
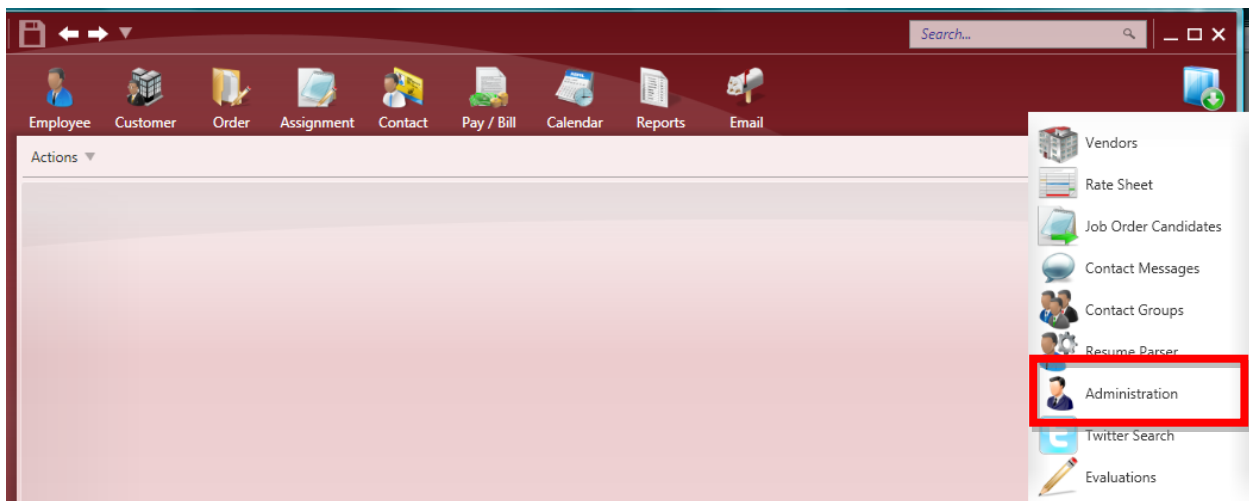


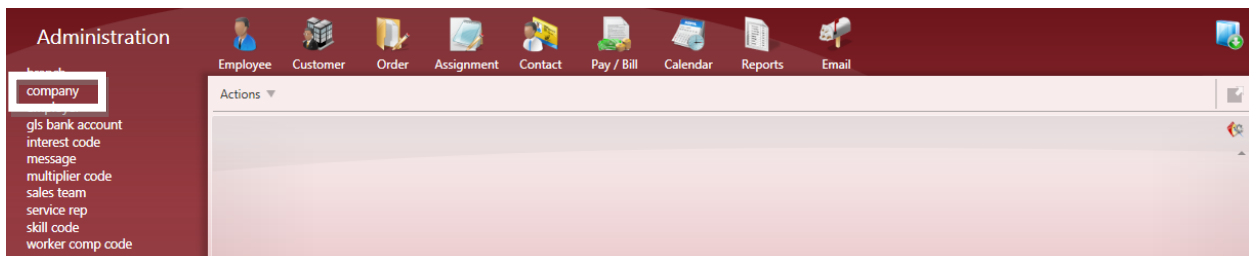
12R7 Enterprise 1099 Consultant Set up and Payroll Processing

1099 Consultant Employee Set up

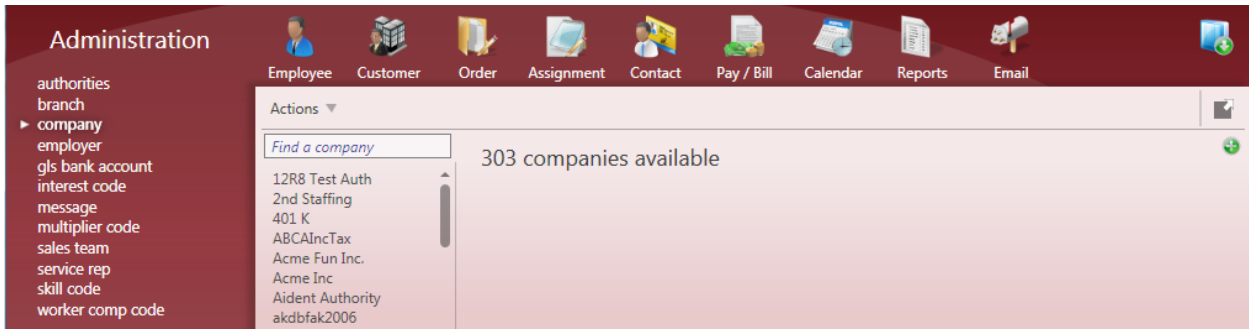
Before a 1099 consultant can be **Assigned** to an **Order** their **Employee** record must be set up so that Enterprise overrides the *Tax* calculations and pulls information from their **Vendor** record instead. The first step is to set up a new **Vendor** record for the consultant. Creating and editing **Vendor** records is part of the **Administration** form. This form is accessed from the  drop down menu in the upper right of the Enterprise screen.



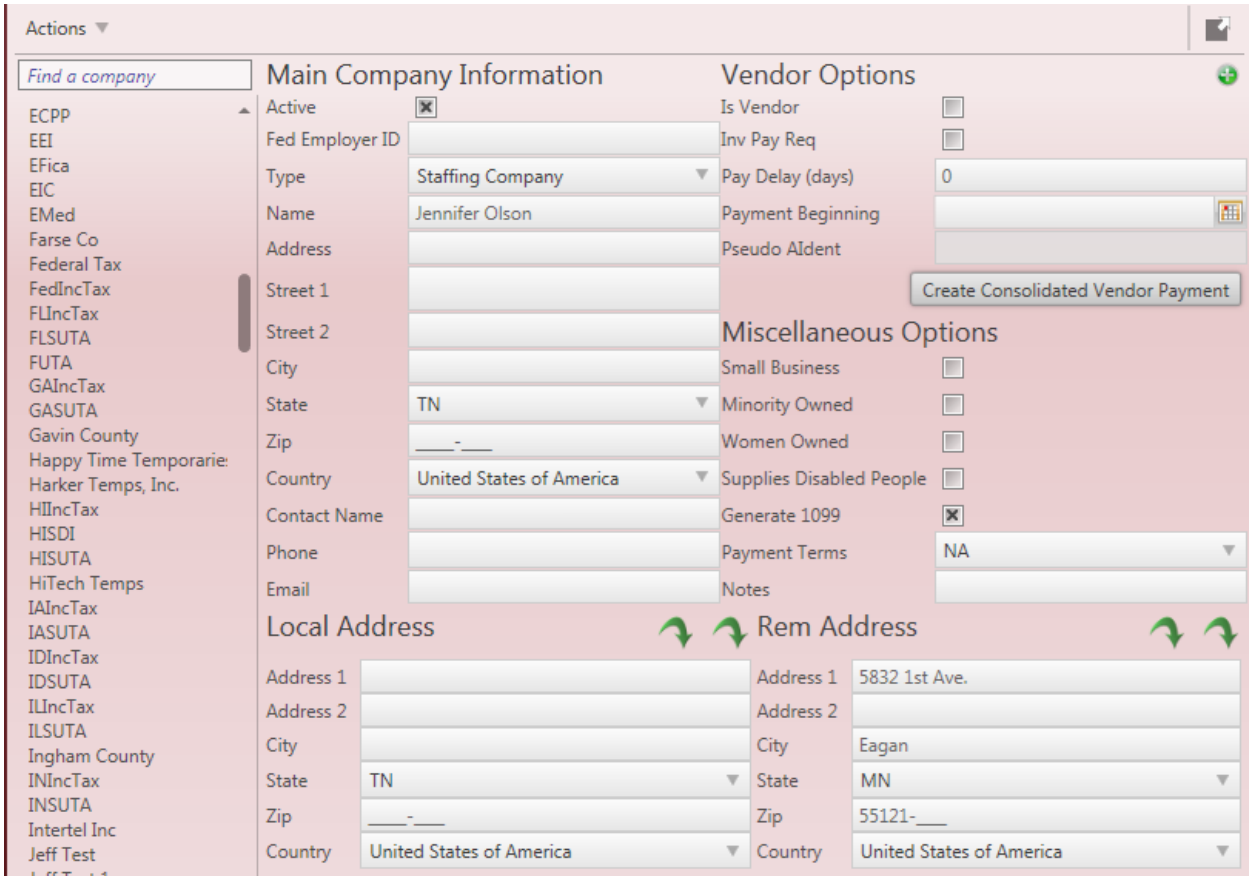
*Note – Only users that have been given access to **Administration** functionality will have this option available in the drop down menu above.




When the **Administration** form is selected the screen above is displayed with the navigation menu on the left. Select the **Company** form to set up or edit **Vendors**.




Current **Vendors** will be listed in a menu on the left side of the form. Enter the name of a **Vendor** into the *Find a Company* look up menu at the top of the list to filter out non-matching **Vendors**.



Click on a record from the list to display the information for that **Vendor** as shown in the view above. At this point the user can make any changes to the **Vendor** that are necessary. To add a new **Vendor** (in this case 1099 consultant), click on the  button in the upper right of the screen.

The screenshot displays the TempWorks software interface for editing a consultant's record. On the left is a list of company codes. The main area is divided into several sections: 'Main Company Information' with fields for Active, Fed Employer ID, Type, Name, Address, Street 1, Street 2, City, State, Zip, Country, Contact Name, Phone, and Email; 'Vendor Options' with Is Vendor, Inv Pay Req, Pay Delay (days), Payment Beginning, and Pseudo AIdent; 'Miscellaneous Options' with Small Business, Minority Owned, Women Owned, Supplies Disabled People, and Generate 1099; and 'Local Address' and 'Rem Address' sections. A red circle highlights a copy button (two green arrows) between the Local and Rem Address sections. Red exclamation marks are present in the Type, Name, and State fields.

Enter the consultant **Employee's** social security number in the *Fed Employer ID* field. Select "Staffing" from the *Type* drop down menu. Then enter the **Employee's** *Name* and address information including

State and *Zip* code. Click on the  button (circled above) to copy the main address into the Rem Address (remittance address) fields.

***Note – The address information included in the Rem Address area will be printed on the consultant **Employee's Paycheck** as well as their 1099 form at the end of the year.**

Click in the boxes for *Is Vendor* and *Generate 1099* and then select "NA – Not Apply" from the *Payment Terms* drop down menu. Selecting *Is Vendor* allows users to edit the **Vendor** record from the **Vendors** form without needing **Administration** access.

***Note – The consultant **Employee** will be paid based on the *Pay Periods* selected in the **Order**, not upon the *Payment Terms* selected in the **Vendor** record.**

Actions ▾

Find a company

- 12R8 Test Auth
- 2nd Staffing
- 401 K
- ABCAIncTax
- Acme Fun Inc.
- Acme Inc
- Aident Authority
- akdbfak2006
- akdbssfak2006
- AKEEUN
- AKIncTax
- AKSUTA
- ALIncTax
- Alisha s company LLC
- ALSUTA
- Another Test
- AP Test
- AP Test
- APTTest
- APTTest
- ARIncTax
- ARSUTA
- AZIncTax
- AZSUTA
- BCCAIncTax
- Blue Cross Blue Shield
- Bracy Staff Vending, Inc.
- Brevard County
- Cable Company
- CAHealth
- CAIncTax

Main Company Information

Active

Fed Employer ID 793-29-5934

Type Staffing Company ▾

Name Vincent Grier

Address

Street 1 409 Albania Ave.

Street 2

City Apple Valley

State MN ▾

Zip 55124-__

Country United States of America ▾

Contact Name

Phone

Email

Vendor Options

Is Vendor

Inv Pay Req

Pay Delay (days) 0

Payment Beginning

Pseudo AIdent

Create Consolidated Vendor Payment

Miscellaneous Options

Small Business

Minority Owned

Women Owned

Supplies Disabled People

Generate 1099

Payment Terms NA ▾

Notes

Local Address

Address 1

Address 2

City

State ▾

Zip -__

Country ▾

Rem Address

Address 1 409 Albania Ave.

Address 2

City Apple Valley

State MN ▾

Zip 55124-__

Country United States of America ▾

When the consultant **Employee's Vendor** record is complete it should look similar to the one displayed above. Once the **Vendor** record is set up, navigate to the consultant's **Employee** record (or create a new **Employee** record for them) and open the **Details** form.

Apple Valley, MN 55124
ID: 16463
SSN:

visifile
details
contact methods
past jobs
work experience
education
work interests
direct hire
candidacy
assignment restrictions
interpersonal
required docs
transportation
test scores
unemployment

tasks
19 Now

+ New Employee Search Actions Reports Favorites

personal information
Last Name Grier
First Name Vincent Initial Rodney
Nickname
SSN 000-00-0000
ID 16463 Contact ID
Act. Date 2/26/2010 11:52:00 AM Deact. Date

address
Street 409 Albania Ave.
Street 2
City Apple Valley
State MN Zip 55124-____
County Dakota School
Country United States of America

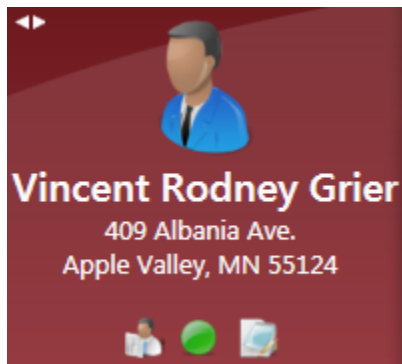
hiring information
Order Type TE Branch Memphis SE
Hire Status Eligible for Hire Staffing Specialist alisha
Profession All Interviewed By alisha
Washed Status familiar
Resume On File
I9 On File
I9 Expire Date
Orientation Date
Anniversary Date
Vendor Vincent Grier
Job Title
How Heard of N/A
How Heard Details
Numeric Rating 0


background information
Convictions Security Clearance

equal opportunity
Birth Day Nationality Disabled
Gender Veteran

On the **Employee Details** form select the consultant's **Vendor** record from the *Vendor* drop down menu. This is the step that transforms this record from a taxable W2 **Employee** to a non-taxable 1099 consultant. The *SSN* field can be populated with the consultant's social security number, but it's not necessary to have the number documented on the **Employee** record if it's been added to the **Vendor** record.

***Note – The *Vendor* must be selected and saved to the consultant's **Employee** record prior to creating an **Assignment** for them on the **Order**. If the **Vendor** record is not attached the **Assignment** will be created as if this was a taxable W2 **Employee**.**



Once the *Vendor* field has been populated with the correct **Vendor** record and the **Employee Details** form has been saved the  icon will be displayed in the Avatar area for this consultant's **Employee** record.

From the *Actions* drop down menu on the **Employee Actions Bar** select *View Vendor Record* to navigate to the **Vendor** record associated with this consultant's **Employee** record. The rest of the **Employee** record can be populated with the information that will be needed to search on and place the consultant.

The screenshot displays the TempWorks software interface for an assignment. The top navigation bar includes icons for Employee, Customer, Order, Assignment, Contact, Pay / Bill, Calendar, Reports, and Email. The main content area is divided into four sections:

- assignment information:** Employee: Grier, Vincent Rodne; AIdent: 16463; Customer: Minnesota Minerals I; Department: Information Services; Order ID: 6145; Assignment ID: 7076; Temp Phone: () - - ; Status: Open.
- financial details:** Multiplier: 1.5325 A; Overtime Factor: 1.5; Hourly Bill: \$35.25; Hourly Pay Rate: \$23.00; Salary Bill: \$0.00; Salary: \$0.00; Unit Bill: \$0.00; Unit Pay Rate: \$0.00; Overtime Bill: \$52.87; Overtime Pay: \$0.00; Doubletime Bill: \$69.00; Doubletime Pay: \$0.00. The **Company** field is highlighted with a red box, showing 'Vincent Grier' and 'EINC -80316'. The **W2** checkbox is unchecked.
- job information:** Job Title: Information Claim Maintenance; Business Code: ; Start Date: 3/1/2010; Expected End Date: 3/2/2011; Actual Date Ended: ; Shift: ; Start Time: ; End Time: ; Shift Notes: ; Weekday selection: Sun, Mon, Tue, Wed, Thu, Fri, Sat.
- other information:** Sales Team: New Team; Assigned: 2/26/2010 12:18:00 PM; Service Rep: Alisha Arnol; Entered By: alisha; Branch: Memphis SE; Do Not Auto Close: ; Perf Note:

When the consultant **Employee** is placed the **Details** screen for their **Assignment** should look similar to the one above. Most of the information on this form will be completed exactly as it would be for a **W2 Employee**. The difference is that in the Financial Details section the *Company* field will display the **Vendor** record associated with the consultant's **Employee** record and the **W2** check box will not be checked.

*This information cannot be changed at the **Assignment** record level. That is why the consultant's **Employee** record must always have the **Vendor** selected in the *Vendor* field before the **Assignment** is created.*

Note – If the *Company* and *W2* fields on the consultant's **Assignment record do not look similar to those shown above, change the *Status* to "Deleted/Mistakenly Entered" and duplicate the date used in the *Start Date* field into the *Actual Date Ended* field. Then update the consultant's **Employee** record with the *Vendor* information (as explained previously in this document) and re-assign them to the **Order**.*

Processing 1099 Consultant Payroll

Once the **Assignment** has been set up correctly, **Payroll** and **Invoicing** can be processed for these *Transactions*. The **Time Entry** and **Proofing** process for a 1099 consultant does not differ from that of other typical W2 **Employees**. The hours, unit pay, salary, one-time adjustments, etc. will be added to the **Time Entry** spreadsheet. Once **Time Entry** is done, complete the **Proofing** process and fix any errors that need to be addressed, and then close the session. Now continue with the steps listed below:

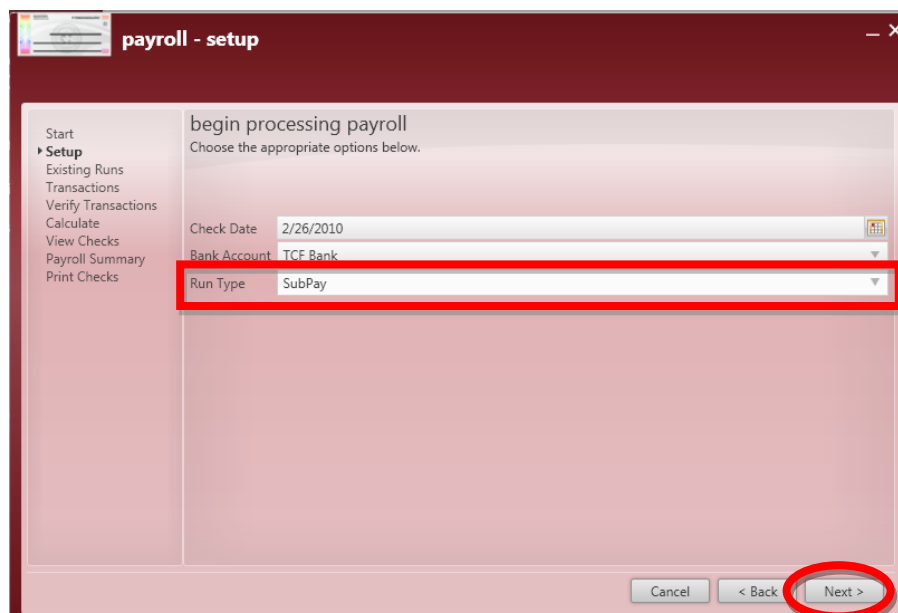
1) Start a Payroll Run.

Select *Start or continue a payroll run* from the *Payroll* option in the **Payroll and Invoicing** form within the **Pay/Bill** section. (This will open the payroll wizard) Select *Create a New Payroll Run*.



2) Setup options.

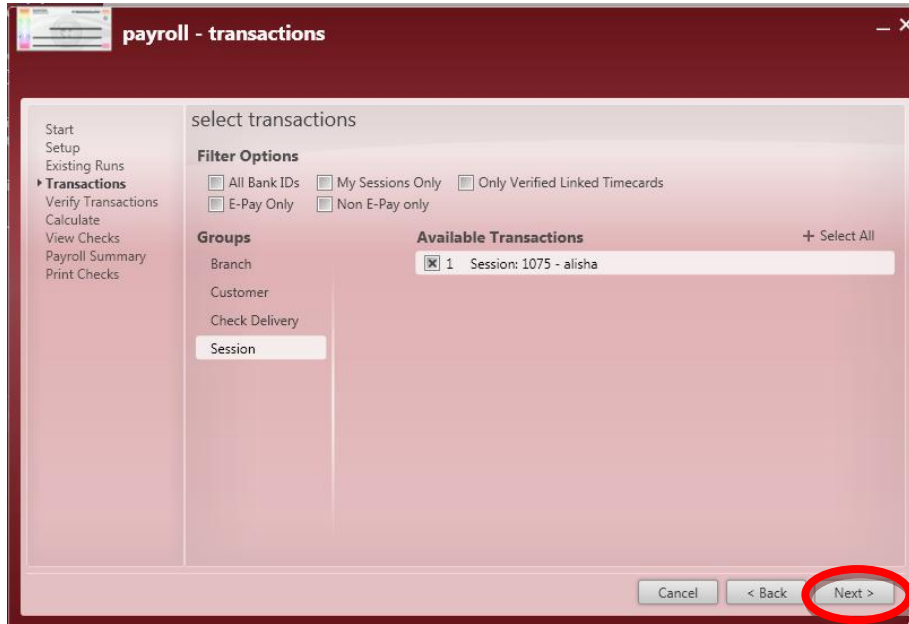
Verify or change the *Check Date*, *Bank Account* and *Run Type*, then click *Next*.



The *Check Date* is the date that will print on all **Paychecks** in this run. The *Bank Account* is the account that the funds will be withdrawn from for the 1099 consultant **Payroll**. The *Run Type* for 1099 consultant checks should be "SubPay".

3) Select Transactions.

View available *Transactions* by selecting *Branch*, *Customer*, *Check Delivery* or *Session* under the Groups section and then click in the box in front of the *Transactions* to be included in the run. Once *Transactions* are selected, click *Next*.

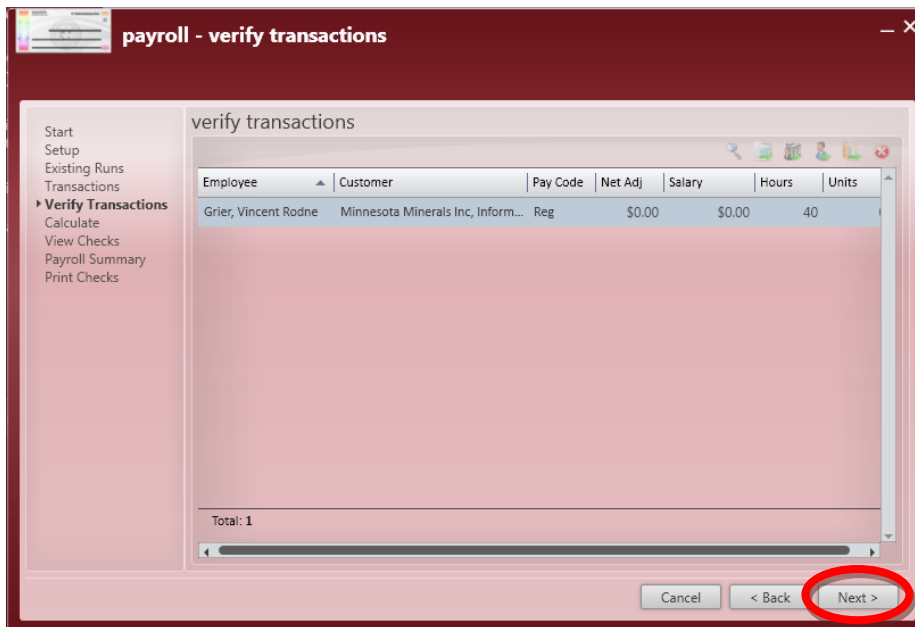



*Note – By choosing a *Run Type* in the previous form of “SubPay”, Enterprise will only display *Transactions* that are set up correctly for this type of **Payroll** run.

Troubleshooting Tip: If the **Time Entry** and **Proofing** are complete and the *Transaction* is still not displaying, the **Assignment** or **Vendor** record may not be set up properly. Refer back to earlier in this document to verify that the records are correct. If not, make the appropriate changes and continue processing. If all record set up seems to be correct and the *Transaction* is still not pulling in, then contact the TempWorks customer support group at 651-452-0366 or by sending an email to support@tempworks.com.

4) View Transactions.

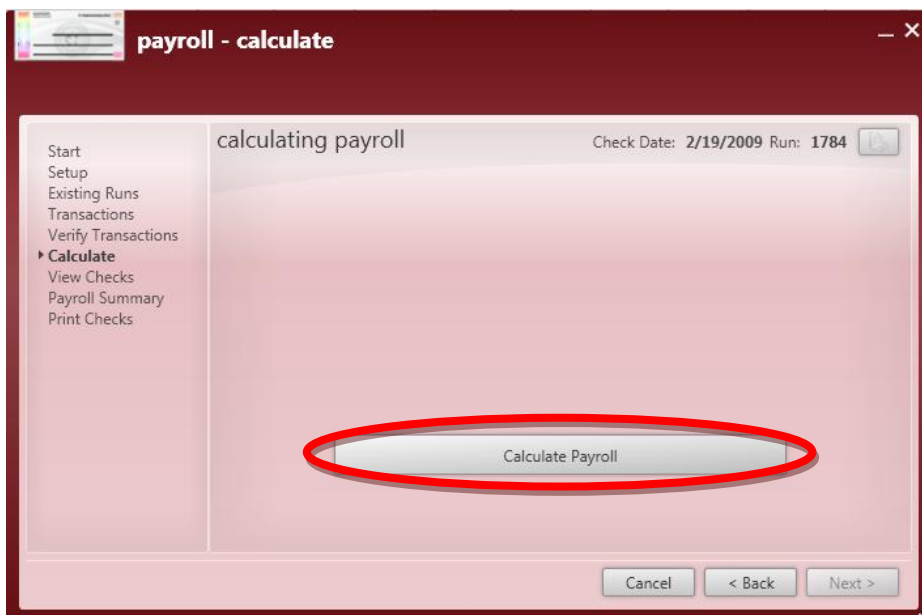
Verify that the correct *Transactions* have been selected and then click *Next*. Choose *Back* to return to the previous screen and select different *Transactions*.



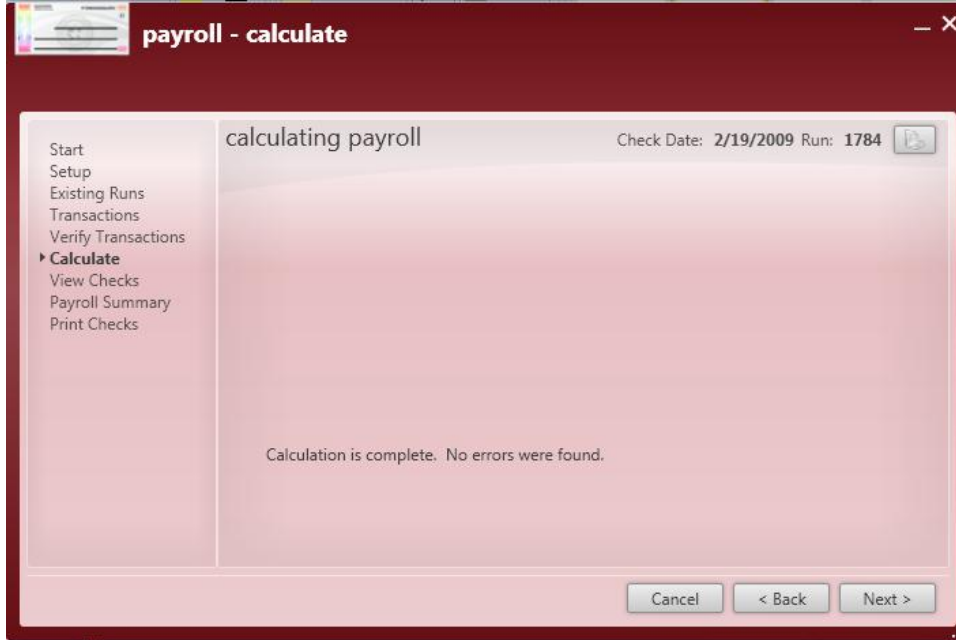
To remove a *Transaction* from the run, right-click and select *Remove Transaction* or highlight the line and click on the  button in the upper right.

5) Calculate Payroll.


Click on the *Calculate Payroll* button and Enterprise will finalize the amount for each **Paycheck**.



When calculation is completed the payroll wizard will display the following message:



*Note – If any check errors occur, refer to the appropriate Enterprise Back Office Training Manual for your version of Enterprise.

Click on the  button in the upper right to view the *Staged Checks* report.

Staged Checks

High Tech Staffing

Entity Level (HierId 2)

Staged checks in PayrollRun 2330

Employee	Gross Pay	Employee Taxes	Adjustments	Net Pay
Grier, Vincent				
Transactions	Gross	THours	Pay Code	
Minnesota Minerals Inc	\$0.00	40.00	Reg	
Check Totals:				

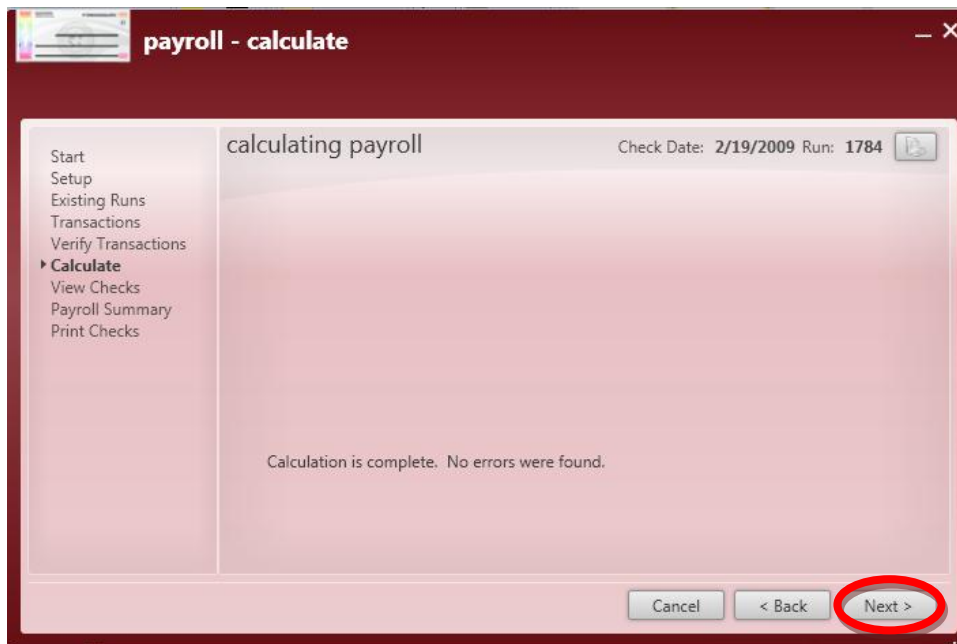
Taxes

Category	Amount Tax	Instances	Description
Tax Totals			

Adjustments

Category	Amount	Instances	Type	Description
Adjustment Totals				

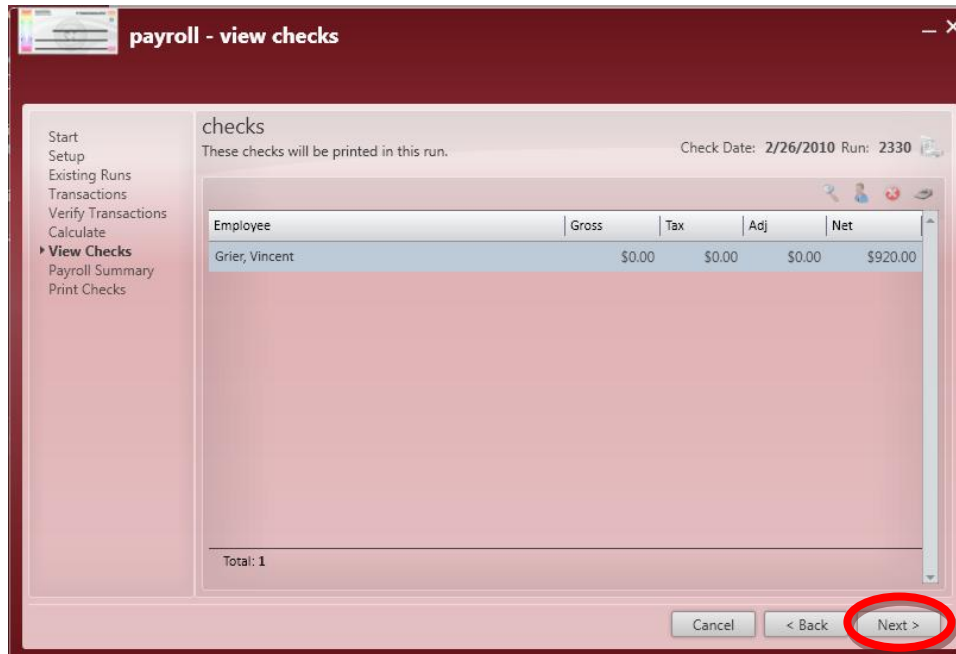
(none)





Click *Next* to continue and view the **Paychecks**.

6) View Checks.

Verify that checks look correct and then click *Next*.



To view the check details right-click on the line for the **Paycheck** and select *View Check* or click on the  button in the upper right. To remove a check from the run highlight the line and click the  button or right-click and select *Remove Check*.

Payroll / Invoicing

Current Weekend Bill
2/14/2010

- 253 Unused Timesheets
- 8 Timesheets Not Paid

payroll and invoicing
time entry
incomplete transactions
check register
check summary
▶ staged check summary
invoice register

Actions

Grier, Vincent Rodney
Vincent Grier
409 Albania Ave.
Apple Valley, MN 55124

Tax Marital Status S
Weekend Bill 2/14/2010
Check Date 2/26/2010

Tax Exemptions
TCF Bank
AP Bank Account
33332221111

Earnings	rate	units	this period
Reg: Regular Hours	\$23.00	40.00	\$920.00
Gross Pay			\$920.00

Deductions	this period
Total Deductions	\$0.00
Net Pay	\$920.00

Other Benefits	this period
Employer Paid Taxes	Amount
Total Employer Taxes	\$0.00

The *Staged Check Summary* above is displayed when *View Check* is selected.

7) Verify Payroll Run Details (Payroll Summary).

Enterprise will automatically pull the next available *Check Number* and place it in the *Starting Check Number* field. Select the *Check Sort* and add a *Stub Memo* that will print on all **Paychecks** in the run. Then click *Next*.

payroll - payroll summary

Start
Setup
Existing Runs
Transactions
Verify Transactions
Calculate
View Checks
▶ **Payroll Summary**
Print Checks

payroll summary
Please verify the information below. Check Date: 2/19/2009 Run: 1784

numbering

Starting Check Number: 10082
Starting EPay Check Number: 639 Use EPay check numbers only
Check Sort: Highest Branch, Employee Name
Stub Memo:



summary

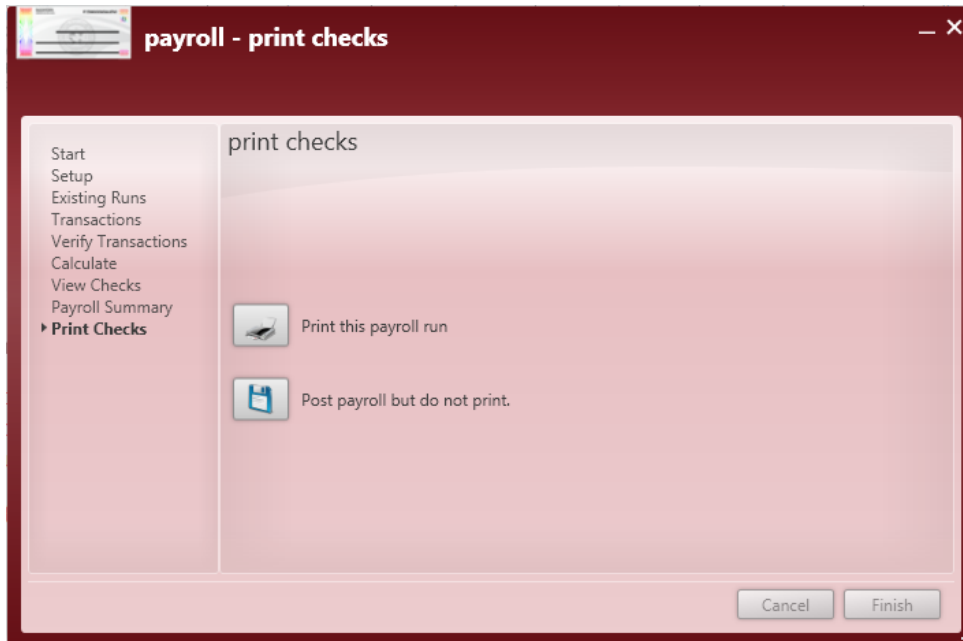
Bank Account	AP Bank Account	Payroll Run Type	CheckRun
Check Date	2/19/2009	Weekend Date	2/22/2009
Checks	2	Payroll Run ID	1784

Cancel < Back **Next >**

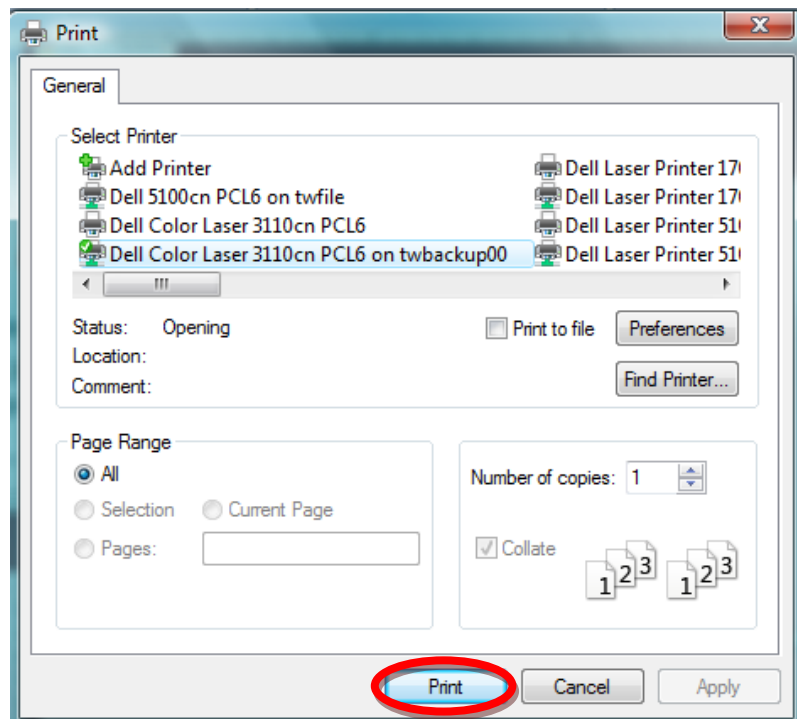
*Note – If pre-printed check stock is being used you will need to verify that the *Starting Check Number* matches the first number on your check stock. Select *Use EPay check numbers only* if this is a run that includes only ACH (direct deposit) *Transactions* and if you use pre-printed check stock.

8) Print Checks.


Select the  button to bring up the printer select prompt and print checks. Click the  button if the run only contains ACH *Transactions* where the **Employee** is going to be viewing their check stub from the WebCenter Employee Portal.

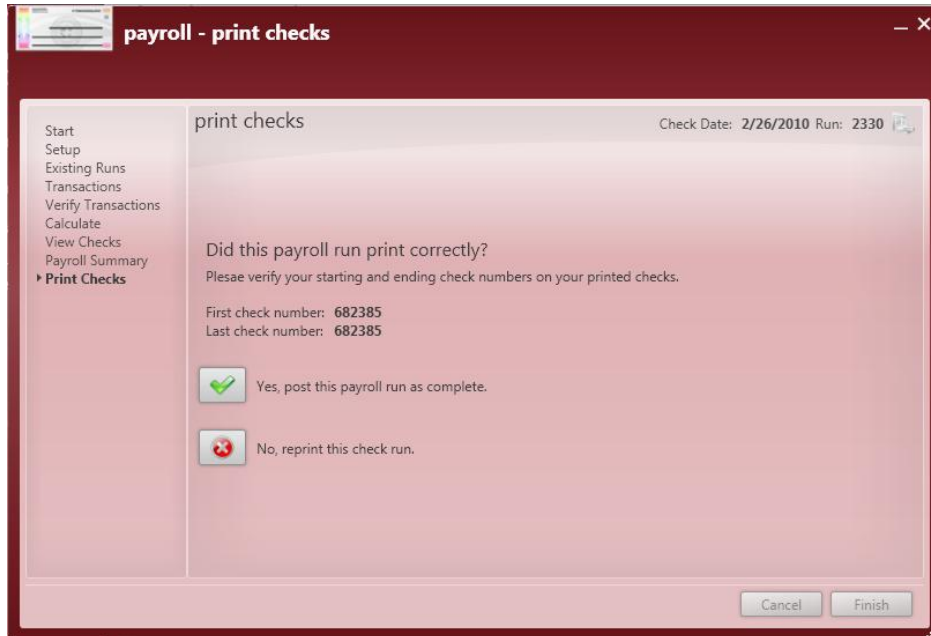


Select the printer from the list and then click *Print*.



9) Post Checks.

Once checks are done printing verify that there wasn't a paper jam and then match the first and last check numbers to the ones listed on this screen. If everything is correct, click on the  button to post the **Paychecks**. Posting the run will close the payroll wizard. **Payroll** is now complete.



*Note – If the **Paychecks** do not print properly, please refer to the appropriate Enterprise Back Office Training Manual for your version of Enterprise to address this issue.

The screen shot below displays a sample of what a **Paycheck** should look like when the "SubPay" **Payroll Run Type** is selected. Notice that there are no *Taxes* listed.

Name: Grier, Vincent				Social Security Number: XXX-XX-		Check Date: 02/26/2010				
Earnings	Rate	Hours	This Period	Tax	Tax	YTD Tax	AWH	Adj	Amnt	YTD
Reg	23.00	40.00	\$0.00							
Accrual				Amount		Balance				
Gross			\$0.00							
Net			\$920.00							
Year To Date Gross			\$0.00	Total	\$0.00	\$0.00	Total	\$0.00	\$0.00	

Allowances

TempWorks Software, Inc.
3140 Neil Armstrong Blvd
Suite 205
Eagan, MN 55121

Anchor Bank
www.anchorlink.com
AnchorLine 952-606-8083
75-1523-960

Check No
682385

Nine Hundred Twenty DOLLARS and Zero CENTS

Date	Amount
02/26/2010	920.00

Vincent Grier
409 Albania Ave.

Apple Valley, MN 55124

AUTHORIZED SIGNATURE(S)

⑈000682385⑈ ⑆78992345⑆333322221111⑈

TempWorks Software Inc.
3140 Neil Armstrong Blvd
Suite 205
Eagan, MN 55121

Vincent Grier
409 Albania Ave.
Apple Valley, MN 55124

***Note - There is no difference between Invoice processing for W2 Employee's and 1099 consultants. For more information on Invoice processing refer to the appropriate Enterprise Back Office Training Manual for your version of Enterprise.**

Still Have Questions?

For more information about 1099 consultants contact our customer support group at 651-452-0366 or by sending an email to support@tempworks.com.

To submit suggestions on how to improve this document or to request documentation on other Enterprise functionality please contact Alisha Arnold (Corporate Trainer) at 651-287-8370 or by sending an email to Alisha@tempworks.com.