Create and Maintain Employees

Document #:	3093	Product:	CenterPoint® Payroll

One of the last steps in creating your payroll database is creating the employees. Each employee is setup with their own unique combination of earnings, deductions & Benefits, Taxes, etc. The Employees screen is organized into a series of tabs to ease data entry.

> Note: If you have many employees that share some of the same taxes, earnings, or deductions/benefits, see the Employee Mass Update procedure to simplify your setup process.

> All changes made to employees from the Employee screen are added to the Employee Audit Log that can be printed from Reports > Payroll Setup Lists > Employees > Employee Audit Log.

This topic includes instructions on how to:

Create an Employee

Edit/Change an Employee

Delete an Employee

Change the Status (Activate/Deactivate) of an Employee

Create an Employee

Step A - General tab

The General tab contains general information about each employee including their name, address, social security number, phone and cell number, and e-mail address.

1. On the **Setup** menu, select **Employees**.
2. Click **New** to create a new blank employee. If the employee you are adding is similar to an existing name, you can highlight the similar name and click **Copy**. This will create a name using information from the highlighted name, excluding the following fields: Address 1 & 2, other addresses, contact Info (E-mail, Fax, Phone, Cell Phone, etc.), Original Hire Date, Last Raise Date, Birth Date, Hours to Next Raise, Last Pay Run, Employee Photo, Education detail, Inactive Earnings, Taxes, Deductions and Leave, ACA dependent information, and Custom Name Fields. Be sure to edit/verify all copied information so it is correct for the new employee.

3. Complete the **Employee Information**.

» In the **Abbreviation** box, enter up to ten unique characters of information that you can easily identify the employee by. If a duplicate Abbreviation is entered, a warning message will immediately display.

» In the **Social Security #** box, enter the employee's social security number. To set how duplicate social security numbers are handled by CenterPoint, right-click and select Allow Duplicates (Use this option to reuse and not require the value in the Social Security # box.) or No Duplicates Allowed (Use this option to require a unique value in the Social Security # box. A message will display. Click OK to return and enter a unique value.).

» In the **Last Name** box, enter the employee's last name.

» In the **Suffix** box, enter the employee's suffix status, for example Jr., Sr., II, III, etc.

» In the **First Name** box, enter the employee's first name.

» In the **Address Line 1** or **Address Line 2** boxes, enter the street address and any other information, for example, suite number or post office box number.

» Enter the **City , State and Zip**.

» In the **Phone** box, enter the phone number for this employee's default home address.

» In the **E-mail** box, enter the employee's e-mail address.

» Select the **Template** check box to identify an employee to be Copied to create new employees. This employee normally has the most common settings that should be copied to other employees, for example State, City, Zip Code, Payroll State, default earnings, deductions etc. This employee will be excluded from the Employee lists in Time Sheet entry and Pay Employees.

4. The **Additional Notes** button is optional and can be used to track internal notes regarding this employee. When notes are added from the Additional Notes button, the button label will change to **Edit Notes** with a yellow background.

Note: To add a time stamp to a note added or edited on the Additional Notes screen, click **Stamp**. If you are adding/editing a stamp in a database without security, the stamp will display "Edited on (current date and time)". If you are adding/editing a stamp in a database with security, the stamp will display "Edited by (username) on (current date and time)".

Step B - Addresses tab

1. Click the Addresses tab if additional addresses are needed for this employee.

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2. To add an additional address, click **New**.

Step C - Payroll Tab

1. Click the **Payroll** tab.

2. Under **Employer Selection** on the left side of the screen, a list of all employers will display. The Status column will indicate whether the employee is Active or Inactive for the employer. Select the employer that the payroll information on the right-side of the screen applies to. Most often there is only one employer.

3. Under **Pay Information**, in the **Pay Period** box, select the appropriate pay period for this employee.
   » Daily
   » Weekly
   » Bi-Weekly
   » Semi-Monthly
   » Monthly
   » Annually
   » Quarterly

   If the employee is a temporary employee, select the pay period used while they are employed by you. The amount an employee is paid is tied to the frequency associated with the earning on the employee for the latest effective date, for example annual, monthly, etc. The rate that is used in Pay Employees, Time Sheets, or Default Earning Time Sheets will be calculated by breaking the default earning rate down based

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on the number of pay periods associated with the employee. For example, Sam Apple is paid bi-weekly and has an annual salary of $52,000; when entering pay, the calculated rate would be 2,000 or $52,000 divided by 26 pay periods.

4. If you are using work shifts, in the **Work Shift** box, select the default work shift for this employee.
5. If this employee should be paid a **Minimum Wage Contract** rate when it is higher than the Federal/State minimum wage rate when minimum wage adjustments are calculated during a pay run, select the applicable contract.
6. In the **Pay Method** box, select the default pay method for this employee. You may still use other pay methods as well.
   » Fixed Rate
   » Piece Rate
   » Hourly
   » Salary
7. Under **Retirement Plan Information**, select whether this employee qualifies and/or participates in a Retirement Plan or a Section 125 Plan. This information is used specifically by the BPAS Retirement Plan export. It can also be used for optional employee reporting information.
8. In the **Bilingual Check Stub** box, select a language. This field is required. If you have not set up additional check stub formats, then select **English**.
9. Under **Federal Reporting Information**, select any applicable check boxes, otherwise, leave the check boxes blank.

> Note: You can set a default value for any of the boxes under the Federal Reporting Information section by right-clicking and selecting Set As Default. To clear the default value, right-click and select Clear Default.

» **Agricultural Employee (Form 943)** - Select this check box if this employee is a farm worker and you will be paying wages that are subject to social security and Medicare taxes or federal income tax withholding.
» **Employer Pays Employee FICA** - Available when the Agricultural Employee check box is selected. When selected, the employee can be included in any Gross Up adjustments made in the Pay Employees process. For more information, see the Employee FICA Paid by Employer (Gross Up Adjustment) document.
» **H-2A** - Only employees selected as H-2A for Federal Reporting will be included on the H-2A Journal, H-2A Journal (Bi-weekly)t, and H-2A Reconciliation reports. Pay runs can be filtered to include only H-2A employees with this selection. H-2A employee earnings will print in Box 3 - Other Income on the 1099-MISC.
» **Statutory Employee (Form W-2)** - If workers are independent contractors under the common law rules, such workers may nevertheless be treated as employees by statute (statutory employees) for certain employment tax purposes if they fall within any one of the following four categories and meet the three conditions described under Social Security and Medicare taxes, below.
   » A driver who distributes beverages (other than milk) or meat, vegetable, fruit, or bakery products; or who picks up and delivers laundry or dry cleaning, if the driver is your agent or is paid on commission.
   » A full-time life insurance sales agent whose principal business activity is selling life insurance or annuity contracts, or both, primarily for one life insurance company.
   » An individual who works at home on materials or goods that you supply and that must be returned to you or to a person you name, if you also furnish specifications for the work to be done.
   » A full-time traveling or city salesperson who works on your behalf and turns in orders to you from wholesalers, retailers, contractors, or operators of hotels, restaurants, or other similar establishments. The goods sold must be merchandise for resale or supplies for use in the buyer's business operation. The work performed for you must be the salesperson's principal business activity.
   » **Social Security and Medicare Taxes** - Withhold Social Security and Medicare taxes from the wages of statutory employees if all three of the following conditions apply.

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> » The service contract states or implies that substantially all the services are to be performed personally by them.
>
> » They do not have a substantial investment in the equipment and property used to perform the services (other than an investment in transportation facilities).
>
> » The services are performed on a continuing basis for the same payer.

» **Third Party Sick Pay (Form W-2)** - Select this box if this employee is paid disability/sick pay from a third party and the employer is responsible for paying the employer portion of FICA and Medicare taxes. The third party should be deducting the employee's portion of those two taxes. This tax and earning information must be documented on the 941. How the information is documented on the 941 depends on who will be providing a W-2 to the employee for the disability pay, the employer or the third party payer. See the Third Party Disability/Sick Pay Payments document for more information.

14. In the **Wages Reported On** box, select which form the wages for this employee should be reported on: **W-2**, **1099-Misc**, or **None**.

15. Select the **Consent to Electronic W-2** check box to allow this employee's W-2 to be viewed electronically through Aatrix. If an employee wants to use the electronic W-2 feature offered by Aatrix, the Consent to Electronic W-2 check box on the Payroll tab and in the Aatrix W-2 grid must be selected and the employee must have a valid e-mail address on the General tab.

16. Select the **Consent to Electronic 1095** if this employee consents to not receive a paper 1095 form and to **only** receive the 1095 electronically to be viewed electronically through Aatrix. If this box is selected, a signed consent form must be on file. This form can be printed from **Federal & State Payroll Forms & Reports** > **Federal Tax Forms** and selecting **Electronic W2 Consent** in the **Report** box.

17. **Qualifies for H.I.R.E. Act** - If this employee qualifies for the Hiring Incentives to Restore Employment (HIRE) Act of 2010, which is a law to provide payroll tax breaks and incentives for business to hire unemployed workers, select this check box.

Step D - Employment Tab

1. Click the **Employment** tab. The Employment tab is available to maintain optional information about the employee. This type of information is often used by Human Resources.


2. Under **Employer Selection** on the left side of the screen, a list of all employers will display. The Status column will indicate whether the employee is Active or Inactive for the employer. Select the employer that the payroll information on the right-side of the screen applies to. Most often there is only one employer.

3. Complete the **Employment Information**.
   » In the **Supervisor** box, assign a supervisor to this employee by selecting an employee from the lookup list. All employees will display in the supervisor lookup list.
   » In the **JobTitle** box, select the employee's job title.
   » In the **Department** box, select the payroll department this employee works in.

» In the **Status** box, select one of the system-supplied employment statuses: **Full-time**, **Part-time**,**Temporary**, or **Other**, a user-defined employment status from the drop-down list, or right-click, select **New**, and repeat the Setup Employment Statuses section of this document to create a new employment status.

» In the **S.O.C.** box, enter the Standard Occupational Classification (SOC) code.

   » The S.O.C. field is 6 digits (MM-mbbd) and is formatted as follows:

      » MM - Major group

      » m - Minor group

      » b - Broad occupations

      » d - Detailed occupations

   » Click here for additional information about the Standard Occupational Classification.

» In the **Original Hire Date** box, 01/01/1900 will display, enter the date the employee was hired the first time. This field does not update new hire reports.

» In the **Hire Date** box, 01/01/1900 will display, enter the date the employee was hired or re-hired. This information updates the new hire reports. If you plan to accrue leave using CenterPoint Payroll, it is important to enter the employee's hire date. When an employee is copied from another employee, the Eligibility and Wait Period dates on the Leave tab will be reset to match the Hire Date. If the Hire Date is changed, you will be prompted if you want to also reset the Eligibility Dates on the Leave tab to the new Hire Date. If you chose to change the Hire Date, the Wait Period Date will be recalculated to an appropriate date on or after the new Hire Date.

» In the **TerminationDate** box, if the employee is no longer employed, enter a termination date.

» In the **Reason** box, if the employee is no longer employed, enter or select the reason for termination. The Reason box saves previously entered reasons in a drop-down list that can be selected from for future entries.

» In the **Last Raise Date** box, if you want to track the number of hours an employee has worked since their last raise date or hire date (this date will default to the current system date) by earning for hours-based raises, either use the employee's hire date or enter the date of the employee's last raise. **The Hours to Next Raise** box is used in conjunction with this box and allows you to enter the number of hours an employee must work before receiving a raise. **The Hours Worked (Since Hire)** report will show you a total number of hours worked since the employee's hire date. The **Hours Worked (Since Raise)** report will show the Employee Name, Last Raise Date, Hours to Next Raise, Hours Worked, and Hours Over Limit.

» In the **Hours to Next Raise** box, if you want to track the number of hours an employee has worked since their last raise date or hire date (this date will default to current system date) by earning for hours-based raises, enter the number of hours the employee must work before they can be considered to receive a raise.

» In the **Last Pay Run** box, the date of the last posted pay run containing this employee will display.

4. Complete the **Personal Information**. All information is optional.

   » In the **BirthDate** box, enter the employee birth date.

   » In the **Gender** box, select a gender. The options to select from are:

      » Male

      » Female

      » Non-Binary

   » The **EEOC Position** box is used to print information about all active employees on the **EEOC Employment** report (**Reports** > **Reports** > **PayrollSetupLists** > **Employees** > **EEOC Employment**). The options to select from are:

      » Executive/Senior Level Officials & Management

      » First/Level Officials & Management

      » Professionals

      » Technicians

      » Sales Workers

- » Administrative Support Workers
- » Craft Workers
- » Service Workers
- » The **EEOC Class** box is used to print information about all active employees on the **EEOC Employment** report (**Reports > Reports > Payroll Setup Lists > Employees > EEOC Employment**). The options to select from are:
  - » White
  - » Black
  - » Hispanic
  - » Asian
  - » American Indian/Alaskan
  - » Native Hawaiian/Pacific Islands
  - » Two or More Races (Multiracial)
  - » Not Disclosed
- » In the **MaritalStatus** box, select either **Single** or **Married** for the employee's marital status. This box is used for reporting purposes only (for example, census information or bids for health insurance) and is separate from the employee's Filing Status found on the **Setup > Employees > Taxes** tab which is used to calculate tax withholding. A **MaritalStatus** column can be added to the **Reports > Reports > Payroll Setup Lists > Employees > Employees** report and the report can be filtered by marital status.
- » In the **Veteran** box, select Yes to indicate the employee is a veteran.
- » Select the **Link to Photo** link to link to an employee photo. The file that you link to can be located in any folder on your computer or network that can be accessed by this machine. You must have a program installed on you machine to allow you to open the file of that type. For example a .doc file would need Microsoft Word or another program capable of opening .doc files.

5. Under **Forms on File**, there is a date field to enter the date that the form was received (the date initially displays as blank) and the ability to create a link to the actual file. The file that you link to can be located in any folder on your computer or network that can be accessed by this machine. You must have a program installed on you machine to allow you to open the file of that type. For example a .doc file would need Microsoft Word or another program capable of opening .doc files. The forms to enter dates for and attach documents are:
   - » Resume
   - » Application
   - » W-4 Date
   - » I-9 Date
   - » Other

Step E - Taxes tab

1. Click the **Taxes** tab.
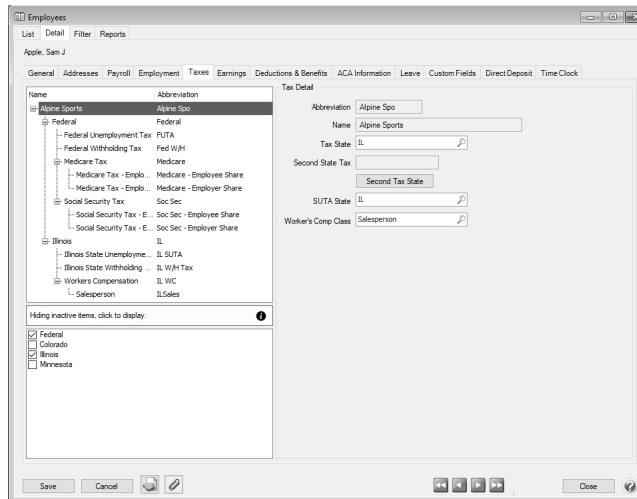
2. On the upper left side of the screen, select the first employer (in most cases only employer).
3. From the lower left side of the screen, all available taxes will display. Select the taxes you will need for this employee.

> Note: By default, only active items display on the Taxes tab. When you inactivate a tax for an employee, it is hidden from the list of available/selected taxes. Use the yellow inactive items filter indicator between the lists to toggle between hiding and displaying inactive taxes.

4. On the upper right side of the screen, in the **Tax State** box, select the employee's tax state.

5. If this employee is required to pay state taxes to an additional state on all income, click the **Second Tax State** button. In the **2nd Tax State** box, select the second state that taxes should be withheld for, and then click **OK**. Taxes will be calculated for the second tax state in addition to the calculated taxes for the first tax state for this employee. If the employee works in multiple states and is taxed on the income earned in each state, the **2nd Tax State** should be left blank. The assigned **Tax State** will be the default Tax State when time is entered, but entries in Time Sheets and Pay Employees can be assigned the correct Tax State for the earnings. Pretax deductions will be prorated by the percentage of taxable income in each state

6. In the **SUTA State** box, select the required employee's state unemployment tax state.

7. In the **Workers' Comp Class** box, select the worker's compensation class for this employee for workers' compensation reporting.

> Note: If the selected class is not valid or left blank for this employee, a message will display that warns you that the information is missing, but you are still allowed to save the employee (if the employer does not have workers' compensation selected and does not have workers' compensation classes setup, this message will not display). If the class is added to the Payroll tab, but not to the Taxes tab, a message will display that warns you that the information is missing, but you are still allowed to save the employee.

8. From the upper left side of the screen select the first tax listed for this empoloyee to display the Tax Detail fields for that tax in the right pane.

> Note: When you select the state tax, you will also notice that workers' compensation and local taxes display for each state selected (be sure to select each state and then setup the details for any workers' compensation classes or local taxes for the state).

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9. Complete the tax details for that tax. Tax Details for each selection are:
  » **Expense Account** - For all employer tax expenses, the screen will default with the expense account that you specified for this tax in the employer record. You can override that account here, or you can add additional accounts and spread the expense among several accounts. Assign percentages to each line. The total percentage must equal 100%.

> Note: Expense accounts are required and verified when saving or navigating away from the Taxes tab.

  » **Effective Date** – Allows you to make changes to this setup prior to the date that the changes are to take place. When the current date is greater than or equal to the effective date, the new information will be used in calculating pay runs.

> Note: Effective dates prior to the system default of 01/01/2006 are not permitted.

  » If you attempt to add a date prior to the system default of 01/01/2006, a message now displays.
  » **Active** – Once a tax has been used for an employee, it can not be removed. It can, however, be made inactive if no longer used. To make the tax inactive, clear the Active check box selection.

Certain types of taxes have additional details:

  » **Federal Withholding** -
    » **FilingStatus** – Per the employee's W-4 form, enter their Federal tax filing status (Single, Married, or Exempt).
    » **Allowances (Pre-2020 W-4)**– Enter the number of allowances indicated on the employee's W-4 form.

» If the employee is submitting a new W-4 form effective after 1/1/2020, Select the **New 2020 W4 On File** check box.

» Based on the selections in each step the employee entered on the W-4 form:

» Select the **W4 Step 2 - Multiple Job** check box if the employee selected the check box in Line (c) Step 2: Multiple Jobs or Spouse Works from the 2020 Form W-4 that the employee submitted.

» Enter the **Dependent Credit Amount** from Step 3: Claim Dependents Line 3 from the 2020 Form W-4 that the employee submitted.

» Enter the **Other Income** amount from Step 4: Other Adjustments Line 4(a) from the 2020 Form W-4 that the employee submitted.

» Enter the **Deductions** amount from Step 4: Other Adjustments Line 4 (b) from the 2020 Form W-4 that the employee submitted.

» **Non-resident Alien** – If the employee is a Non-resident Alien, select this check box.

» Enter the **Extra Withholding** amount from Step 4: Other Adjustments Line 4(c) from the 2020 Form W-4 that the employee submitted.

> Note: See the Employee Form W-4 Designations document for additional information about the W-4 form.

» **Use Alternate Flat Tax** – If you are entering a flat tax and want to have the tables use a specified percentage rather than the tax tables, select this check box, and then enter the flat tax percentage in the Flat Tax Percent box below.

» **Flat Tax Percent** - enter the percentage to use to calculate the Alternate Flat Tax amount.

» **State Withholding** - (details for state withholding may vary by state.)

» **Filing Status** – Per the employee's W-4 form, enter their Federal tax filing status (Single, Married, or Exempt).

» **Allowances** - Enter the number of allowances indicated on the employee's W-4.

» **Non-resident Alien** – If the employee is a Non-resident Alien, select this check box.

» **Extra Withholding Amount** – Some employees will request that an additional amount be taken out for their federal taxes, possibly to cover tax shortage from other income sources. Enter in the additional amount per pay period here

» **Use Alternate Flat Tax** – If you are entering a flat tax and want to have the tables use a specified percentage rather than the tax tables, select this check box, and then enter the flat tax percentage in the Flat Tax Percent box below.

» **Local Taxes**

» **Default Tax Calculation** – This check box will automatically be selected when a local tax is added to an employee. You can change this selected to indicate which local taxes should be included by default for the employee. For example, if an employee lives in Ohio and works in Pennsylvania, the employee has Ohio state taxes withheld but since the employee works in Pennsylvania they need to also pay the local city tax. By selecting this check box, the Ohio state taxes and the Pennsylvania Local City tax is withheld.

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> » **Allowances** - If this local tax uses allowances with the local tax employee method % of Wages Tax, %of Wages Tax with Wage Limit, % of Wage Tax - Annual, Monthly, or Period Limit, enter the number of allowances (exemptions).

> » **Worker's Compensation** - To setup information specific to this workers' compensation class, select Setup > Payroll Details > Employers > Taxes tab. From the left side of the screen, under the state abbreviation the class was created in, select Workers' Compensation and then on the right side of the screen add the workers' compensation identification number, liability account, and determine the workers' compensation overtime earning calculation. Then, select the workers' compensation class you created from the left side of the screen, and on the right side of the screen setup the expense account, select the date the workers' compensation class becomes effective, and enter the rate for the class.

10. Repeat step E-5 for each tax listed for this employee.

Step F - Earnings tab

1. Click the **Earnings** tab.
2. In the upper left side of the screen, select the employer this earning should be added to.

3. On the right side of the screen, enter a **Base Hourly, Piece**, and **Salary Rate**. This is the rate that will be defaulted as the rate for all of the earnings for the selected employee (if you do not enter a different rate), and will be the rate that displays in the grid on the 2. Enter Pay tab.

4. When a Base rate is entered, the Earnings update screen displays. If the **Create New Effective Date** check box is selected, the date field is enabled and the date specified is used to either update an earning with that specific effective date or add that date if it doesn't exist. For example; if an earning has an effective date of 01/01/2006 and another effective date of 01/01/2011 and an effective date of 12/16/2010 is selected during the update, the a new effective date of 12/16/2010 would be created with the new rate. However, if the selected date had been 01/01/2011 then the existing effective date of 01/01/2011 would have been updated with the new rate. If the **Create New Effective Date** check box is not selected, it indicates that the

update will affect the current effective date of each earning included; where current is defined as the effective date that would be used as of the current system date. For example; if an earning has an effective date of 01/01/2006 and another effective date of 01/01/2011 and the update is performed on 12/16/2010, then the 01/01/2006 effective date rate would be updated as it's the rate that would be used as of 12/16/2010.

5. The **Update Last Raise Date** check box is active when the Create New Effective Date check box is selected. Select this check box to update the Last Raise Date on the Employment tab to the effective date selected in the Create New Effective Date box..

6. Click **Update**.

7. Select the **Overtime Earning** used to calculate overtime for this employee. The earnings that display in the lookup will be those earnings with the Include in Calculated Overtime check box selected in Setup > Payroll Details > Earnings. The earning must first be added to the employee and it must be active, see steps 7-8.

8. In the lower left, all active earnings display. Select the check box next to the earning(s) you want to add. The earning will display in the upper left under the Employer you selected. In the upper left, select the earning you just added.

9. Under **Earning Detail** (right), enter the specifics about this earning for this employee including effective dates, whether to include this employee in the Pay Employees grid (if this earning is the default earning for the employee), and rates. Repeat for each earning.

   » **Salary, Salary Leave and Bonus Earnings**

      » **Display in Pay Employees Grid** - Marking an earning to display in the Pay Employee Grid (default earning) will display the earning automatically each time you enter pay for this employee. You may select more than one earning as a default.

      » **Use to calculate Hourly Leave Accrual Rate** - Marking an earning to calculate the Hourly Leave Accrual Rate will indicate that this is the earning to use to calculate the hourly leave accrual rate to be used on the Employee Leave Amounts Accrued report.

> Note: One salaried earning per employee can be marked to calculate the hourly leave accrual rate.

      » **Effective Date** – Allows you to make changes to this setup prior to the date that the changes are to take place. When the current date is greater than or equal to the effective date, the new information will be used in calculating pay runs. Click Add to enter a new effective date. Click Remove to remove an effective date (the default 1/1/2006 effective date cannot removed).

      » **Pay Rate** – Enter in the rate of pay, and then select the schedule that this rate applies to. Enter in the rate of pay, and then select the schedule that this rate applies to. The rate that is used in Pay Employees, Time Sheets, or Default Earning Time Sheets is calculated by breaking the rate down based on the number of pay periods associated with the employee. For example, if Sam Apple is paid Bi-Weekly and had a monthly salary of $4,500; when entering pay, the calculated rate would be $2,076.92 or $4,500 multiplied by 12 months, divided by 26 pay periods or if Same Apple is paid bi-weekly and has an annual salary of $52,000; when entering pay, the calculated rate would be $2,000 or $52,000 divided by 26 pay periods. For bonuses, you will probably leave the rate blank and enter it at the time of the payroll. For salary leave, you will also likely leave the rate 0.00 and just use the paid leave earning to record the hours when they are used.

      » **Schedule** – If a rate is entered in the Pay Rate field, enter a schedule that this rate applies to. The options are Daily, Weekly, Bi-weekly, Monthly, Semi-monthly, Quarterly, and Annually. The entered pay rate is multiplied by the number of periods represented by this selection to calculate the annual salary amount.

      » **TrackHours** – This will default as selected if it was setup in the Employer detail as such. You can either leave the default or change it. If selected, you will be required to enter the hours worked for this employee even though the earning is for salary. If you chose to track hours for

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Salary Pay and you include Salary Pay as a default earning on the Processes > Pay Employees > Pay Grid, you do not need to enter Hours if the Salary Pay earning does not have an extended amount (if you wish to process the payroll without Salary Pay, you can clear the extended amount.)

» **UseAccountDistribution** –If this earning should be distributed to various profit centers, locations or projects, select this check box. If the check box is selected, you must specify a distribution. Expenses are distributed by percentage and are distributed at the time the pay runs are performed. Select the **General Ledger Account**, **Percentage**, and the **Distribution** that should be used for this employee.

» The default account to post this earning expense to was setup on the employer record and defaults in this screen. You can accept this default or select a new account. You can also choose several different accounts to spread the expense to by a percentage. The percentages must equal 100%.

> Note: Expense accounts are required and verified when saving or navigating away from the Earnings tab.

» If a default Profit Center/Department, Production Center/Location, Production Year/Tracking Number 1, Production Series/Tracking Number 2, and Project was entered in Setup > Payroll Details > Employers it will display or you can select the default Profit Center/Department, Production Center/Location, Production Year/Tracking Number 1, Production Series/Tracking Number 2, and Project to display for this employee earning entry in Time Sheets, Pay Employees, and Default Earning Time Sheets.

» **Active** - Once an earning has been used for an employee, it cannot be removed. It can, however, be made inactive if no longer used. To make the earning inactive, clear the Active check box selection.

» **Hourly Earnings**

» **Display in Pay Employees Grid** – Marking an earning to display in the Pay Employee Grid (default earning) will display the earning automatically each time you enter pay for this employee. You may select more than one earning as a default.

» **Effective Date** - Allows you to make changes to this setup prior to the date that the changes are to take place. When the current date is greater than or equal to the effective date, the new information will be used in calculating pay runs.

» **Hourly Rate** – Enter in the hourly rate for this employee. If you setup a default on the employer record, a rate may already display. You can override this default rate.

» **Use Account Distribution** – If this earning should be distributed to various profit centers, locations or projects, select this check box. If the check box is selected, you must specify a distribution. Expenses are distributed by percentage and are distributed at the time the pay runs are performed. Select the **General Ledger Account**, **Percentage**, and the **Distribution** that should be used for this employee.

» The default account to post this earning expense to was setup on the employer record and defaults in this screen. You can accept this default or select a new account. You can also choose several different accounts to spread the expense to by a percentage. The percentages must equal 100%.

> Note: Expense accounts are required and verified when saving or navigating away from the Earnings tab.

» If a default Profit Center/Department, Production Center/Location, Production Year/Tracking Number 1, Production Series/Tracking Number 2, and Project was entered in Setup > Payroll Details > Employers it will display or you can select the default Profit Center/Department,

Production Center/Location, Production Year/Tracking Number 1, Production Series/Tracking Number 2, and Project to display for this employee earning entry in Time Sheets, Pay Employees, and Default Earning Time Sheets.

» **Active** - Once an earning has been used for an employee, it cannot be removed. It can, however, be made inactive if no longer used. To make the earning inactive, clear the Active check box selection.

> Note: By default, only active items display on the Earnings tab. When you inactivate an earning for an employee, it is hidden from the list of available/selected earnings. Use the yellow inactive items filter indicator between the lists to toggle between hiding and displaying inactive earnings.

Step G - Deductions & Benefits Tab

1. Click the **Deductions & Benefits** tab.

> Note: By default, only active items display on the Deductions tab. When you inactivate a deduction for an employee, it is hidden from the list of available/selected deductions. Use the yellow inactive items filter indicator between the lists to toggle between hiding and displaying inactive deductions.

2. The company Abbreviation and Name display.
3. In the **Limit Total Garnishments to [X] % of Net Income** field enter a % to be used to limit the total garnishments of the employee's net pay during the pay employees process.
4. All active deductions/benefits display in the box on the lower-left side of the screen. Select the deduction and benefits that apply to this employee.

In the upper box, click on the + sign next to the employer and enter in details on the right side of the screen. Notice that each deduction/benefit has a main level and then either has an employer level, employee level, or both underneath it. Enter the details on each level.

The following details display on the main level of a deduction/benefit:

» **Alternate Name** - Used to supply information specific to the employee on the check stub when vendor checks are printed. For example, for a child support deduction, it may be necessary to supply a Case Number specific to an employee garnishment.

» **Active** – Once a deduction/benefit has been used for an employee, it cannot be removed. It can, however, be made inactive if no longer used. To make the deduction/benefit inactive clear the Active check box selection.

» **Effective Date** – As is throughout the system, the payroll setup works off of effective dates that allow you to make changes to earnings, deductions/benefits, taxes, and leave before the date the actual change is

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effective without affecting your current payroll. If you are just starting, the effective date will likely be the date of your first payroll.

The following details display on either the employer or employee levels of a deduction/benefit:

» **Schedule** – Each deduction/benefit needs to have a schedule assigned to it so that payroll knows when these amounts need to be calculated and when they do not. The correct default will probably display from the Employer record.

» **Effective Date** – As is throughout the system, the payroll setup works off of effective dates that allow you to make changes to earnings, deductions/benefits, taxes, and leave before the date the actual change is effective without affecting your current payroll. If you are just starting, the effective date will likely be the date of your first payroll.

» **Rate** – Enter in the rate used for this employee. In some instances, the default rate from the employer record display correctly, but for something like a 401 K, there might be a different rate per employee.

» If the deduction/benefit is a garnishment, in the **Up to Amount** box, enter the dollar amount that the contribution will be calculated up to when using a percentage. For example, if the garnishment is 5% of an employee's gross pay, with the garnishment amount not to exceed $500, enter $500 in this box.

» If the deduction/benefit is a garnishment, in the **Minimum Net Pay** box, enter the dollar amount that the net pay will not be allowed to fall below. If a garnishment calculates an amount that will cause the Net Pay to be less than the entered amount, the garnishment will only deduct the amount that will leave the employee at the entered value and no more. For example, if the Minimum Net Pay is set to $225.00, an employee's Net Pay is $250.00, and a garnishment calculates to be $50.00; the garnishment will only deduct $25.00.

> Note: The Minimum Net pay will be compared to the Net Pay after any preceding garnishments (determined by the Sequence Number set on the Garnishment deduction.)

» To specify a maximum amount that can be subtracted from taxable earnings (employee taxes amount) before the garnishment is calculated, enter the amount in the **Maximum Reduction Amount** column in the grid. If the deduction calculation is greater than the Maximum Reduction Amount, the Maximum Reduction Amount is used in the net amount calculation. For example, an employee has taxable earnings of $500.00 and:

  » Employee taxes are $100.00
  » The calculated 401K deduction is $75.00
  » The 401K checkbox is selected to indicate that the 401K deduction should be subtracted from taxable earnings before the garnishment is calculated.
  » The Maximum Reduction Amount is entered as $50.00
  » The Garnishment deduction is 10% of the net pay.
  » Since $75.00 is greater than the Maximum Reduction Amount of $50.00, $50.00 is used in the garnishment calculation.
  » (500.00 - 100.00 - 50.00) *.10 = $35 is garnished from the employees wages.

» When the Employer Method for a benefit is % of Gross Employee Deduction (Multiple Rates) or % of Net Employee Deduction (Multiple Rates), the **Use Capped Match Rate** selection indicates that the **Cap Match rate at** percentage should be used to cap the employer contribution percentage when calculating the employer match. This allows benefits to be configured where the employer match limit is shared across multiple benefits.

» Select the **Expense account** that this payroll expense will post to. In most cases, the default from the employer record will display correctly. If not, you can override it. You can also enter in multiple expense accounts to spread this cost to. The percentages assigned to each account must add up to 100%.

> Note: Expense accounts are required and verified when saving or navigating away from the Deductions & Benefits tab.

» **Limit** – If this deduction/benefit has an annual limit, enter it in this box. The deduction/benefit will not be applicable after the annual limit is met.

» **Non-taxable Limit** – If a non-taxable limit has been set up for this deduction/benefit, it will display in this screen. In most cases, this will not need to be changed, but it can be overridden from the employer record at this level.

» In the grid that lists all deductions assigned to the employee (the grid will list only deductions that are in use by the employee, excluding other garnishments), select the deductions that should be subtracted from taxable earnings (employee amount) before calculating the garnishment.

Step H - ACA Information Tab

For detailed information see the Affordale Care Act (ACA) procedure.

1. Click the **ACA Information** tab., and then click **Add**.

> Note: For specific instructions from the IRS regarding the lines on the 1095-C and 1094-C, please visit the IRS website at http://www.irs.gov/instructions/i109495c

2. Select the New Coverage Period's **Year** and **Month**.
3. Click **OK**.
4. Select the **Offer** coverage code. This code will be used for Line 14 on the 1095-C .**Note:** The Red Wing Software Technical Support department will not be able to inform you about what code you should be selecting in this field. If necessary, contact your Tax Accountant or Health Plan Administrator for specifics about which code to select.
    » **Not Applicable (No Form)**: Select this option if you want an employee to be included in the ACA counts, but excluded from printing a 1095 form, for example for part-time employees.
    » **1A - Qualifying Offer**: Minimum essential coverage providing minimum value offered to full-time employee with employee contribution for self-only coverage equal to or less than 9.5% mainland single federal poverty line and at least minimum essential coverage offered to spouse and dependent(s).
    » **1B - Minimum Essential Coverage (Employee Only)**: Minimum essential coverage providing minimum value offered to employee only.
    » **1C - Minimum Essential Coverage (Dependents Not Spouse)** - Minimum essential coverage providing minimum value offered to employee and at least minimum essential coverage offered to dependent(s) (not spouse).

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» **1D. - Minimum Essential Coverage (Spouse Not Dependents)** - Minimum essential coverage providing minimum value offered to employee and at least minimum essential coverage offered to spouse (not dependent(s).

» **1E - Minimum Essential Coverage (Dependents & Spouse)** - Minimum essential coverage providing minimum value offered to employee and at least minimum essential coverage offered to dependent(s) and spouse.

» **1F - Minimum Essential Coverage NOT Providing Minimum Value** - Minimum essential coverage not providing minimum value offered to employee, or employee and spouse or dependent(s), or employee, spouse and dependents.

» **1G - Offer of Coverage (Not Full-Time)** - Offer of coverage to employee who was not a full-time employee for any month of the calendar year and who enrolled in self-insured coverage for one or more months of the calendar year.

» **1H - No Offer of Coverage** - The employee was not offered any health coverage or employee offered coverage that is not minimum essential coverage.

» **1J - Minimum Essential Coverage (Conditionally Spouse, NOT Dependents)** - Essential coverage providing minimum value offered to you; minimum essential coverage conditionally offered to your spouse' and minimum essential coverage NOT offered to your dependent(s)

» **1K - Minimum Essential Coverage (Conditionally Spouse & Dependents)** - Essential coverage providing minimum value offered to you; minimum essential coverage conditionally offered to your spouse; and minimum essential coverage offered to your dependent(s).

» **1L - Individual Coverage HRA (Employee only) with affordability determined by primary residence ZIP code -** Individual coverage HRA offered to employee only with affordability determined by using employee's primary residence location ZIP code.

» **1M - Individual Coverage HRA (Employee & Dependents, not Spouse) with affordability determined by primary residence ZIP code** - Individual coverage HRA offered to employee and dependent(s) (not spouse) with affordability determined by using employee's primary residence location ZIP code.

» **1N - Individual Coverage HRA (Employee, Spouse & Dependents) with affordability determined by primary residence ZIP code** - Individual coverage HRA offered to employee, spouse, and dependent(s) with affordability determined by using employee's primary residence location ZIP code.

» **1O - Individual Coverage HRA (Employee only) using primary employment ZIP code affordability safe harbor** - Individual coverage HRA offered to employees only using the employee's primary employment site ZIP code affordability safe harbor.

» **1P - Individual Coverage HRA (Emplyee & Dependents, not Spouse) using primary employment ZIP code affordability safe harbor** - Individual coverage HRA offered to employee and dependent(s) (not spouse) using the employee's primary employment site ZIP code affordability safe harbor.

» **1Q - Individual Coverage HRA (Employee, Spouse & Dependents) using primary employment ZIP code affordability safe harbor** - Individual coverage HRA offered to employee, spouse, and dependent(s) using employee's primary employment site ZIP code affordability safe harbor.

» **1R - Individual Coverage HRA that is NOT affordabl**e - Individual coverage HRA that is NOT affordable offered to employee; employee and spouse, or dependent(s); or employee, spouse and dependents.

» **1S - Individual Coverage HRA (Not Full-Time)** - Individual coverage HRA offered to an individual who was not a full-time employee.

» **1T - Individual Coverage HRA (Employee & Spouse, No Dependents)**with affordability determined by primary residence ZIP code.

» **1U - Individual coverage HRA (Employee & Spouse, No Dependents)** using primary employment ZIP code affordability safe harbor.

5. Enter the **Employee Share of Lowest-Cost Monthly Premium** if you selected 1B, 1C, 1D or 1E in the Offer field. This amount is used for Line 15 of the 1095-C. Enter the amount of the employee share of the lowest-cost monthly premium for self-only minimum essential coverage providing minimum value that is offered to the employee (this amount may not be the amount the employee is paying for the coverage, for example, if the employee chose to enroll in more expensive coverage such as family coverage or if two plans were offered and the employee chose the higher cost plan).

6. Select a **Section 4980H Safe Harbor Code** if one of the following situations applied to the employee (this is an optional field, but should be selected if any of the situations listed below apply to the employee). In some circumstances more than one situation could apply to the same employee in the same month. For example, an employee could be enrolled in health coverage for a particular month during which he or she is not a full-time employee. However, only one code may be used for a particular calendar month. For any month in which an employee enrolled in minimum essential coverage, indicator code 2C reporting enrollment is used instead of any other indicator code that could also apply. For an employee who did not enroll in health coverage, there are some specific ordering rules for which code to use; see the descriptions of the codes below.

   » **2A - Employee Not Employed** - Select code 2A if the employee was not employed on any day of the calendar month. Do not use code 2A for a month if the individual was an employee of the employer on any day of the calendar month. Do not use code 2A for the month during which an employee terminates employment with the employer.

   » **2B - Employee not Full-time** - Select code 2B if the employee is not a full-time employee for the month and did not enroll in minimum essential coverage, if offered for the month. Enter code 2B also if the employee is a full-time employee for the month and whose offer of coverage (or coverage if the employee was enrolled) ended before the last day of the month solely because the employee terminated employment during the month (so that the offer of coverage or coverage would have continued if the employee had not terminated employment during the month). Also use this code for January 2015 if the employee was offered health coverage no later than the first day of the first payroll period that begins in January 2015 and the coverage offered was affordable for purposes of the employer shared responsibility provisions under section 4980H and provided minimum value.

   » **2C - Employee Enrolled in Coverage Offered** - Select code 2C for any month in which the employee enrolled in health coverage offered by the employer for each day of the month, regardless of whether any other code in Code Series 2 might also apply (for example, the code for a section 4980H affordability safe harbor).

   » **2D - Employee in Section 4980H(b)** - Select code 2D for any month during which an employee is in a Limited Non-Assessment Period for section 4980H(b). If an employee is in an initial measurement period, enter code 2D (employee in a section 4980H(b) Limited Non-Assessment Period) for the month, and not code 2B (employee not a full-time employee). For an employee in a section 4980H(b) Limited Non-Assessment Period for whom the employer is also eligible for the multi-employer interim rule relief for the month code 2E, enter code 2E (multi-employer interim rule relief) and not code 2D (employee in a Limited Non-Assessment Period).

   » **2E - Multi-employer Interim Rule Relief** - Select code 2E for any month for which the multiemployer interim guidance applies for that employee. This relief is described under Offer of Health Coverage definition on the IRS website at http://www.irs.gov/instructions/i109495c/ar01.html#d0e655.

   > **Note for Codes 2F through 2H:** Although employers may use the section 4980H affordability safe harbors to determine affordability for purposes of the multiemployer interim guidance, an employer eligible for the relief provided in the multiemployer interim guidance for a month for an employee should enter code 2E (multiemployer interim rule relief), and not a code for the section 4980H affordability safe harbors (codes 2F, 2G, or 2H.

   » **2F - Section 4980H - Form W-2** - Select code 2F if the employer used the section 4980H Form W-2 safe harbor to determine affordability for purposes of section 4980H(b) for this employee for the year. If an employer uses this safe harbor for an employee, it must be used for all months of the

calendar year for which the employee is offered health coverage.

>> **2G - Section 4980H - Federal Poverty Line** - Select code 2G if the employer used the section 4980H federal poverty line safe harbor to determine affordability for purposes of section 4980H(b) for this employee for any month(s).

>> **2H - Section 4980H - Rate of Pay** - Select code 2H if the employer used the section 4980H rate of pay safe harbor to determine affordability for purposes of section 4980H(b) for this employee for any month(s).

>> **2I - Non-calendar Year Transition Relief(2015 Only)** -Select code 2I if non-calendar year transition relief for section 4980H(b) applies to this employee for the month. See the instructions at http://www.irs.gov/instructions/i109495c/ar01.html#d0e655under Section 4980H Transition Relief for 2015 and 2015 Section 4980H(b) Transition Relief for Employers with Non-Calendar Year Plans (Form 1095-C, line 16, code 2I), for a description of this relief. This code was valid for 2015 only.

a. The **Dependents** section is used for Lines 17-22 on the 1095-C. The first line in the Dependents grid will automatically display the current employee's information. Select the **Incl** check box to include the dependent on the 1095-C. Enter the dependents associated with this employee. The First Name and Last Name are required fields. The DOB is a required field if the SSN is not entered. The Middle initial, Suffix, and SSN are optional fields. Dependents or blank rows can be removed from the grid by right-clicking on the dependent row and then selecting Delete Row. Dependents apply to all coverage periods.

b. Repeat Steps 4-9 for each coverage period for this employee.

c. Click **Save**.

d. Repeat Steps 1-11 for all employees.

e. You can print the Employee ACA Setup report from **Reports** > **Reports** > **Payroll Setup Lists** > **Employees** > **Employee ACA Setup** to list the employee ACA setup information. By default, the report will show employees that are not set up with ACA. To add ACA information for an employee, edit the employee (s) and select the ACA Information tab. To show employees that are set up, change the ACA Setup filter to Yes.

Step I- Leave Tab (If you are tracking leave balances in CenterPoint)

1. Click the **Leave** tab.

2. Select the employer in the box on the upper left side of the screen, In the lower left box, all active leave items display. Select which leave items pertain to this employee. Under **Leave Detail** on the right-side of the screen, there will be an **Accrual Rate Percent** box. This percentage will display 100%. The percentage can be overridden. If you seasonally reduce employees work schedules, you can reduce the leave accrual rate to a percentage of its normal rate and use the **Maximum Percent** field (set at the employer level on the Leave tab) to continue to accrue the total hours they earn, just at a reduced rate. For example, if Maximum hours is 80 hours and Maximum Percent is 80%, the Maximum field will display 64 hours. Both the Accrued Rate and Maximum hours will be displayed on the employee at the reduced percentage.

>> Full-time = 100%

>> Part-Time = 75%

>> Temporary = 0%

3. Click the + sign next to the employer to display the leave options you selected. Under the employer, select one of the leave options. Complete the leave details.

> Note: Adjustments to balances on the Leave tab here will be effective as of today's date.To make an adjustment for a specific date, use Processes > Leave Adjustments.

» **Eligibility Date** – Is used to calculate the years of service variable that is used in a Leave calculation. By default, it is the same as the Hire Date, but may be changed by the user.

» **Wait Period Date** – Is calculated as the Eligibility Date + any hours, days, or months entered as a wait period when you set up leave on the Leave Maintenance screen. The Wait Period Date is the date on which Leave Accrual Begins. The Wait Period Date must be equal to or greater than the Eligibility Date. This data is calculated by CenterPoint.

» **Earning** – Select the required earning account that will be used to track the leave that is used during a pay period. This should be different than the regular earning. If an account is not selected when you click Save, you will receive a message to select an earning before you can continue.

» The **Years of Service** and **Hours Earned** (per Month) boxes - will display based on the employee's hire date (from the **Setup > Employees > Employment** tab), system date, and information from **Setup > Payroll Details > Leave** after you click **Save**.

» The remainder of the fields on the screen are automatically filled in by leave accrued, leave adjustments, and leave used. After a new employee is created and saved and a beginning leave balance has been created, you will be able to change the **Used** and **Adjustments** boxes. If you edit any of these fields directly, the maximum hours are not enforced so it is possible to create available hours that exceed a defined maximum.

Repeat step I-3 for each leave option assigned to the employee.

Step J - Custom Fields Tab (Optional)

To create a new **CustomField** Name:

1. Click the **Custom Fields** tab.
2. Click **Custom Fields**.
3. Click **New**.
4. In the **Abbreviation** box, enter an optional abbreviation for the custom field. For example NFC for Name of First Child.
5. In the **Name** box, enter a name for this custom field. For example, Name of First Child.
6. Select the type of information you want to enter in the custom field. Field types are:
   » Date
   » Numeric

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>> Percentage
>> Text

7. If the type is **Numeric** or **Percentage**, enter in the number of decimal places.
8. Click **Save**. Click **Close**. The new custom field will now be a custom field that you can use to collect data for not only your employees, but for any name on your Names list
9. Select the line that contains the **Custom Name Field** Name you want to add information to. For example Name of First Child.
10. In the **CustomFieldInformation** box, enter the specific information for this employee. For example, if you have a custom name field called "Name of First Child" and you want to track the names of your employee's children, enter a name in the Custom Field Information box.

Step K - Direct Deposit Tab

If you purchased the Direct Deposit additional payroll option, click the Direct Deposit tab. Refer to the Direct Deposit: Setup & Processing topic for step by step instructions.

Step L - Education Tab.

If you purchased the Employee Training/Certification Tracking additional payroll option, click the **Education** tab and follow the Employee Training/Certification procedure.

Step M - Publish Pay Advices

If you subscribe to Publish Pay Advices, refer to the Publish Pay Advices - New Installation document for detailed information.

Step N - CenterPoint Time Clock

If you subscribe to CenterPoint Time Clock, refer to the CenterPoint Time Clock Setup document for detailed information.

> Note: If you want to attach a document to this employee, see the Scan and Attach Documents topic for detailed information.

>> Click **Save** to save the employee and return to the **List** tab, or click **Close** to save the employee and close the **Employees** screen.

Edit/Change an Employee

You can edit an employee to modify their information at any time.

1. On the **Setup** menu, click **Employees**.
2. Select the Employee you want to change and click **Edit** (or double click on the name). Make any changes to the employee setup.
3. Click **Save** to save the changes and return to the List tab, or click **Close** to save the changes and close .

Delete an Employee

The Delete button completely removes an employee from the system. Note: You cannot delete a record that has any type of history or other records linked to it in the system. If you have an employee that is no longer working for you, but does have historical activity, please refer to the Change the Status of an Existing Employee topic below.

1. On the **Setup** menu, click **Employees**.
2. Select the employee you want to delete, and then click **Delete.**
3. At the "Are you sure you want the item deleted?" message, click **Yes**.

Change the Status (Activate/Deactivate) of an Existing Employee

Employees can be activated/deactivated for an employer for specific company(s)/fund(s). Employees that no longer work for you, but have history, can be deactivated.. In the Pay Employees screen, the list of employees will only include employees that are active. Filters can be created in reports, lists, etc. to only include active employees. Names can be active for some employers and not for others.

1. On the **Setup** menu, click **Employees**.
2. Select an active employee, right-click and select **Activate/Deactivate**.
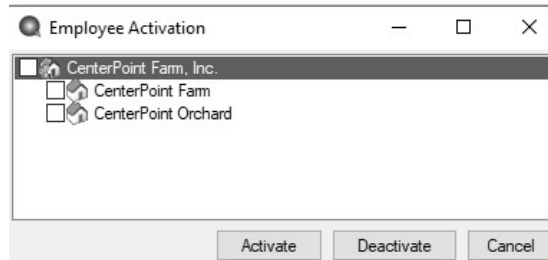
3. Select the employer and the company(s)/fund(s) to activate/deactivate and click either **Activate** or **Deactivate**.