Entering New Hires Guide

A guide covering entering new hires in Checkwriters

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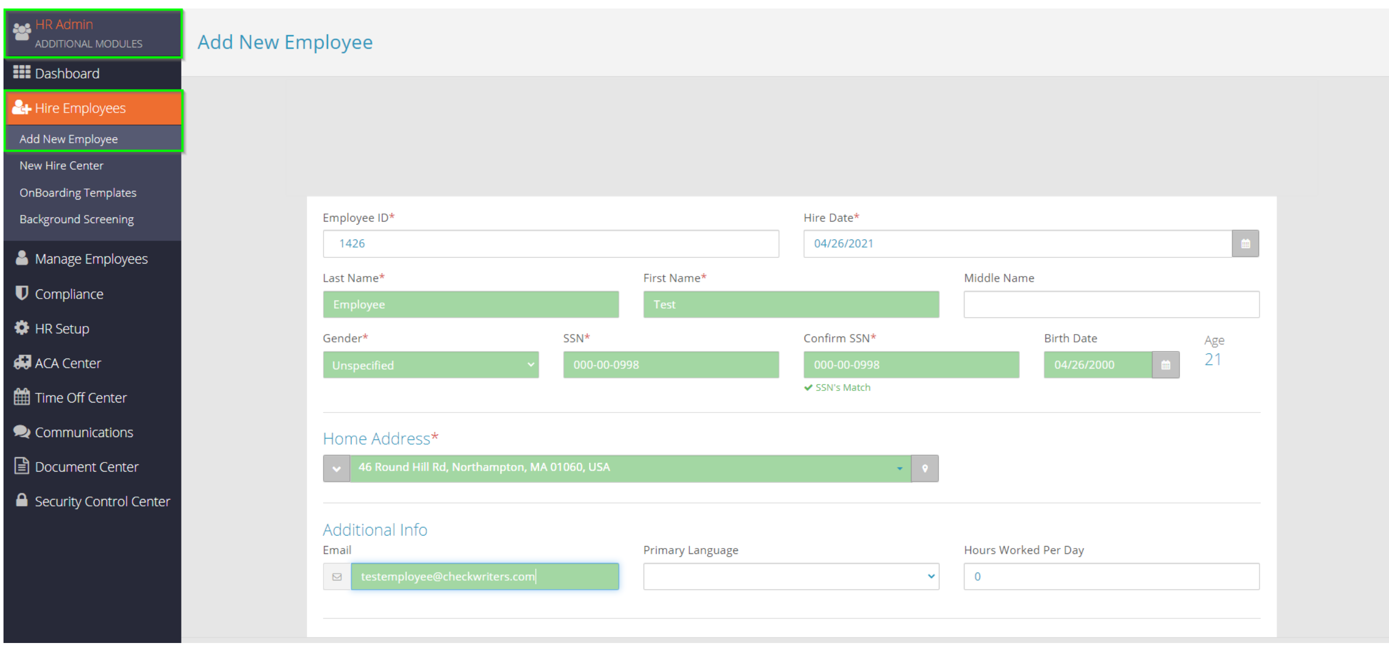
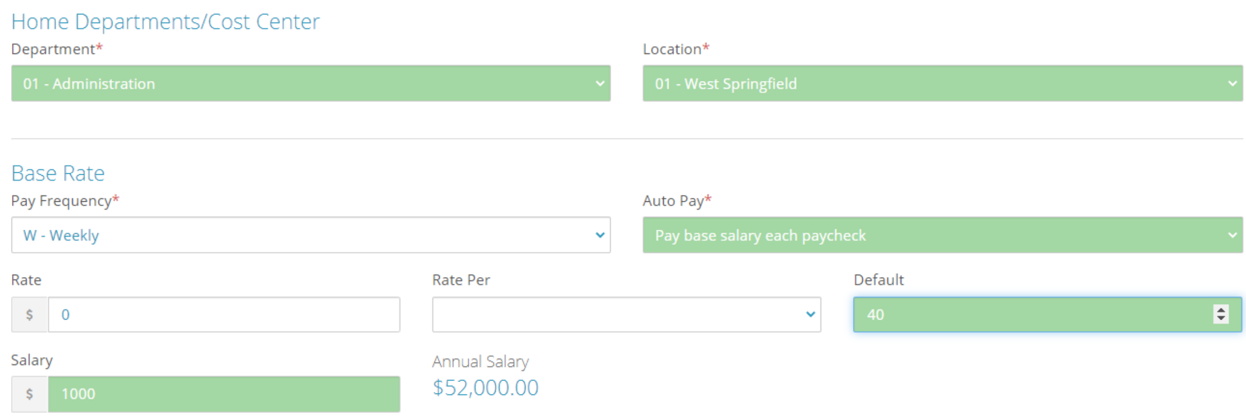
1. In the **HR Admin** Module, select *Hire Employees -> Add New Employee*
2. The Employee ID will automatically generate as the next available ID number. This can be changed. Keep in mind, the next employee you add will have the next number sequentially as their ID.
3. The Hire Date defaults to the date the info is being added and can be changed as well.
4. The fields that have a red asterisk are required, but you can fill in the info for the rest of the fields if desired (IE Birth Date, Employee Type, etc)
    a. *The SSN fields do not have asterisks, but are required, and needs to be entered twice.*
    b. *It is important to add the email address so an enrollment can be sent for the employee to set up their Employee Self Service (ESS) account.*

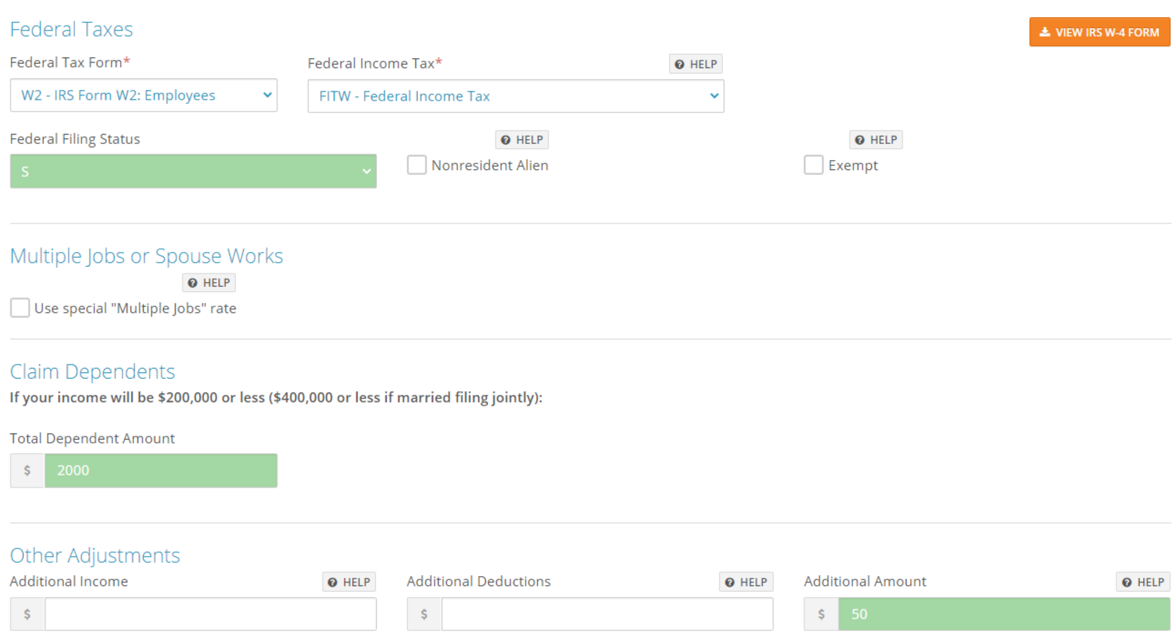


5. A cost center (or department) must be pulled in for all employees. If your company utilizes multiple cost centers, each level will have to be assigned.
6. For the Base Rate, we need to determine if the employee is an hourly or salary employee.
    a. **Hourly** – The hourly rate would be entered in the box labeled *Rate*
    b. **Salary** – The per payroll salary amount would be entered in the box labeled *Salary*
        i. **For salary employees, you will want to pull in the Auto Pay – <u>Pay Base Salary Each Paycheck</u> to pay the salary each payroll automatically.**

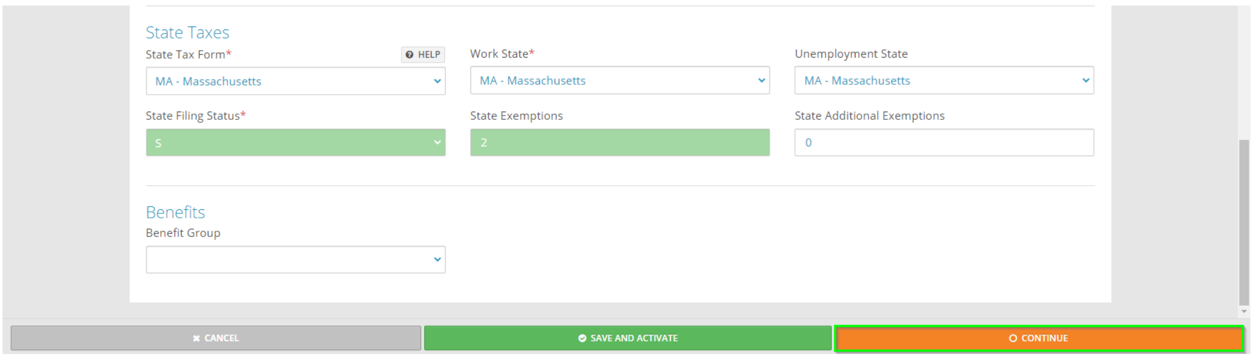
ii. **You can also type in the default numbers of hours each pay period to memo them in the default box.**



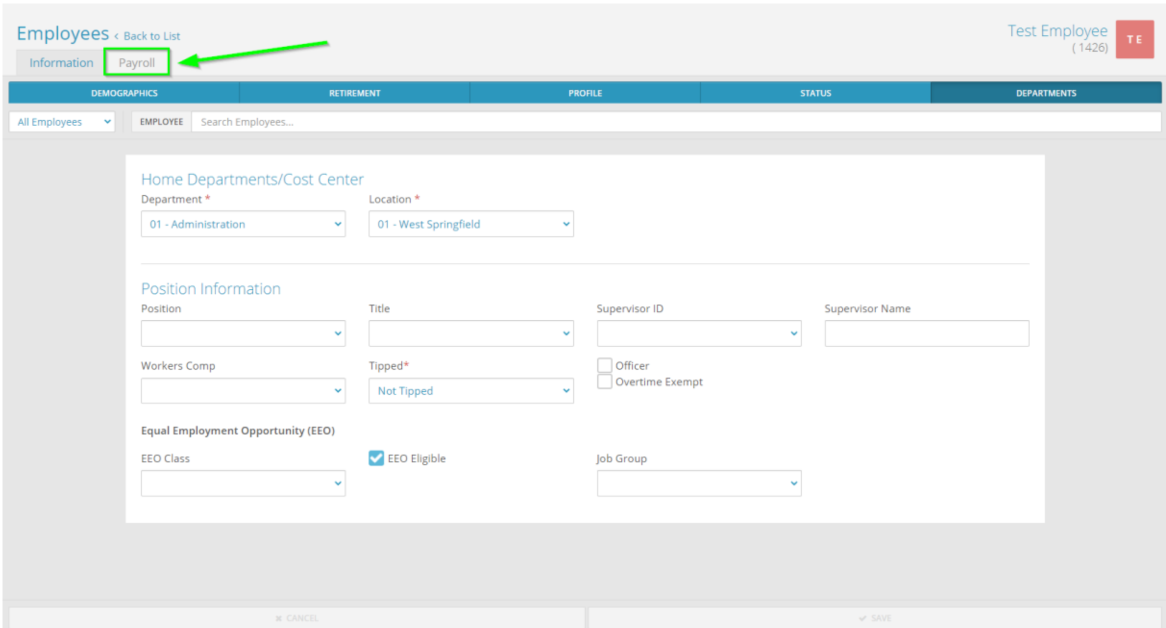
7. For Taxes, you will want to select the Filing Status for Federal and State, including dependents or exemptions (if applicable)
    a. *If you have employees in multiple states, you will need to select the applicable state for this employee.*
    b. *If the employee has an additional amount to withhold for state taxes, that will get added later.*



8. Hit **Continue** to save the new hire in the *New Hire Center* under Hire Employees.



9. You will now be on the **Demographics** tab. Here, you can add in phone numbers, ethnicity, Time Clock ID (if applicable) and other extra demographic info.
10. The **Retirement** tab in the blue bar has information for tracking and reporting purposes if the employee contributes to your retirement plan.
    a. Please note that this does <u>**not have any effect on payroll**</u>
11. The **Profile** tab can be used to upload a profile picture of the employee, if desired
12. The **Status** tab is where you can adjust the Employee Type (Full Time, Part Time).
    a. You can also pull in a *Pay Policy* if you are using the Time Off Calendar.
13. The **Departments** tab is where you can pull in the position, Supervisor Name, and check off their EEO Eligible
14. You will now want to select the **Payroll** tab, next to **Information** above the blue bar.



15. This next blue bar has more payroll centered information such as Accruals, Deductions, Direct Deposit, and more.
16. **Accrual** – this is where you can assign the proper accrual codes to the employee after clicking the *Add New* button. Please remember to assign every applicable code (Sick, Vacation, Personal, etc).
17. **Auto Pay** – if there are any additional payments the employee may receive in addition to their salary, you can include that here under the proper earning code after hitting *Add New*. You can indicate an amount to pay each payroll and assign it to a department. When using this feature employee will get paid regardless if they get paid salary or not.
18. **Deduction** – if the employee should have any deductions assigned to them (Medical, Dental, 401k, etc), they can be assigned here under *Add New*.
    a. If you are adding a 401k deduction and it is a percentage contribution, you will want to pull in the **Calc Code *%EARN - % of Eligible 401k Earnings*** so it will calculate off the defined earning codes which are eligible for the 401k calculation.

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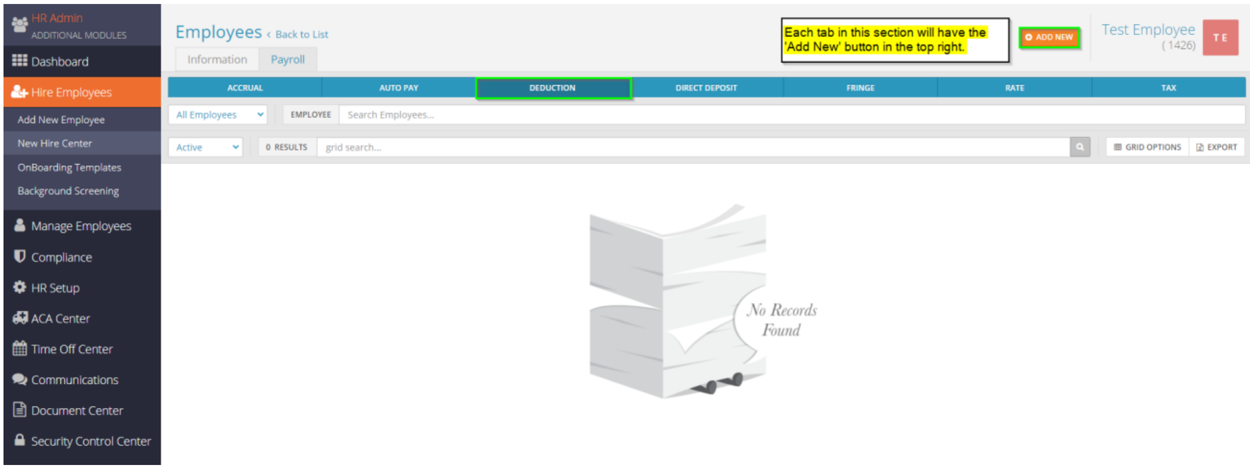
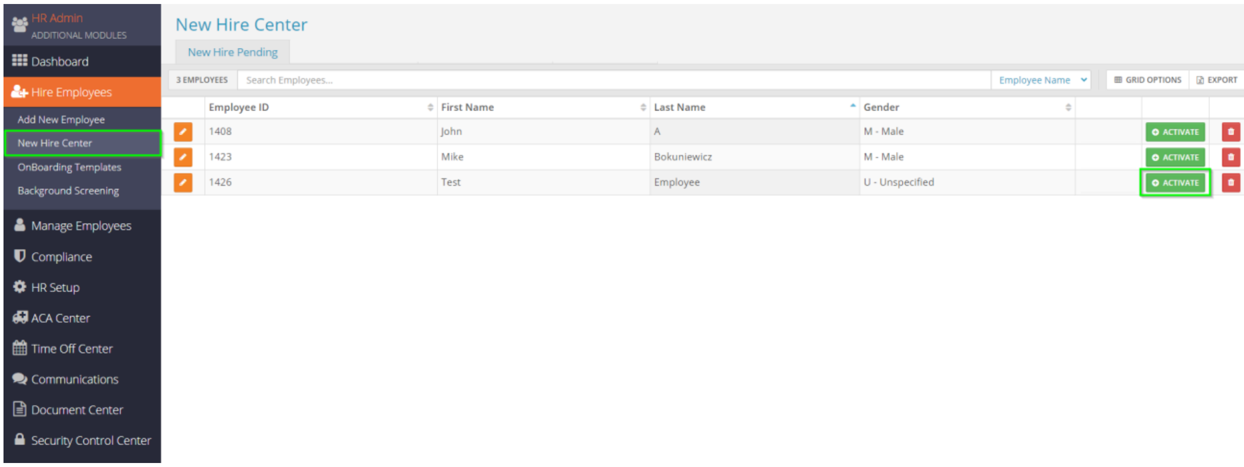
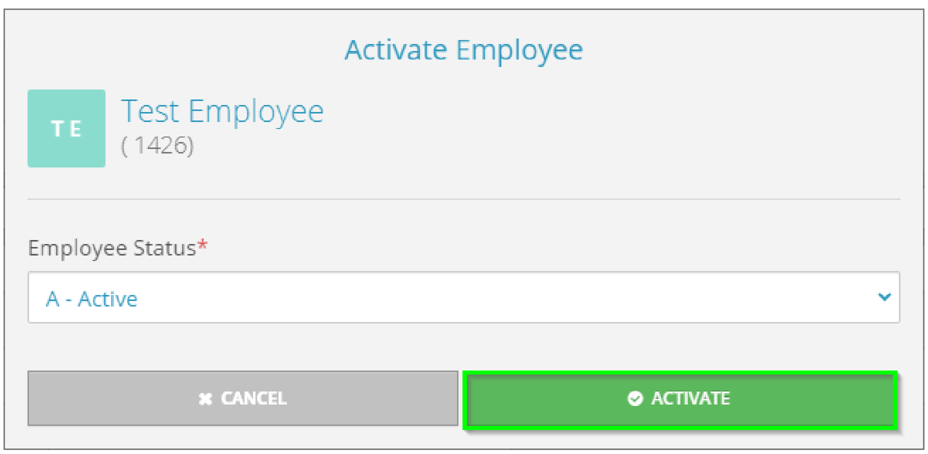


19. **Direct Deposit** – this is where the employee's direct deposit can be added
    a. If it should be the entire net pay in one check, you will want to pull in the **Amount Code** *Percentage of Net Pay* and the amount as **100%**. The priority would be 99.
    b. If you would like to override the prenote date and have the direct deposit go in immediately, you can input a date well beyond 14 days from the next check date to override it (01/01 is typically used)
20. **Fringe** – Similar to Auto Pay, if an employee has an additional amount with each check, you can add this code here. The difference with Fringe is that it gets added whenever the employee gets paid. Auto Pay occurs regardless if the employee is paid their salary or not.
21. **Rate** – If you need to adjust the employee's rate or add an additional rate, you would come here.
    a. To add an additional rate, you will click the *+ New Additional Rate* button in the top right hand corner of the screen, near the employee's name.
    b. Here you can pull in a numbered rate code, type in the rate, and indicate which department it should go in to if necessary.
22. **Tax** – Here you can adjust the Withholding Status for State and Federal. By hitting the edit pencil on each code (FITW for Federal, the state's abbreviation for State), you can pull their statuses in more detail.
    a. To add an additional amount, you can type the desired Additional Flat amount in the box labeled *Flat Amount*.
23. Once all pertinent information is added, select *New Hire Center*. You can then press the Green **Activate** button. This will bring up a box containing another Green **Activate** button. Select this to activate your employee for payroll.


HR Admin
ADDITIONAL MODULES
Dashboard
Hire Employees
Add New Employee
New Hire Center
OnBoarding Templates
Background Screening
Manage Employees
Compliance
HR Setup
ACA Center
Time Off Center
Communications
Document Center
Security Control Center
New Hire Center
New Hire Pending
3 EMPLOYEES
Search Employees...
Employee Name
GRID OPTIONS
EXPORT
Employee ID
First Name
Last Name
Gender
1408
John
A
M - Male
ACTIVATE
1423
Mike
Bokuniewicz
M - Male
ACTIVATE
1426
Test
Employee
U - Unspecified
ACTIVATE


Activate Employee
TE
Test Employee
(1426)
Employee Status*
A - Active
CANCEL
ACTIVATE