Southwestern Payroll Service, Inc.

Payentry™

NextGen User Guide

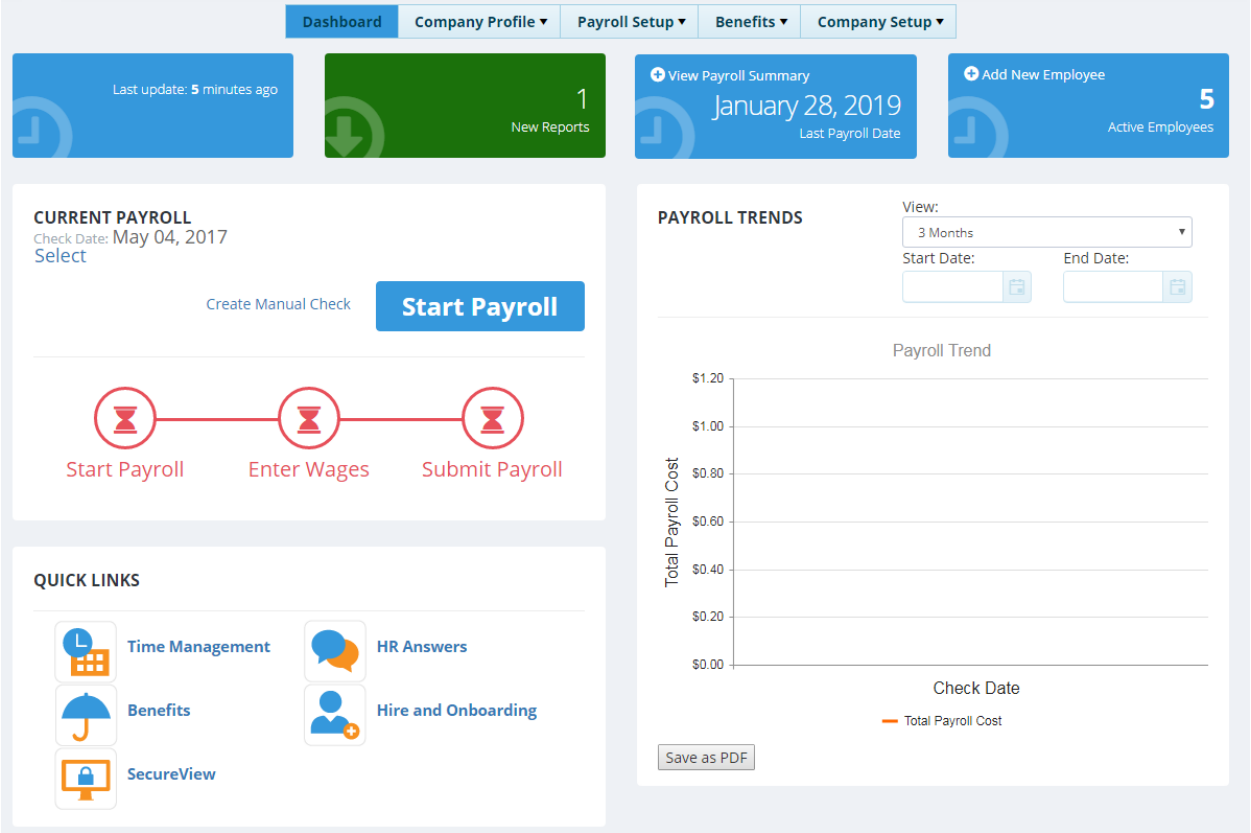
Table of Contents

Company Dashboard 2
View Company Employees 4
View Payroll Summary 6
View Payroll Summary 7
Payentry NextGen W4 Changes and Updates 10
Delete Employees 16
Company Reports 17
My Reports 19
Secure View 21
Process Payroll **22**
Select Check Date 22
Start Payroll **24**
Payroll Batches 26
Batch Controls 27
Restart a Batch 28
Remove a Batch 29
Import Time Clock Files **30**
Enter Payroll Wages **32**
New Enter Payroll Wages 36
Edit Check Details 41
Edit Check Attributes 44
Delete a Check 46
Run Preprocess Register **47**
Close Batch **49**
Close Payroll **50**
Submit Payroll **51**

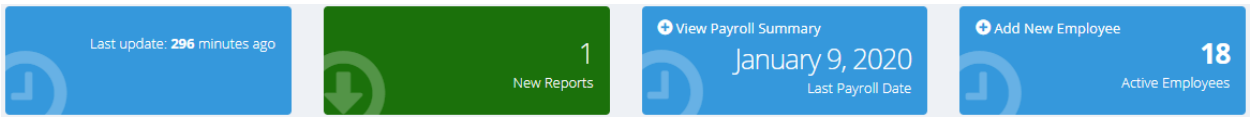
Company Dashboard

The **Company Dashboard** is where users can quickly navigate to frequently accessed areas of the system. The items selected to appear on this screen are some of the most regularly used and are meant to convey critical information to individuals who work with it. Users can quickly navigate to specific sections of the site by clicking on the dashboard sections and be taken directly to the page that they need to see and work with.

See: Company Dashboard Actions for more information.



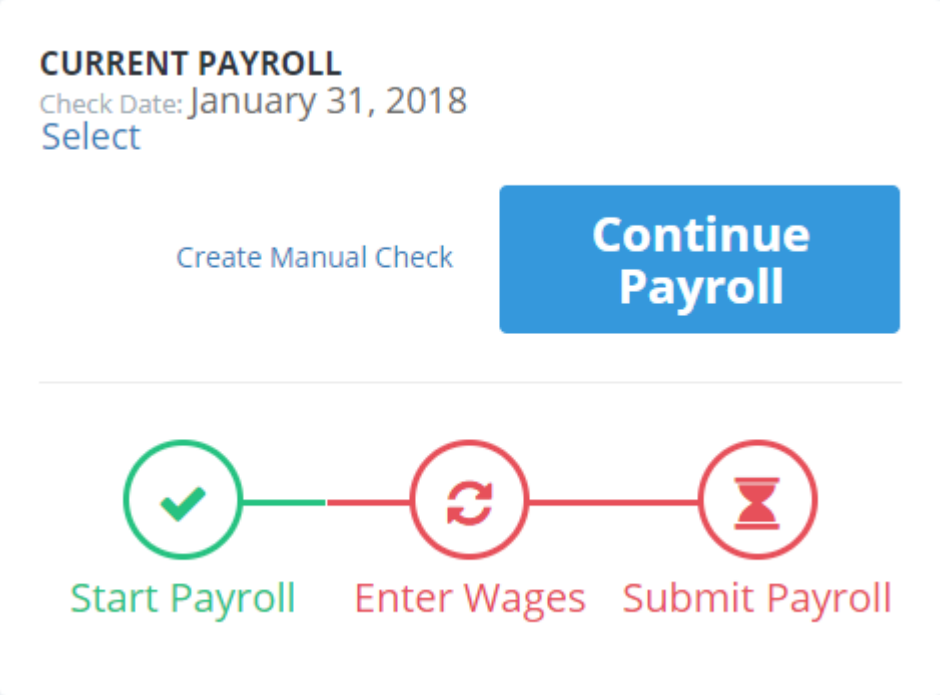
Status Bar:



- **Last Update** - shows when the last sync with the service bureau took place and when the next one will happen.
- **Reports** - shows if there are any reports ready for you to view. When you click on this widget it takes you to the My Reports page.
- **Last Payroll Date** - shows when the last payroll was run.

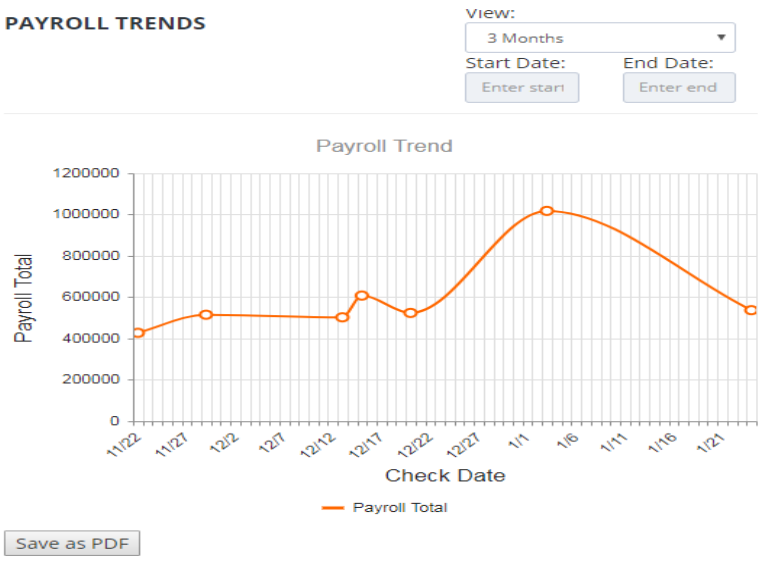
- **Active Employees** - indicates the number of active employees in the company. When you click on this widget, you are taken to the listing of active employees where you can add, edit, and delete employees. You may also click directly on the + Add New button to go straight to the Add New Employee page.

Current Payroll



The **Current Payroll** section is where you can begin or continue to process payroll. Once you click Start or Continue Payroll, you are taken from one screen to another and are warned if something is missing or incomplete. If you have to stop, Payentry saves all of your progress and you can come back to it any time; the progress bar lets you know where you stopped.

Payroll Trends

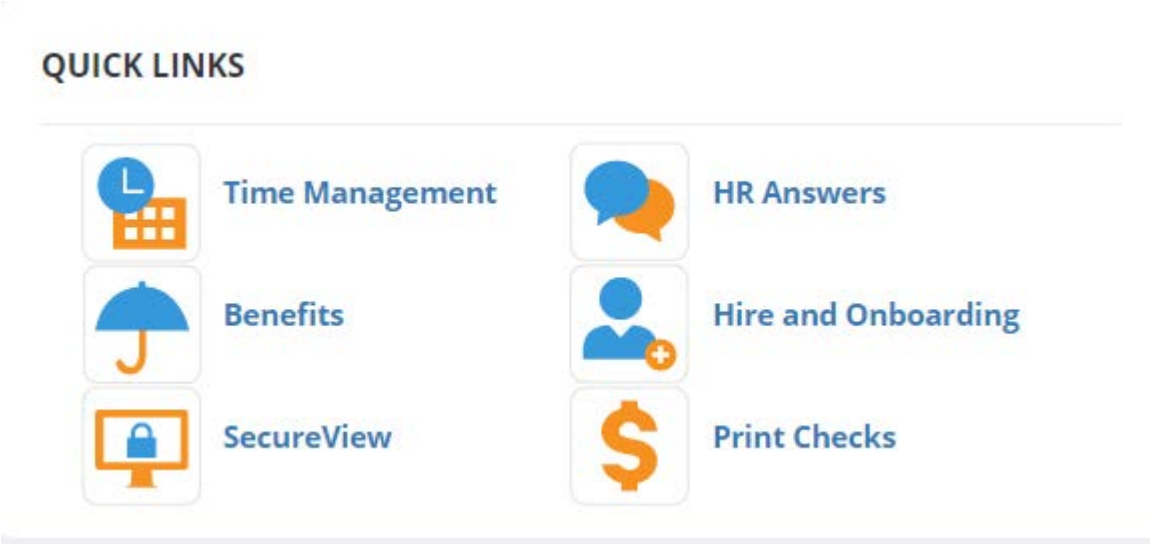


Company users can view a dynamic **Payroll Trends** graph that illustrates total payroll cost over time. You can edit the time period you wish to view and can also save the chart as a pdf. This can help

managers and executives notice trends and take action when necessary. When you click on a particular payroll check date, you are directed to the payroll summary report which details the total payroll cost for that period.

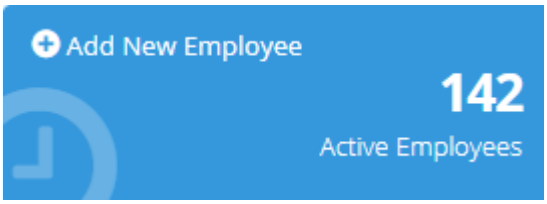
Quick Links

You can access other critical services from the Company Dashboard as well. A direct link to Time Management, HR Answers, Benefits, and Hire and Onboarding, Secure View, and Print Checks make access to these additional services easy. However, these are only available if your company subscribes to these services and you have appropriate permissions.



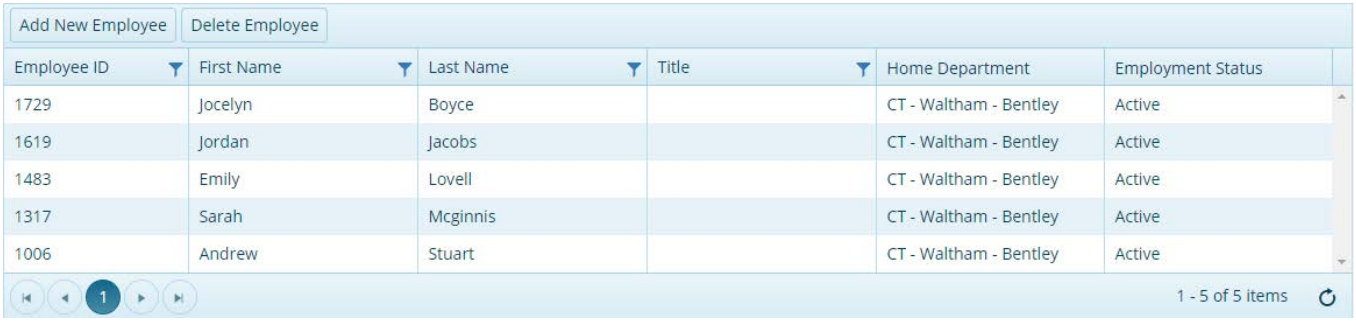
View Company Employees

You may view all the employees of the company by either clicking on the Employee status bar on the Company Dashboard;



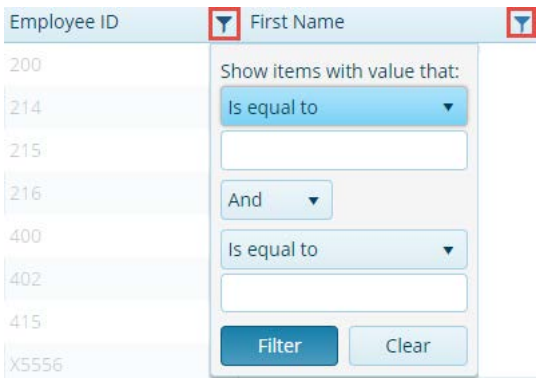
Or through the side bar, by clicking first on the Company, then Employees, and once the section expands, click on See all.

You are taken to the **Browse Employees** page, here you can: Add New Employees or Delete Employees, and go to employee pages by clicking on their row.



You can search for various employees by using the filters in each column.

- Expand the list by clicking **Show All**, you then see terminated and other non-active employees.
- Click on the little siphon icon in the column header to filter by each category in the table.



- You may also sort employees by Employment Status.
- You may sort by more than one column at a time.

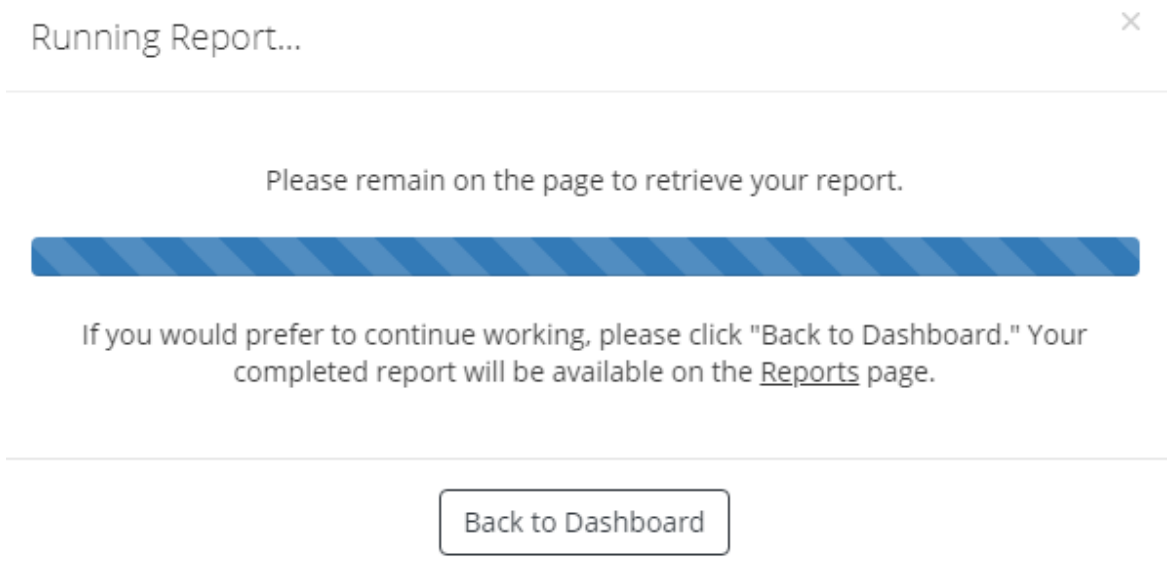
View Payroll Summary

You can run the Payroll Summary report from the Last Payroll widget that is located on the Company dashboard. When you click on the 'View Payroll Summary' link, a progress message opens and the system begins to generate the Payroll Summary report. If you remain on the page without clicking "Back to Dashboard" the report will open in a new tab once it is generated. If you decide not to wait for the report to be generated, you can find it later on the My Reports page, in the Recent Reports section.

1. Go to your **Company Dashboard**.
2. Click in the **View Payroll Summary** link on the Last Payroll Date widget, a progress bar appears.

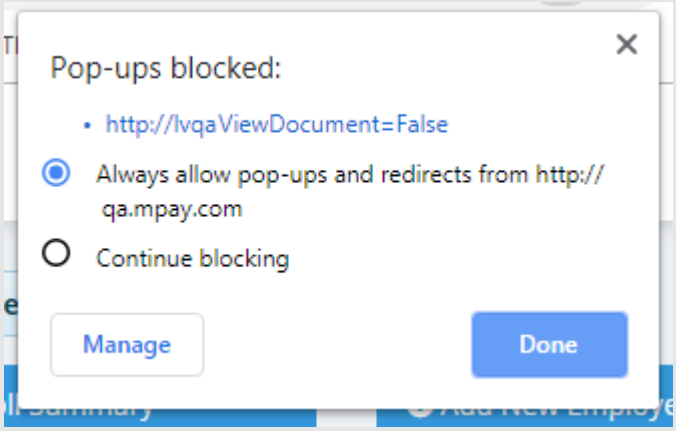
To see the report right away:

3. Remain on the **page** without clicking away from the progress bar.



4. The **report** opens in a new tab once it is generated.

Important: If you have a pop-up blocker on, the report may be flagged and get blocked. Depending on your browser, you may get a message informing you that it has been blocked and ask if you want to open it. We recommend that you enable pop-ups for Next Gen.



To see the report later:

1. Click on **Back to Dashboard**.
2. Access the **report later** by going to Reports.
3. Click on **My Reports**. The report will be listed in the Recent Reports section.

View Payroll Summary

You can run the Payroll Summary report from the Last Payroll widget that is located on the Company dashboard. When you click on the 'View Payroll Summary' link, a progress message opens and the system begins to generate the Payroll Summary report. If you remain on the page without clicking "Back to Dashboard" the report will open in a new tab once it is generated. If you decide not to wait for the report to be generated, you can find it later on the My Reports page, in the Recent Reports section.

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To see the report right away:

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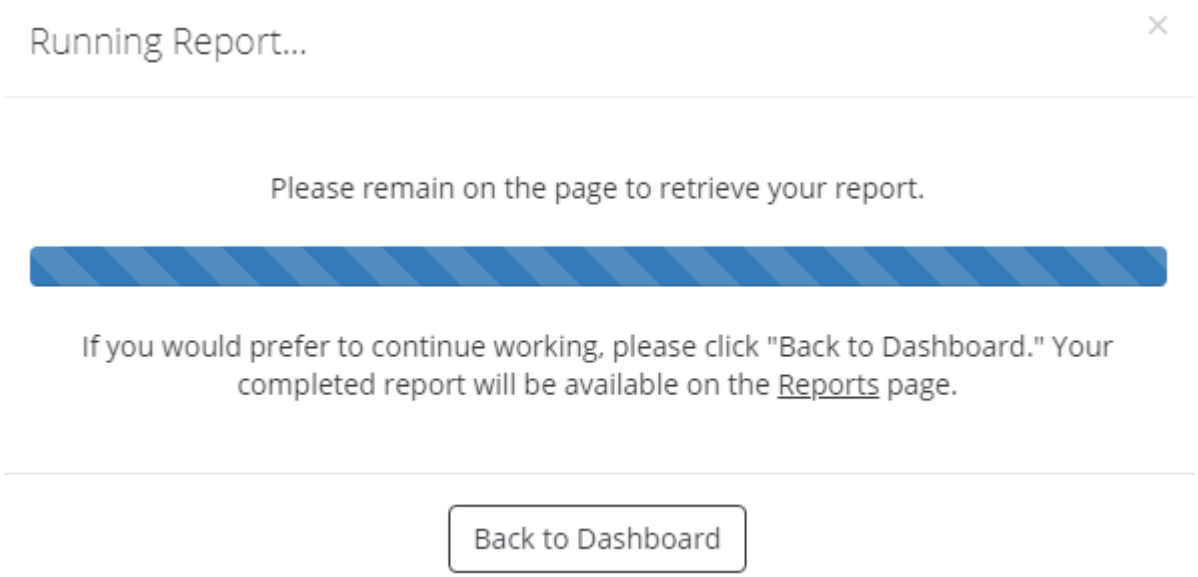

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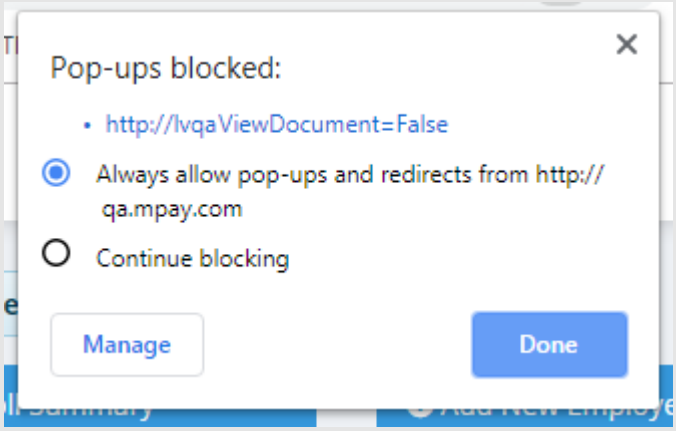


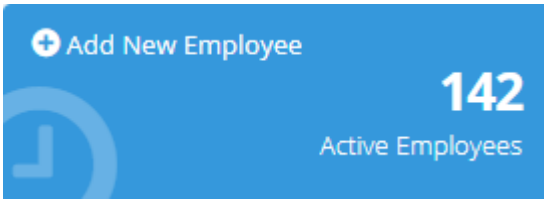
To see the report later:

1. Click on **Back to Dashboard**.
2. Access the **report later** by going to Reports.
3. Click on **My Reports**. The report will be listed in the Recent Reports section.

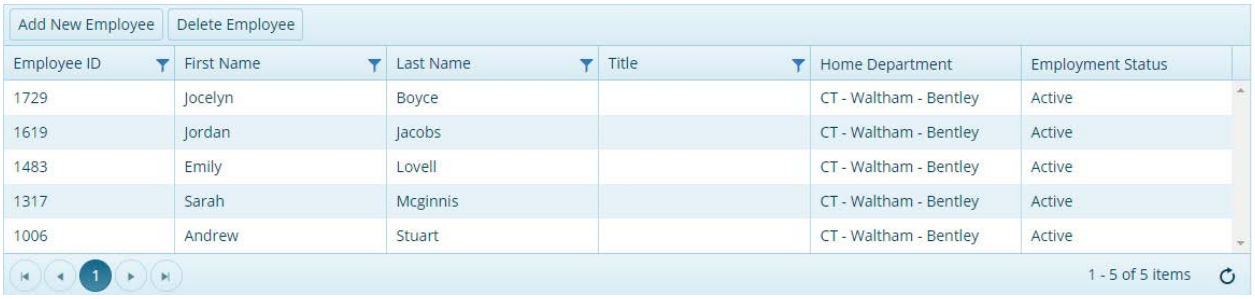
Add New Employees

1. Go to the **Company's Dashboard**.

2. Click on the **Active Employees** widget, you are taken to the Browse Employees page. You may also click directly on **+ Add New** button on the widget, you are taken to the new employee form.

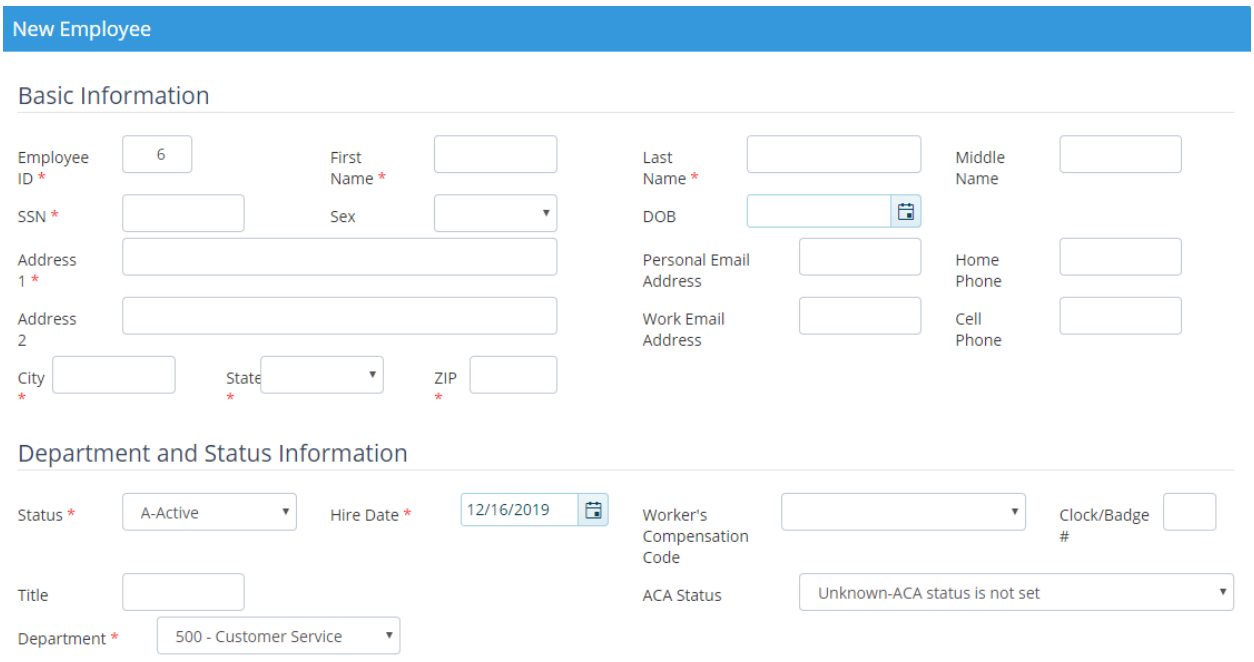


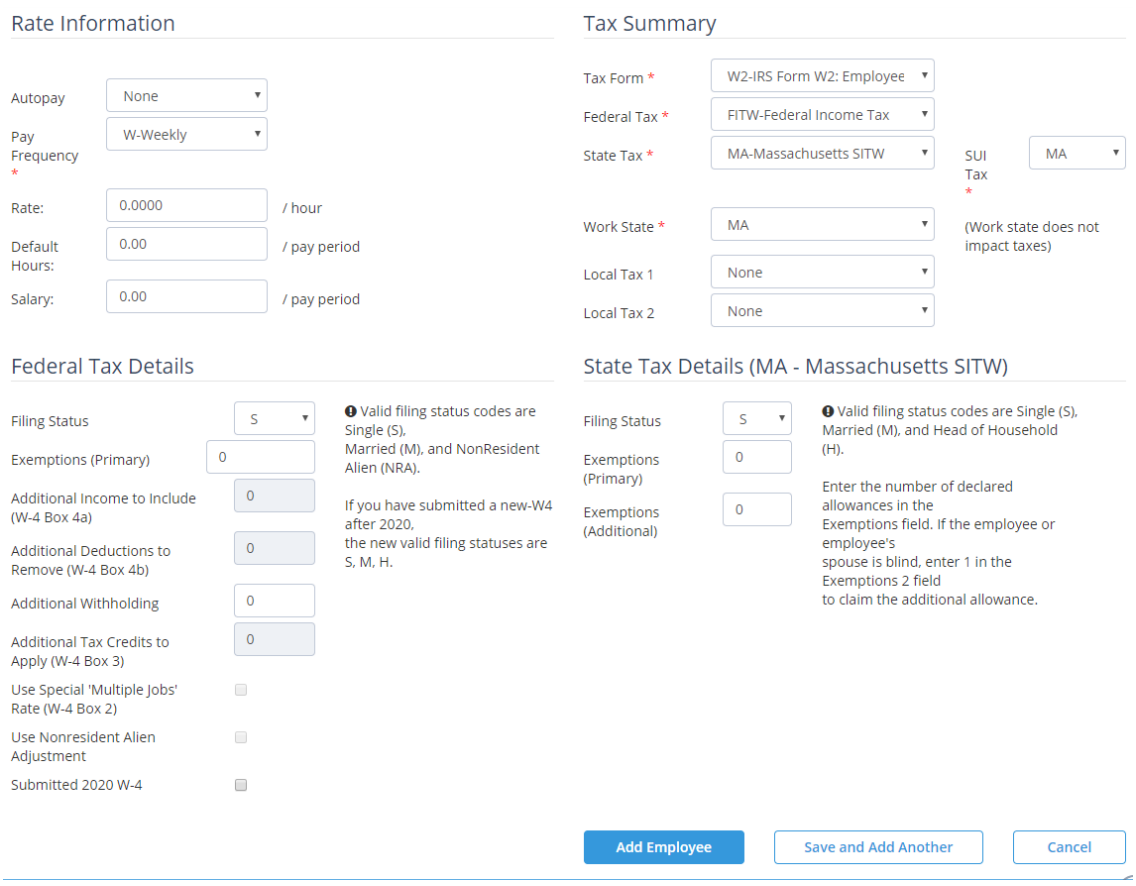
3. Click on **Add New Employee**.



4. Fill out the **New Employee** form. Fields marked with a red asterisk * are required. For definitions of the W4 fields, see: [Payentry NextGen W4 Changes and Updates].

> **Important:** The required fields for this section vary depending on whether the "Screen new Hires for WOTC" is selected, in particular the employee's personal email and the title.





Note: The **Work Opportunity Tax Credit (WOTC)** is a federal tax credit available to employers who hire and retain veterans and individuals with difficulty getting jobs. Employers are encouraged to select this check box to initiate the WOTC screening process as it has the possibility of yielding a significant tax credit for the business. Selecting the check box will send an email questionnaire to the employee to help ascertain whether the company qualifies for the credit.

5. Click on **Add Employee**. OR:

6. Click **Save and Add Another** if you wish to add another new employee.

Paynetry NextGen W4 Changes and Updates

Federal income tax calculation has some significant changes in 2020. Instead of claiming a set number of dependents, employees can now claim direct adjustments to their taxable income and to their calculated tax. In order to collect the needed adjustments, the Federal W-4 form has changed.

As of this writing, IRS has released a draft version of the new W-4 Form and has indicated that there will be no further substantive changes. For more information, including any updates and future developments related to Form W-4, please go to www.irs.gov/FormW4

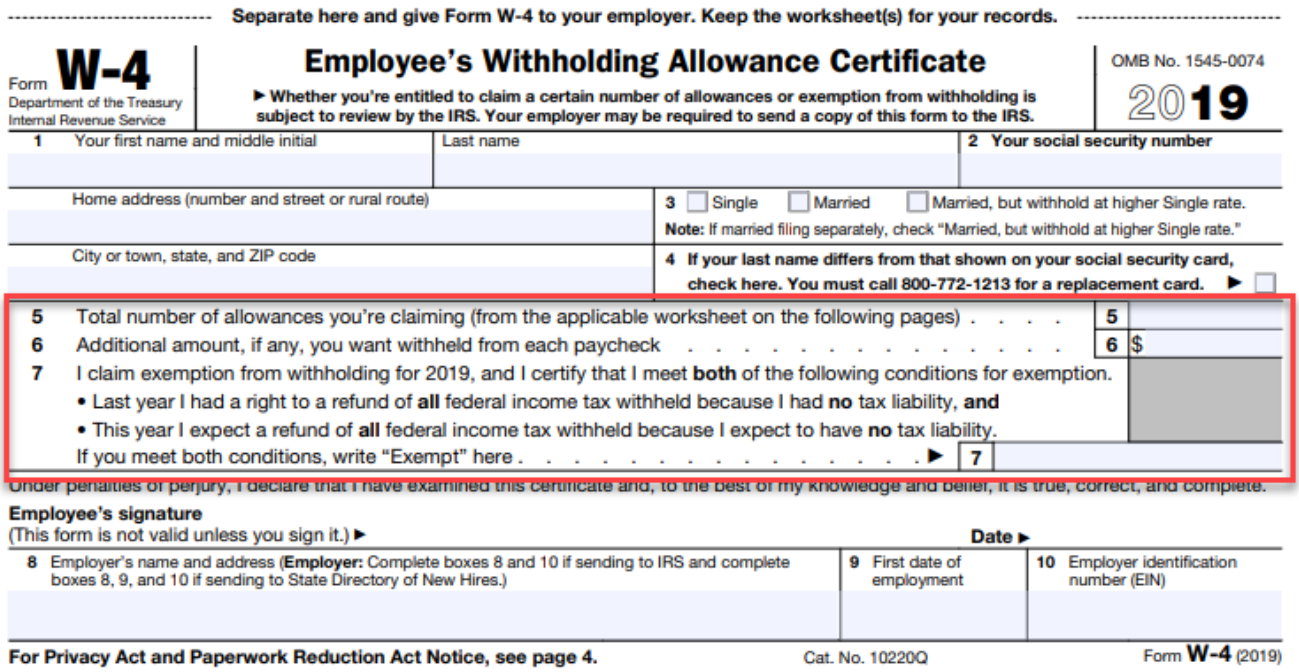
See also: https://www.irs.gov/newsroom/faqs-on-the-draft-2020-form-w-4 for the FAQ.

Payentry NextGen and M3 have been updated to house these new values in order to calculate the Federal Income Tax correctly. Currently this will only be used for FITW, but states may also be switching to this new format.

Important: If an Employee does not submit a new W-4, supervisors do not need to update their employee tax information and leave settings on default.

Important: Employees who have submitted Form W-4 in any year before 2020 are not required to submit a new form merely because of the redesign. Employers will continue to compute withholding based on the information from the employee's most recently submitted Form W-4.

The Old W-4



Separate here and give Form W-4 to your employer. Keep the worksheet(s) for your records.

Form **W-4** Department of the Treasury Internal Revenue Service

Employee's Withholding Allowance Certificate

▶ Whether you're entitled to claim a certain number of allowances or exemption from withholding is subject to review by the IRS. Your employer may be required to send a copy of this form to the IRS.

OMB No. 1545-0074

2019

1 Your first name and middle initial | Last name | 2 Your social security number

Home address (number and street or rural route) | 3 ☐ Single ☐ Married ☐ Married, but withhold at higher Single rate.
Note: If married filing separately, check "Married, but withhold at higher Single rate."

City or town, state, and ZIP code | 4 If your last name differs from that shown on your social security card, check here. You must call 800-772-1213 for a replacement card. ▶ ☐

5 Total number of allowances you're claiming (from the applicable worksheet on the following pages) 5

6 Additional amount, if any, you want withheld from each paycheck . . . . . 6 $

7 I claim exemption from withholding for 2019, and I certify that I meet **both** of the following conditions for exemption.
- Last year I had a right to a refund of **all** federal income tax withheld because I had **no** tax liability, **and**
- This year I expect a refund of **all** federal income tax withheld because I expect to have **no** tax liability.

If you meet both conditions, write "Exempt" here . . . . . ▶ 7

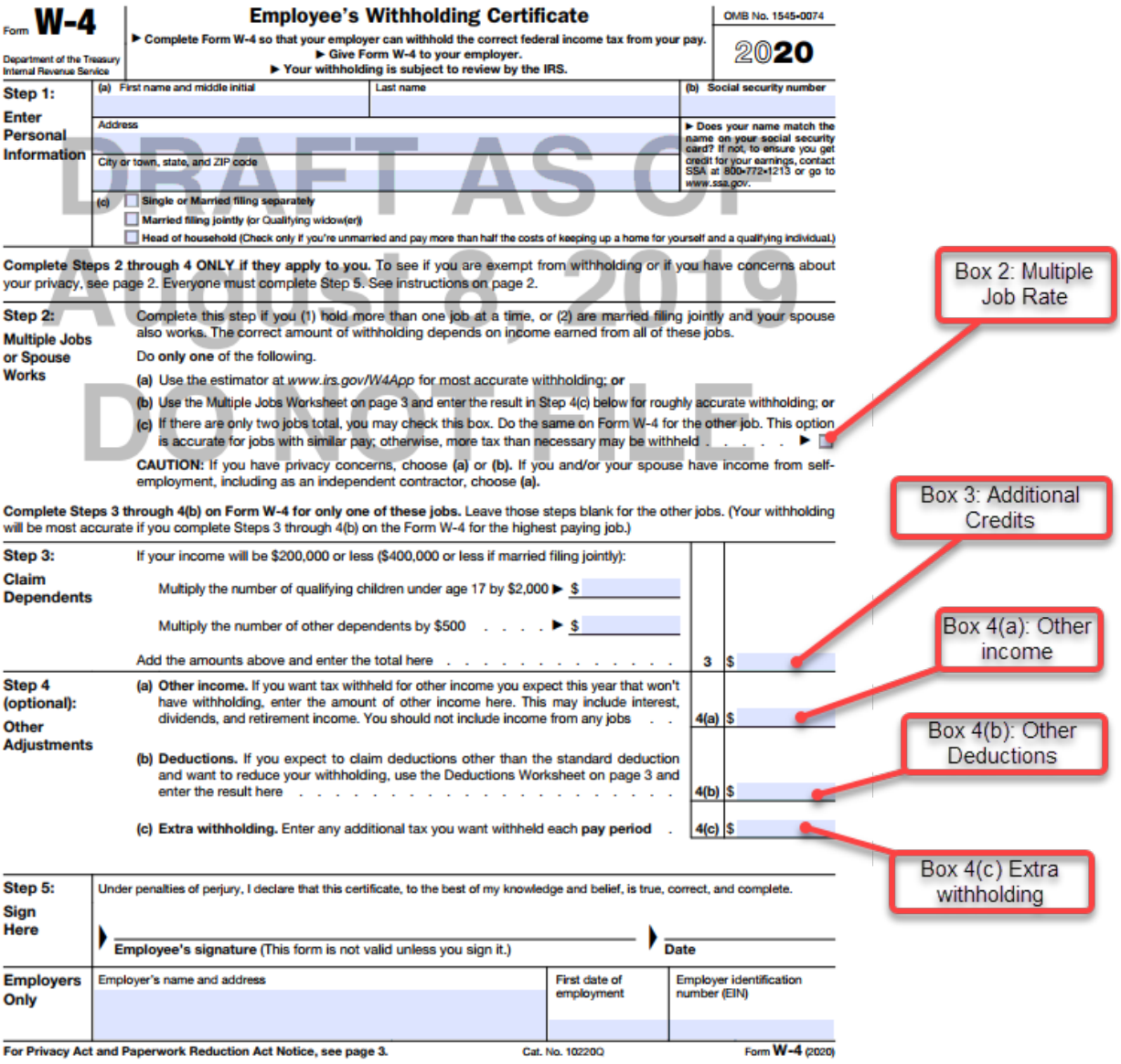
Under penalties of perjury, I declare that I have examined this certificate and, to the best of my knowledge and belief, it is true, correct, and complete.

Employee's signature (This form is not valid unless you sign it.) ▶ **Date** ▶

8 Employer's name and address (**Employer:** Complete boxes 8 and 10 if sending to IRS and complete boxes 8, 9, and 10 if sending to State Directory of New Hires.) | 9 First date of employment | 10 Employer identification number (EIN)

For Privacy Act and Paperwork Reduction Act Notice, see page 4. Cat. No. 10220Q Form **W-4** (2019)

The New W-4 Form



Form **W-4**

Department of the Treasury
Internal Revenue Service

Employee's Withholding Certificate

▶ Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay.
▶ Give Form W-4 to your employer.
▶ Your withholding is subject to review by the IRS.

OMB No. 1545-0074

2020

Step 1: Enter Personal Information

(a) First name and middle initial | Last name | (b) Social security number

Address

City or town, state, and ZIP code

▶ Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov.

(c) ☐ Single or Married filing separately
☐ Married filing jointly (or Qualifying widow(er))
☐ Head of household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.)

DRAFT AS OF August 8, 2019 DO NOT FILE

Complete Steps 2 through 4 ONLY if they apply to you. To see if you are exempt from withholding or if you have concerns about your privacy, see page 2. Everyone must complete Step 5. See instructions on page 2.

Step 2: Multiple Jobs or Spouse Works

Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs.

Do **only one** of the following.

(a) Use the estimator at *www.irs.gov/W4App* for most accurate withholding; **or**

(b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below for roughly accurate withholding; **or**

(c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld . . . . . ▶ ☐

CAUTION: If you have privacy concerns, choose **(a)** or **(b)**. If you and/or your spouse have income from self-employment, including as an independent contractor, choose **(a)**.

Complete Steps 3 through 4(b) on Form W-4 for only one of these jobs. Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3 through 4(b) on the Form W-4 for the highest paying job.)

Step 3: Claim Dependents

If your income will be $200,000 or less ($400,000 or less if married filing jointly):

Multiply the number of qualifying children under age 17 by $2,000 ▶ $

Multiply the number of other dependents by $500 . . . . ▶ $

Add the amounts above and enter the total here . . . . . 3 $

Step 4 (optional): Other Adjustments

(a) Other income. If you want tax withheld for other income you expect this year that won't have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income. You should not include income from any jobs . . 4(a) $

(b) Deductions. If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use the Deductions Worksheet on page 3 and enter the result here . . . . . 4(b) $

(c) Extra withholding. Enter any additional tax you want withheld each **pay period** . 4(c) $

Step 5: Sign Here

Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.

Employee's signature (This form is not valid unless you sign it.) | **Date**

Employers Only

Employer's name and address | First date of employment | Employer identification number (EIN)

For Privacy Act and Paperwork Reduction Act Notice, see page 3. Cat. No. 10220Q Form **W-4** (2020)

Box 2: Multiple Job Rate

Box 3: Additional Credits

Box 4(a): Other income

Box 4(b): Other Deductions

Box 4(c) Extra withholding

Add New Employees Page:

Additional fields have been added to the Add New Employee page, Federal Tax Details section. **These fields will only visible if the new employee hire date is on or after October 1st, 2019. These fields will be read-only until the 'Submitted 2020 W-4' field is selected.**

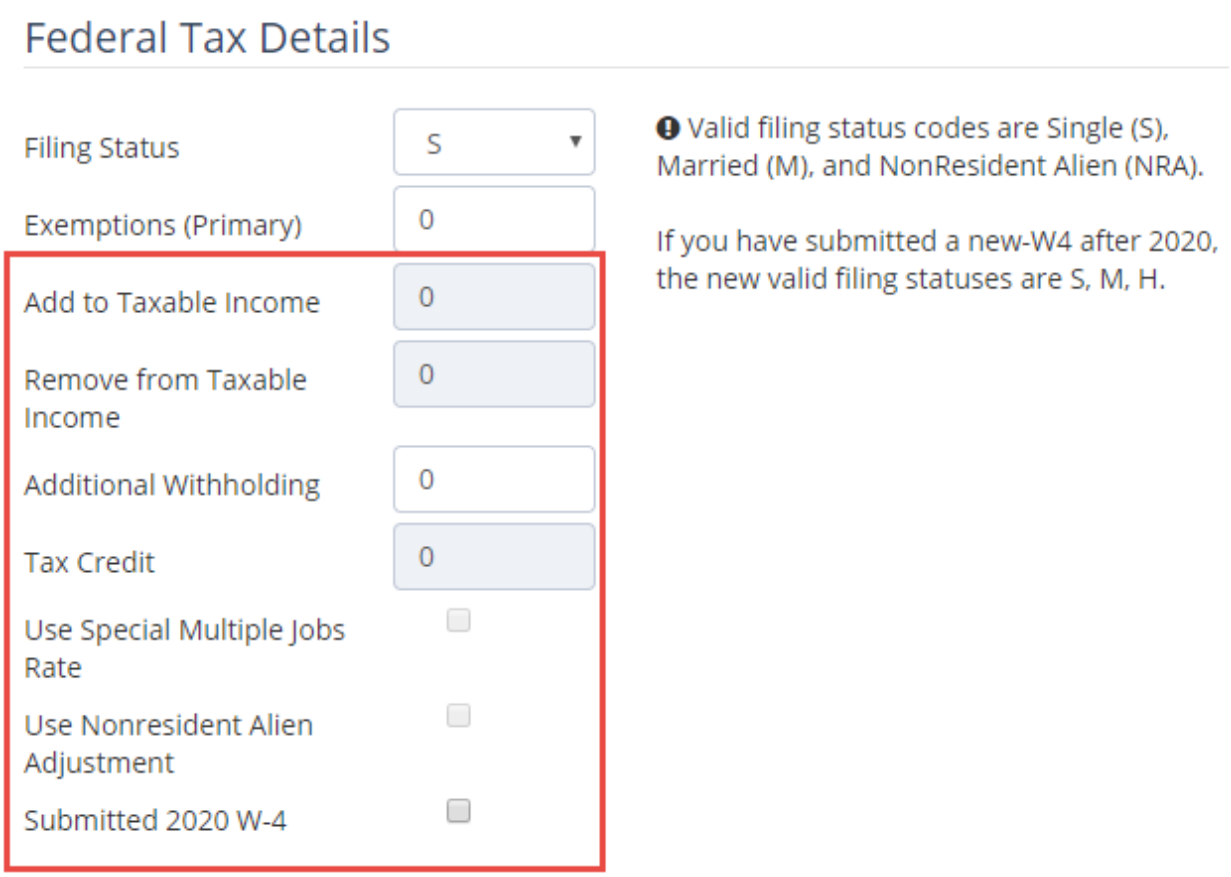


Table 4-216: Tax Summary Fields

Field	Description
Add to Taxable Income	Field for the amount of additional income claimed by the employee for all taxes that support additional income.
Remove from Taxable Income	Field for the amount of additional deductions claimed by the employee for all taxes that support additional deductions.
Additional Withholding	Field for the amount of additional credits claimed by the employee for all taxes that support additional credits.
Tax Credit	Field for the amount of additional credits claimed by the employee for all taxes that support additional credits.
Use Special 'Multiple Jobs' Rate (W-4 Box 2c)	Check box that when selected indicates modified tax processing for all taxes that support modified tax processing. (This corresponds to selecting the multiple jobs rate, selecting non-resident alien status, and selecting if a 2020 W-4 has been filed for FITW).
Use Nonresident Alien Adjustments	Check box for nonresident alien tax adjustments. This check box only appear when required for the tax.

Table 4-216: Tax Summary Fields

Field	Description
	We have changed the way M3 determines a nonresident alien; prior to now if the employee was an NRA you would select filing status NRA (for single) or NRM (for married). Those tax tables would ensure that the appropriate amount was used to increase the taxable wages for the employee. This check box can be used to identify the employee as a nonresident alien. By checking that box, the employee will automatically get the new (higher) amount added to their taxable income. So for employees that started prior to 2020 and have not submitted a new W-4 simply leave them set up with the existing NRA (or NRM) filing status codes. For newly hired employees (or ones submitting a new W-4) check the new nonresident alien box and set them up with a standard (M, S, H) filing status.
Employee Submitted 2020 (or later) W-4	Check box to indicate an updated W-4. This check box only appear when required for the tax.

Employee Tax

Six new fields have been added to the employee edit screen in order to support the new 2020 FITW W4 changes.

- Additional Income to Include (W-4 Box 4a)
- Additional Deductions to Remove (W-4 Box 4b)
- Additional Tax Credits to Apply (W-4 Box 3)
- Use Special 'Multiple Jobs' rate (W-4 Box 2)
- Use Nonresident Alien Adjustment
- Employee submitted 2020 (or later) W-4

These fields will only visible if the current check date is on or after January 1st, 2020. They will be read-only until the 'Employee submitted 2020 (or later) W-4' field is selected.

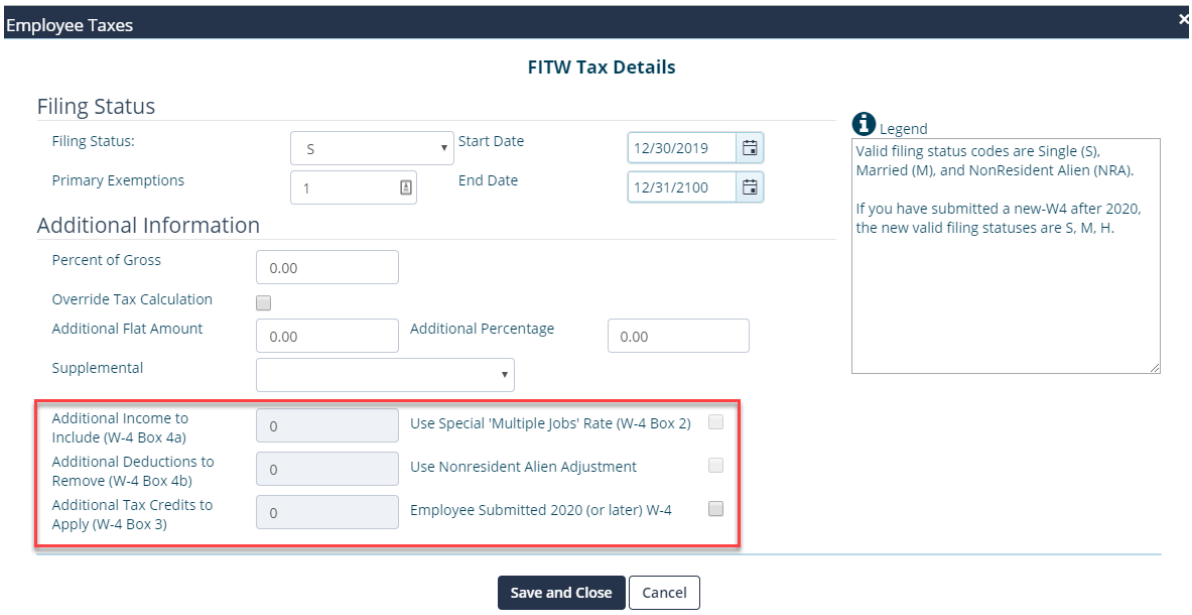


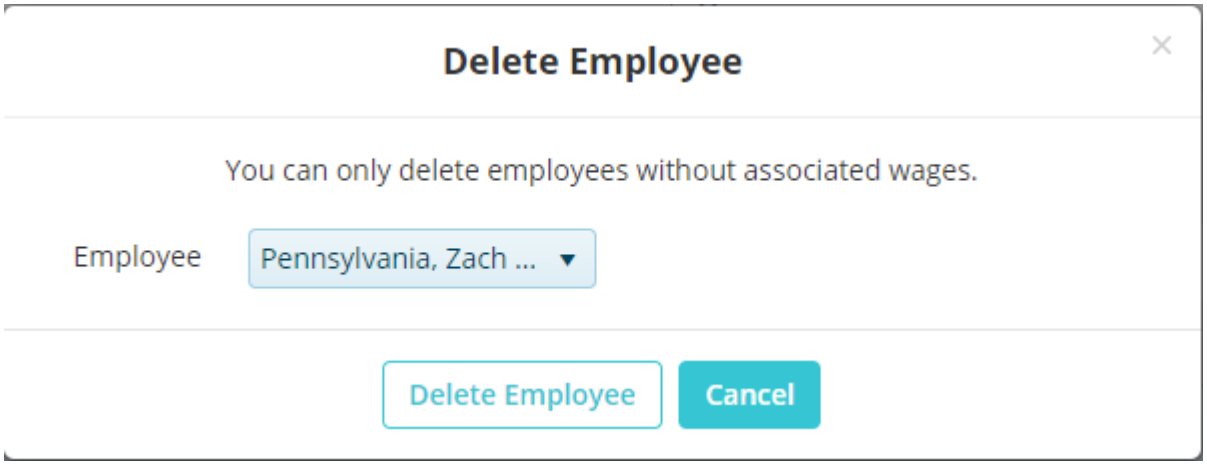
Table 4-217: Tax Summary Fields

Field	Description
Additional Income to Include (W-4 Box 4a)	Field for the amount of additional income claimed by the employee for all taxes that support additional income.
Additional Deductions to Remove (W-4 Box 4b)	Field for the amount of additional deductions claimed by the employee for all taxes that support additional deductions.
Additional Tax Credits to Apply (W-4 Box 3)	Field for the amount of additional credits claimed by the employee for all taxes that support additional credits.
Use Special 'Multiple Jobs' Rate (W-4 Box 2)	Check box that when selected indicates modified tax processing for all taxes that support modified tax processing. (This corresponds to selecting the multiple jobs rate, selecting non-resident alien status, and selecting if a 2020 W-4 has been filed for FITW).
Use Nonresident Alien Adjustments	Check box for nonresident alien tax adjustments. This check box only appear when required for the tax.
Employee Submitted 2020 (or later) W-4	Check box to indicate an updated W-4. The box is unchecked by default.

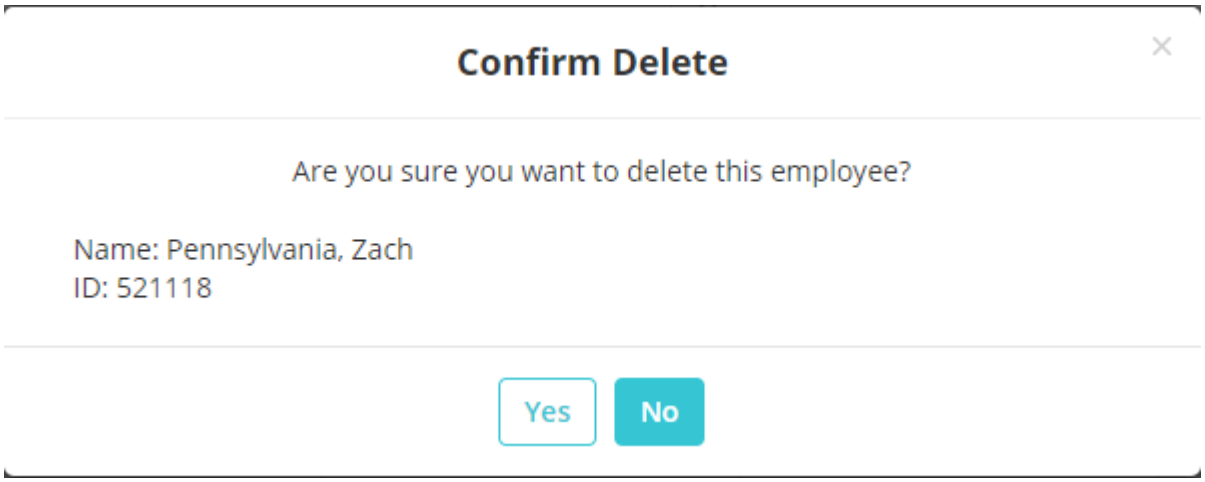
Delete Employees

You can only delete employees without associated wages.

1. Go to the **Company's Dashboard**.
2. Click on the **Active Employees** widget, you are taken to the Browse Employees page.
3. Click on **Delete Employee**, the Delete Employee dialog comes up.



4. Select the **employee** from the drop-down; to make it easier, you are given a list of employees without associated wages.
5. Click **Delete Employee**, a confirmation comes up.



6. Click **Yes** to delete the employee.

Important: This action may not be undone.

Reports

The report section is made up of three tabs, depending on your permissions, you may not see all three:

- Company Reports
- My Reports
- Secure View

Important: If you're a multi-company user, the Reports tab won't show until you choose a company.

Company Reports

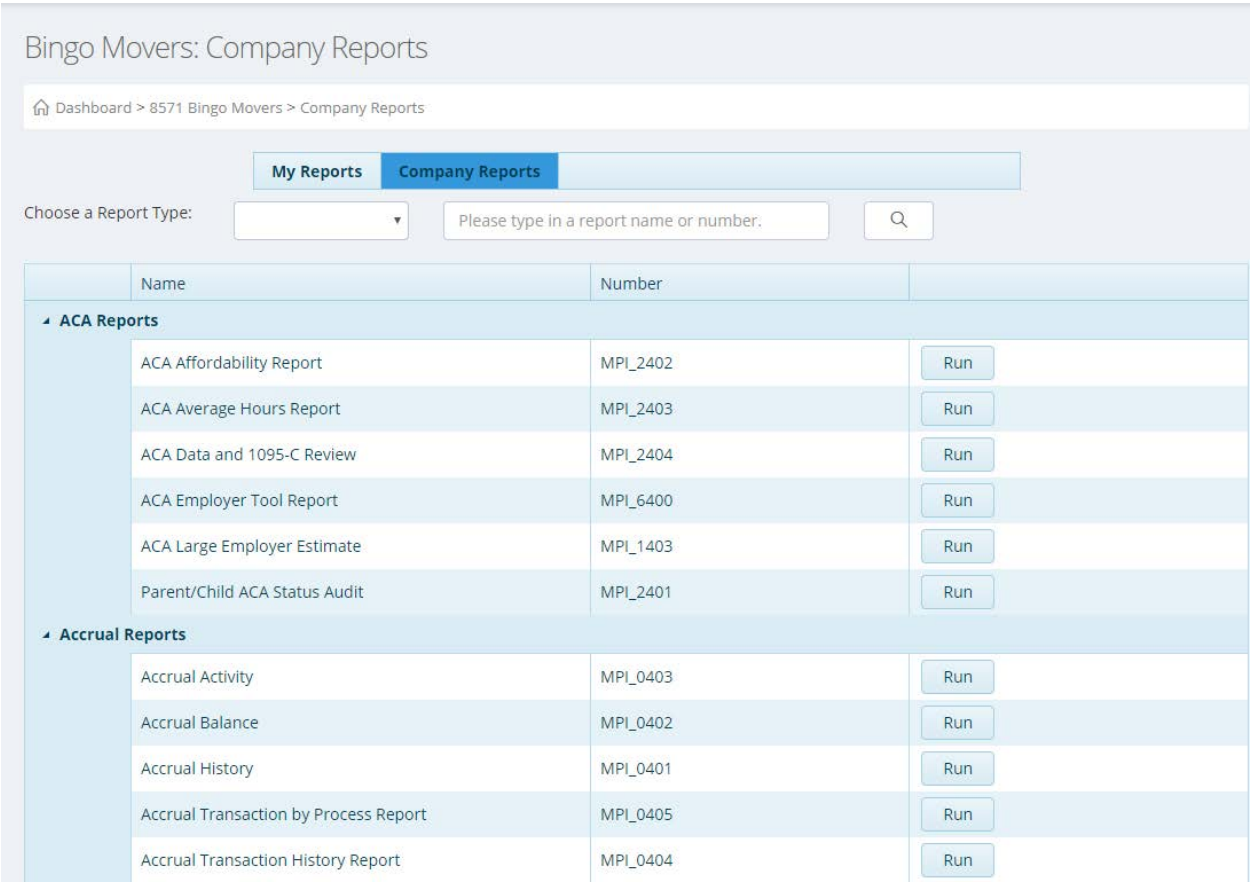
Company Reports contains all the reports preconfigured by MPAY for the following categories:

- ACA Reports
- Accrual Reports
- Company Reports
- Custom Reports
- Compliance Reports
- Employee Reports
- General Ledger Reports
- Insurance Reports
- Miscellaneous Reports
- Payroll Reports
- Tax Reports

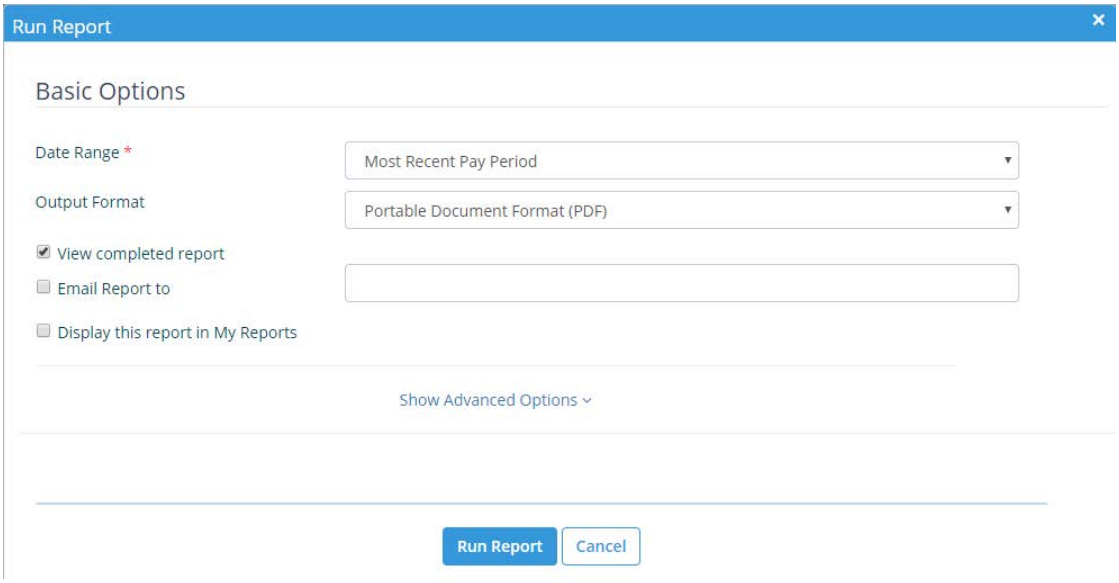
To see the list of reports for each category, please see: Types of Company Reports.

You can easily search all available reports by:

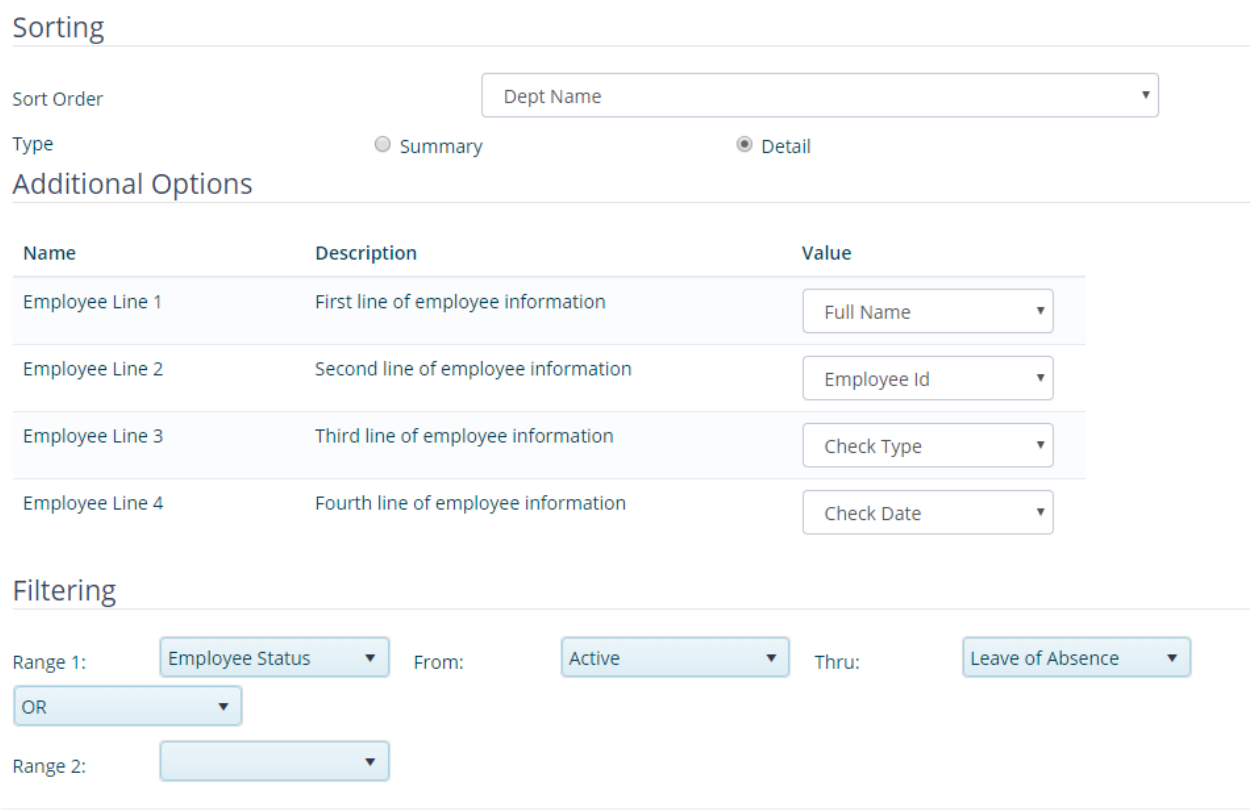
- Choosing a report category from a drop-down, so that only the reports from that category display on the page.
- Type in a report name, keyword, or number to narrow down the displayed list of reports to only those containing the search criteria.
- You can also do both if either option alone doesn't narrow down the list enough.



When you click the Run button you get the following menu, which allows you to choose the Date Range, Output Format, and how you want to see and keep the report. For more information, please see: Run Company Report Menu Options.



With **Advanced Options** you can further configure details for your report. Please note that the options may be different than the ones shown depending on what type of a report you are running:



My Reports

My Reports is the main page that displays when you go to Reports. It's split into two sections: Saved Reports and Recent Reports. Saved Reports lists all of the user's existing report writer reports, and any Company Reports that the user has added to their saved reports.

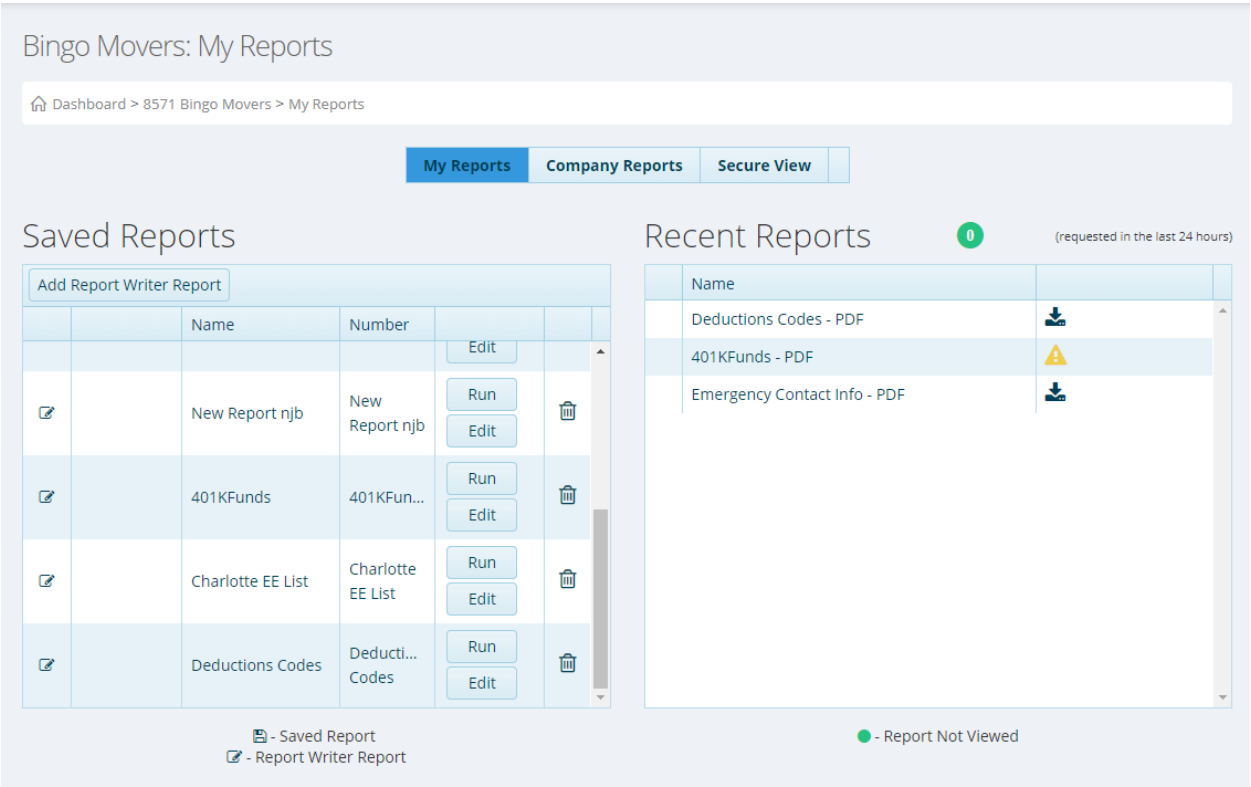
Recent Reports displays all of the reports that have been run within the last 24 hours. It displays an indicator (the green dot) when an available report hasn't yet been viewed. Reports only appear in the Recent Reports section for 24 hours.

When you choose to run a report from the Saved Reports list, it appears on the Recent Reports section as in-progress. If you do nothing, the report displays or downloads automatically once complete. If you navigate away from the page, the report will be available in the report pickup area for 24 hours.

Users can download Recent Reports by clicking on the download icon. If there is a issue with the report a yellow warning triangle appears instead of a download icon. And if the report failed entirely you see a red x.

On this page you can:

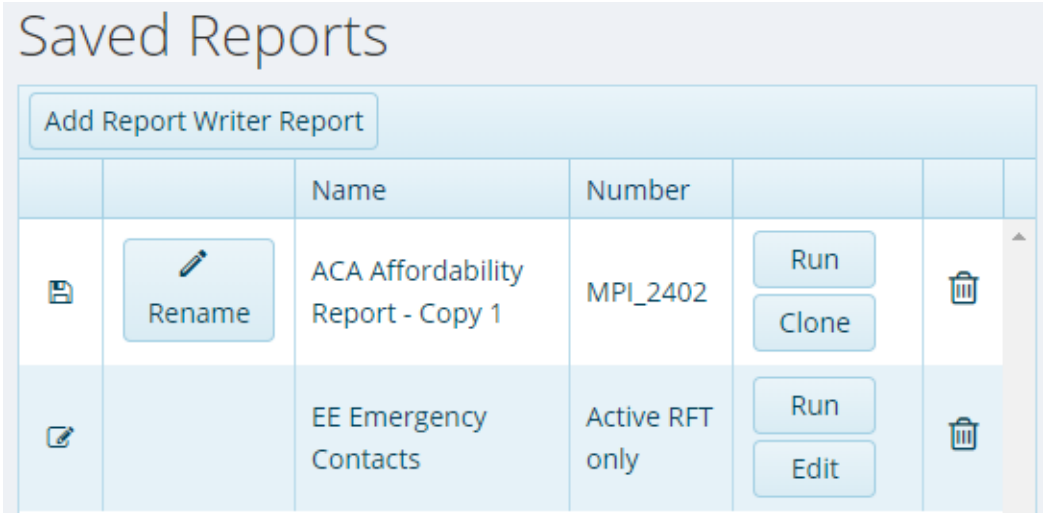
- Add a Report Writer Report
- Run a Saved Report
- Edit a Saved Report
- Download a Recent Report
- Delete a Saved Report



When you add a Company Report to Saved Reports, you see a **Rename** button and a **Clone** button instead of an Edit button. When you save a company report on the My reports page, it's going to retain the report run options (including any advanced options) previously configured.

The **Rename** button allows you to rename your report and edit the number of the report.

The **Clone** button lets you create a copy of the report. You see Copy # next to reports that have been cloned. The ability to clone company reports is similar to the report scratchpad functionality on M3.

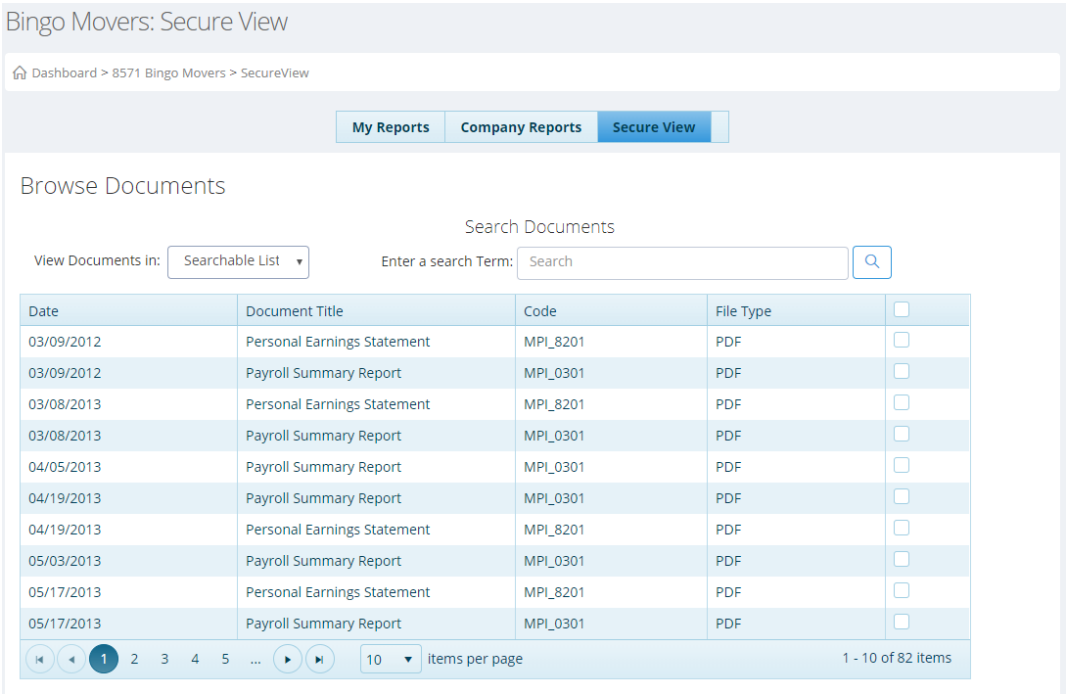


Secure View

Secure View is a document storage system for any documents that a company wants to keep track of and that allows companies to quickly and efficiently access all their files through a folder tree or a searchable list. Downloaded documents will also be available in the Recent Reports section of My Reports as a SecureView zip file for 24 hours after download.

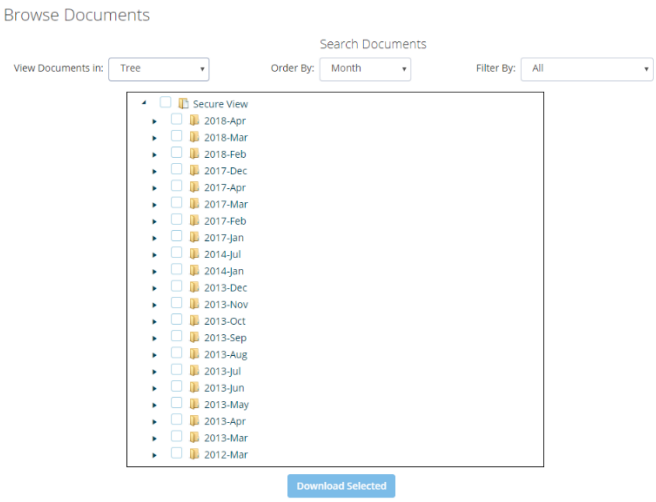
Document list view:

You can easily find a relevant document by entering a relevant key word into the search bar.



Tree View:

You can search your document list by month, quarter, year, or report. As well as filter by report type: AdHoc Reports, Payroll Reports, Pay Stubs Reports, Tax Forms, and Year End Reports.



Process Payroll

Processing Payroll is a fairly simple process. You are taken from one screen to another and are warned if something is missing or incomplete. If you have to stop, Payentry saves all of your progress and you can come back to it any time, the progress bar lets you know where you stopped. To begin Payroll Processing, you need to go to the Dashboard of the Company you wish to process it for.

- Select Check Date
- Start Payroll
- Edit Payroll Options
- Payroll Batches
- Create a Manual Check
- Add Batch to Payroll
- Import Time Clock Files
- New Enter Payroll Wages
- Edit Check Details
- Edit Check Attributes
- Run Preprocess Register
- Close Batch
- Close Payroll
- Submit Payroll

Other payroll processing actions:

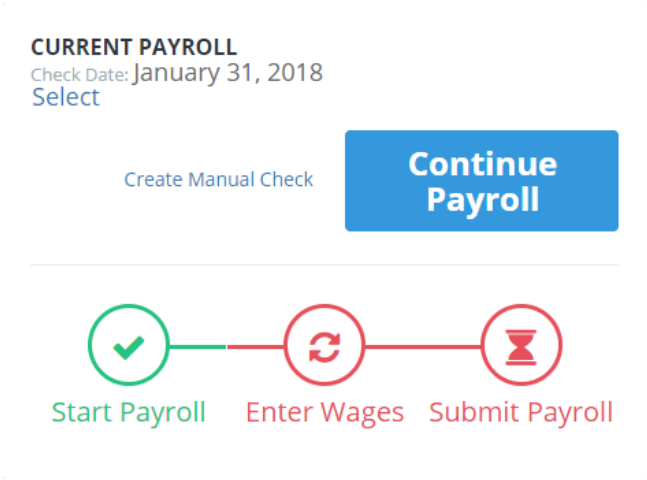
- Batch Controls
- Restart a Batch
- Remove a Batch
- Add 3rd Party Sick Check
- Edit Check Attributes
- Delete a Check

Select Check Date

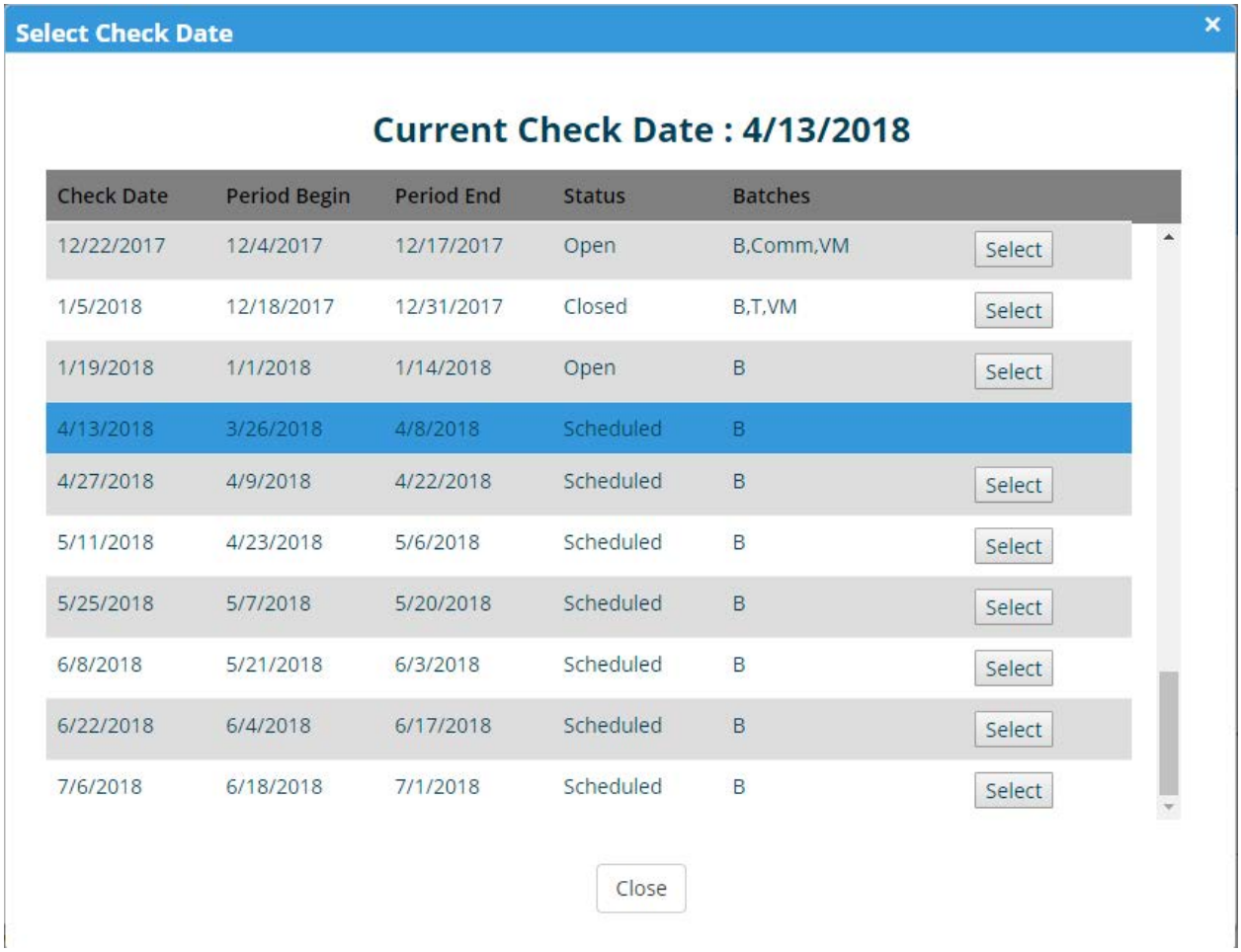
If you need to work on a payroll for a check date other than what is currently selected, it's easy to select another check date.

1. Go to the **Company Dashboard**, either by selecting it in the side menu or by entering the name into the Smart Search Bar.

2. Click on **Select** in the Current Payroll section, the Select Check Date dialog comes up.



3. Find the **check date** that you wish to process payroll for from the table.



4. Click **Select** to choose the new check date.

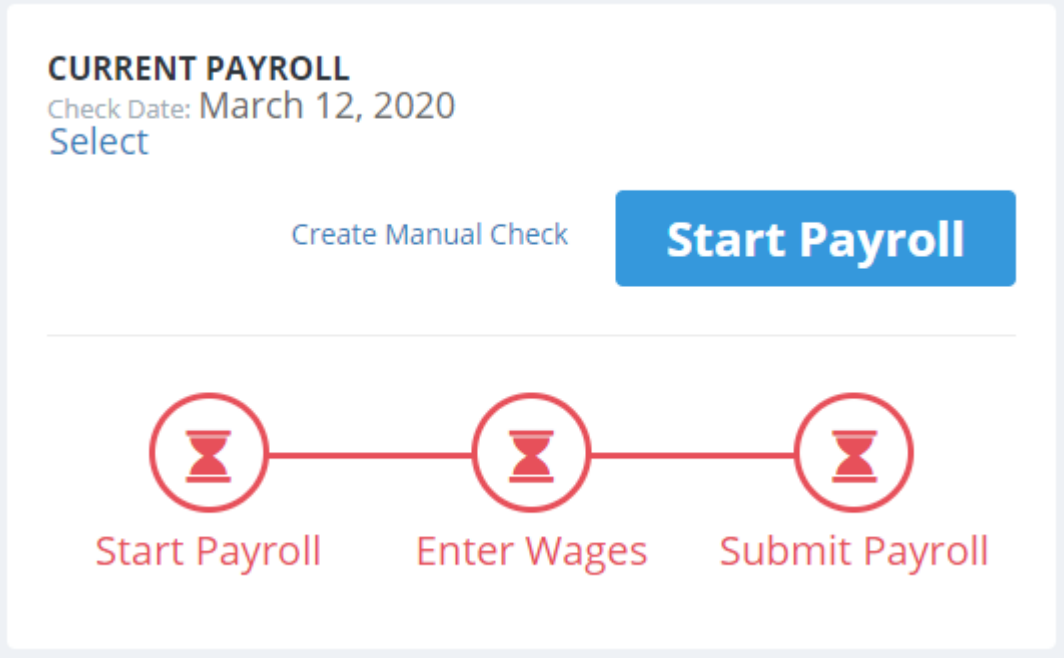
5. Click **Close** to exit the Select Check Date window.

You are now ready to Start Payroll.

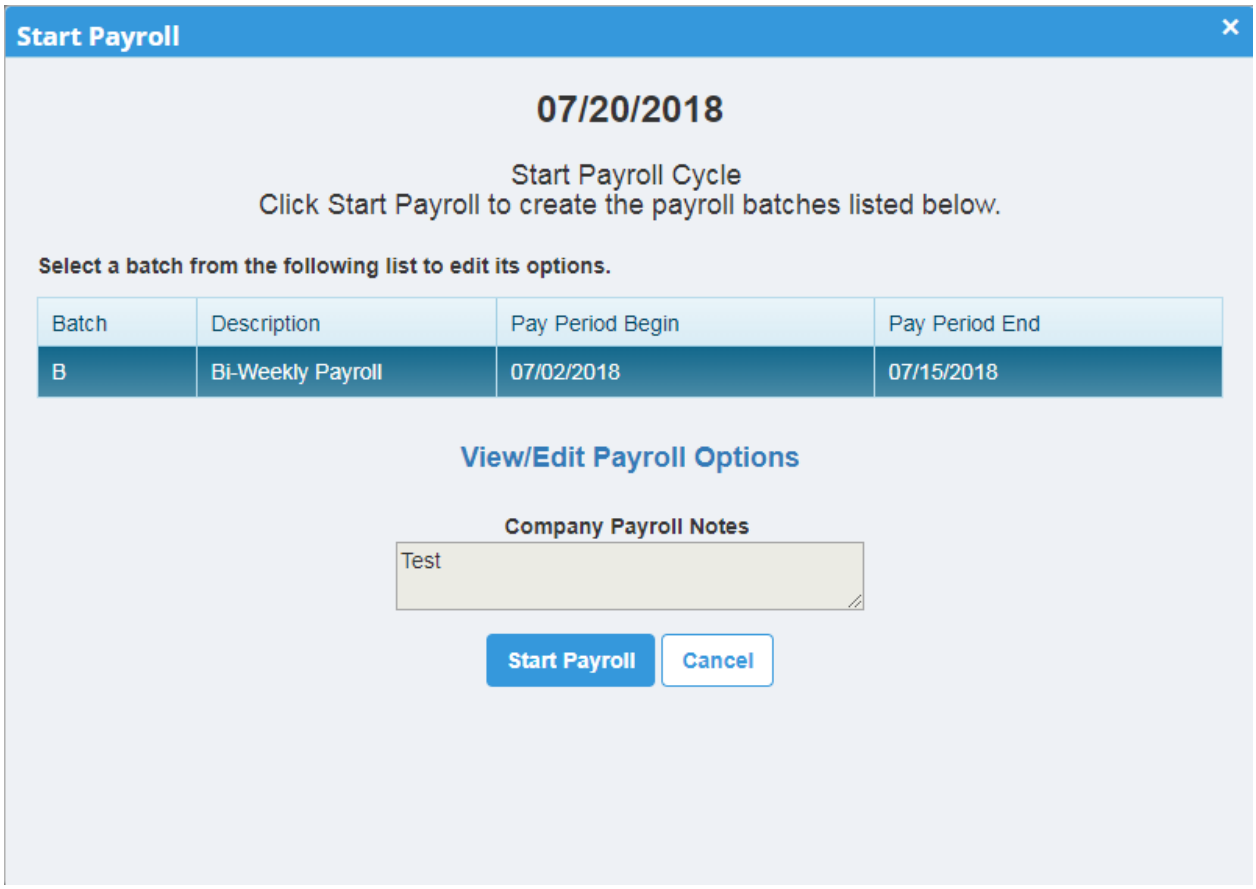
Start Payroll

1. Go to the **dashboard** of a company that you wish to Process Payroll for, either by selecting it in the side menu or by entering the name into the Smart Search Bar.

2. Click the **Start Payroll** button in the Current Payroll section, a Start Payroll dialog comes up.



3. Select the **Batch** you wish to process, if you wish to edit batch details, click View/Edit Payroll Options, see here for more details: Edit Payroll Options.



4. Click **Start Payroll**, a progress dialog opens as the Payroll process begins and you are taken to the Payroll Batches page.

Depending on your needs, from here you can:

- Add Batch to Payroll
- Import Time Clock Files
- Create a Manual Check
- Run Preprocess Register
- Enter Payroll Wages
- Batch Controls

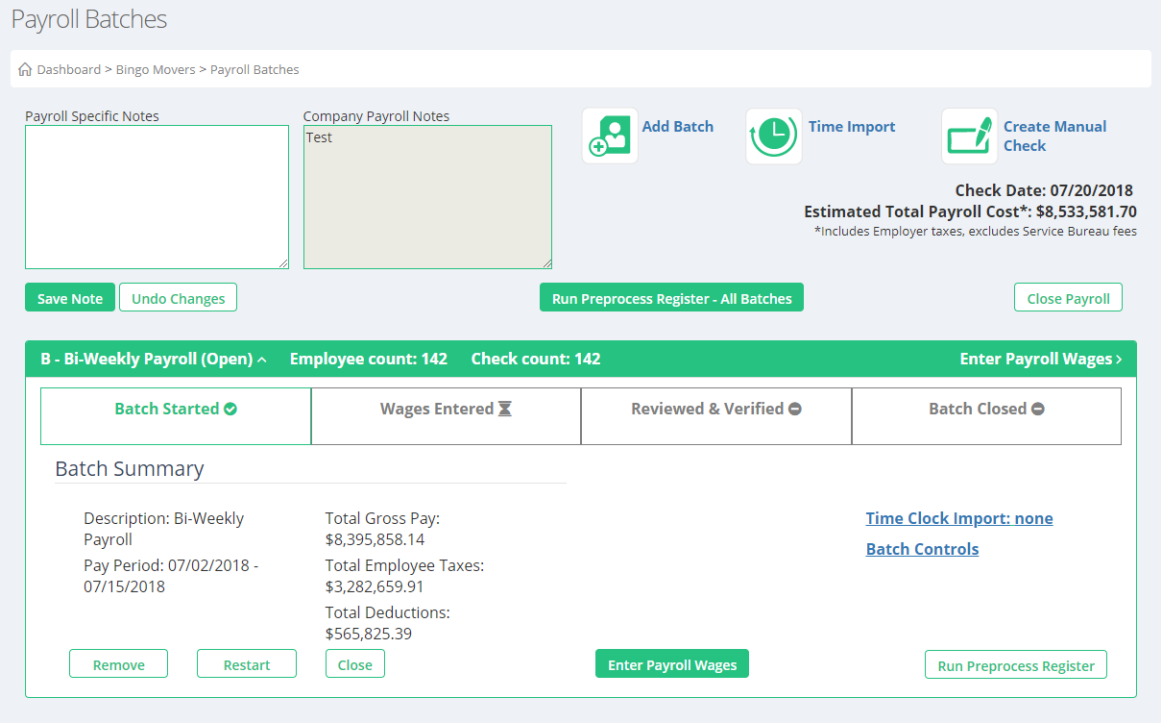
Related topics:

- Remove a Batch
- Restart a Batch
- Close Batch
- Close Payroll
- Submit Payroll

Payroll Batches

Payroll Batches is the control center of payroll processing. This is the page where you need to be in order to carry out nearly all of the functions to run your payroll. To get to this page you need to Start or Continue Payroll on the Company Dashboard.

It might look a little different based on your permissions and settings. The screen also updates as you enter various information and go through the payroll processing steps.



From here you can:

Add Batch to Payroll

View Batch Controls

Remove a Batch

Restart a Batch

Import Time Clock Files

Create a Manual Check

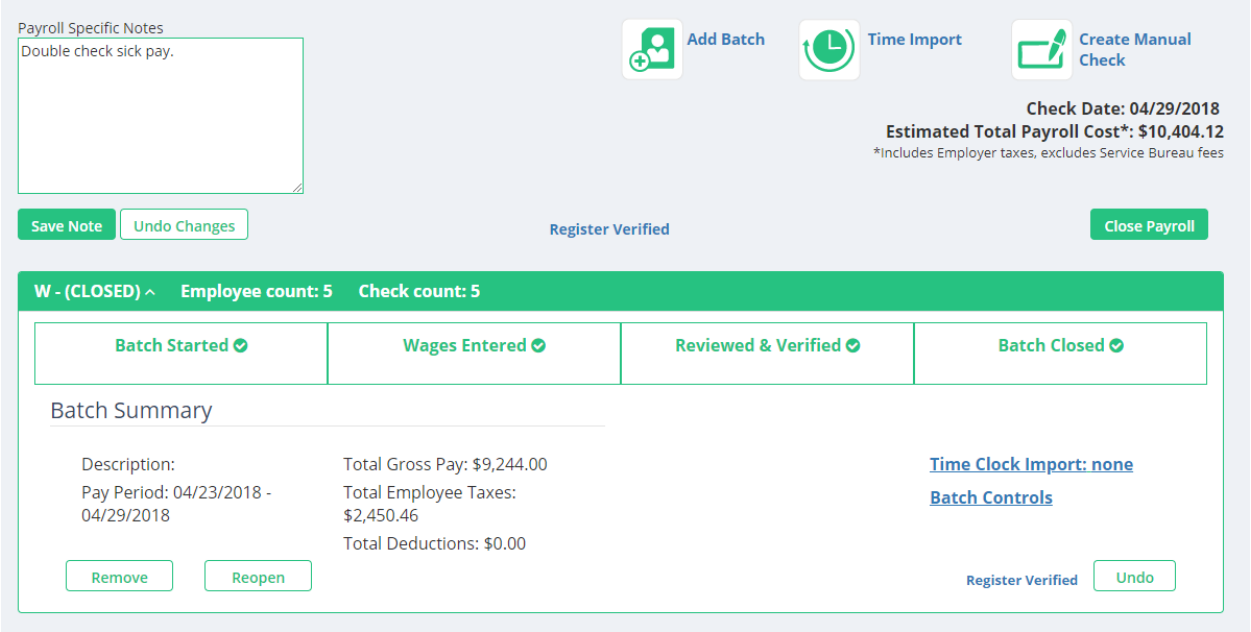
Enter Payroll Wages

Run Preprocess Register

Close Batch

Close Payroll

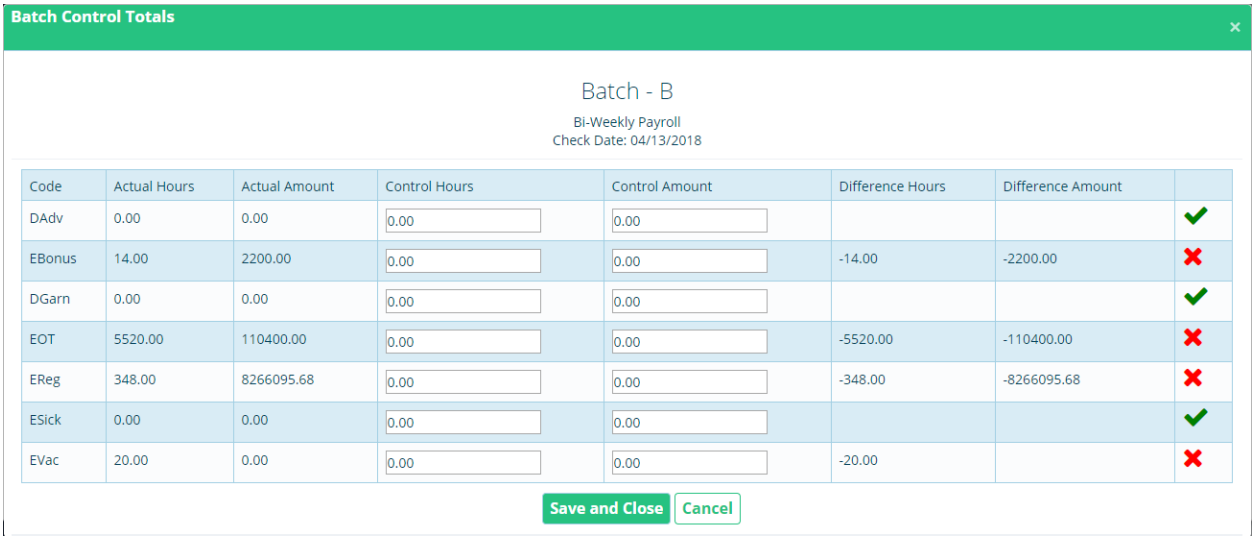
Create Payroll Specific Notes. Also see: Payroll Notes



Batch Controls

Batch Controls allows you to compare the information you've entered in Payentry to control totals from an external system. The batch controls that you see depend on the deductions, taxes, and earnings you have in your batches. This page is informational only and does not influence payroll besides letting your know where the differences are.

A green check means that there are no discrepancies between hours and amount. A red x indicates that there is a difference in either hours or amount. It is possible you may have a difference in hours but the same amount, and vice-versa.



Enter the **total number of hours** that appears in your external system into **Controls Hours** box in order to verify it against the number of hours in Payentry.

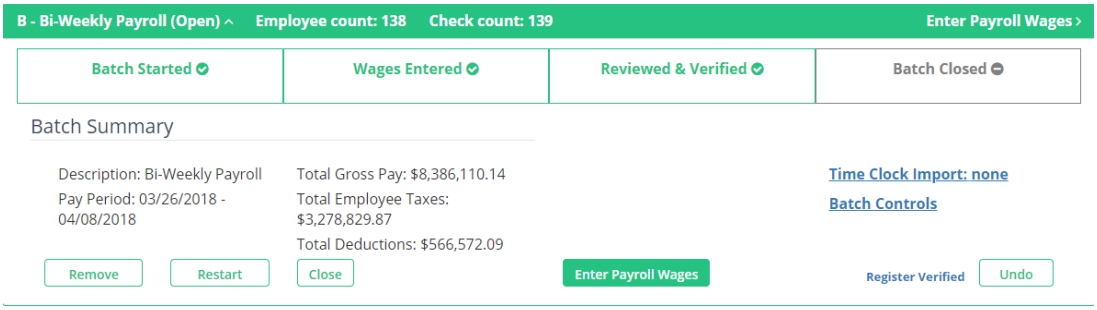
To check payment Amount, enter the amount you have in your external system into Control Amount box. The system automatically calculates if there are any differences.

Restart a Batch

If you need to restart a batch, be aware that any changes you have made prior to are erased.

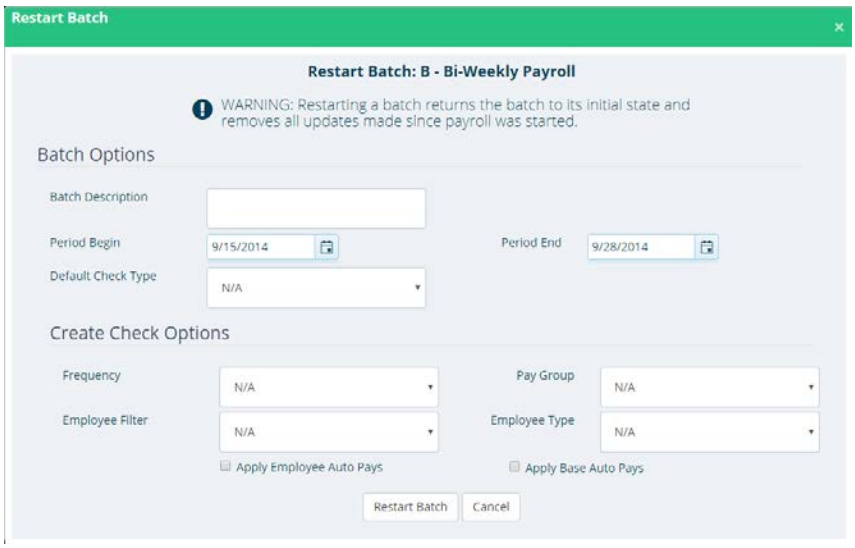
You have to Start Payroll and be on Payroll Batches page before you can restart a batch.

Click **Restart** in the batch, the Restart Batch dialog comes up.



You can edit the **Batch Description, Period Beginning and End, and Default Check Type**.

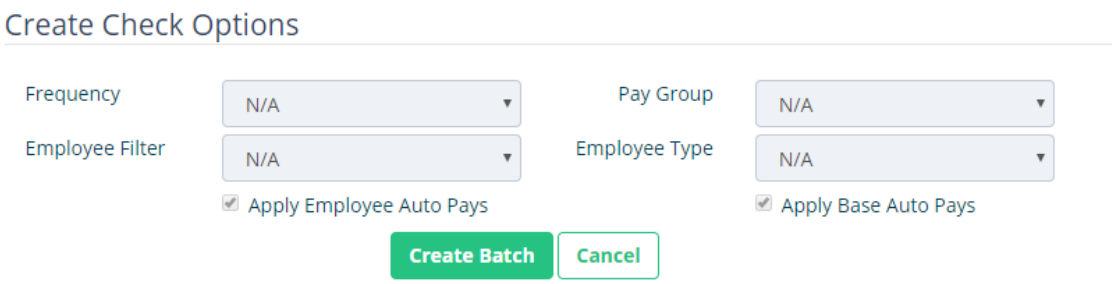
> **Important:** Restarting a batch returns the batch to its initial state and removes all updates made since payroll was started.



Or:

Select **Create checks using the following options:** - use filters to create checks for appropriate groups of employees. Selecting this option enables the Create Check Options. All of the filters in this section are optional, so you can either select one or all of them.

Important: You are filtering by Employee, so the options you select must match the Employees you want to create checks for, otherwise they are filtered out.



Select the appropriate **filters** you need to create checks individually for a certain group of employees.

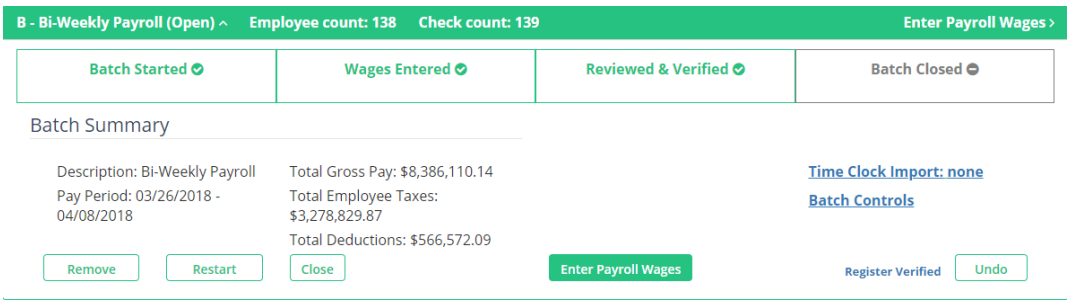
Click **Restart Batch,** the Payroll Batches page reloads and the batch is cleared of any previous modifications.

Remove a Batch

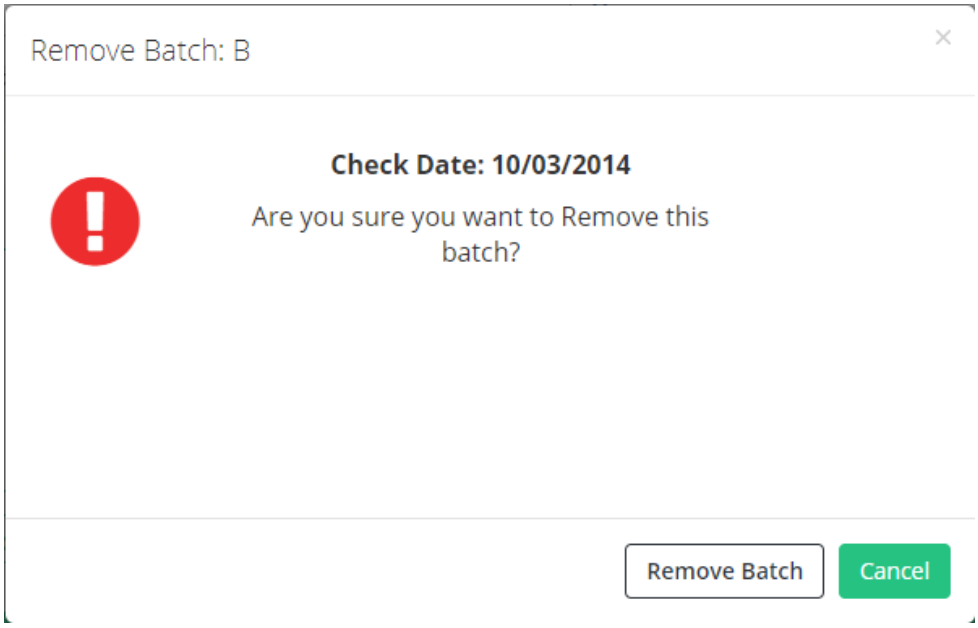
Note: Removing a batch removes it entirely from the currently selected payroll. If you remove the default batch, it will appear again when you start payroll for another check date.

On the Payroll Batches page:

Expand the **batch** you wish to delete.



Click on **Remove**, a confirmation dialog opens.



Click on **Remove Batch** to remove it permanently from the current payroll.

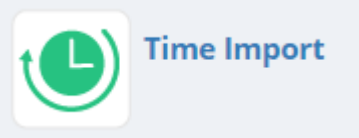
Important: This action may not be undone.

Import Time Clock Files

You can either directly import time clock files from Time Management or upload your employees' hours data as a CSV or a TXT file from your computer.

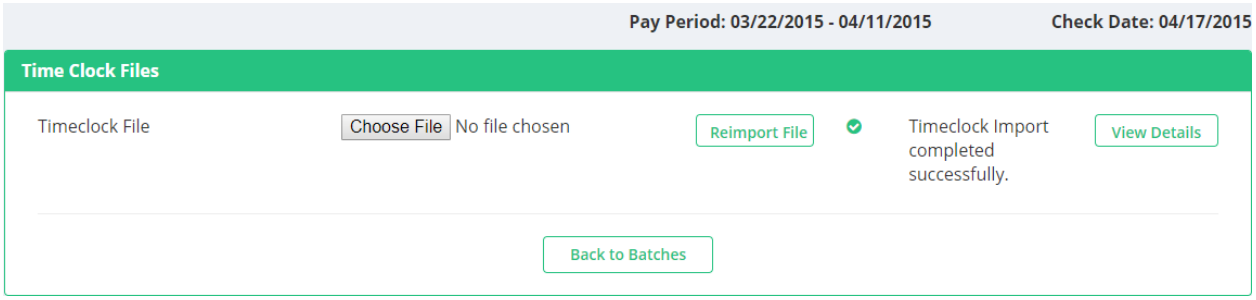
You have to Start Payroll and be on the Payroll Batches page to import time clock files.

Click on the **Time Import** icon, you are taken to the **Payroll Batch Import** page.

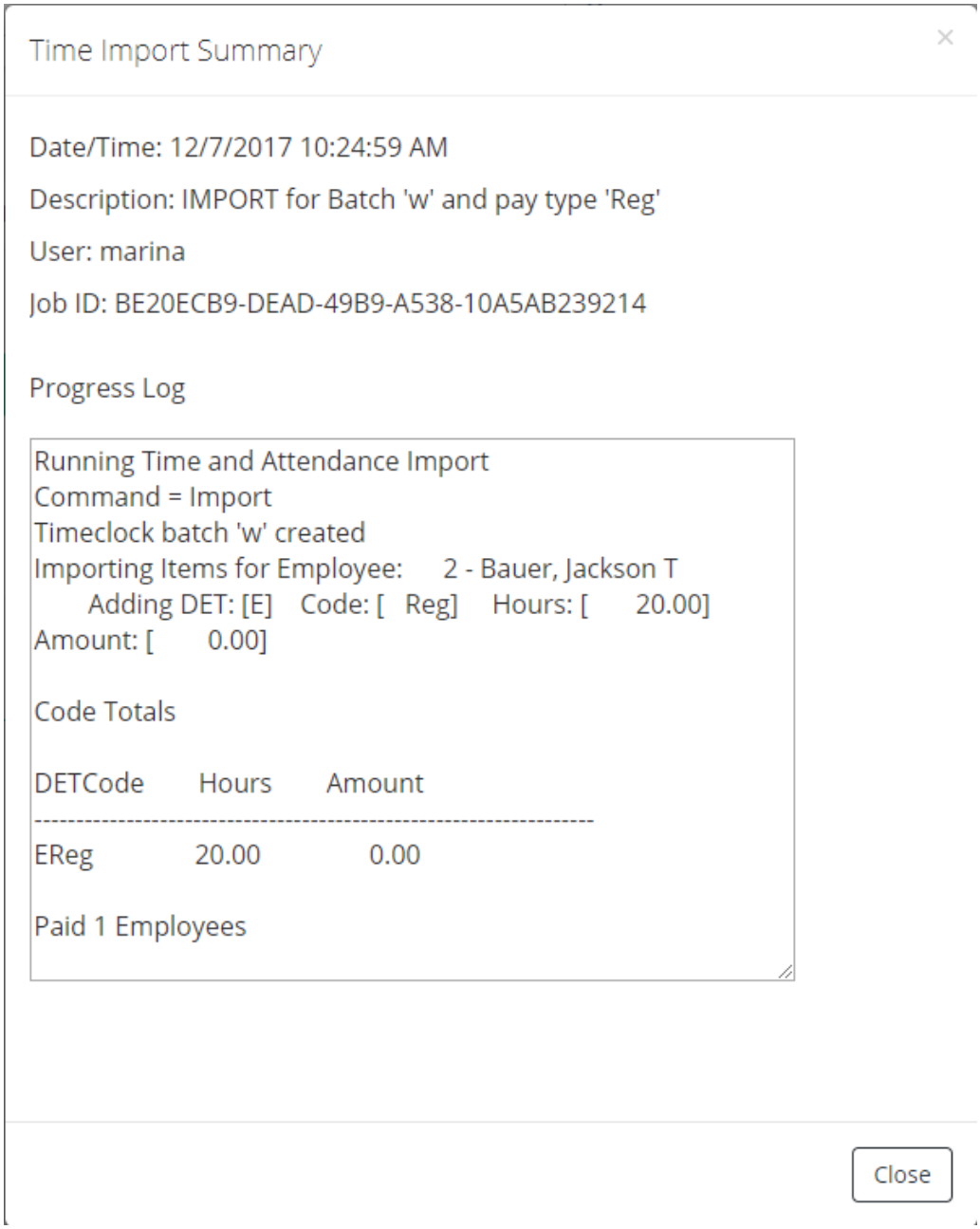


Click **Import File**, a progress bar appears as the file loads and then a dialog opens to tell you whether or not import has been successful. You had to have exported your payroll in Time Management for this to work. If you have not done so, do so now. For more information, please see: Payroll Tab and Export a Payroll pages. You also see a green check mark next to Import File if the upload has been successful.

Note: If you are using an external time management service, you can manually import .CSV (or fixed width) files from your computer by clicking the Choose File button.



Optional. Click on **View Details** to see the information about the imported file.



Click on **Back to Batches** to return to the Payroll Batches page.

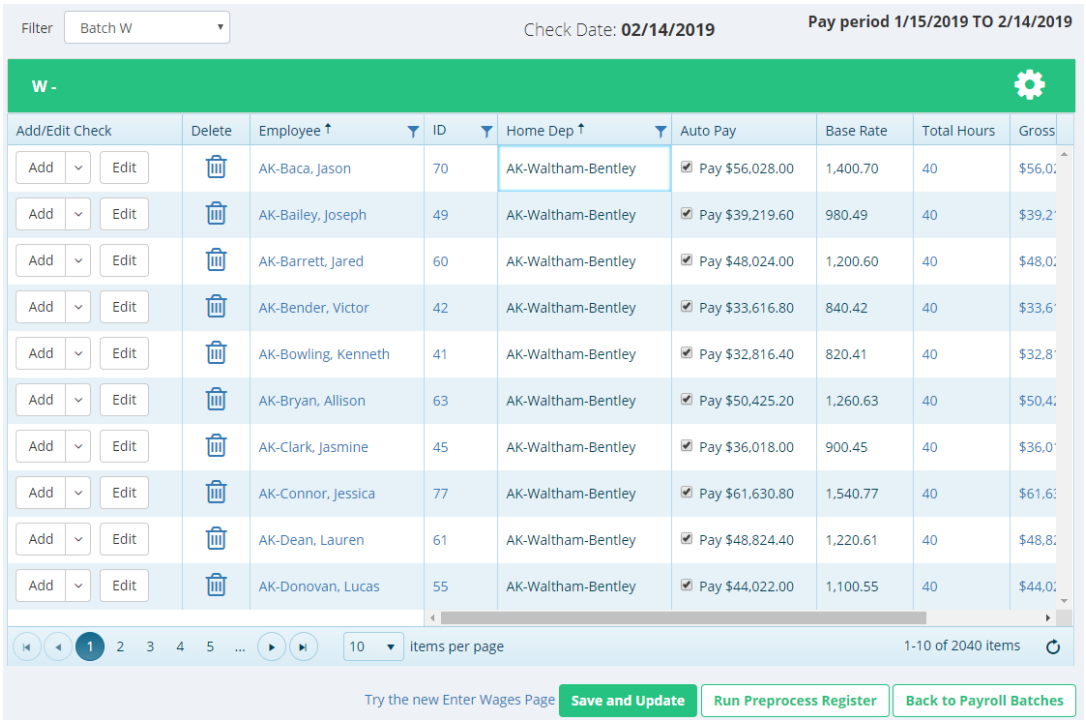
Enter Payroll Wages

Enter Wages portion of the Payroll Process enables you to enter detailed wage information for each of your employees at a summary level, within the grid, so you can quickly and accurately complete the payroll process. You may also add extra checks, 3rd-Party Sick checks, edit and delete existing checks.

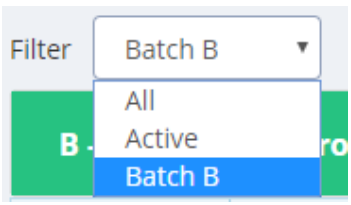
You have to Start Payroll, and you should Import Time Clock Files if you need to, before you Enter Wages.

From the Payroll Batches page:

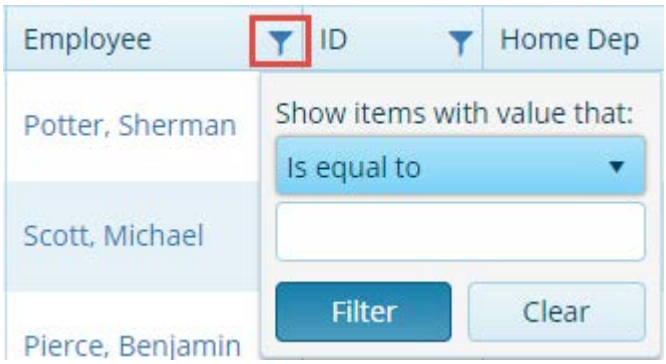
Click on **Enter Payroll Wages** for the batch you want to work on. You are taken to the Enter Wages page.



Filter your list of employees by **employee status**: all, active, or by batch from the drop-down menu at the top-left of the grid.

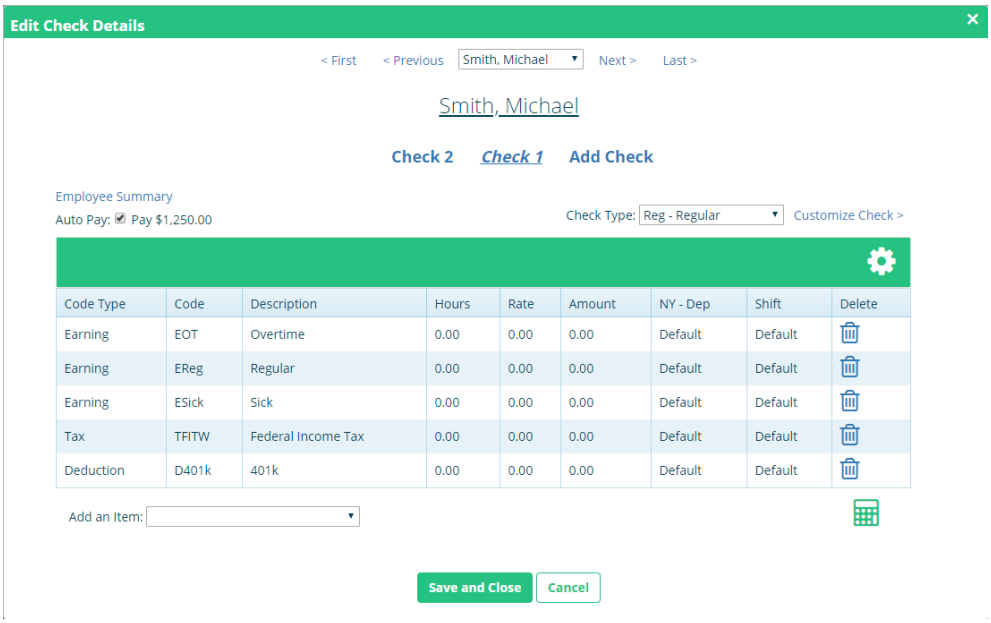


Find the **Employee** that you wish to Add or Edit a check for; you can filter by Employee, ID, or home department by clicking on the siphon icon. Click on the name to sort by ascending or descending order, or choose the filter icon to specify a filter criteria.



Click **Add** to add a new check or click the downward error button to select the type of check you wish to add: Check or 3rd Party Sick. An extra row appears for the employee you added the check for; AND/OR:

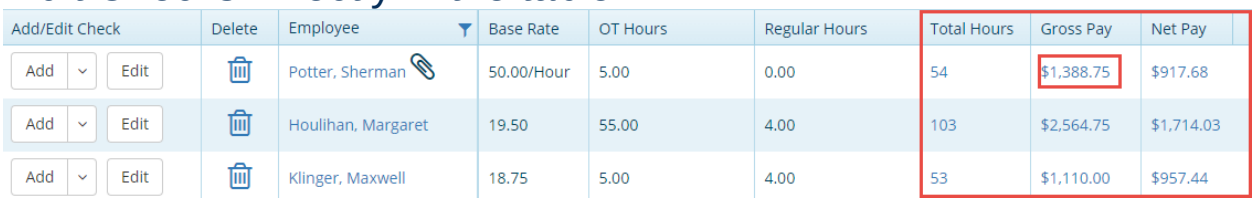
Click on **Edit** to modify the newly added or existing Check. The Edit Check Details window comes up.



Edit the **check** as needed, see Edit Check Details for more information. You can switch between different checks by clicking on Check # link. You may also add additional checks by clicking on Add Check.

Click **Save and Close** when you're done.

Edit Checks Directly in the table:



Add/Edit Check	Delete	Employee	Base Rate	OT Hours	Regular Hours	Total Hours	Gross Pay	Net Pay
Add Edit		Potter, Sherman	50.00/Hour	5.00	0.00	54	$1,388.75	$917.68
Add Edit		Houlihan, Margaret	19.50	55.00	4.00	103	$2,564.75	$1,714.03
Add Edit		Klinger, Maxwell	18.75	5.00	4.00	53	$1,110.00	$957.44

You may have to scroll horizontally to see certain columns.

For a particular check record within the grid, you can do any of the following:

Click **Add** to add an additional check or 3rd party Sick check to the employee.

Click **Edit** to access and edit the details of that check

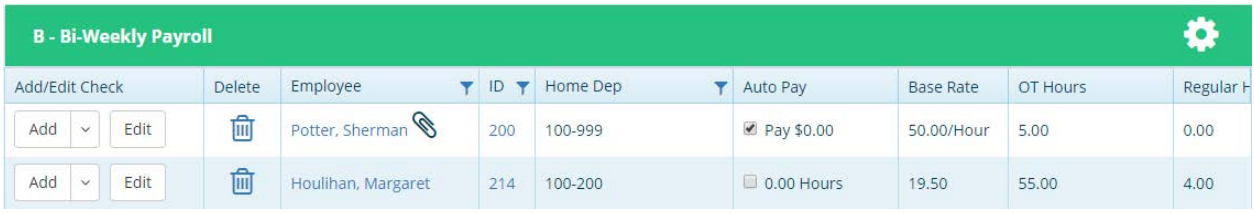
Click on the Total Hours, Gross Pay, or Net Pay value to view a calculated paycheck.

Delete a check.

Click on the employee's name or ID to view the employee's profile in another browser tab

Select or de-select auto-pay for the employee

Adding Extra Columns to the Grid:

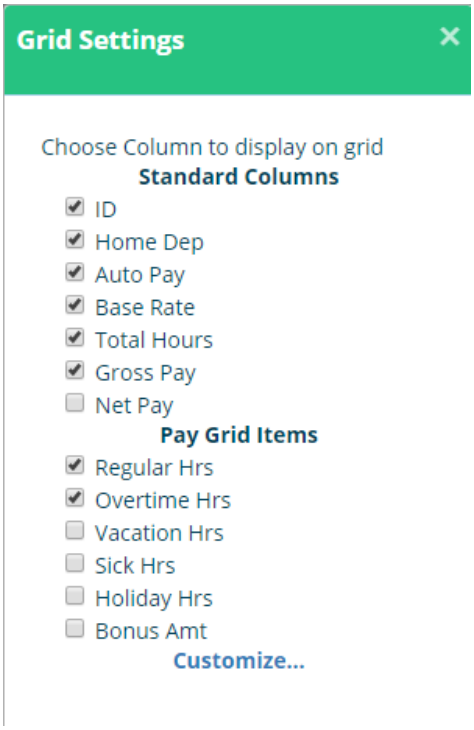


B - Bi-Weekly Payroll

Add/Edit Check	Delete	Employee	ID	Home Dep	Auto Pay	Base Rate	OT Hours	Regular H
Add Edit		Potter, Sherman	200	100-999	Pay $0.00	50.00/Hour	5.00	0.00
Add Edit		Houlihan, Margaret	214	100-200	0.00 Hours	19.50	55.00	4.00

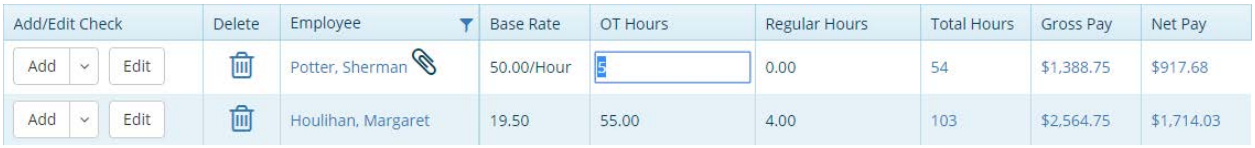
Click the **Gear icon** to add extra columns to your Enter Wages grid, the Grid Settings menu opens.

Check off boxes next to the **field names** you want to appear on your grid. The Enter Wages grid updates with the selections automatically. There are two types of columns: Standard and Pay Grid. You cannot edit Standard columns, but you can customize the pay grid item columns in Company > Payroll Setup > Pay Grid Items, though you should not do so while running payroll. The options selected for this are saved on the per user basis.



Click directly into the **field** that you want to change to make it editable.

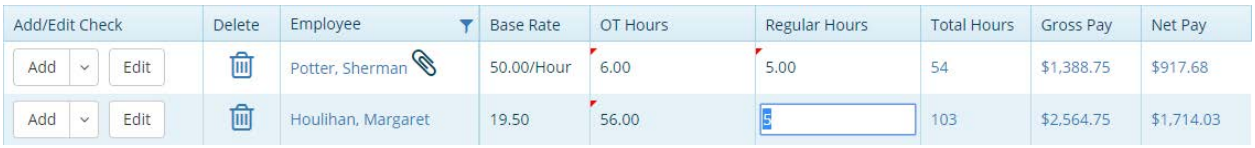
Important: You cannot edit 3rd Party Sick Checks in the grid.



Add/Edit Check	Delete	Employee	Base Rate	OT Hours	Regular Hours	Total Hours	Gross Pay	Net Pay
Add / Edit		Potter, Sherman	50.00/Hour		0.00	54	$1,388.75	$917.68
Add / Edit		Houlihan, Margaret	19.50	55.00	4.00	103	$2,564.75	$1,714.03

Type in the **value** for the column.

Click **Tab** on your keyboard to move to the next field, this also helps the page automatically save. The little red flag in the corner means the value has not been saved, but once you click through the entire row, the page updates, and you can see the table update the totals amount. If you enter values by clicking into fields with your mouse, you need to click the Save and Update button to save your changes. Any field with a red tick in the top left corner has not yet been saved. The system is going to save everything automatically every 60 secs.



Add/Edit Check	Delete	Employee	Base Rate	OT Hours	Regular Hours	Total Hours	Gross Pay	Net Pay
Add / Edit		Potter, Sherman	50.00/Hour	6.00	5.00	54	$1,388.75	$917.68
Add / Edit		Houlihan, Margaret	19.50	56.00		103	$2,564.75	$1,714.03

Click on **Save and Update** at any time to save your data and to update your screen.

Once your are done entering wages, you may then Run Preprocess Register or go back to Payroll Batches page.

New Enter Payroll Wages

Payentry NextGen has a new Enter Wages page! The new page maintains the pay grid item concept, but has numerous improvements to make payroll entry easier for larger companies. Features include:

The ability to search for a particular employee by name, ID, or last 4 digits of social security number.

The ability to instantly apply sorts on one or more columns. Sorts are saved automatically, per company, per user.

Drag-and-drop columns. Columns are saved automatically, per user.

Decreased row height to display more rows in the available page area on a screen.

The user's items per page selection will be automatically saved.

Checks are calculated as values are entered instead of at initial page load, improving performance.

To see the New Enter Wages page click on the "Try the New Enter Wages Page" link at the bottom of the existing Enter Wages page.

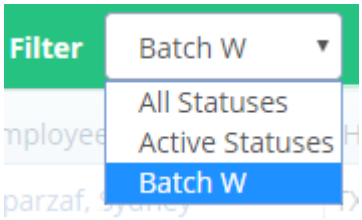
Enter Wages portion of the Payroll Process enables you to enter detailed wage information for each of your employees at a summary level, within the grid, so you can quickly and accurately complete the payroll process. You may also add extra checks, 3rd-Party Sick checks, edit and delete existing checks.

You have to Start Payroll, and you should Import Time Clock Files if you need to, before you Enter Wages.

Click on **Enter Payroll Wages** for the batch you want to work on. You are taken to the Enter Wages page.

Click on the **Try the new Enter Wages Page** link at the bottom of the page to work with the new Enter Wages.

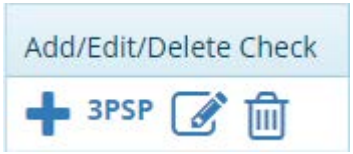
Filter your list of employees by **employee status**: All Statuses, Active Statuses, or by Batch from the drop-down menu at the top-left of the grid.



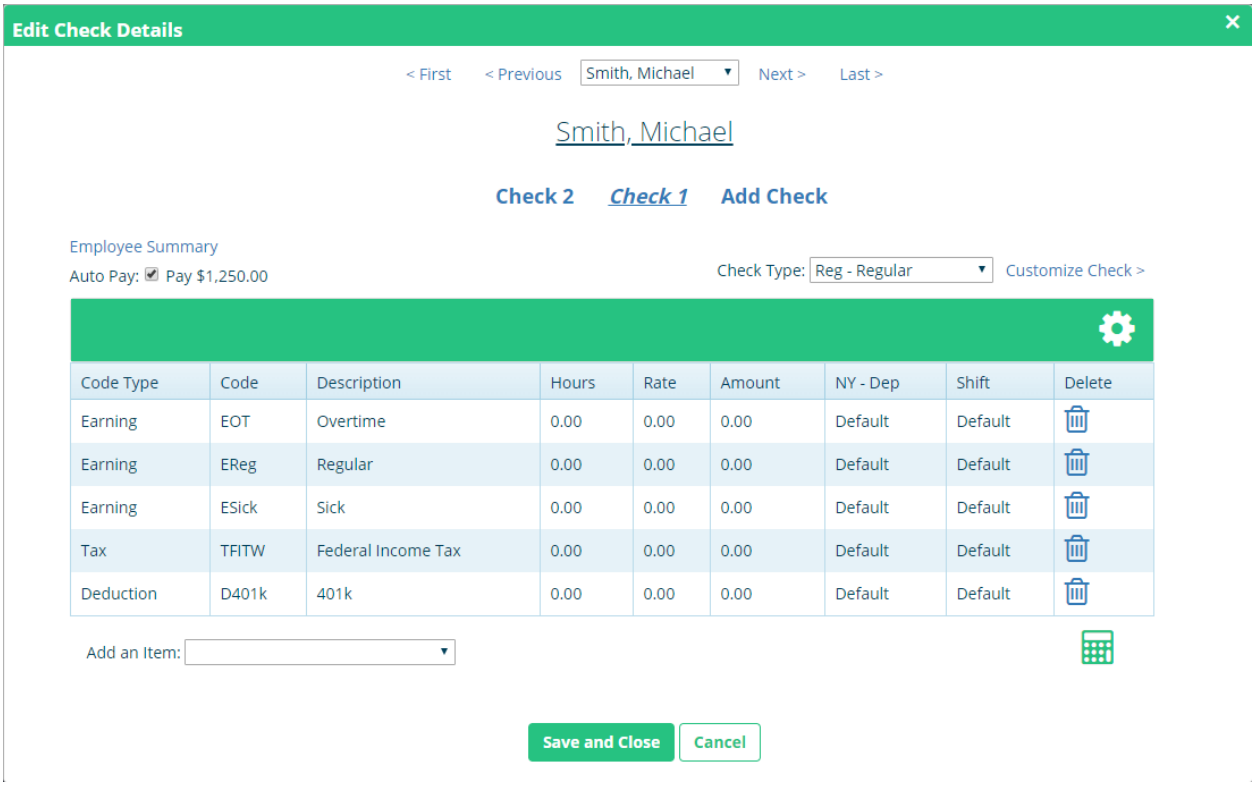
Find the **Employee** that you wish to Add or Edit a check for by entering their name, ID, or the last 4 digits of social security number into the search bar.

> **Note:** The sorts that you apply to the Enter Wages grid will transfer to the Edit Check Details page, so employees will be listed in the same order that they are displayed in on the grid.

Click big + **button** to add a new check or the **3PSP** button to add a 3rd Party Sick check. An extra row appears for the employee you added the check for; AND/OR:



Click on **Edit icon** to modify the newly added or existing Check. The Edit Check Details window comes up.



Edit the **check** as needed, see Edit Check Details for more information. You can switch between different checks by clicking on Check # link. You may also add additional checks by clicking on Add Check.

Click **Save and Close** when you're done.

Edit Checks Directly in the table:

You may have to scroll horizontally to see certain columns.

For a particular check record within the grid, you can do any of the following:

Click on the header titles to sort checks by those items. Apply sorts on one or more columns. Sorts are saved automatically, per user.

Click **Add** to add an additional check or 3rd party Sick check to the employee.

Click **Edit** to access and edit the details of that check.

Click on **Calculate** in the Total Hours, Gross Pay, or Net Pay column to view a calculated paycheck.

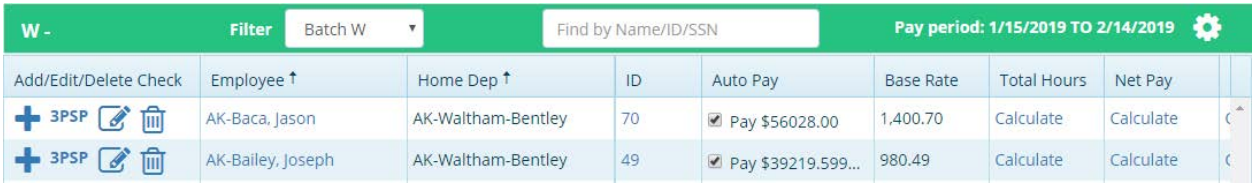
Click on the values within the Total Hours, Gross Pay, or Net Pay columns to see the entire check.

Delete a check.

Click on the employee's name or ID to view the employee's profile in another browser tab.

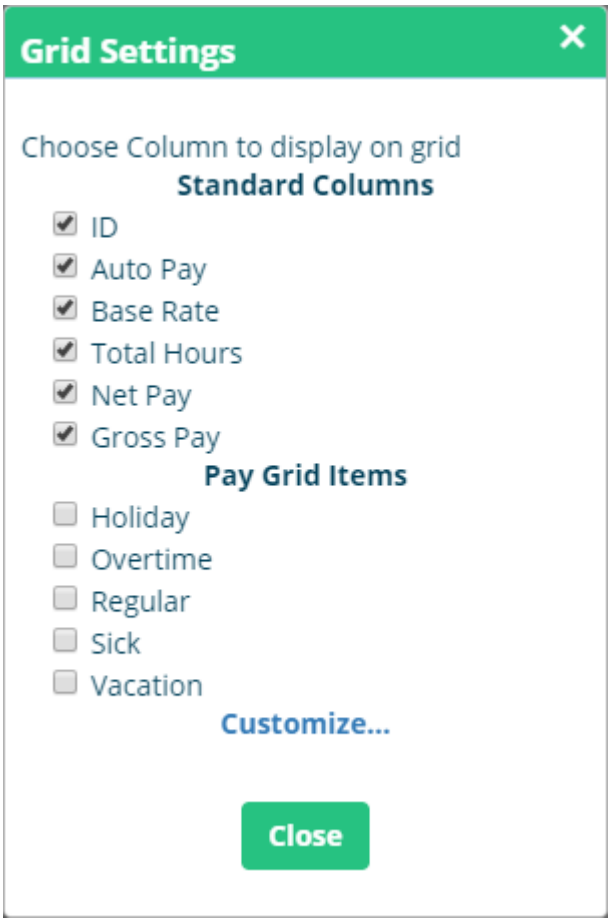
Select or de-select auto-pay for the employee.

Adding Extra Columns to the Grid:



Click the **Gear icon** to add extra columns to your Enter Wages grid, the Grid Settings menu opens.

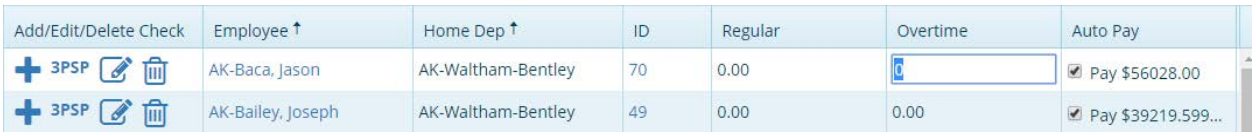
Check off boxes next to the **field names** you want to appear on your grid. The Enter Wages grid updates with the selections automatically. There are two types of columns: Standard and Pay Grid. You cannot edit Standard columns, but you can customize the pay grid item columns in Company > Payroll Setup > Pay Grid Items, though you should not do so while running payroll. The options selected for this are saved on the per user basis.



Rearrange the columns to your liking: click on the column, then drag and drop in a new location. The first three columns- Add/Edit/Delete Check, Home Department, and Employee Name are the exception and remain static. All columns to the right of the Home Department column can be dragged-and-dropped to customize the page to a user's liking. The application will save the column arrangement automatically. Each user can save their own column arrangement, and users with access to multiple companies can save a different arrangement for each company they can access.

Click directly into the **field** that you want to change to make it editable.

> **Important:** You cannot edit 3rd Party Sick Checks in the grid.



Type in the **value** for the column.

Click **Tab** on your keyboard to move to the next field, this also helps the page automatically save. The little red flag in the corner means the value has not been saved, but once you click through the entire row, the page updates, and you can see the table update the totals amount. If you enter values by clicking into fields with your mouse, you need to click the Save and Update button to save your changes. Any field with a red tick in the top left corner has not yet been saved. The system is going to save everything automatically every 60 secs. You may also press **Enter** to key in values one column at a time.

Click on **Save and Update** at any time to save your data and to update your screen.

Once your are done entering wages, you may then Run Preprocess Register or go back to Payroll Batches page.

Edit Check Details

You have to Start Payroll, and you should Import Time Clock Files if you need to, before you edit a check.

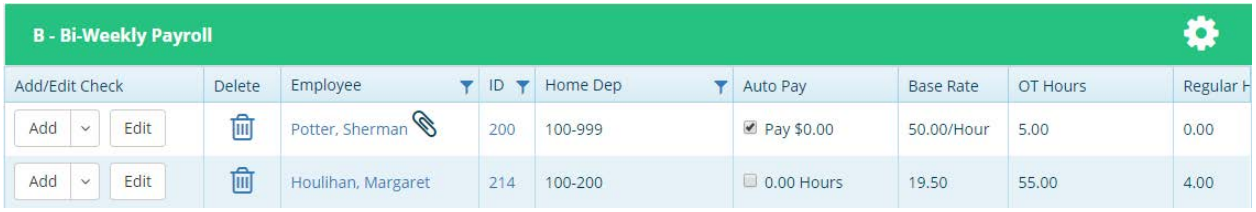
From the Payroll Batches page:

Click on **Enter Payroll Wages** within the batch for the required check. You are taken to the Enter Wages page.

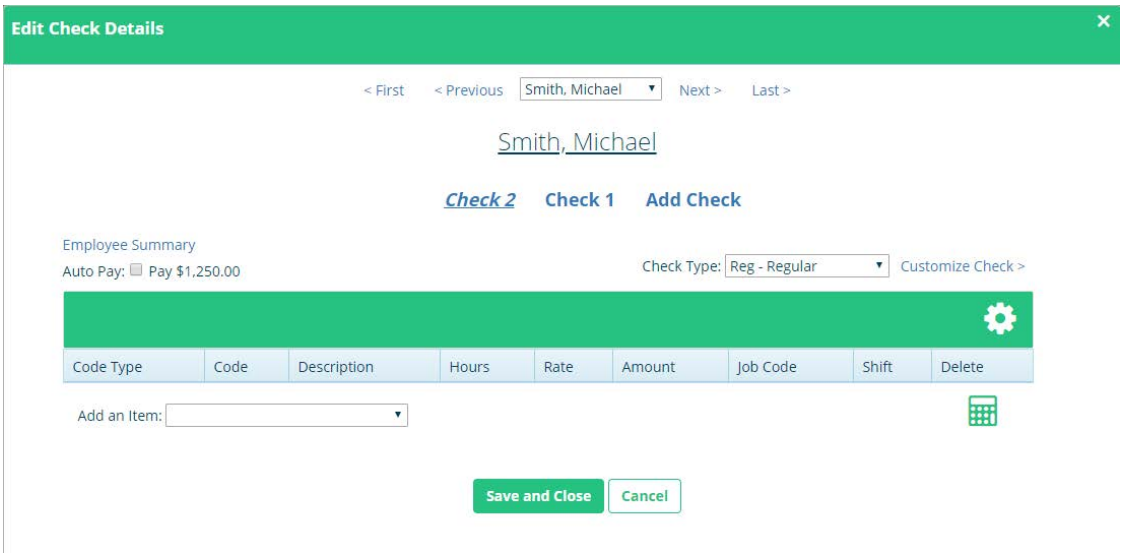
Find the **Employee** that you wish to Edit a check for; you can filter by Employee, ID, or home department. You may also filter by employee status: Active, All, and Batch. Click on the name to sort ascending or descending, or choose the filter icon to specify a filter criteria. Employees with more than one check have a number after the employee's name for the second and subsequent checks.

> **Note:** The sorts that you apply to the Enter Wages grid will transfer to the Edit Check Details page, so employees will be listed in the same order that they are displayed in on the grid.

Click **Edit** next the employee you wish to edit the check for.



Click on **Edit** to modify the newly added or existing Check. The Edit Check Details window comes up.



Click on the **Employee Summary** to expand and view employee details while you edit the check.

Employee Summary

Dept: MA-Waltham-Bentley--
Frequency: W - Weekly
Status: A - Active
Type:

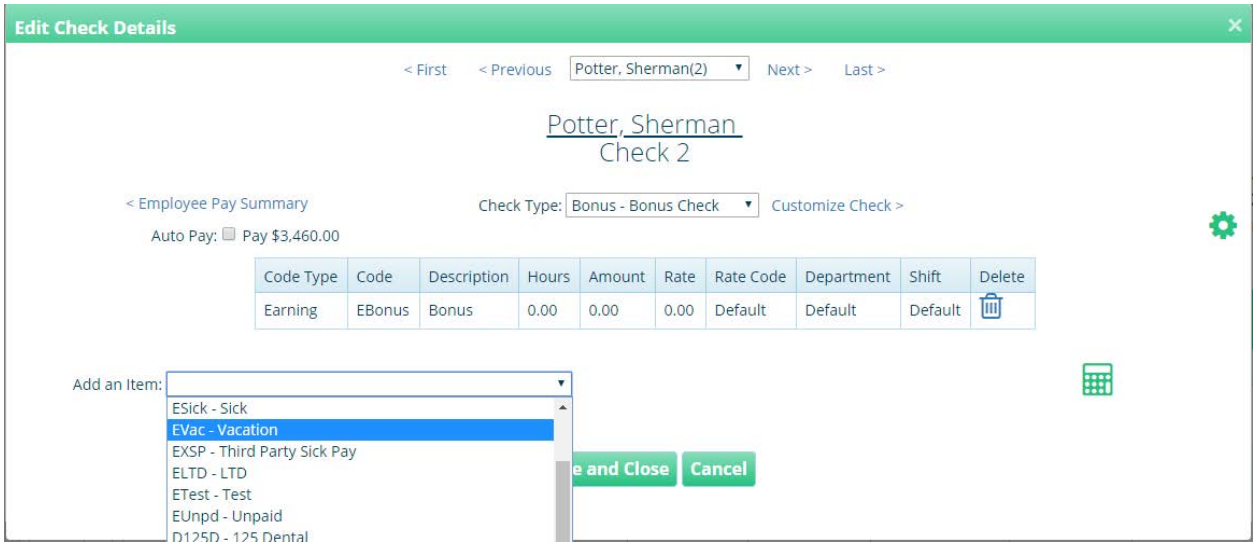
Rate	Amount/Per	Salary
Base	121.00	4,001.00

Accrual	Hours
Sick	0.00
Vac	0.09

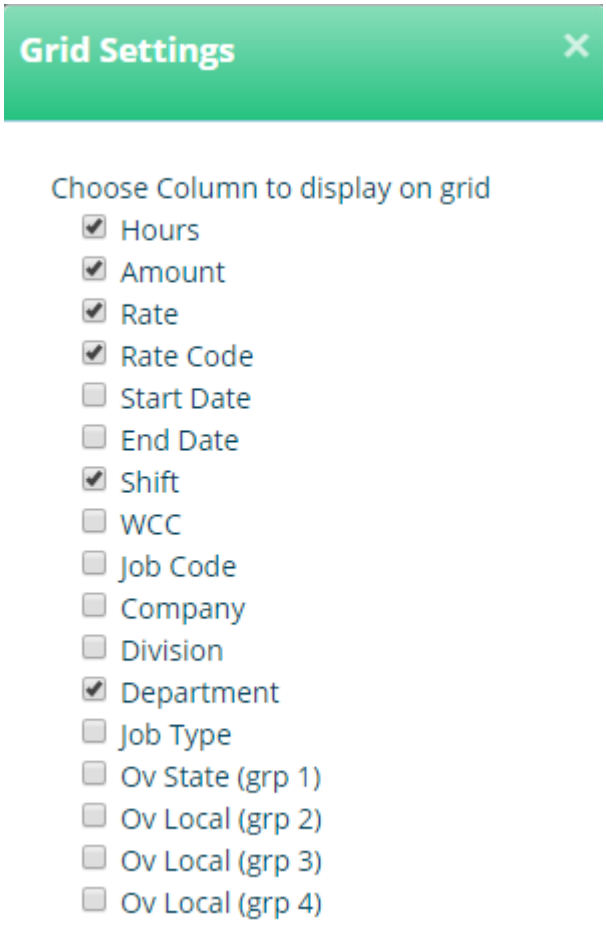
Edit **Check Type**: Select new check type from the Check Type drop-down menu.

Check off **Auto Pay** if needed.

Add **earning, deductions, tax etc** by selecting them in the **Add an Item** drop-down menu. The items are automatically added to the earnings table.

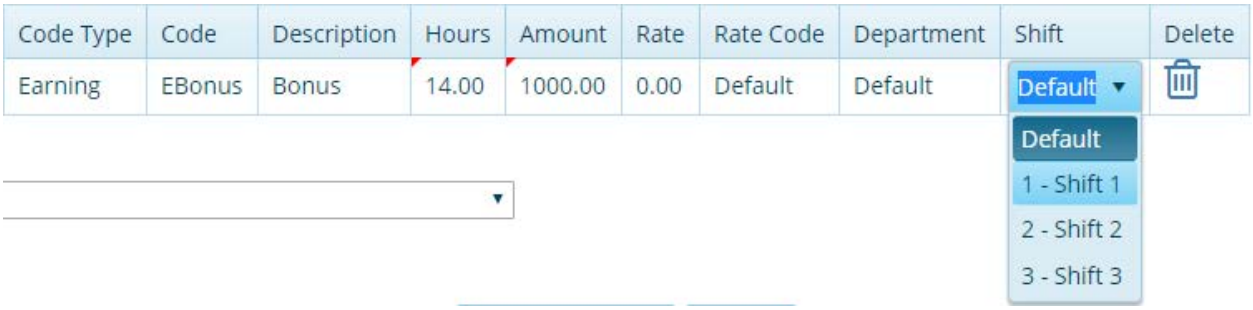


Click on the **gear icon** to select standard columns and pay grid items in the earnings table. When you select an item and click on it, it automatically adds to the earning table, or deselect items to hide them.

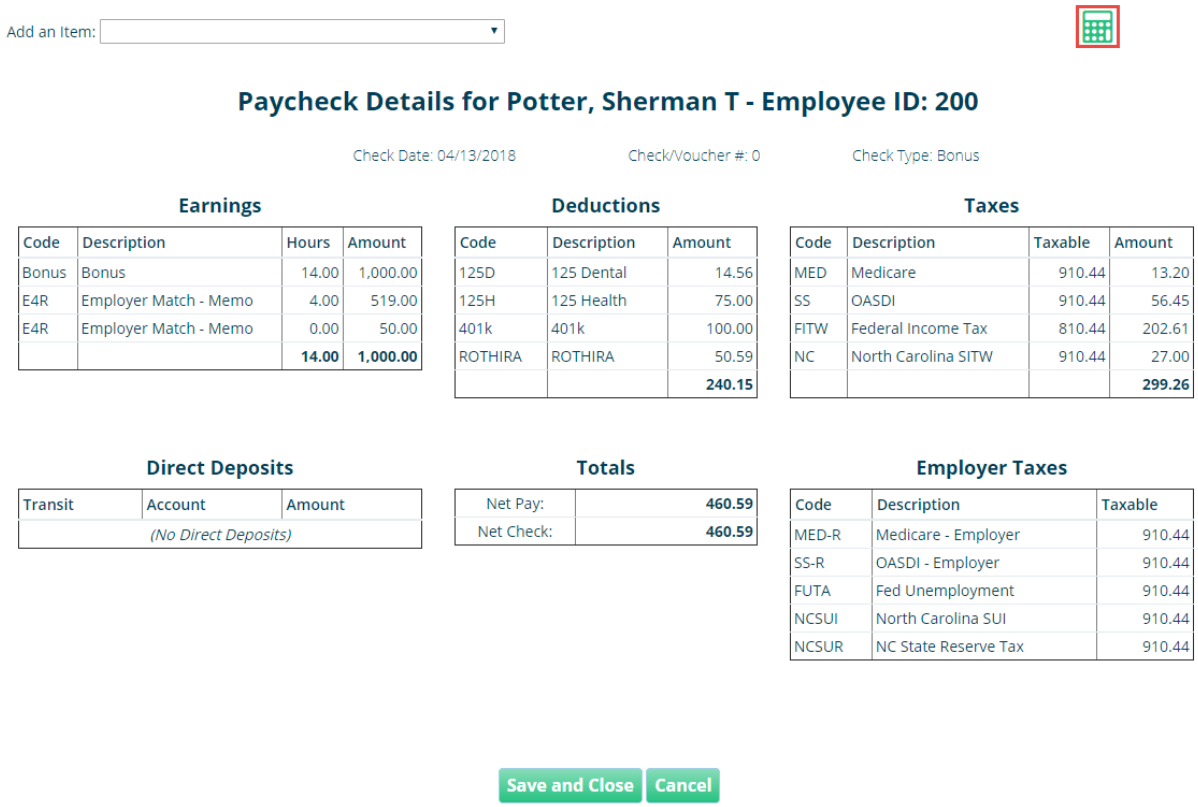


Edit the **earning table data** as needed by clicking directly in the table.

Note: Department and Job Code menus can be searched by either description or code. See UI Preferences for more information.



Click on the **calculator** icon to see check details.



. *Optional*. **Customize the Check** further by clicking on the link next to the Check Type menu. For more information see: Edit Check Attributes.

. Click **Save and Close** when you're done.

From this page you can also Edit Check Attributes as well or continue editing information on the Enter Payroll Wages page.

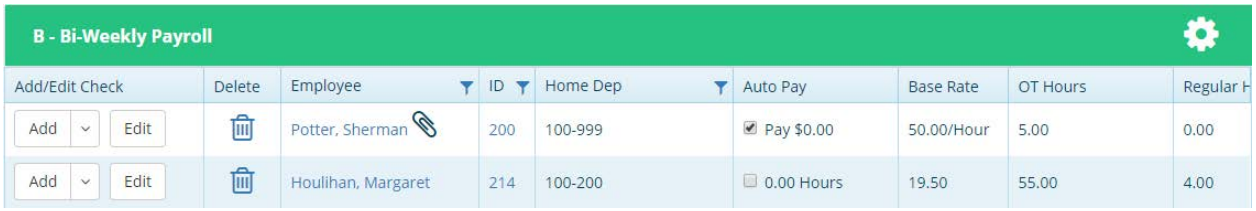
Edit Check Attributes

You have to Start Payroll, and you should Import Time Clock Files if you need to, before you can edit and customize employee checks.

Click on **Enter Payroll Wages** for the batch containing the check. You are taken to the Enter Wages page.

Find the **Employee** that you wish to customize a check for the check for.

Click on the **Edit** button next to the check you just added to view the details of the check and make sure everything is as it should be.



Click on **Customize Check** link next to the Check Type menu or label.

You can:

Select to **Block Labor Allocation**.

Select Earnings to block by checking off appropriate boxes in the **Block Earning** table. Select **Check All** to block all earnings.

Select Deductions to block by checking off appropriate boxes in the **Block Deductions** table. Select **Check All** to block all deductions.

If an employee has a direct deposit account, you may also block direct deposit.

Select how frequently taxes get taken out from the **Tax Frequency** drop-down.

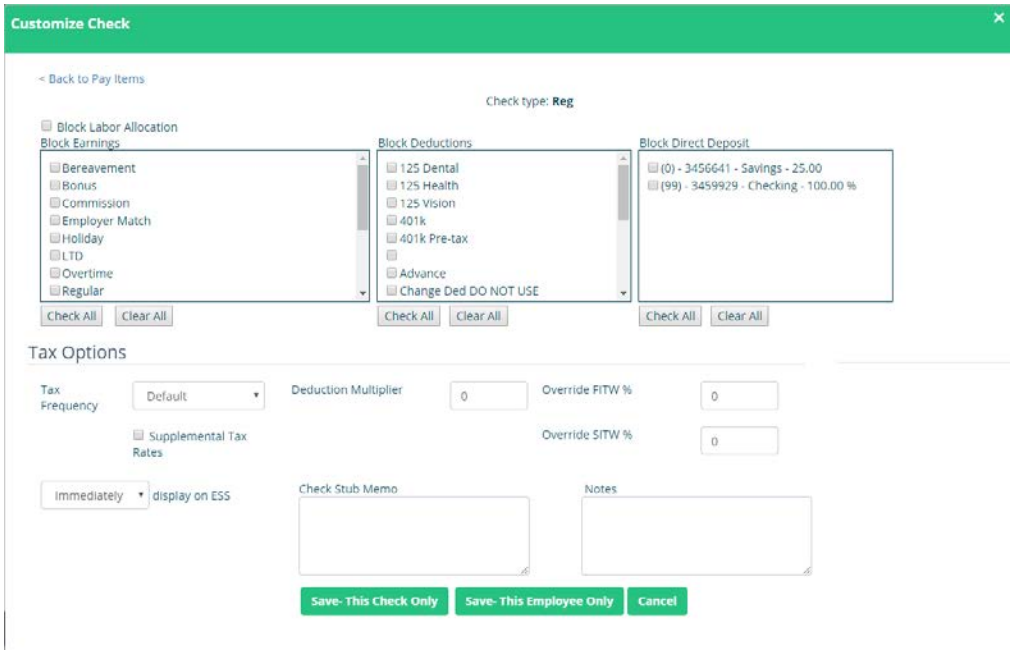
Select whether you want **Supplemental Tax Rates**, if you chose this, Override FITW and SITW % fields become disabled.

Type in how much is taken out in deductions from a paycheck in **Deduction Multiplier**.

If want to override them, type in the percent to **Override FITW %** and **SITW %,** is used to override the standard calculation and/or employee level overrides.

Type in a **Check Stub Memo**.

Type in **Notes**.



Click **Save- This Check Only**, to only change the attributes of this single check, so that the options on all other checks for this employee reset to the company default. Click **Save- This Employee Only**, to save the check and so that all subsequent checks for this employee use the options you've selected here.

> **Important:** If you click **Back to Pay Items** your changes won't save. To exit the screen click on one of the Save buttons.

Then you can Run Preprocess Register or go back to Payroll Batches page.

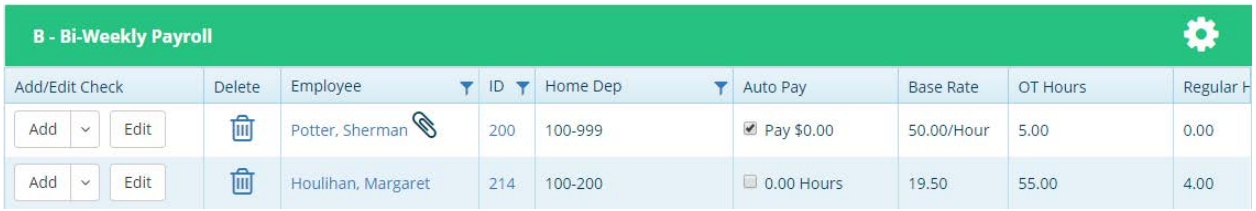
Delete a Check

You have to Start Payroll to be able to delete a check.

From the Payroll Batches page:

Click on **Enter Payroll Wages** for the batch containing the check. You are taken to the Enter Wages page.

Find the **Employee** that you wish to delete a check for the check for; you can filter by Employee, ID, or home department. Click on the name to sort ascending or descending, or choose the filter icon to specify a filter criteria. Some employees can have more than one check.



Click on the **Trashcan** icon in the Delete column, a dialog comes up. Since it's possible for an employee to have more than one check in the same batch, make sure to verify the details before deleting.

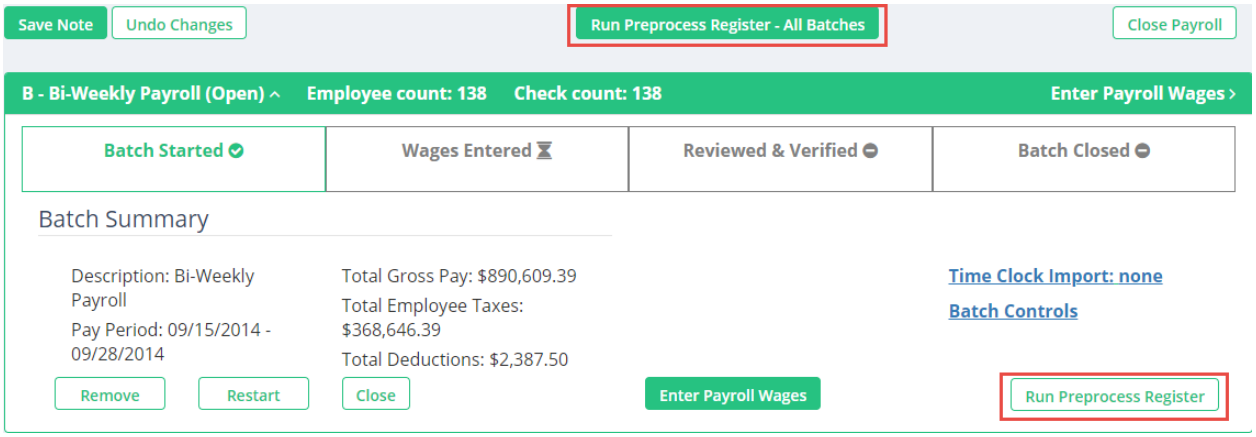
Click **OK** to permanently delete the check.

> **Important:** This action may not be undone.

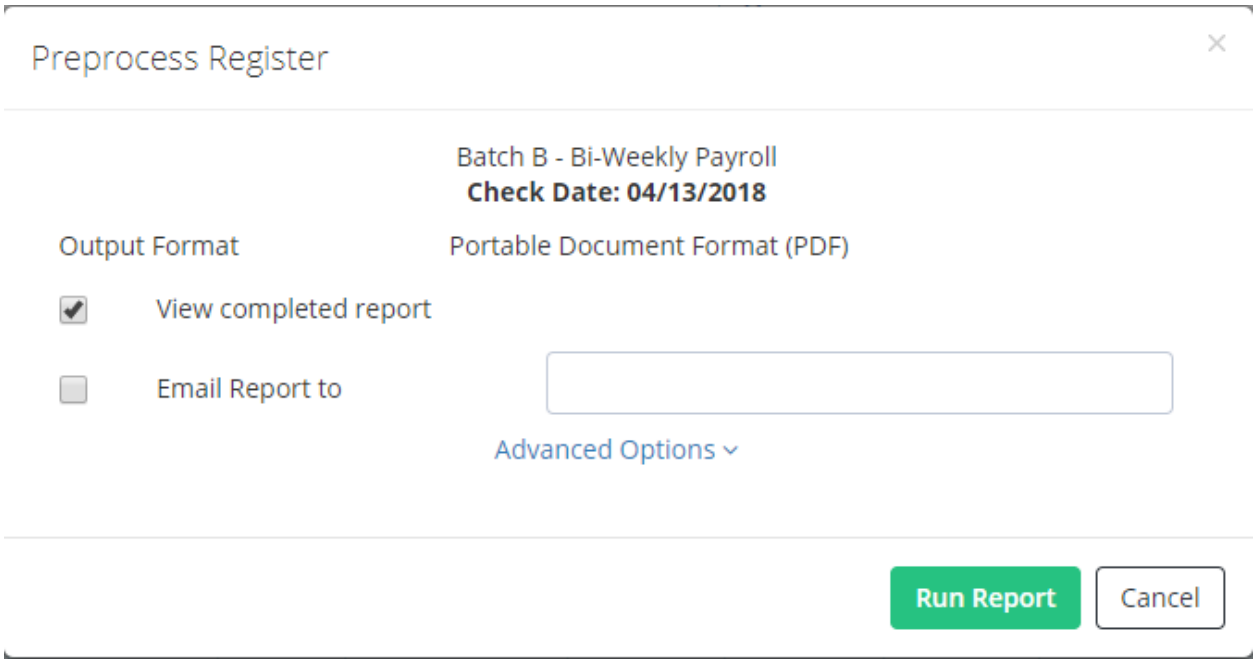
Run Preprocess Register

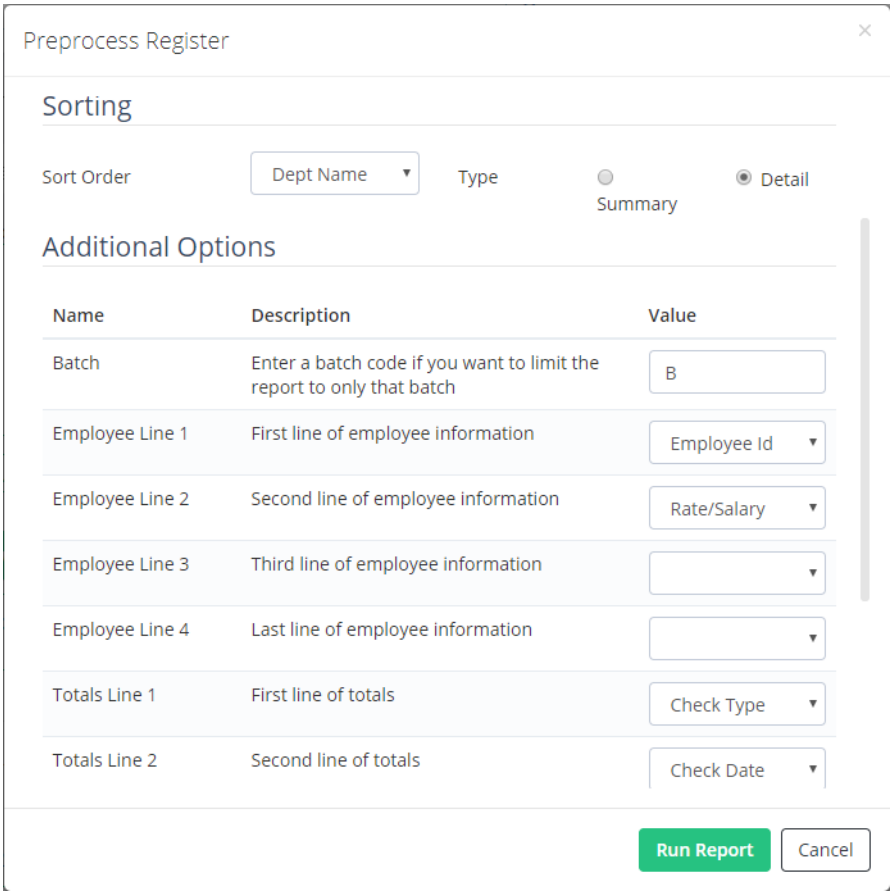
Once you've finished entering payroll information you are ready to Run Preprocess Register to make sure that your payroll is ready to be Closed and Processed (for more information on how to do so, see: Close Payroll and Process Payroll). You can run the Preprocess Register on one batch or all batches at once, but you must run the Preprocess Register for all batches (either all at once or individually) in order to submit the payroll.

Click on **Run Preprocess Register** - All Batches, or for a specific batch. A Preprocess Register dialog opens.

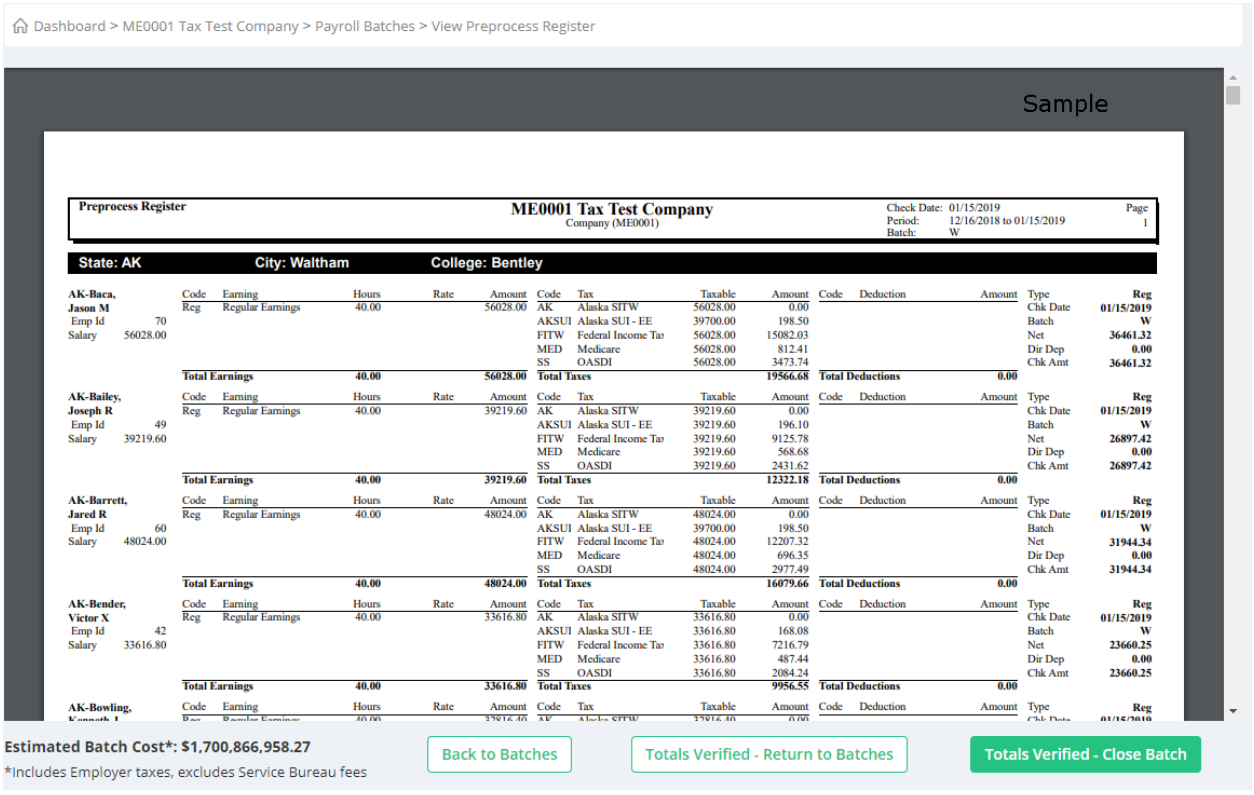


Select the **Output Format**: you can either **View completed report** in browser or **Email Report** to a specified email. You can also decide how your report is organized by clicking on Advanced Options and going through the options.





Click **Run Report** once you are done, a progress dialog appears and the View Preprocess Register page opens.



Go through the report and make sure the **payroll information** is accurate.

Do one of the following:

Click on **Back to Batches** to return to the Payroll Batches pages if you need to make changes. The batch remains unverified; OR

Click on **Totals Verified - Return to Batches** this verifies the batch but doesn't close it; clicking it brings you back to the Enter Wages page.

Click on **Totals Verified - Close Batch** this verifies and closes the batches.

If the last batch is verified, payroll is closed automatically, but not submitted. You are taken back to the Payroll Batches page.

Depending on your needs, from here you can:

Remove a Batch

Restart a Batch

Close Batch

Close Payroll

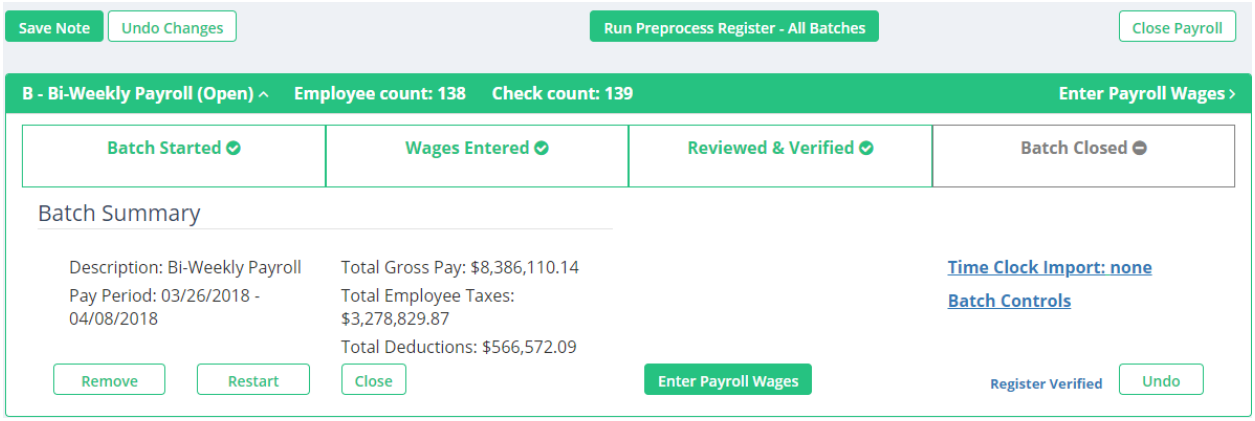
Submit Payroll

Close Batch

When you're done Enter Payroll Wages, finished modifications to your payroll - if you needed to, and Run Preprocess Register you are ready to close the batch. You can close batches individually or click Close Payroll to close all batches at once.

If you chose “Totals Verified- Close Batch” or the “Totals Verified- Close Payroll” option when running the preprocess register, all of the batches should already be closed.

Make sure that you're done making all the modifications to your payroll and **everything is verified**. If you're not sure, click on Register Verified, and Run the Register again.



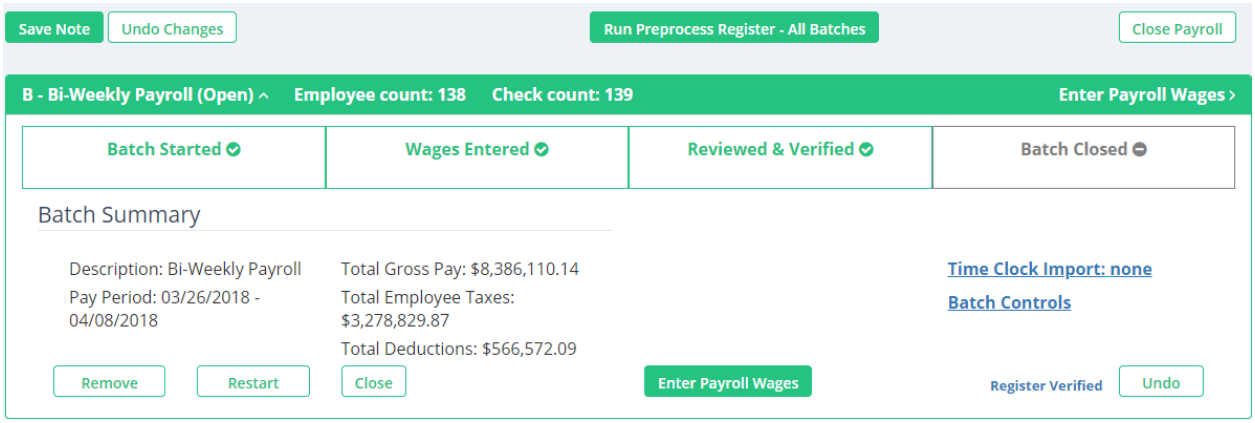
Click on **Close** in the Batch, a success message appears if the batch has been closed.

You are ready to Close Payroll.

Close Payroll

The application will automatically close the payroll after you've verified the last payroll batch using the Preprocess Register. If you choose, you can manually close the payroll before verifying all batches using the preprocess register. However, you will not be able to submit the payroll until all batches are verified.

Click on **Close Payroll** on the right side of the screen. The Payroll is closed immediately (and batches if they were still open).



Once all you batches have gone through the Run Preprocess Register and closed payroll, you are ready to Submit Payroll.

Submit Payroll

You had to have started payroll, verified and closed your batches, before you can submit your payroll. See the following pages for more information:

Start Payroll

Create a Manual Check *(optional)*

Add Batch to Payroll *(optional)*

Import Time Clock Files *(optional)*

Enter Payroll Wages *(optional)*

Run Preprocess Register

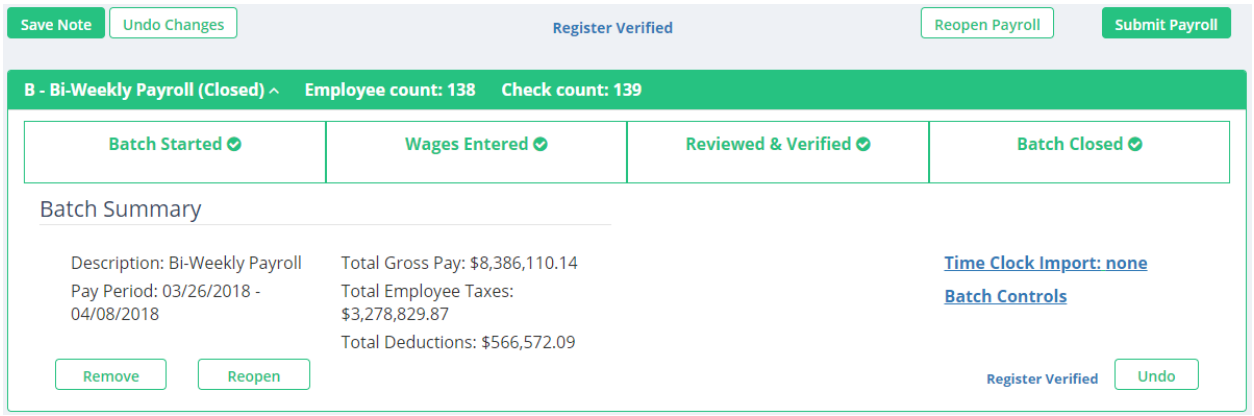
Close Batch

Close Payroll

Note: Once you Submit Payroll, you cannot make any more changes or reopen this payroll again.

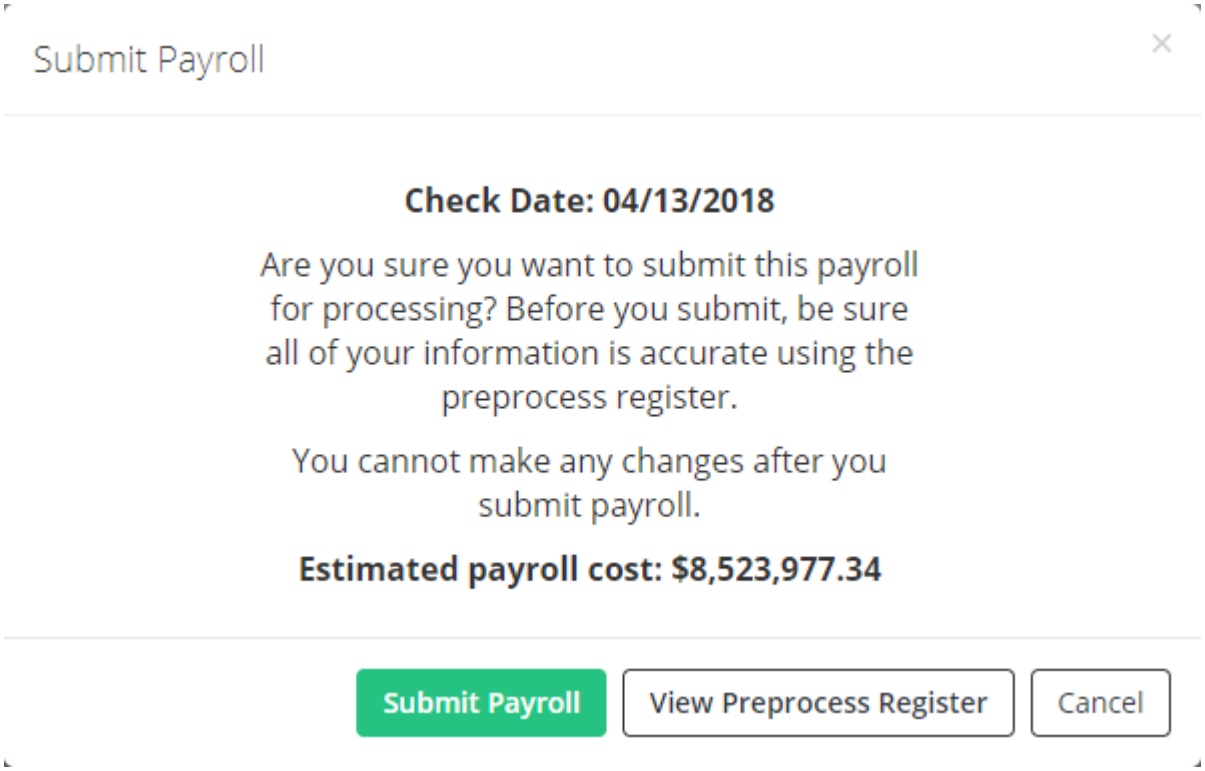
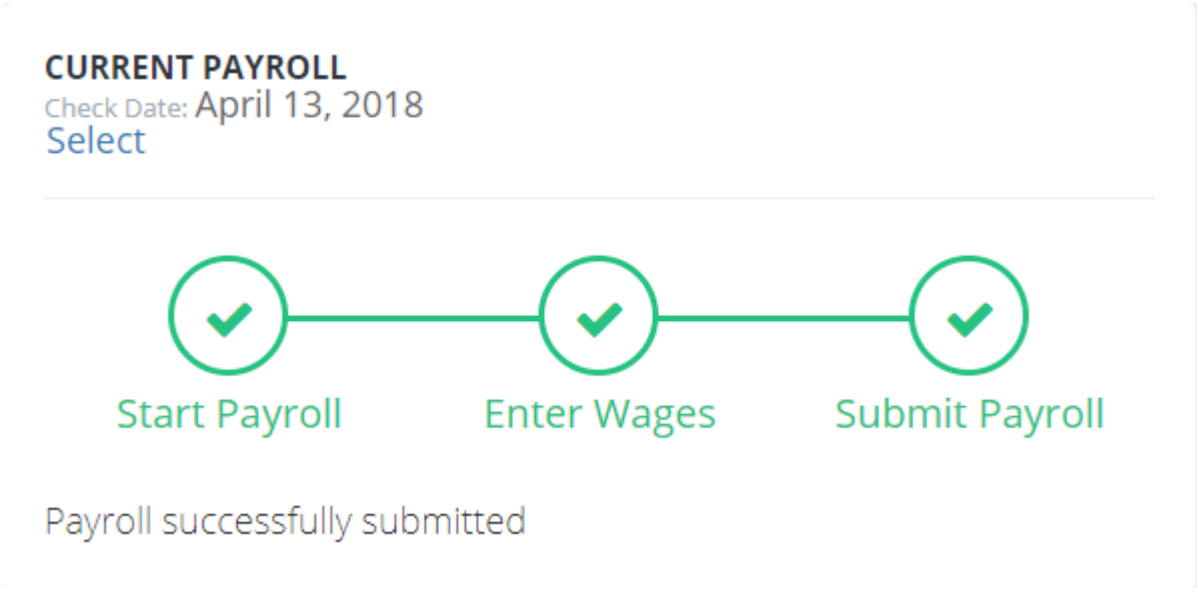
On the Payroll Batches page:

Click on **Submit Payroll,** a confirmation dialog opens.



Verify that the **Check Date** and the **Estimated payroll cost** are correct.

Note: The Estimated payroll cost represents an estimate of the amount of money that should be in the company's payroll account at the time of payroll submission. It includes a calculation of gross wages plus employer tax liability.



Click on **Submit Payroll** in the payroll is submitted and you are taken back to the Company Dashboard, where you can see the completed progress bar.