number or EIN. If the employee is a 1099 contractor and has an EIN, enter the EIN instead of the social security number.

***Note:*** If you are adding a 1099 contractor, as soon as you finished entering the social security number or EIN, go directly to the "W2" tab and under "W2 Information" select whether you have entered an EIN or SSN. Then select "1099" for "1099 or Employee." It is **VERY** important that you do this before continuing to assure that this individual or company is properly exempted from the payroll taxes. When finished, you can go back to the "EE Entry" tab and continue entering the basic information.

**EE Code** - (EE Number) must be alpha or numeric, up to 9 characters, and unique to the employee.

### **Pay Section**

**Salary Amount** – The per pay salary amount to be pre-populated on each check

**Rate Number** – Default EE Rate number

**Standard Hours** – The hours per payroll if you want them **pre-populated** on each check for this employee

**Average Hours** – Information field only

**Rate Amount** - Primary HOURLY pay rate.

**Note:** Enter pay rate information for one rate. To enter more pay rates or pay rate information, go to the [Employee - Pay Rate Info - Details tab](#).

**Position for Pay Grade** – DO NOT USE unless you have Pay Grades setup for your company. If you are not sure, DO NOT USE.

**Pay Grade** – DO NOT USE unless you have Pay Grades setup for your company. If you are not sure, DO NOT USE.

## **Position Section**

**ACA Status** - same as Position Status (full-time, part-time, etc.) This value is used to determine Full-Time Eligibility (FTE) when running the ACA Eligibility Analysis Report (S2713).

**Dependent Coverage Available** – Informational Field

**Healthcare Coverage** – Not Used

**Eligible for Benefits** – Informational Date Field

## **Labor Defaults Section**

**Assign D/B/D/T** - choose the home D/B/D/T for this employee. You must click on this button and select a Division/Department/Branch/Team level to place the employee.

**Default WC** - Workers' Comp state code for the employees' position - select the applicable code from the dropdown list if you have requested workers compensation tracking.

**Default Job** - Job that is considered the employees "main" job or labor tracking number. Only used if you have requested labor tracking.

**Union** - Union that the employee belongs to - only used if you have requested union tracking.

## Taxation Details Section

**Federal Marital Status** – Select Single or Married

**Federal Dependents** – Enter any number 0 - 99

**State  
SDI  
SUI** } State information entered at the  
Company level.

**State Marital Status** – Select if applicable

**State Dependents** – If applicable, enter any number 0 - 99

**Locals button** – AFTER saving the employee’s initial information, this button will become active and offers a view of local taxes available and setup for the company in under “Company Local Tax”, and local taxes automatically setup for the employee under “Employee Locals”.

## Employee Details Tab

This tab has additional optional employee fields that you may or may not use.

**New Hire Report Sent** – DO NOT change this field for new hires.

**FLSA Exempt** – DO NOT change this field unless you are familiar with the Fair Labor Standards Act and know that you are employing individuals that are exempt.

### **Generate Second Check**

Yes - a second check is created for the employee when the payroll batch is created.

No - only one check is created for the employee when the payroll batch is created.

**Second Check Template** - check template on which to base the second check, if Yes is selected for Generate Second Check.

## Address Tab

This tab stores address overrides for an employee

**Address 1** - mailing information; where W-2 forms will be sent

**Alternate Address** - address used for all payroll checks

**E-mail**- employee address for Virtual Mail Room (VMR) documents to be sent

**VMR Password** - selected by the service bureau or the employee, the password is used to retrieve VMR documents that are emailed to the employee.

## **W-2 Tab**

Specify how the employee's Form W-2 is processed on this screen.

### **EIN or SSN**

EIN - number entered is formatted as an EIN (00-0000000)

SSN - number entered is formatted as a SSN (000-00-0000)

### **1099 or Employee (W-2)**

## **Federal Tab**

The taxes exempted or overridden on this tab affect every check issued to the employee. If taxes are blocked or exempted at this level, they will not be able to be overridden on the employee's checks.

Taxes can only be overridden if they are calculated for the check. Therefore, if an employee's taxes are regularly blocked, but not always, it may be better to set them up with the Single – 99 status. Statuses can be changed only as of the Effective (as of) Date.

**Override Federal Tax Type** - is it a regular amount / percentage; or an additional amount / percentage?

**Override Federal Tax Value** - If an Override Tax Type is entered, an Override Tax Value is required before saving.

## **Notes Tab**

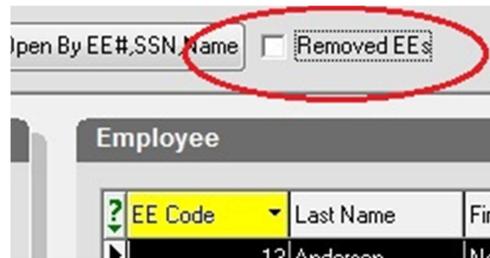
Notes entered here can be viewed by the payroll processor, or other internal colleagues. The information does not appear "publicly" and cannot be viewed by the employees.

**Payroll Notes** – If any notes are entered in this section, the employee will be highlighted in yellow on the payroll Quick Entry grid to alert the person doing the data entry. This area should be used for saving reminders that are pertinent to view at the time you are entering payroll. They can be viewed on this screen, or on the Notes tab of the Payroll -> Check screen.

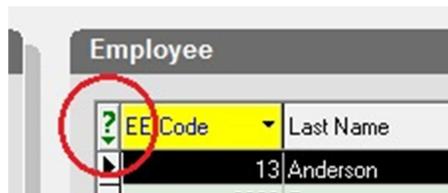
**General Notes** - general notes about the employee and payrolls, the notes are stored with the employee data and only appear on this screen - not on checks. When deleting a note, be sure to delete all of the spaces, before saving and committing.

## Viewing Terminated Employees

The default display in Evolution is to show Active employees only. To remove this filter, from the Employee – Employee screen, click on the “Removed EEs” check box, and then click Yes when prompted to clear the filter.



To change your view back to only show Active employees, click on the green ? in the upper left corner of the employee list. When the filter box appears, enter “ACTIVE” in the Status field, then click [OK].



# Employee – Locals

**Important** – If you are a **Pennsylvania** employer, Act 32 requires that you withhold the higher of the local earned income tax rates for each employee, between their home township and the township in which they are working. For Evolution to properly calculate and report the correct local tax information, you **MUST** have **BOTH** the employee’s **residential** local taxing jurisdiction as well as the **non-residential** local taxing jurisdiction setup for each employee. Evolution has been setup to automatically add the non-resident (working) township to each new hire, but you must add the employee’s residential code. If the employee’s residential township is not shown in the list of available townships, please contact Evolution Payroll Services and request to have it added to your company.

1. Go to the [Employee - Locals](#) screen
2. Select an Employee from the list on the right side of the screen
3. Click the “Details” tab to view the employee’s local taxes

## **Summary Section**

This section shows a list of any local taxes setup for the employee. To display the Details for a local tax, choose a record from the list in the “Summary” section.

## **Local Details Section**

This section shows the tax rate and county associated with the local tax record that is selected in the summary box.

## **Additional Local Details Section**

This section controls the use of the local tax currently selected.

# Stopping or Changing a Local Tax

1. From the Employee – Locals screen, select the local tax to be stopped.
2. Under “Local Enabled” in the “Additional Local Details” section, click “No”
3. The Effective Date Editor will pop up. Click the “Create” button to create a new effective period and then choose “No” for “Local Enabled.”
4. Click the “OK” button. You will be prompted whether you want to add another local tax.
5. If you choose “Yes,” you will be given a list of local taxes to add. Choose the local tax you want to add and press “OK,” and then close the Effective Period Editor using the red “X” in the top right corner of the window.
6. If you choose “No,” simply close the Effective Period Editor by clicking the red “X” button in the top right corner of the window.

## Adding a Local Tax

To add a Local tax to an employee:

1. From the Employee – Locals screen, click  Create New Record button
2. Choose a Local tax from the “Local” box under “Local Details.”
3. Click the Post Changes  button , and then Commit Changes 

***Out of State Resident Employees:*** If you have an employee working **in PA** but living in another state, you still must enter a residential local tax in Evolution. The proper code for these employees is **Out of State Res.**

# Scheduled E/Ds

Scheduled E/Ds are any earnings or deduction that are setup for an employee to be automatically included when their payroll check is created.

## Scheduled E/Ds – Details Tab

To begin:

1. Go to the [Employee – Scheduled E/D’s screen](#).
2. Select and open the company from the list on the left-hand side of the screen.
3. Select the employee from the right side of the screen or from the employee selection box at the top of the screen.
4. Click the “Browse Scheduled E/D’s” tab at the top of the screen.

A list of E/D codes setup for the employee will be displayed along with some basic information about each E/D.

To view details of a single E/D:

1. Select an E/D from the list on the “Browse Scheduled E/Ds” tab
2. Click the “Details” tab at the top of the screen.

The details for the E/D code are displayed on the screen:

### **Earning / Deduction Code Section**

**E/D Code** - E/D Code for the deduction

### **Calculation Section**

**E/D Calculation Method** - method used to calculate deduction

**E/D Group** - select an E/D Group if the Scheduled E/D is calculated based on a total of a group of E/Ds.

**Amount** - amount of the E/D to be used each pay. Ignored if a “%” type Calculation Method is chosen

**% Percentage** - Used if a “%” type Calculation Method is chosen

**Always Pay / Deduct** - offers flexibility to override E/D similar to Blocking Week 1 - 5

No - if the employee has no wages in a payroll cycle, the system does not pay/deduct the E/D, nor is it tracked to be made up later.

All payrolls - earnings are paid whether or not there are earned wages for the employee; deductions are tracked to take from the next payroll and taken if your company is setup to allow catch up deductions

Current Payrolls - the E/D is applied to the current the payroll whether or not there are earned wages for the employee. If deduction exceeds amount in check the amount is not tracked to be made up later.

**Deductions to Zero** - Tells the system whether or not to take partial amounts for deductions if there is not enough net pay to take the entire deduction.

Yes - the entire amount is deducted, until the check is zero.

No - a deduction is taken only when there are sufficient funds to take the whole deduction.

**Priority** – Establishes a priority to deduct in relation to other E/D codes

## **Frequency Section**

**Frequency** - select how frequently the deduction takes place.

**Month Number** - if the frequency is quarterly, semi-annual, or annual, select the month in which the deduction takes place.

### **Which Payrolls**

All - The E/D will be included in all payrolls.

First - The E/D will be included in the first scheduled payroll of the pay period.

Last - The E/D will be included in the last scheduled payroll of the pay period.

Nearest to the 15th - The E/D is included in the payroll nearest to the 15th of each month. If the 15th falls directly in the middle of the pay cycle, the E/D is taken from the second payroll.

**Effective Start Date** – Start date of deduction (must be on or before check date to be active)

**Effective End Date** – Used to STOP a deduction (must be on or before a check date to be active)

**Block Week 1 - 5** - offers flexibility of blocking the deduction for a particular week of the month. For example, an insurance deduction that is withheld only twice per month would have “Block Week 5” set to “Yes” to prevent the deduction from being withheld where there may be 5 weekly payrolls or 3 bi-weekly payrolls scheduled in one month.

## Destination Details Section

**Agency** - agency to which the payments are sent.

**Child Support Case** – used to attach a child support case to an E/D and is printed on Agency check

**Garnishment/Loan ID** - enter the garnishment ID to print the garnishment ID on agency checks

**EE Direct Deposit** - select the direct deposit bank account number to use direct deposit for the Scheduled E/D. When an employee's direct deposit account number is changed on the **Direct Deposit tab**, the employee Scheduled E/D is automatically updated.

**Deduct Whole Check** – determines whether the deduction will take the entire remaining net pay

Yes - deducts the net check (use for direct deposits)

No - deducts a portion of the check based on the Calculation Method and Rate

**Take Home Pay** - enter the take home pay amount. To set this up, Yes must be selected in the **Deduct Whole Check** field and the E/D Type must be setup as a Levy.

- If a person has a levy against them - an involuntary deduction from employee's earnings for unpaid federal or state taxes - enter the amount of take-home pay, or “Exempt Amount”. The levy amount is calculated automatically as Net Pay minus the “Take Home Pay” amount.

**Employee Button** - shortcut to the **Employee - Employee screen** for the selected employee.

## Scheduled E/Ds – Advanced Tab

This tab is most often used to setup E/D's with target amounts, such as loans that are paid back over multiple pay periods. Other uses are to establish annual or per pay period maximums for E/Ds.

### Annual Maximum Amounts Section

**Employee** – Enter the annual (Calendar year) maximum for this E/D for this employee.

**Client** – Only used if an annual maximum is setup globally on the client level.

### Limits Section

**Minimum E/D Group** – The E/D Group amount used when specifying a minimum % for this E/D

**Minimum Pay Period %** –Specify a minimum amount for this E/D as a % of **Minimum E/D Group**

**Minimum Pay Period Amount** –Specify a minimum \$ amount for this E/D

**Maximum E/D Group** – The E/D Group amount used when specifying a maximum % for this E/D

**Maximum Pay Period %** –Specify a maximum amount for this E/D as a % of **Maximum E/D Group**

**Maximum Pay Period Amount** –Specify a maximum \$ amount for this E/D

## **Target Actions Section**

**Target Action** –

- **Reset Balance:** Each time the target is met, the balance is reset and the number of targets will be reduced. Once the number of targets reaches zero (0), then an **Effective End Date** is automatically entered on the **Details 1 tab** of the **Employee - Scheduled E/Ds window**.
- **Reset Balance and Issue Agency Check:** When the Target is met, Evolution resets the balance and creates a check for the agency.
- **Do Not Reset Balance but Leave Line:** When target is met, target balance is NOT reset but the E/D is still displayed on the Payroll – Check window.
- **Do Not Reset Balance and Remove Line:** When target is met, target balance is NOT reset and the E/D is NOT displayed on the Payroll – Check window.

**# of Targets Remaining** - enter the number of times the target should be reset

**Balance Taken** – displays the amount of the E/D taken since being setup. Can be overridden.

**Target Amount** – enter the target amount of the deduction.

## **Scheduled E/Ds – Direct Deposits Tab**

This tab is used to setup and store direct deposit bank accounts for the employee.

### **Summary Section**

This section shows all direct deposit bank accounts setup for the employee. By selecting an account from this list, the details will be displayed below in the “Direct Deposit Detail” section.

### **Direct Deposit Detail Section**

**ABA Number** - enter the bank’s 9-digit ABA number (also known as Transit/Routing number)

**Bank Account Number** – enter the employee’s bank account number associated with the ABA number entered.

**Account Type** – choose Checking or Savings.

**In Prenote** –

- “Yes” will generate a test transaction with the next live payroll to verify the employee’s account information is correct and that the account is open and valid.
- “No” will force the direct deposit to go live immediately with the information you have entered for this account. No verification will be completed, and any errors in keying the account information could cause the funds to be rejected, returned, or incorrectly routed.

**Form on File** – Information field only

## **Scheduled E/Ds – Child Support Cases Tab**

This tab is used to setup and store child support orders issued for the employee.

### **Summary Section**

This section shows all child support orders setup for the employee. By selecting a case from this list, the details will be displayed below in the “Child Support Case Detail” section.

### **Child Support Case Detail Section**

**Priority Number** – Indicates the priority order if the employee has multiple child support cases and if the employee does not have enough earnings to cover all support deductions. Enter 1 for first order.

**Case Number** – The assigned case number, or remittance identifier number for the child support case

**Origination State** – State in which the order was filed.

**Agency** – The agency to which the support deductions are paid

**Arrears** – Choose “Yes” if the child support case is in arrears.

**St Medical Ins Eligible** – Choose whether the employee is eligible for medical insurance

## Adding a NEW Scheduled E/D

**Note:** The E/Ds setup for your company have been built with default values for most of the fields. In almost every case when adding a Scheduled E/D, you will only need to worry about selecting the E/D Code, Calculation Method and the Amount or Percentage.

1. Go to the [Employee –Scheduled E/Ds](#) screen.
2. Select and open the company if necessary
3. Select the Employee from the list on the right side of the screen or from the employee selection box at the top of the screen
4. Click the **Browse Scheduled E/Ds** tab at the top of the screen.
5. Verify that the E/D code you wish to add does not already exist in the list. If the E/D code does exist, see the following section titled “Changing a Scheduled E/D.”

6. Click the green “Create New Record” button



7. Select the E/D Code that you would like to add
8. Choose the Calculation Method
9. Enter the “Amount” or “Percentage” for the E/D

10. Click the Post Changes button



and then Commit Changes



**Note:** If you are adding an E/D for an employee who has a check already created in a waiting (unprocessed) payroll, when you leave the EDs screen Evolution will ask you if you want to refresh the check lines for that employee to update them with the new information. If you want the changes to be updated in the waiting payroll, click “**Yes**” in the first window and then “**Refresh All Except Manual**” in the next window.

## Changing a Scheduled E/D

1. Go to the [Employee –Scheduled E/Ds screen](#).
2. Select and open the company if necessary
3. Select the Employee from the list on the right side of the screen or from the employee selection box at the top of the screen
4. Click the **Browse Scheduled E/Ds** tab at the top of the screen
5. Click to highlight and select the E/D that you want to work with
6. Click on the **Details** tab at the top of the screen
7. **DO NOT** attempt to change the E/D Code on this screen or you will get an error
8. Make the necessary changes to the Calculation, Frequency or Destination
9. Click the Post Changes button  and then Commit Changes 

**Note:** If you are changing an E/D for an employee who has a check already created in a waiting (unprocessed) payroll, when you leave the screen you are on Evolution will ask you if you want to refresh the check lines for that employee to update them with the new information. If you want the changes to be updated in the waiting payroll, click “**Yes**” in the first window and then “**Refresh All Except Manual**” in the next window.

## Deleting a Scheduled E/D

Scheduled E/D’s can be stopped by entering an effective end date.

1. Go to the [Employee –Scheduled E/Ds screen](#).
2. Select and open the company if necessary
3. Select the Employee from the list on the right side of the screen or from the employee selection box at the top of the screen
4. Click the **Browse Scheduled E/Ds** tab at the top of the screen
5. Click to highlight and select the E/D that you want to work with
6. Click on the **Details** tab at the top of the screen
7. Enter an effective end date for the E/D that is before the check date that you want to stop the E/D.

**Note:** Once you have effective end dated a scheduled E/D, it can be permanently removed from the employee’s Browse Scheduled E/D list, but once it is removed it cannot be restored. To remove the scheduled E/D permanently, when you have the E/D selected a new button will appear at the top of the screen called [Remove E/D]. Click this button and the E/D will be removed.

## Adding a Direct Deposit

**Note:** Direct Deposits are setup as Scheduled E/Ds like all other deductions. Adding a new direct deposit is a two-step process of adding a direct deposit bank account, and then adding a Scheduled E/D linked to that bank account. If you do not complete the second step the employee will not receive direct deposit!

### **Step 1: Add Bank Account**

1. Go to the [Employee –Scheduled E/Ds](#) screen.
2. Select and open the company if necessary
3. Select the Employee from the list on the right side of the screen or from the employee selection box at the top of the screen
4. Click the **Direct Deposits** tab at the top of the screen.
5. Click the green Create button 
6. Enter the 9-digit ABA Number
7. Enter the Bank Account Number
8. Choose Account Type “Checking” or “Savings”
9. Choose a “Pre-note” selection (see page 21 for description of this field)
10. Click the Post Changes button  and then Commit Changes 

### **Step 2: Add Direct Deposit E/D Code**

11. Click the green Create New Record button 
12. Choose a Direct Deposit E/D Code
  - DNP – Net Pay:** This code will deposit ALL the remaining net pay for the employee into the selected account
  - Direct Deposit 1, 2, 3:** These codes will deposit a PORTION of the employee’s net pay into the selected account.
13. Choose the “EE Direct Deposit” bank account that you want to use under “Destination Details” on the right side of the screen.
14. **IF** you chose a partial direct deposit E/D code, select the Calculation Method and Amount or Percentage that the employee would like deposited.
  - Fixed Amount:** Choose Calculation Method “Fixed” and enter an Amount
  - % of Net Pay:** Choose Calculation Method “% of Net” and enter a Percentage
15. Click the Post Changes button  and then Commit Changes 

**Note:** If you are adding a Direct Deposit for an employee who has a check already created in a waiting (unprocessed) payroll, when you leave the screen you are on Evolution will ask you if you want to refresh the check lines for that employee. If you want the changes to be updated in the waiting payroll, click “Yes” in the first window and then “**Refresh All Except Manual**” in the next window. If you do not refresh the check lines, the direct deposit will not be included in the waiting payroll.

## Adding a Child Support

**Note:** Adding a new child support deduction is a two-step process

### **Step 1: Add Child Support Case**

1. Go to the [Employee –Scheduled E/Ds screen](#).
2. Select and open the company if necessary
3. Select the Employee from the list on the right side of the screen or from the employee selection box at the top of the screen
4. Click the **Child Support Cases** tab at the top of the screen.
5. Click the green Create button 
6. Enter the priority number of this case (1 if the first case, 2 if the second, etc)
7. Enter the Child Support Case number or Remittance ID number
8. Enter the Origination State (state from which the notice was sent)
9. Choose an Agency if Evolution will be creating a payment check for you. If the Agency is not available, contact your payroll specialist for further assistance.
10. Choose whether the case is in arrears
11. Click the Post Changes button  and then Commit Changes 

### **Step 2: Add Child Support E/D Code**

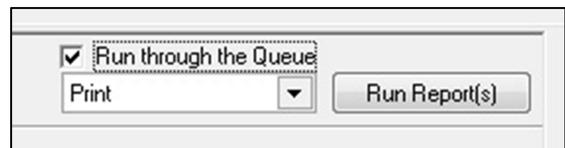
12. Click the green Create New Record button 
13. Choose a Child Support E/D Code (usually DCS)
14. Enter the Amount of the deduction from the child support order based on pay frequency
15. Under Destination Details on the right side of the screen, choose the Child Support Case that you added in step 1.
16. Click on the “Advanced” tab at the top of the screen
17. Under the Limits section, choose the Maximum E/D Group as “Disposable Wages”
18. In the Maximum Pay Period % field, enter the maximum percentage of disposable wages as allowed by law. This is printed on the child support order.
19. Click the Post Changes button  and then Commit Changes 

***Note:*** If you are adding a child support deduction for an employee who has a check already created in a waiting (unprocessed) payroll, when you leave the screen you are on Evolution will ask you if you want to refresh the check lines for that employee to update them with the new information. If you want the changes to be updated in the waiting payroll, click “**Yes**” in the first window and then “**Refresh All Except Manual**” in the next window. If you do not refresh the check lines, the child support will not be included in the waiting payroll.

# Reports

## Running Reports

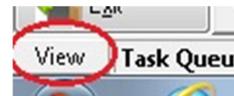
1. Go to Reports – Run Reports from the left menu in Evolution
2. If your company is not already open, double-click on the company name on the left
3. On the right side of the screen, check the box to the left of the report name that you wish to run
4. Click the Report Parameters tab at the top left of the screen to view the report options
5. Choose your options for running the report (see following section “Report Parameters” for details)
6. In the upper right corner of the screen, check “Run through the Queue” and choose to Print or Preview the report, then press the “Run Report(s)” button.



7. If you chose to Preview the report, you can access it in the Queue.

## Queue

1. Click on the View button in the very lower left corner of the Evolution window to access the Queue

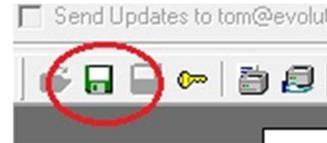


2. Make sure the “Auto show task details” is checked in the middle of the screen.
3. Your tasks will be listed at the top of the screen with the most recent at the top. Click on the top line to select the current task and click the Refresh button until the Status shows “Finished Successfully.”

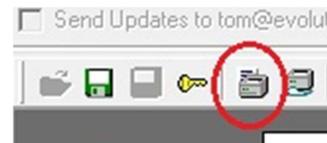
User	Finished	Priority	Id	Upda
Tom	<input type="checkbox"/>	1000	6869984	6/18,
Tom	<input checked="" type="checkbox"/>	1000	6869846	6/18,
Tom	<input checked="" type="checkbox"/>	1000	6869837	6/18,

4. Your report will be displayed in the bottom section of the screen.

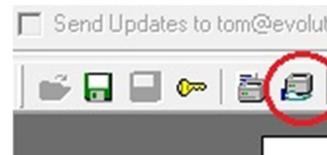
5. To Save your report to a PDF, click the green disk icon



6. To Print your report to your default printer, click the printer icon



7. To Print your report to an alternate printer, click the second printer icon



8. When finished in the Queue, you can press the red X in the upper right corner of the window to close the Queue and return to Evolution.

## Report Parameters

When running most reports in Evolution, you will have to enter the parameters (options) to select what data to include in the report. These parameters are accessed via the “Report Parameters” tab at the top of the screen after selecting the report that you wish to run. After clicking the “Report Parameters tab”, there will be a new group of tabs displayed that group the different parameter types for the report.

### Payrolls

This parameter allows you to select which payroll, or multiple payrolls to be included in the report that you run. Not all reports will allow multiple payrolls to be selected, nor will all reports have a payroll selection parameter.

**Check Date Period** box will allow you to filter a range of dates for selection in the lower box.

**Select Payrolls for** box will select all of the payrolls for the period chosen

Regardless of the Check Date Period filter applied to the payroll list shown, only the payrolls with blue check marks will be included when you run the report. You can manually select the payrolls by clicking the box to the left of the payroll date, or you can select all of the payrolls displayed by clicking on the small box to the left of the “Check Date” heading and then choosing “Select all.”

?	Check Date	Run #	Processed	Status	Type
<input checked="" type="checkbox"/>	6/20/2014	1	6/18/2014 11:48:42 ...	P	R
<input type="checkbox"/>	6/13/2014	2	6/11/2014 8:51:08 AM	P	R
<input type="checkbox"/>	6/6/2014	1	6/2/2014 4:47:31 PM	P	R

### Employee Filter

Like the Payroll selection parameter, if available this will allow you to pick and choose which employees to include in the report. This option is particularly useful if you need to run an Employee Pay History. You can do so by choosing the “Payroll Register”, selecting the payroll check dates to include, then selecting the single employee on the Employee Filter tab. The report will show all checks for that employee that were issued within the group of selected payrolls.

## **DBDT Filter**

Like the Employee Filter parameter, if available this will allow you to pick and choose which Divisions, Departments, Branches or Teams to include in the report.

## **Misc Filter**

This parameter tab, if available, can vary from report to report. It will included miscellaneous options that are specifically built for the report you have chosen to run.

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