

Setting up the Payroll Module's Employee Options

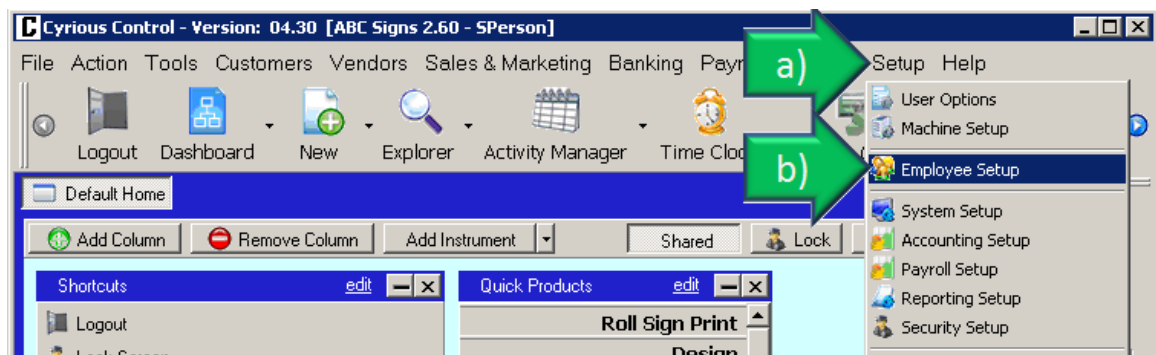
What's the purpose of this setup step?

In this step you will set up the payroll options for each employee, such as:

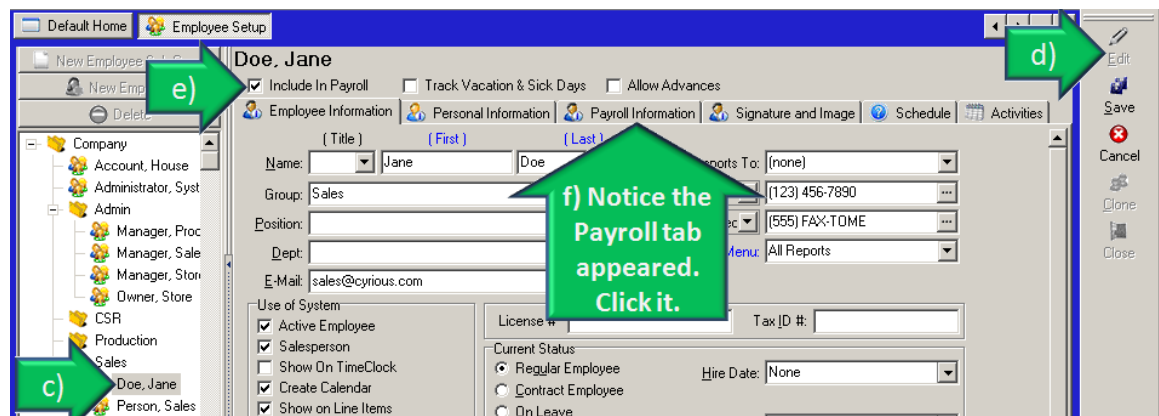
- A. Whether to include them in payroll;
- B. Whether to track vacation and sick time; and,
- C. Whether to track advances.

A. To include employees in payroll, follow these steps:

- 1) Open the Employee screen by:
 - a) Clicking **Setup**.
 - b) Clicking **Employee Setup**.



- c) Click on an employee to setup for payroll.
 - d) Click **Edit**.
 - e) Check the box for **Include in Payroll**.
 - f) Notice a new tab appears, called **Payroll Information**. Click on the **Payroll Information** tab.



- g) You'll notice that the payroll system options you chose in the prior step will show up on this screen as choices. Enter the information, in the same order as the fields on this screen:

1. **Rate Information:** Choose appropriate settings for this employee. Control supports multiple pay periods for different employees (e.g. Bi-Weekly for hourly and semi-monthly for salary). Click the drop down arrow to see the choices.
2. **Hourly Rate or Salaried Rate:** These fields will vary depending on whether the employee is hourly or salaried. Enter the information for this employee. If the employee is hourly, enter the corresponding wage rates. If the employee is salaried, enter the wage for that pay period.
3. **Miscellaneous payroll information:**
 - **Assumed Hours Worked per Year:** Enter the presumed number of hours that an employee (salary or hourly) works in a typical year. This field is most often used to convert the time a salary employee works into hours for purposes of benefit and tax calculations.
 - **All Hours from Timecard:** Check this box if you want to require that ALL time for the employee be associated with timecards. If this box is not checked you can override the number of hours worked when running payroll. If it is checked, you will not be able to adjust the employees time without enter new timecards.
 - **Last Raise Date:** The date this employee was last given a raise. This field is optional.
 - **YTD Pay History:** This button opens a small screen that shows the employees pay history (income, taxes, deductions, etc) for the time period you select. Nothing needs to be done with this right now.

4. Accounting related info:

- **Default Wage Expense Account:** Enter the default wage expense account for this employee. This expense account is used for time paid not associated with a timecard and/or not associated with an order or station.
- **Default Workers Comp Code:** Enter the default workers comp code for this employee. This expense code is used for time paid not associated with a timecard and a timecard not associated with a station.

5. Withholdings information:

- Check the boxes for the taxes that apply. The Federal and State Tax Tables will auto-populate based on the employees state (if you entered one) and the Marital Status will auto-populate based on your entry from #1. You can override any of these as appropriate. Then enter the appropriate Exemptions and Additional Withholdings (in percent or dollars) for this employee.

6. Deductions:

Check the boxes for the Deductions that you want to include for this employee. For the Deductions that you checked, fill-in the amount and change any information that needs to be updated. Some deductions may not apply to every pay period in the month. If this applies, you may select which pay periods in the calendar month to apply this deduction.

7. Benefits:

Check the box for the benefits that you want to apply to this employee. Fill-in the amount and change any information that needs to be updated.

h) When you're finished entering the payroll information for this employee, click **Save**.

B. To track vacation and sick days for employees, follow these steps:

- 1) First turn on the screen for tracking this by:
 - a) Clicking **Edit**.
 - b) Check the box for **Track Vacation and Sick Days**. (Note: If you don't see this checkbox, you may need to enable Vacation and Sick Day tracking within Payroll Setup.)
 - c) Notice a new tab appears, called **Vacation/Sick**. Click on that tab.

The screenshot shows the 'Employee Setup' window for 'Doe, Jane'. The 'Accounting' tab is active, showing fields for 'Default Wage Expense' and 'Default Workers Comp Code'. A green arrow labeled 'a)' points to the 'Edit' button in the top right. Another green arrow labeled 'b)' points to the 'Track Vacation & Sick Days' checkbox, which is checked. A third green arrow labeled 'c)' points to the 'Vacation/Sick' tab, which is highlighted. The 'Vacation/Sick' tab is located between the 'Payroll Information' and 'Signature and Image' tabs. The 'Vacation/Sick' tab is currently selected, and a green box with the text 'c) Notice the Vacation / Sick tab appeared. Click it.' is overlaid on the tab.

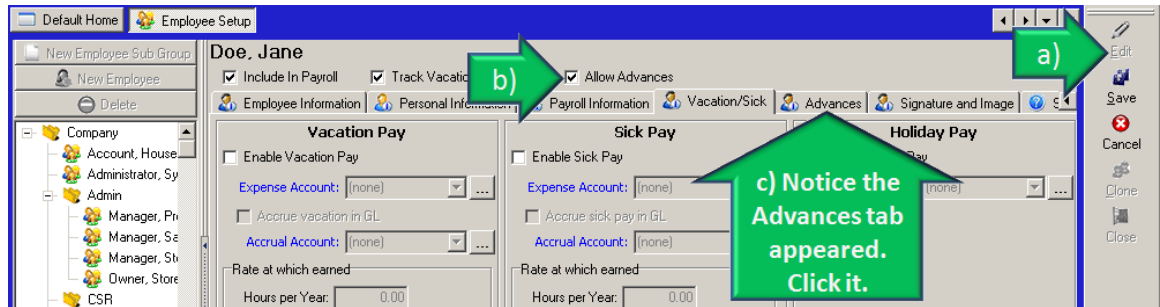
- d) Start on the left and work your way to the right. Fill in the information that you want to track.

The screenshot shows the 'Payroll Employee Option Setup' window for 'Doe, Jane'. The 'Vacation/Sick' tab is selected, displaying three main sections: 'Vacation Pay', 'Sick Pay', and 'Holiday Pay'. Each section contains options to enable the respective pay type, select an expense or accrual account, and set a rate and hours per year. A green box highlights the 'Include In Payroll' and 'Track Vacation & Sick Days' checkboxes. Green arrows point to the 'Save' button and the 'Track Vacation & Sick Days' checkbox.

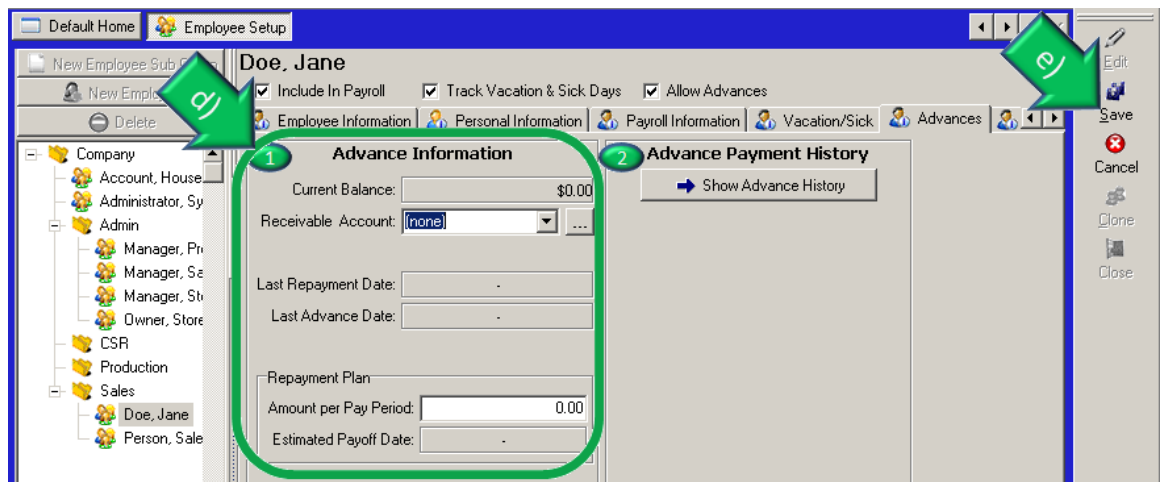
1. **Vacation Pay:** If you want to track vacation pay, check the Enable Vacation Pay box.
 - **Expense Account:** Enter the Expense Account that will be used to account for the vacation pay as it is earned.
 - **Accrue Vacation in GL:** Do you want to accrue in the general ledger the vacation earned but not yet taking? If so, check this box and enter the Accrual Account for tracking the accrual.
 - **Rate:** How many hours per year can this employee earn? Enter that rate here. Control will calculate the equivalent hourly rate at which vacation is earned. The employee will earn this much vacation for each hour work.
 - **Use Overtime?:** If you want the employee to earn vacation on overtime worked, check this box.
 - **Current Vacation Balance:** This will show the amount of vacation time that the employee has earned but not yet used.
 - **Vacation History:** Click this button to show the history of all vacation earned and taken by that employee.
 2. **Sick Pay:** Sick Pay works in a similar fashion to Vacation Pay.
 3. **Holiday Pay:** Holiday Pay works in a similar fashion to Vacation Pay, except that Holiday pay cannot be accrued.
- e) When you're finished entering the vacation and sick pay information for this employee, click **Save**.

C. To track advances for employees, follow these steps:

- 1) First turn on the screen for tracking this by:
 - a) Clicking **Edit**.
 - b) Check the box for **Allow Advances**. (Note: If you don't see this checkbox, you may need to enable Allow Employee Advances within Payroll Setup.)
 - c) Notice a new tab appears, called **Advances**. Click on that tab.



- d) Fill-in the information that you want to track.



1. **Advance Information:** You will actually give advances to employees from within the payroll screen, but this option must be turned on for that employee first. This screen will show you the current balance of any advance outstanding to this employee. Most of the fields on this screen are for tracking the current status of the employee's advances.
 - **Receivable Account:** Enter the Receivable Account that will be used to track the advance as it is awaiting repayment.
 - **Repayment Plan:** If you want to setup a repayment plan, enter the amount that you want to collect per pay period. This amount will then be pre-filled in to come out of the employees paycheck each payroll (until it is paid off). Control calculates the estimated date when the advance will be fully repaid assuming that amount is paid every pay period.
2. **Advance Payment History:** Click this button to see a list of the prior advances and repayments made.

- e) When you're finished entering the advance information for this employee, click ***Save***.

D. Now repeat steps A, B and C for each of the employees.

Congratulations. You've completed all your payroll setup except for stations, which is an easy step that we'll cover later. It's time for the next step.