

Looking at **Employee Setup**, you can see it is divided into 4 separate sections. You can access any section by clicking on the icon.

- Employees
- Employee Payroll Specifics
- Employee Withholding Info
- Employee Types

The **Employees** screen looks as follows:

The screenshot shows the 'Payroll / Employees' screen for 'Cleveland Rocks, Inc.'. The screen displays a table of employee records. The table has the following columns: Employee ID, Suffix, Employee Name, Email, Gender, SSN, Phone 1, Employment Type, Employment, Date Last Hired, Date Termination, Primary D, Date of Birth, Contractor, Current Use, Job Title, and Count. The table contains 15 rows of data. On the right side of the table, there are buttons for New, Edit, Clone, Delete, Print, Close, and Import... At the bottom of the screen, there is a 'Filter And Refresh Master Data' section with a dropdown menu for 'Field' (set to '[None]') and a 'Relates' dropdown (set to '>='). There are also buttons for 'Advanced Filter', 'Show Inactive', 'Refresh Data', 'Auto Create Users...', 'Default Facility...', 'Emergency Contacts', 'Direct Deposits', 'Withholding Info', 'Payroll Specifics', 'Time', and 'Taxable Wage Balances', and 'Change Employee Type'.

Employee ID	Suffix	Employee Name	Email	Gender	SSN	Phone 1	Employment Type	Employment	Date Last Hired	Date Termination	Primary D	Date of Birth	Contractor	Current Use	Job Title	Count
10		Chapman, Piper	marta@galaxyhi	F	123-45-6789		Default	F - Full Time	01/01/2014		100	01/01/1983	T	T		
100		Fields, Marcus A		M			Terminated	F - Full Time	01/01/2014	01/06/2015	100		F	T		
3		Franklin, Aretha T		F	333-33-3333	783-366-3765	Default	F - Full Time	01/01/2013		100	03/25/1942	F	T		
1		Freed, Alan		M	111-11-1111	216-555-7625	Default	F - Full Time	01/01/2013		100	12/15/1921	F	T		
4		Holly, Buddy		M	444-44-4444	647-344-9783	Default	F - Full Time	01/01/2013		300	09/07/1956	F	T		
5		Lewis, Jerry L		M	555-55-5555	843-545-5370	Default	F - Full Time	01/01/2013		300	09/29/1965	F	T		
2		Presley, Elvis A		M	222-22-2222	216-555-5464	Default	F - Full Time	01/01/2013		200	01/08/1935	F	T		
236		Reed, Dizzy		M	555-23-2121		Default	F - Full Time	01/01/2014		100		F	T		
8		Rose, Axl		M	995-55-6644		Default	F - Full Time	05/01/2014		100	05/07/2014	T	T		
700		Sample, Max					Default	F - Full Time	01/01/2014		300		F	T		
222		Sample, Susie		F	000-00-0000		Default	F - Full Time	01/01/2014		200		F	T		
7		Seeger, Bob		M	288-56-6656	223-333-8555	Default	F - Full Time	09/01/2013		100	02/11/1922	F	T		
6		Stanley, Michael K		M	666-66-6666		Default	F - Full Time	01/01/1972		100	01/01/1954	T	T		
1111		Surdyka, Mark		M	111-22-3333		Default	F - Full Time	01/01/2014		100	01/01/1980	F	T		

This is where new employees are added and existing employee's information can be edited.

To add a new employee, there are 4 screens you have to go through if they don't want direct deposit. And if they do want direct deposit, there are 5 screens. The first screen is their demographic info. Click **New** on the far right side.

Payroll / Employees | Cleveland Rocks, Inc.

Master | Detail | Custom Fields | Departments | Attachments

Employee ID: 10

First Name: Piper

Last Name: Chapman

Middle Name: A

Suffix:

Gender: F

SSN: 123-45-6789

Date of Birth: 01/01/1983

Contractor: Yes No

Job Title: Office Assistant

Country: US - United States

Address 1: 12345 Example Rd

Address 2: Suite 1

City: Beachwood

State: OH ZIP: 44122

Phone 1: 111-222-3333

Phone 2:

Phone 3:

Fax:

E-mail: piper.chapman@example.com

User ID:

Payment Settings

Employment: Full Time Part Time

Date Hired: 01/01/2014

Date Last Hired: 01/01/2014

Employee Type: Default

Current Type Date: 01/01/2014

Date Terminated:

EBT Date:

F1099: Yes No

Current Use: Yes No

The fields that have a magnifying glass sign have different options. Please click the magnifying glass to access the options.

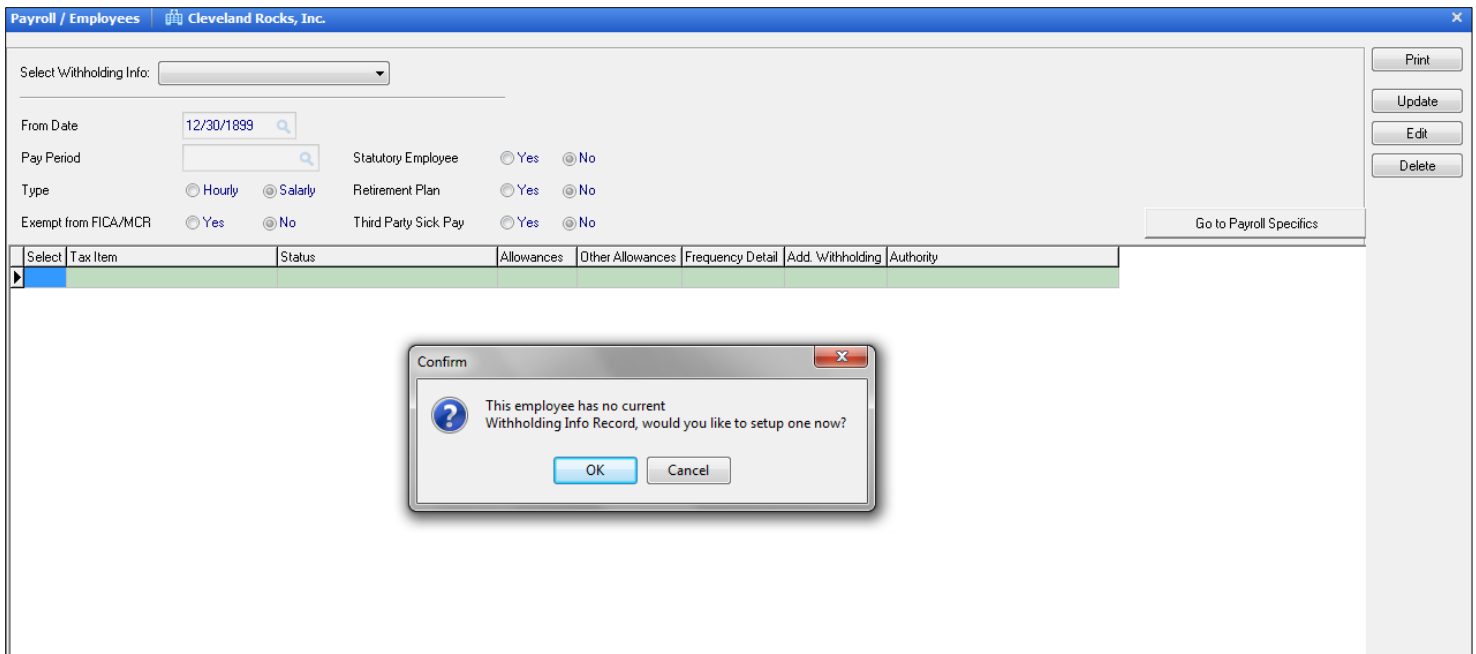
Employee ID is a mandatory field and it can start from 01. If there are already some employees added, it can be the next available number.

Date Last Hired will be the same as Date Hired for a new employee. It will only be different for employees who were terminated and rehired.

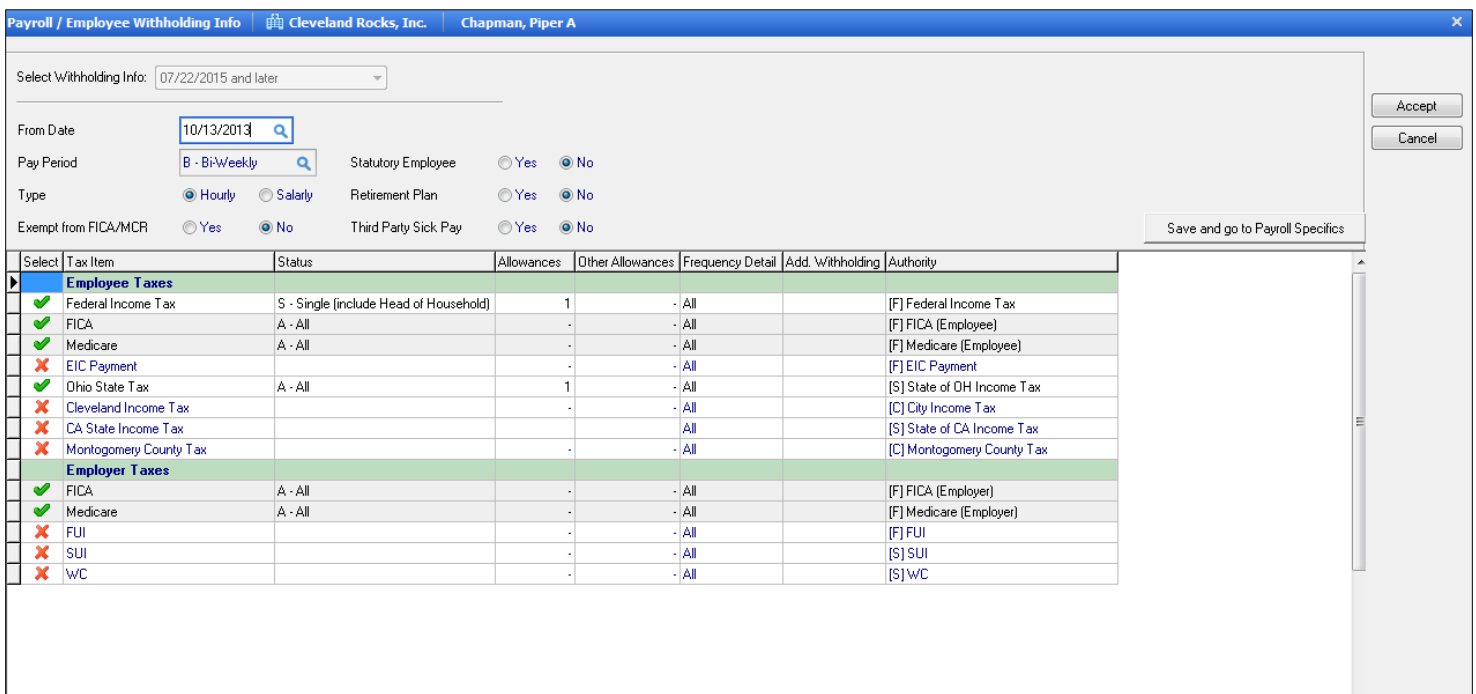
New employees will have an **Employee Type** of "Default".

For independent 1099 contractors, the **F1099** will need to be switched to "yes".

Once everything is filled out, click **Save and Go to Withholding Info**, which would take you to the second screen in adding your employee.



Please click “ok” here and the following will show up:



The first thing to change on this screen is the **From Date** at the top. It should **always** be the hire date of your employee. If the hire date is in a previous year, then you can put 1/1 of the current year. If you leave it at the default date that it comes with, the employee doesn't show in the payroll batch most of the times.

Please don't change **Pay Period** unless you can contacted Payroll4Free and has one of the Account Managers change your pay frequency in their side of setup.

Exempt from FICA/MCR applies only to independent 1099 contractors. If you are hiring a W-2 employee please leave this as “no”, but if you're adding a contractor change it to “yes”.

The table lists some Employee Taxes and some Employer Taxes. The tax items with a green check mark indicate that those are active and the ones with red X mean that they are inactive. If you see a tax item that should be active but is showing a red X, please double click on the X and activate it. Usually this happens with local taxes and other special

taxes since those are manually added based on need. On the other hand, if you see a tax item showing a green check mark where that item shouldn't be active, please double click the green check mark to inactivate it.

At this point you should have a Federal Withholding Certificate, Form W-4, filled out by your employee as well as a state withholding certificate if your state imposes one. The W-4 form can be found on IRS.gov website. If you are not sure if your state imposes a state withholding certificate, please refer to this link: <http://data.bls.gov/cgi-bin/print.pl/jobs/statetax.htm>. Once you find out, you can do a Google search to get the appropriate form(s).

The filing status for federal withholding (item# 3 on form W-4) goes in the **Status** field for **Federal Income Tax** and the total number of allowance (item# 5 on form W-4) goes in the **Allowances** field. If your employee has written a dollar amount in line item 6 in the W-4 form, it goes in the **Add. Withholding** field. If your state imposes state tax then the filing status and the total number of allowance that your employee has filled out on the state withholding certificate goes in the relevant fields.

Under Employer Taxes, the only field there is to fill out in the status for FUI. It would be "All others" if you are participating in the state unemployment program and if you don't have any SUI liability, then the status for FUI would be "No SUI".

Then click **Save and Go To Payroll Specifics**, which would take you to the third screen (if the software gives you any error message such as "some of the fields are not filled properly" please try entering "0" for Other Withholdings and see if that works. If it still doesn't work, please check to see if everything discussed above is filled properly).

Payroll / Employee Payroll Specifics | Cleveland Rocks, Inc. | sdgff, afd

Display Items: All | Active | Historical | As of Date: 10/13/2015 | Print | Go to Direct Deposits

E - Earnings | D - Deductions | B - Benefits

Select	Payroll Item	Start Date	End Date	Rate	Check Limit	Annual Limit	Total Limit	Frequency Detail	Current Use
<input checked="" type="checkbox"/>	[E] Regular							All	
<input checked="" type="checkbox"/>	[E] Overtime							All	
<input checked="" type="checkbox"/>	[E] Holiday							All	
<input checked="" type="checkbox"/>	[E] Vacation							All	
<input checked="" type="checkbox"/>	[E] Sick Pay							All	
<input checked="" type="checkbox"/>	[E] PTO							All	
<input checked="" type="checkbox"/>	[E] Bereavement							All	
<input checked="" type="checkbox"/>	[E] Jury Duty							All	
<input checked="" type="checkbox"/>	[E] Tip-Reg Hours							All	
<input checked="" type="checkbox"/>	[E] Tip-O/T Hours							All	
<input checked="" type="checkbox"/>	[E] Reported Tips							All	
<input checked="" type="checkbox"/>	[E] ER Paid Tips							All	
<input checked="" type="checkbox"/>	[E] Make-Up Tips							All	
<input checked="" type="checkbox"/>	[E] Bonus Eams							All	
<input checked="" type="checkbox"/>	[E] Commission Eams							All	
<input checked="" type="checkbox"/>	[E] Retroactive Eams							All	
<input checked="" type="checkbox"/>	[E] Other Eams							All	
<input checked="" type="checkbox"/>	[E] Mileage Eams							All	
<input checked="" type="checkbox"/>	[E] Salary							All	
<input checked="" type="checkbox"/>	[E] 1099percent of job							All	

Like the Withholding Info screen, the pay items with a red X indicate they are inactive. Please double click on the red X's to activate items that might apply to the employee. If you don't see the item that you need for the employee (such as Reimbursement, Milage etc.), please contact Payroll4Free and an account manager can help you.

Once the items are activated, a date will show up and you should **always** change them to your employee's date of hire (or if date of hire was in a previous year, then 1/1 of current year).

The rate would either be their hourly rate (if "hourly" was chosen in the previous screen) or his/her salary for the pay period (for example, if your company's pay frequency is bi-weekly, divide his/her annual salary by 26. If it's semi-monthly, divide the yearly salary by 24)

At the top, you have option to switch to the **Deductions** and **Benefits** tabs and do the exact same things.

Once done, there are 2 things you can do depending on if they want direct deposit or not.

1. If he/she doesn't want direct deposit, you can simply just click on small white "x" at the top right corner.
2. If he/she wants direct deposit, click on **Go to Direct Deposit** at the top.

Payroll / Direct Deposits | Cleveland Rocks, Inc. | sdgff, afd

Master | Detail

#	Bank Name	Bank Type	Amount	Bank Account No	Bank Routing No

New
Edit
Clone
Delete
Print
Close

Filter And Refresh Master Data

Field: [None] | Relates: >= | Advanced Filter

Value: | Apply Simple Filter | Refresh Data

Then click "New" at the far right side.

Payroll / Direct Deposits | Cleveland Rocks, Inc. | sdgff, afd

Master | Detail

Bank Name:

Bank Type:

Percentage: Yes No

Amount:

Bank Account No:

Bank Routing No:

Buttons: Cycle, Accept, Cancel

Fill out the bank info and double check the account number and routing number. Once done, click "Accept" on the right side and then click on small white "x" at the top right corner.

You will then be returned to the main Employee Setup screen.

Payroll / Employees | Cleveland Rocks, Inc.

Master | Detail | Custom Fields | Departments | Attachments

Employee ID	Suffix	Employee Name	Email	Gender	SSN	Phone 1	Employee Type	Employment	Date Last Hired	Date Terminated	Primary D	Date of Birth	Contractor	Current Use	Job Title	Count
10		Chapman, Piper A	piper.chapman@	F	123-45-6789	111-222-3333	Default	F - Full Time	01/01/2014		100	01/01/1983	T	T	Office Assist	US - U
100		Fields, Marcus A		M			Terminated	F - Full Time	01/01/2014	01/06/2015	100		F	T		
3		Franklin, Aretha T		F	333-33-3333	783-366-3765	Default	F - Full Time	01/01/2013		100	03/25/1942	F	T		
1		Freed, Alan		M	111-11-1111	216-555-7625	Default	F - Full Time	01/01/2013		100	12/15/1921	F	T		
4		Holly, Buddy		M	444-44-4444	847-344-9783	Default	F - Full Time	01/01/2013		300	09/07/1966	F	T		
5		Lewis, Jerry L		M	555-55-5555	843-545-5370	Default	F - Full Time	01/01/2013		300	09/29/1965	F	T		
2		Presley, Elvis A		M	222-22-2222	216-555-5464	Default	F - Full Time	01/01/2013		200	01/08/1935	F	T		
236		Reed, Dizzy		M	555-23-2121		Default	F - Full Time	01/01/2014		100		F	T		
8		Rose, Axl		M	995-55-6644		Default	F - Full Time	05/01/2014		100	05/07/2014	T	T		
700		Sample, Max					Default	F - Full Time	01/01/2014		300		F	T		
222		Sample, Susie		F	000-00-0000		Default	F - Full Time	01/01/2014		200		F	T		
7		Seeger, Bob		M	288-56-6656	223-333-8555	Default	F - Full Time	09/01/2013		100	02/11/1922	F	T		
6		Stanley, Michael K		M	666-66-6666		Default	F - Full Time	01/01/1972		100	01/01/1954	T	T		
1111		Surdyka, Mark		M	111-22-3333		Default	F - Full Time	01/01/2014		100	01/01/1980	F	T		
22		sdgff, afd					Default	F - Full Time	10/13/2015				F	T		

Buttons: New, Edit, Clone, Delete, Print, Close

Filter And Refresh Master Data

Field: [None] Relates: >=

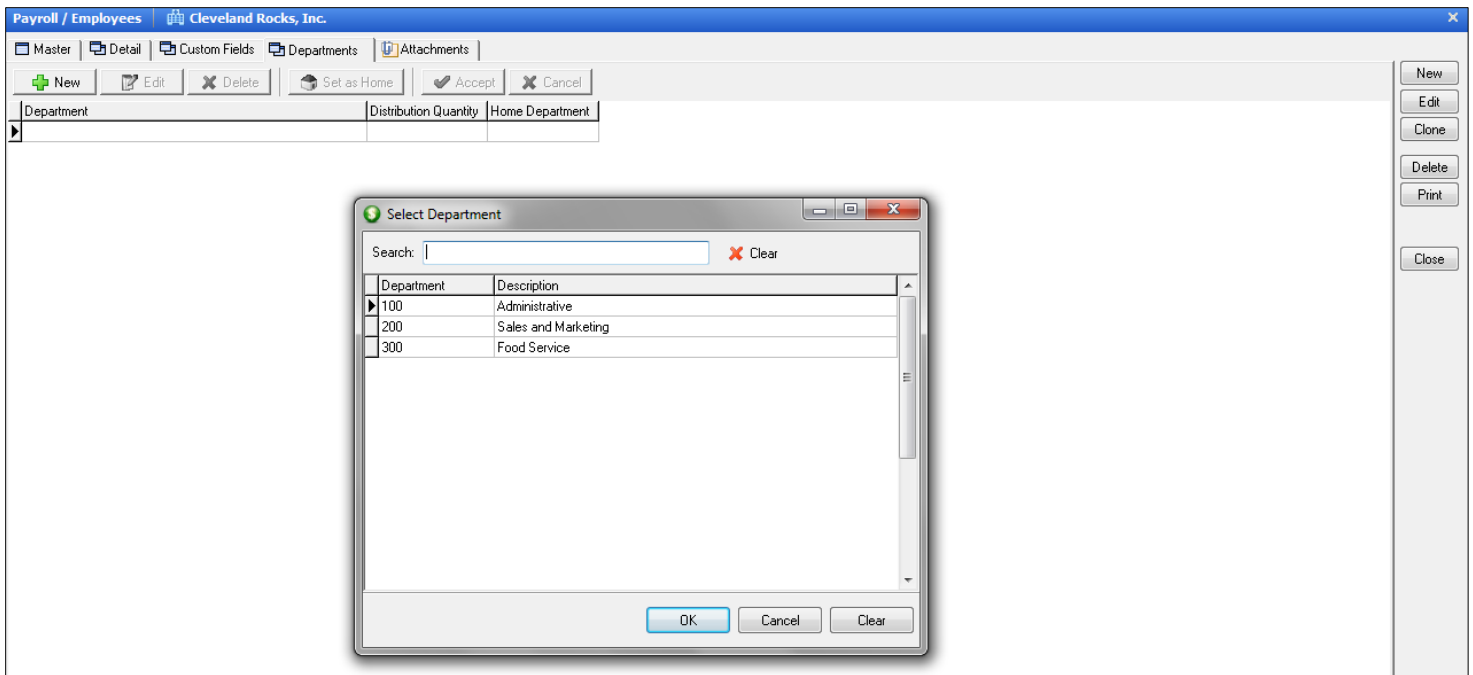
Value: Apply Simple Filter

Advanced Filter | Show Inactive | Emergency Contacts | Payroll Specifics | Change Employee Type

Refresh Data | Auto Create Users... | Direct Deposits | Time | Taxable Wage Balances

Default Facility...

There is just one last screen left before the employee setup is complete. At the top of this screen, there are some tabs (Master, Detail, Custom Fields etc.). Click on **Departments** from here.



In Departments, at the top left click on the button **“New” with the green plus sign** and the the smaller window will pop up. Usually you will only see one department listed named **“Operations”**. Select it and click OK at the bottom. And then click **Accept** button at the top with the green check mark. If you want the department name to be changed or want more departments added, please contact Payroll4Free.

There is another tab at the tab that’s optional, called Attachments. If you want you can attach employee files in here, i.e. W-4 form, state withholding certificate etc., for your own record.

The new employee should now be setup and ready for running payroll.