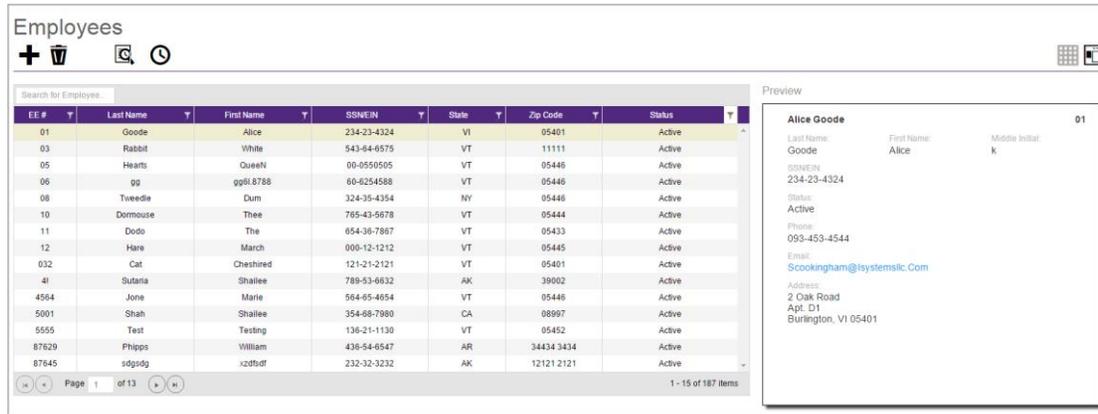


Table View



The screenshot shows the 'Employees' table view. At the top left, there is a search field labeled 'Search for Employee'. Below it is a table with columns: EE #, Last Name, First Name, SSN/EIN, State, Zip Code, and Status. The table contains 187 items, with page 1 of 13 displayed. A preview pane on the right shows details for Alice Goode, including her last name, first name, middle initial, SSN/EIN, status, phone, email, and address.

EE #	Last Name	First Name	SSN/EIN	State	Zip Code	Status
01	Goode	Alice	234-23-4324	VT	05401	Active
03	Rabbit	White	543-64-6575	VT	11111	Active
05	Hearts	Queen	00-0550505	VT	05446	Active
06	gg	gg6l 8788	60-6254588	VT	05446	Active
08	Tweedie	Dum	324-35-4354	NY	05446	Active
10	Dormouse	Thee	765-43-5678	VT	05444	Active
11	Dodo	The	654-36-7867	VT	05433	Active
12	Hare	March	000-12-1212	VT	05445	Active
032	Cat	Cheshire	121-21-2121	VT	05401	Active
41	Sutanta	Shaltee	789-53-6632	AK	39002	Active
4564	Jone	Marie	564-65-4654	VT	05446	Active
5001	Shah	Shaltee	354-88-7980	CA	08997	Active
5555	Test	Testing	136-21-1130	VT	05452	Active
87629	Phipps	William	436-54-6547	AR	34434 3434	Active
87645	sdgsdg	xzdfsdf	232-32-3232	AK	12121 2121	Active

Employees – Table View

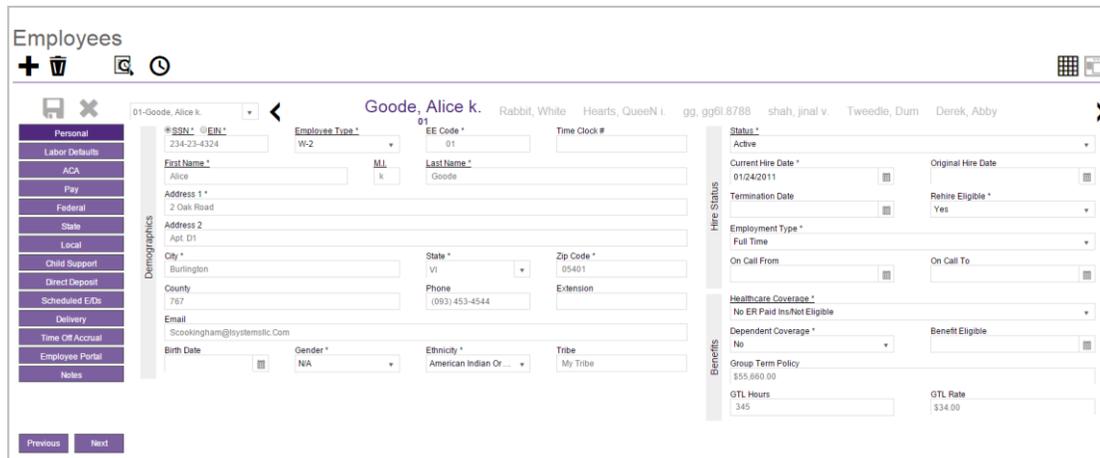
The first screen that displays when you click the Employees menu bar item is the Employees screen – in Table View. The Table View presents this Client / Company’s employees in a table view with columns listing data for each employee. Note the **Preview** pane on the right side displays information for the employee currently selected (highlighted in the table). Use the Preview pane to help determine if this is the employee you are searching for. The Table View is the default view.

To display more information for an employee, highlight the employee row in the table and either click the Form View icon at the top right; or you can double-click on the selected employee row in the table.

Result: The system displays the Employees – Personal screen for the selected employee. See below.

In Table View, you can search for another employee in the **Search for Employee** field at the top left by entering an employee number, name, state, or zip code. Any matches display below.

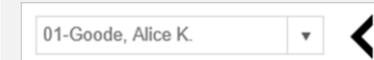
Form View



The screenshot shows the 'Employees - Personal' form view for Alice Goode. It includes a navigation menu on the left with options like Personal, Labor Defaults, ACA, Pay, Federal, State, Local, Child Support, Direct Deposit, Scheduled EFDs, Delivery, Time Off Accrual, Employee Portal, and Notes. The main form area contains fields for Personal, Demographics, Hire Status, and Benefits information.

Employees – Form View

The Employees – Personal screen (Form View) displays detailed information about the employee – demographics, hire status, and benefit information. You can also use the Employees sub-menu on the left side to display other screens for this employee – see details later in this job aid. In Form View, you can select a different employee from the Employee dropdown field in the upper-left of any of the Employees menu screens.



The screenshot shows a dropdown menu with the text '01-Goode, Alice K.' and a left-pointing arrow icon.

You can also enter an employee’s last name or an employee code in the dropdown to search for a different employee.

When navigating in Form View on the Employee screens, we recommend that you press the **Tab** key to move from field to field. Press **Shift + Tab** to move to the previous field.

To Display the Employees Menu

On the menu bar on the left side of the screen, click the **Employees** menu item.



Result: The Employees screen opens – in Table View.

Click the Form View button



at the top right to switch to the Employees – Form View.

Basic Entry



The Employee Basic Entry menu items (above).

The Employee Advanced Entry menu items (shown at right). Note the additional menu items compared to Basic Entry).

Advanced Entry



New Employee Entry Method

The two graphics at the left are examples of the Employees menu items you may see depending on which Employee entry method you use when adding a new employee to Evolution Payroll:

- Basic entry method
- Advanced entry method

Basic Entry Method

Basic entry is useful when you want to quickly add a new employee to Evolution Payroll with the minimum amount of data entry; it is all that is required to save a new employee record and it is the default entry method. It is only used when creating a new employee, when the user selects the Basic method.

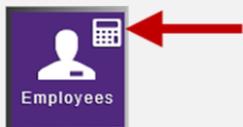
Note that you must have the security rights to the Quick Entry screen enabled in order to use the Basic Entry Method; if not, the system takes you to the Personal screen using the Advanced method.

Advanced Entry Method

Advanced entry is useful when you want to add a new employee requiring more detailed information. Editing employee information is done through the same menu items used during the Advanced entry method. Note: The number of screens that display as menu choices on the Employee sub-menu for either method depend on the specific configuration of your service bureau, the specific client/company you are accessing, and your security access rights. You may see fewer Employee menu items than are shown in these examples.

Employees Menu Item Shortcut Button – Check Calculator

The Check Calculator shortcut button is located on the Employees menu item on the menu bar on the left side of the screen. Note: You must have the correct security access in order to see the shortcut button on the menu.

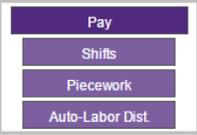


Use the Check Calculator tool to calculate gross-to-net or net-to-gross earnings for an employee's check. You can also block or apply overrides for Federal, State, and Local taxes and recalculate the check on the fly. You can also use the Check Calculator to bring year-to-date totals current in Evolution Payroll.

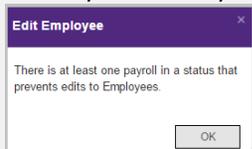
Evolution Payroll Employees Menu Screens

The following table presents a brief overview of each of the Employees menu screens, listed by employee entry method: Basic vs. Advanced.

Screen	Description
Basic Entry Method Menu Screens	
Basics	The Employees – Basics screen displays only when creating a new employee, when the Basic method is selected. The Basics screen contains only the most common fields needed when entering an employee, including multiple pay rates and organizational levels. When using the Basic method, only the information on the Basics screen is required to save the new employee record. Additional Employees menu items are available on the left side of the screen if needed. Sections on the Basics screen include: Demographics, Benefits, Status, Pay, Taxation, and VMR.
Local	View, add, or delete local taxes. The screen lists all of the local taxes and their details for this employee.
ACA	The ACA tab manages most of the ACA (Affordable Care Act) tracking and reporting.
Child Support	View, add, or delete child support case information for an employee.
Direct Deposit	View, add, or delete direct deposit information for an employee. This can be done at any time, not just when loading a new employee.
Scheduled E/Ds	View, add, or delete Scheduled E/Ds for an employee. Scheduled E/Ds are earnings and deductions that are scheduled to be processed automatically with every payroll. E/D Codes are separated into three categories – Earnings, Deductions, and Memos.
Time Off Accrual	The Time Off Accrual screen displays a balance of unused paid time off, as well as used and accrued time off. Note: The Time Off Accrual menu item may not appear in the list, depending upon the company settings that determine whether to make TOA available to employees.
Notes	View or enter any Payroll Notes that the processor should see at payroll entry or any General Notes regarding the employee. Sections on the Notes screen include: Payroll Notes and General Notes.
Advanced Entry Method Menu Screens	
Personal	The Personal screen contains the same information about the employee as the Basics screen, but provides additional fields to record more details. It is also the screen you access when you are editing information about an existing employee. Note the additional Employee menu items on the left side of the screen compared to those on the Basics screen. Sections on the Personal screen include: Demographics, Hire Status, and Benefits.
Labor Defaults	This screen provides details about salary information and organization level default values for this employee. Sections on the Labor Defaults screen include: Salary Information and Organization Level.

ACA	The ACA tab manages most of the ACA (Affordable Care Act) tracking and reporting.
Pay	 <p>The Pay screen contains salary information, position info, rate amounts for hourly employees, pay frequency, planned updates etc. The Pay screen has the following sub-menu tabs: Shifts, Piecework, Auto-Labor Distribution: If shifts and/or piecework items have been created in Evolution Classic, they can be applied to employees in Evolution Payroll. When an employee holds more than one position in a company, the earnings and/or deductions and taxes can be distributed across the employee's various job roles in Evolution Payroll.</p>
Federal	The Federal screen contains settings and statuses of Federal Tax information for the employee. Sections on the Federal screen include: Taxation, EE Tax Status, ER Tax Status, W-2 Form, W-2 Settings, and 1099R.
State	The State screen is where State Tax information can be added, deleted, and viewed for an employee.
Local	[See the description of the Local screen above in the Basic Entry Method section]
Child Support	[See the description of the Child Support screen above in the Basic Entry Method section]
Direct Deposit	[See the description of the Direct Deposit screen above in the Basic Entry Method section]
Scheduled E/Ds	[See the description of the Scheduled E/Ds screen above in the Basic Entry Method section]
Delivery	Lists delivery information for all of the employees' payroll and tax forms, including override address and VMR delivery options. Sections on the Delivery screen include: Primary Address, VMR, and Payroll Override Address.
Time Off Accrual	[See the description of the Time Off Accrual screen above in the Basic Entry Method section]
Employee Portal	The Employee Portal tab on Evolution Payroll contains the same fields as are on the Employee – Employee – Self Service tab in Evolution Classic. This screen sets the access to the Employee Portal for an employee and any group assignments they belong to. The Employee Portal is a Web-based portal offering employees access to their payroll information via the Internet.
Notes	[See the description of the Notes screen above in the Basic Entry Method section]

Note: If the company has any payrolls with a status of C, H, I, Y, or B, (in other words – any status *other than* Pending (W), Processed (P), or Void (V)), an error message displays and the user cannot make any edits to any employees of that company or add any new employees to that company.



Depending on the SB, Company, and your access rights, you may see a SwipeClock icon on the Employee screens. If applicable, this provides single source sign on to the SwipeClock application.



Click on the trash can icon to delete an employee. The employee cannot be part of a pending payroll.