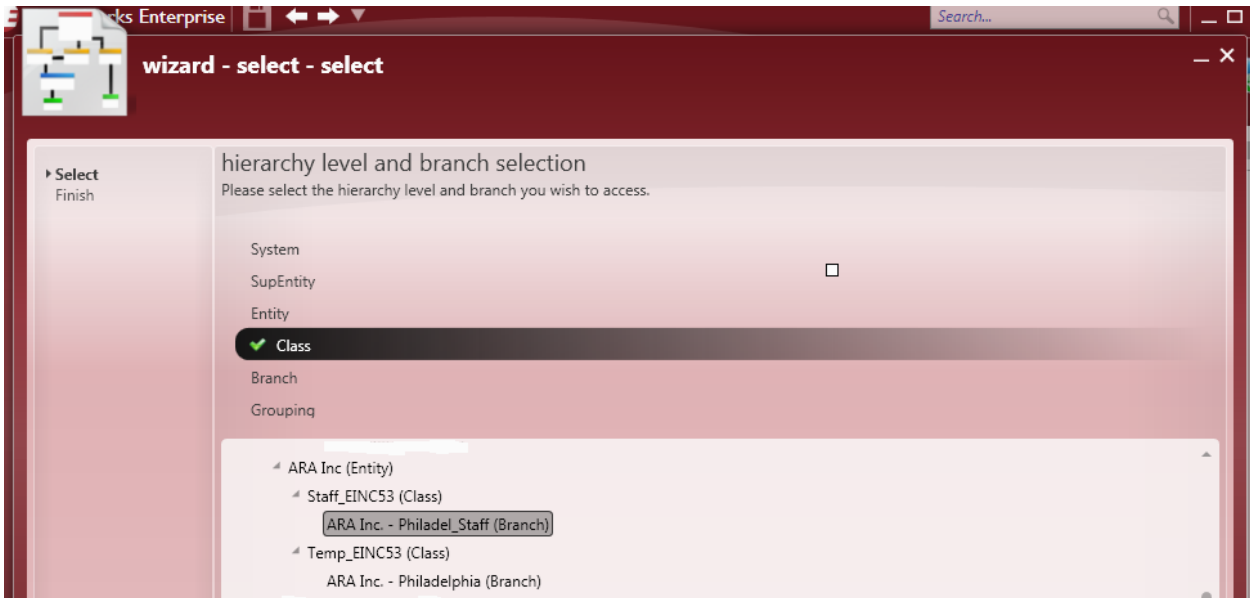
14R2 Enterprise Internal Staff Payroll

TempWorks' Enterprise consolidates internal staff and external temporary **Employee Payroll** processing into one system. This is made possible by the internal company hierarchy. In most instances, only a few users will have access to the "Staff" entity within Enterprise. If a user does not have access to the "Staff" entity, they will not see it listed in the *Switch Branch* functionality from the *E* menu.

<u>Selecting the Branch</u>

Before adding new staff **Employee** records or **Assignments** and before doing **Time Entry** and **Payroll**, the user must first select the "Staff" *Branch* from the hierarchy selector. To access the "Staff" *Branch* open the *E* menu in the upper left and select *Switch Branch*.



In the view above you can see the form that opens when *Switch Branch* is selected. You will choose the appropriate hierarchy level ("Class" level in the example above) for your company and then select the *Branch* listed under the "Staff" entity ("ARA Inc – Philadel_Staff" above). Then click *Next* at the bottom of the form.

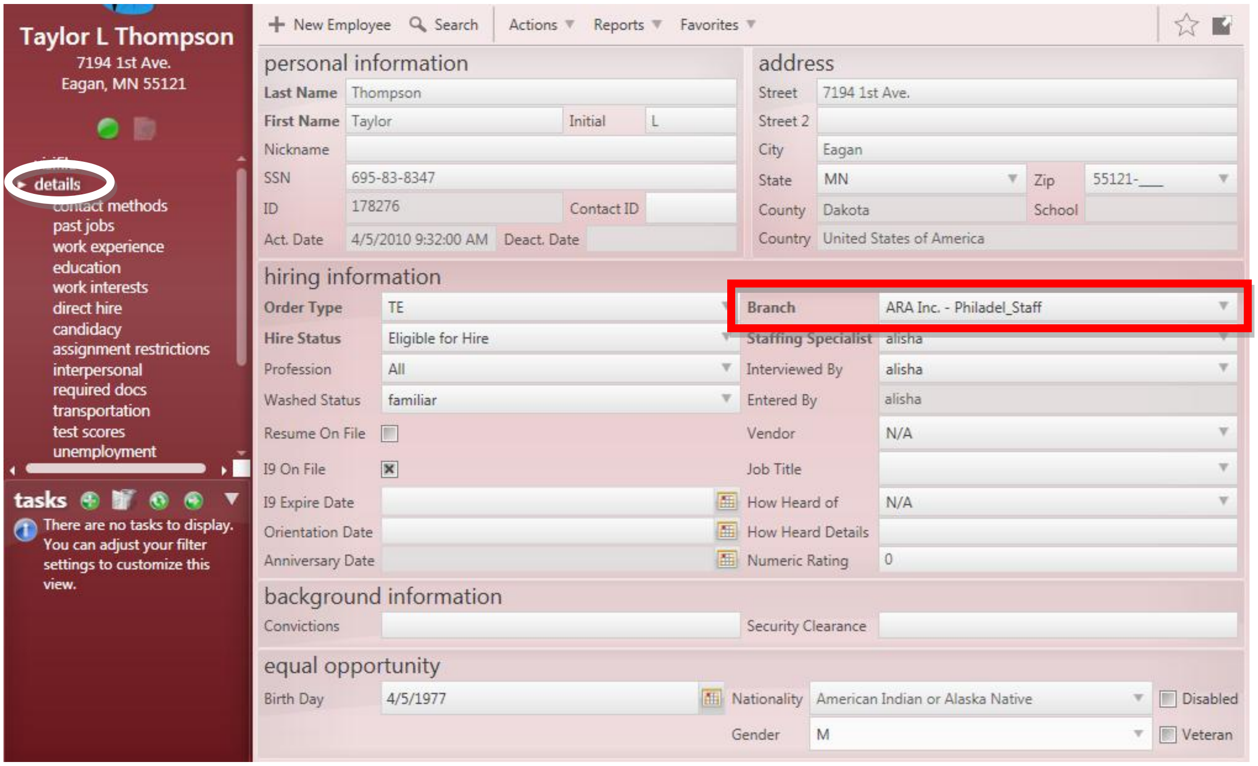
On the Summary screen of the hierarchy wizard it will display the *Hierarchy Level* and *Branch* that have been selected.

Click the *Finish* button at the bottom of the form to update Enterprise to the "Staff" *Branch*.

*Note – The *Hierarchy Level* that you select for your internal staff **Payroll** may differ from what is shown here.

Adding Staff Employees

Once the "Staff" *Branch* has been selected, open the **Employee** record area and add the staff **Employee** in the same way that a temp **Employee** is added. The *Branch* that the **Employee** is associated with will be "Staff".

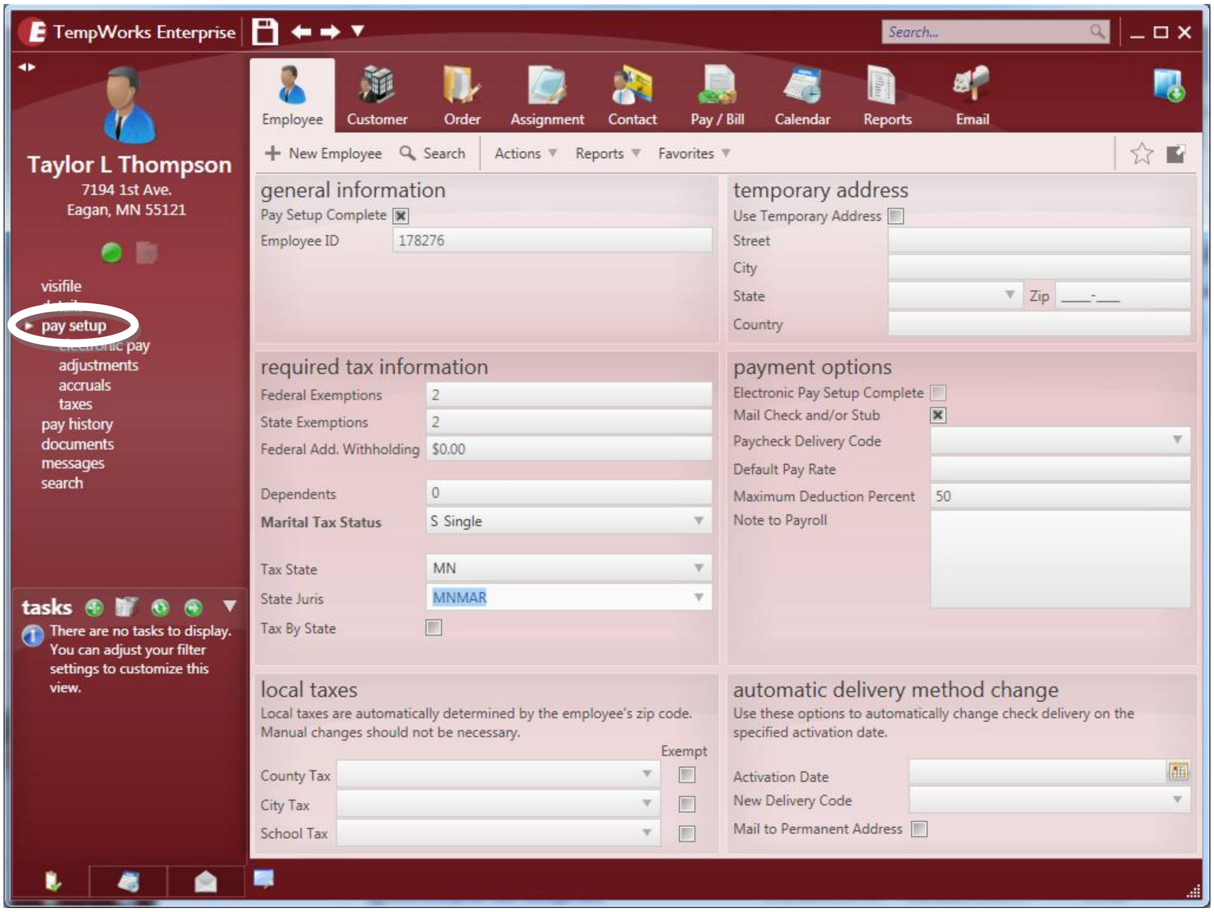


The **Employee Details** form above shows the *Branch* is "ARA Inc – Philadel_Staff". Make sure that the *Last Name*, *First Name*, *SSN*, *Street*, *City*, *State*, *Zip*, and *Branch* are correct before processing **Payroll** for this **Employee**.

*Note – It is extremely important that the *Zip* code for the **Employee** is accurate because it is used for calculating **Payroll** *Taxes* for the **Employee's Paycheck**. The *Zip* code indicates if any local *Taxes* are applicable based on where the **Employee** lives.

As this **Employee** is internal to your company, most of the **Employee** forms will not need to be completed. If you wish to track information like ***Past Jobs***, ***Contact Methods***, ***Education***, etc. for your internal staff, the functionality is certainly available. However, since you are not looking to place these people in other positions it's not necessary to have this information in the database.

*Note – If you need to track equal employment opportunity information for the **Employee** it will need to be filled out on the **Details** form as shown above.



On the **Employee Pay Setup** form make sure that the *Federal Exemptions*, *State Exemptions* (if applicable), *Federal Add. Withholding*, *Marital Tax Status*, *Tax State*, and *State Juris* (if applicable) are correct. If the **Employee** works remotely from their home in another state, click in the *Tax By State* check box. Using the *Tax By State* functionality will override the *Work Site* information from the **Order** and only *Taxes* the **Employee** based on their *Tax State*.

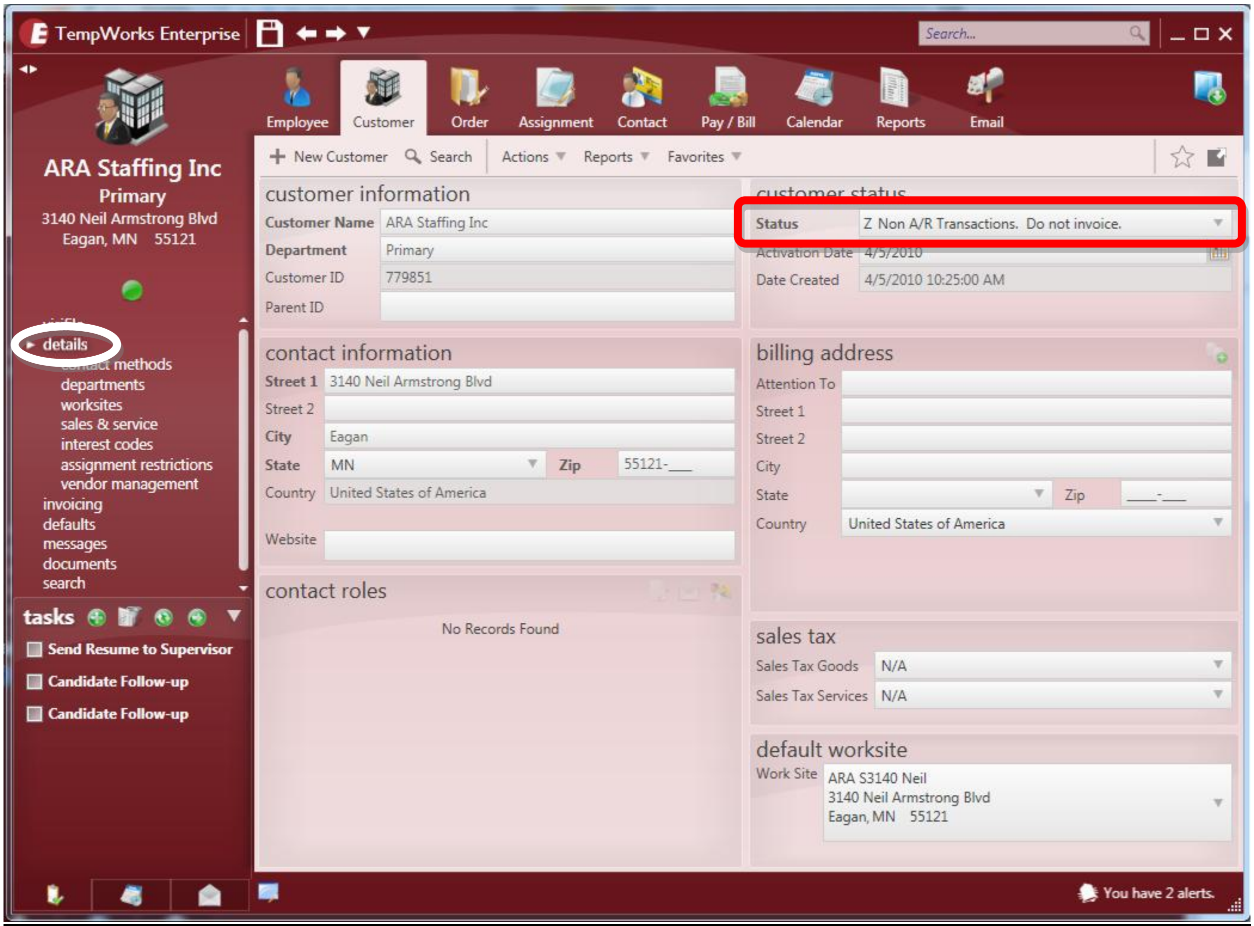
*Note – if the **Employee** wishes to receive their **Paycheck** or check stub at a different address than their main address, fill out the *Street*, *City*, *State*, and *Zip* fields in the Temporary Address section. Then check off the box for *Use Temporary Address*. The *Tax* calculations will not change; they will still be based on the *Zip* code selected in the **Employee's** Address section on the **Details** form.

Once the **Pay Setup** form is completed with the correct information, you can add a direct deposit account to the ***Electronic Pay*** form, enter recurring (weekly) deductions from the ***Adjustments*** form, add ***Accruals***, and additional ***Taxes***.

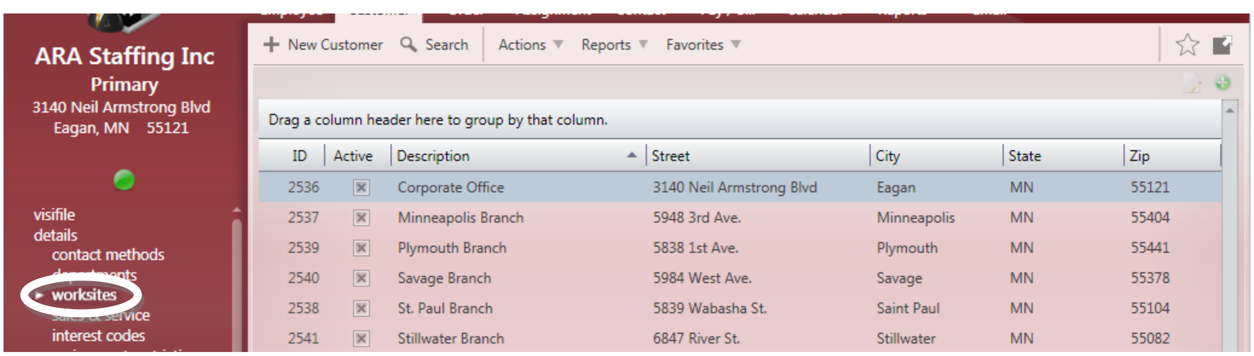
*Note – It is extremely important that the **Employee's** *Tax* deductions (including *County Tax*, *City Tax*, and *School* [District] *Tax* if applicable) are set up correctly before the first **Paycheck** is issued, otherwise the check may need to be reversed or voided.

<u>Setting up the Company Customer Record</u>

Once the "Staff" *Branch* has been selected, open the **Customer** record area and add the **Customer** in the same way that a temp **Customer** is added. The *Branch* that the **Customer** is associated with will be "Staff" (displayed on the ***Sales & Service*** form).



The **Customer Details** form should have the *Customer Name*, *Street 1*, *Street 2* (if applicable), *City*, *State*, and *Zip* code for the main *Branch*. As no **Invoices** will be created, the Billing Address section can remain blank. The **Customer** *Status* should be "Z Non A/R Transactions. Do not invoice." (as outlined in red above).

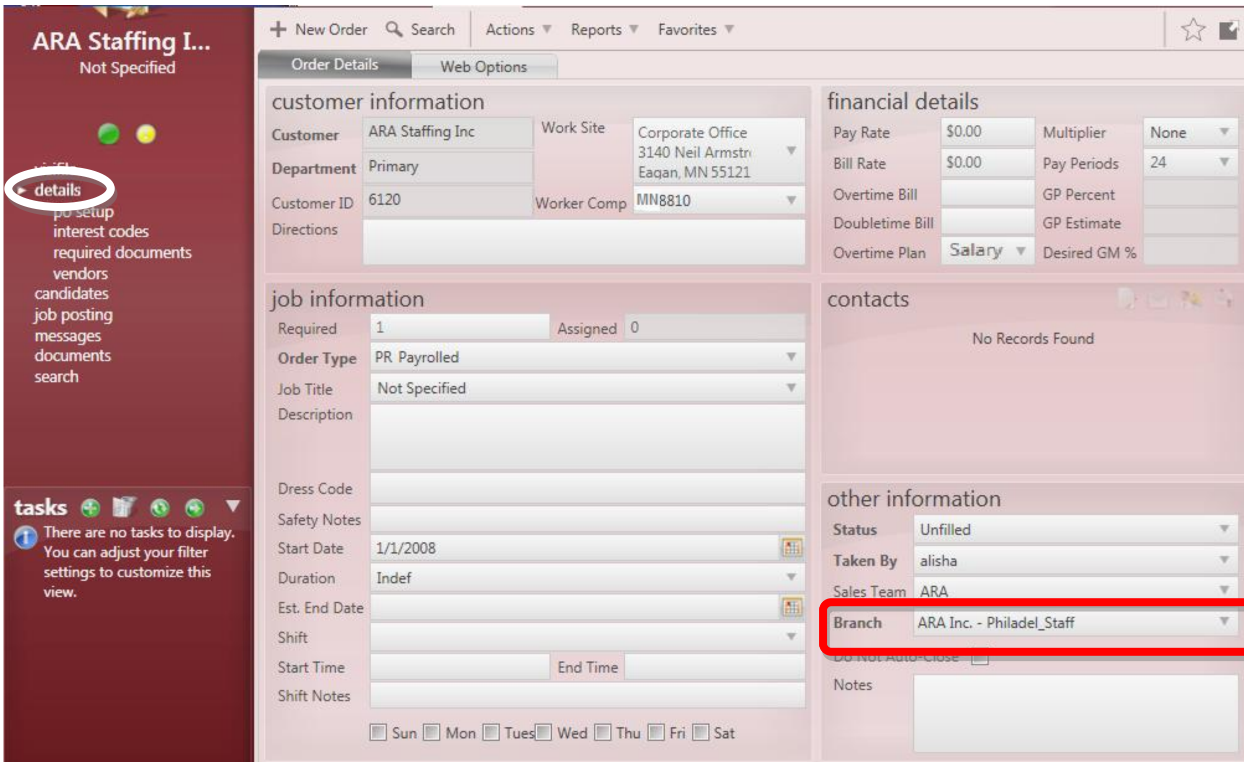


Set up ***Worksites*** for the *Branch* locations. Each **Order** that is created will have one of the *Branch* ***Worksites*** selected.

*Note – It is extremely important that the ***Worksites*** are set up with the correct *Street1*, *Street2* (if applicable), *City*, and *Zip* in the Worksite Details section and that the correct *State* is selected in the Tax Information section. The ***Worksite*** is used to determine any *Tax* reciprocity rules that exist between the locations where the **Employee** lives and where they work (based on the *Work Site* chosen in the **Order**).

<u>Creating Staff Orders</u>

Once the "Staff" *Branch* has been selected and the company **Customer** record has been set up, open the **Customer** record area and add the **Order** in the same way that a temp **Order** is added (*Actions* drop down menu/*New Order*). The *Branch* that the **Order** is associated with will be "Staff".



The **Order** needs to have the correct *Work Site* and *Worker Comp* code. The *Order Type* chosen should be "PR Payrolled" as the internal staff **Employees** will be on long-term **Assignments**. The *Overtime Plan* ("Salary" or "PlanSTD") and *Pay Periods* need to be selected on the **Order**.

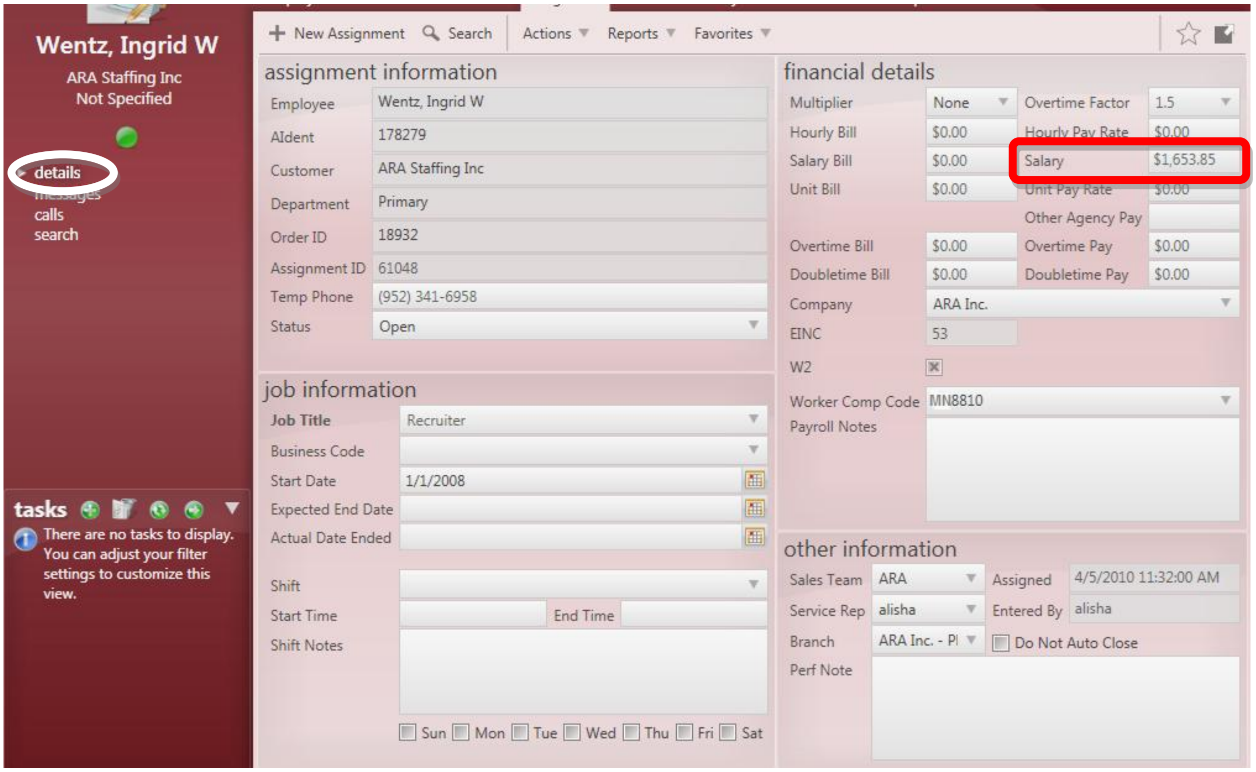
*Note – The correct *Work Site* and *Worker Comp* code need to be chosen on the **Order** before any **Assignments** are created, as neither of these fields can be changed on the individual **Assignment** record.

The *Job Title*, *Start Date*, and *Pay Rate* can be selected on the individual **Assignment** record. If a different *Work Site*, *Worker Comp* code, *Overtime Plan*, or *Pay Periods* is needed, a separate **Order** will need to be created.

*Note – If the internal staff are paid weekly select "52" (default) from the *Pay Periods* drop down menu, for bi-weekly staff **Payroll** select "26", semi-monthly is "24" and monthly is "12".

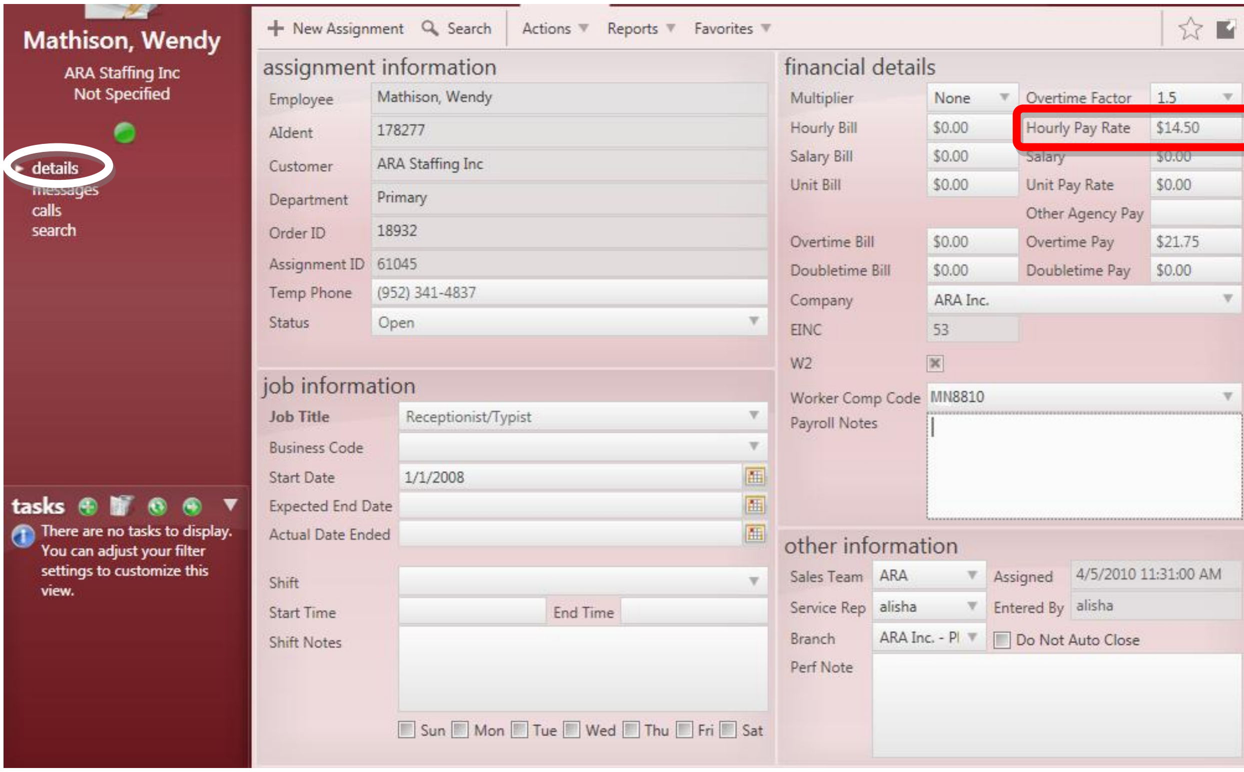
Assigning Staff Employees

Once the "Staff" *Branch* has been selected and the **Order** record has been set up, open the **Order** record area and add the **Assignment** in the same way that a temp **Assignment** is added (*Actions* drop down menu/*Create New Assignment* or *Assign* [insert open employee record here] *to this Order*). The "Staff" *Branch* will be associated with this **Assignment**.



Enter the **Employee's** office number in the *Temp Phone* field, the *Status* should be "Open", select the *Job Title*, *Start Date*, enter a *Start Time* and *End Time*, and add the *Hourly Pay Rate* or *Salary*. The *Hourly Bill* and *Salary Bill* fields will remain blank.

*Note – For exempt (salaried) **Employees** the amount entered into the *Salary* [Pay] field should be the amount they receive per pay period. In the example above the **Employee's** annual salary is $43,000 paid bi-weekly (26 pay periods) so the amount entered is "$1,653.85". If the **Employee** was paid semi-monthly (24 pay periods) the amount would be "$1791.67" for the same annual salary.



The screen shot above displays an **Assignment** created for a non-exempt (hourly) staff **Employee**. The *Hourly Pay Rate* is entered (outlined in red) and during **Time Entry** the number of hours that the **Employee** worked will be input.

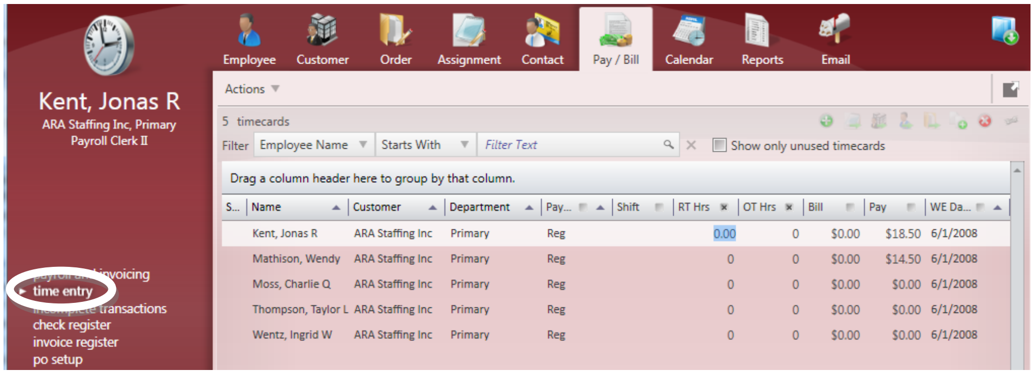
If a staff **Employee** leaves or is let go, enter the last day of their employment with your company in the *Actual Date Ended* field and change the *Status* to "Complete".

*Note – The *Status*, *Start Date*, and *Actual Date Ended* fields will determine if a *Transaction* is created for the **Assignment** record so that **Time Entry** can be completed.

If a rate change is going to be applied to this **Employee** for a future *Start Date*, use the *Extend Assignment* functionality available from the *Form Actions* section of the *Actions* drop down menu. For more information on this function download the help document entitled "14R2 Enterprise Assignment Rate Changes" from the following link:
http://www.tempworks.com/ClientServices/documents/14R2EnterpriseAssignmentRateChanges.pdf

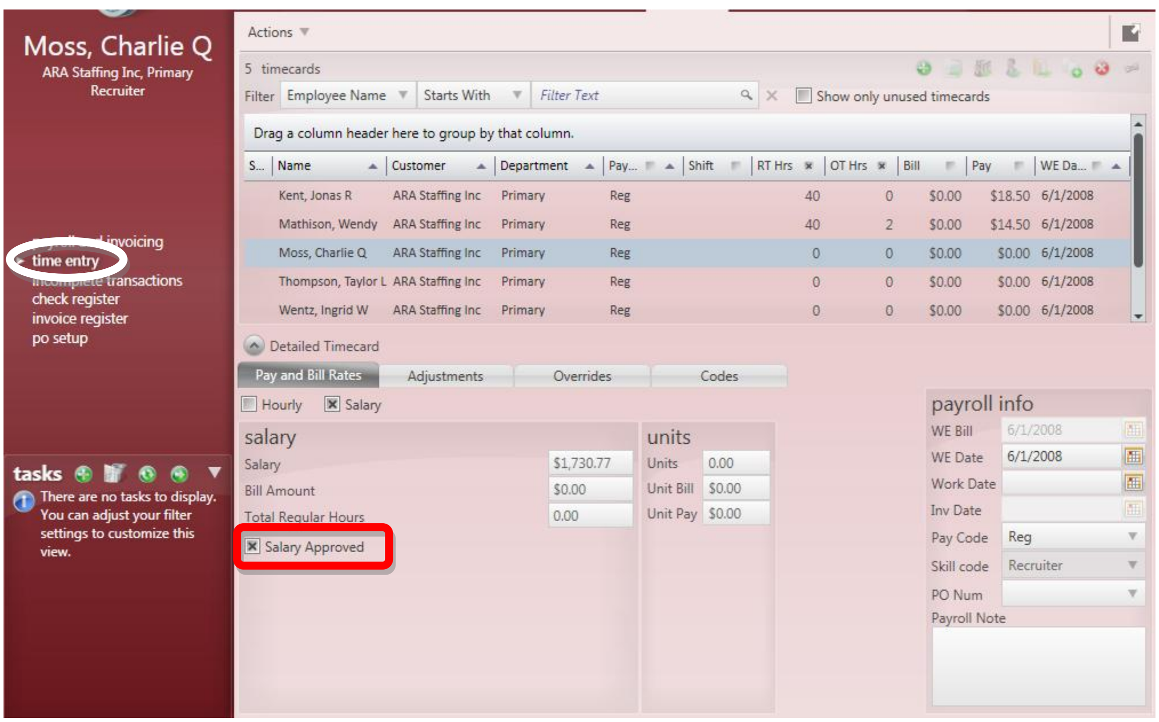
Paying Staff Employees

Once the "Staff" *Branch* has been selected and the **Employees' Assignments** are set up, click on the tab for **Pay/Bill** to complete **Time Entry**, **Proofing**, and **Payroll** for the internal staff.



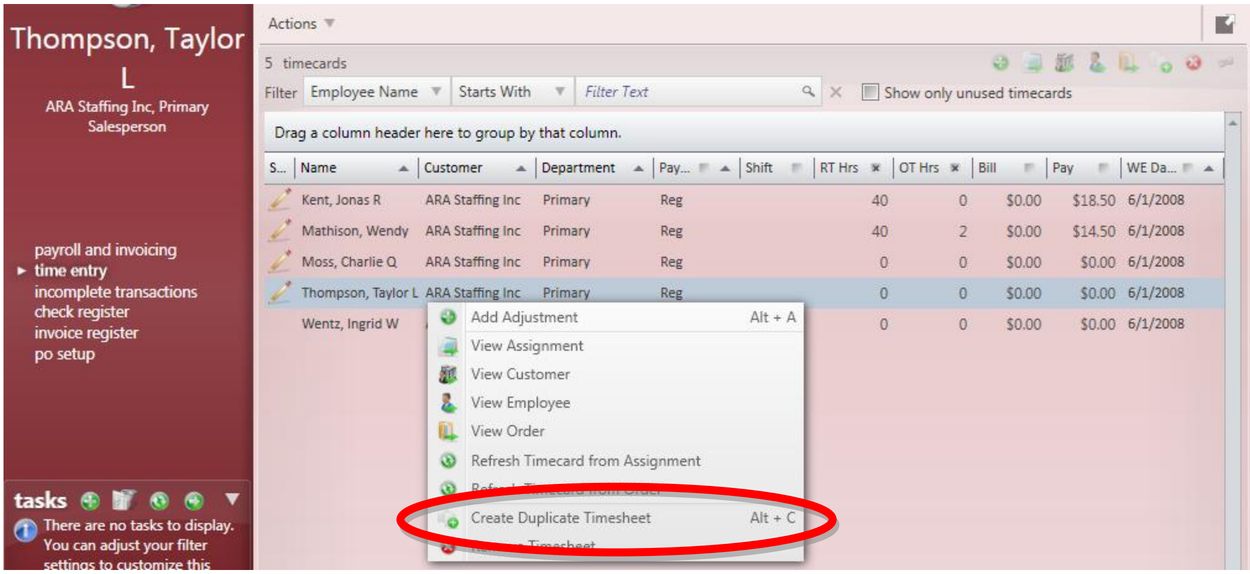
Follow the steps listed in the 12R8 Enterprise Back Office Training Manual to create the *Transactions* that appear in the **Time Entry** form. For all non-exempt (hourly) **Employees** enter the *RT Hrs* (regular time) and *OT Hrs* in the appropriate fields.

*Note – The non-exempt **Employees** will have an actual amount in the *Pay* field. The exempt **Employees** will have a "$0" amount listed there.

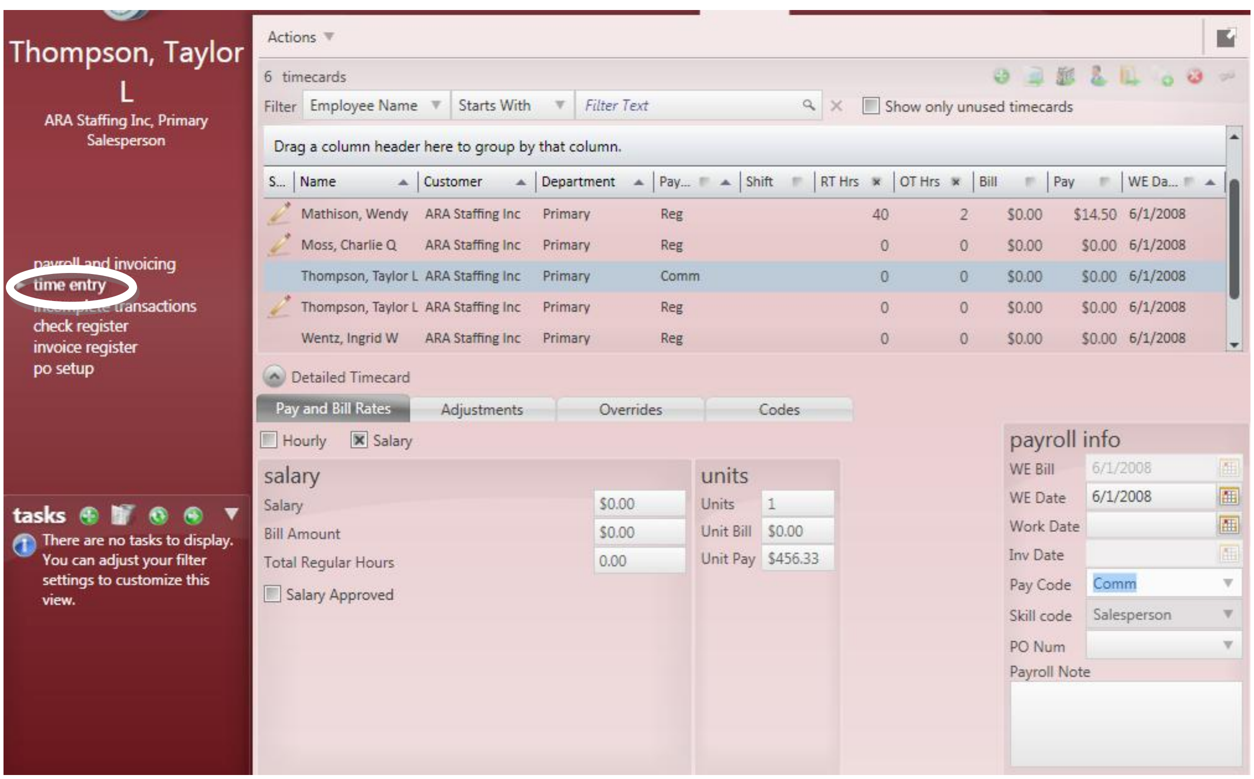


For the exempt (salaried) **Employees**, select their *Transaction* line and expand on the Detailed Timecard section (shown above). The *Salary* box will be checked because the **Assignment** is set up with a *Salary* instead of an *Hourly Pay Rate*. The *Salary* from the **Assignment** will be listed. Click in the *Salary Approved* check box (outlined in red) to indicate that the *Salary* for this *Transaction* is approved. The *Total*

Regular Hours can be entered for **Reporting** purposes, but a salaried **Employee** will not be paid based on the number of hours they worked.



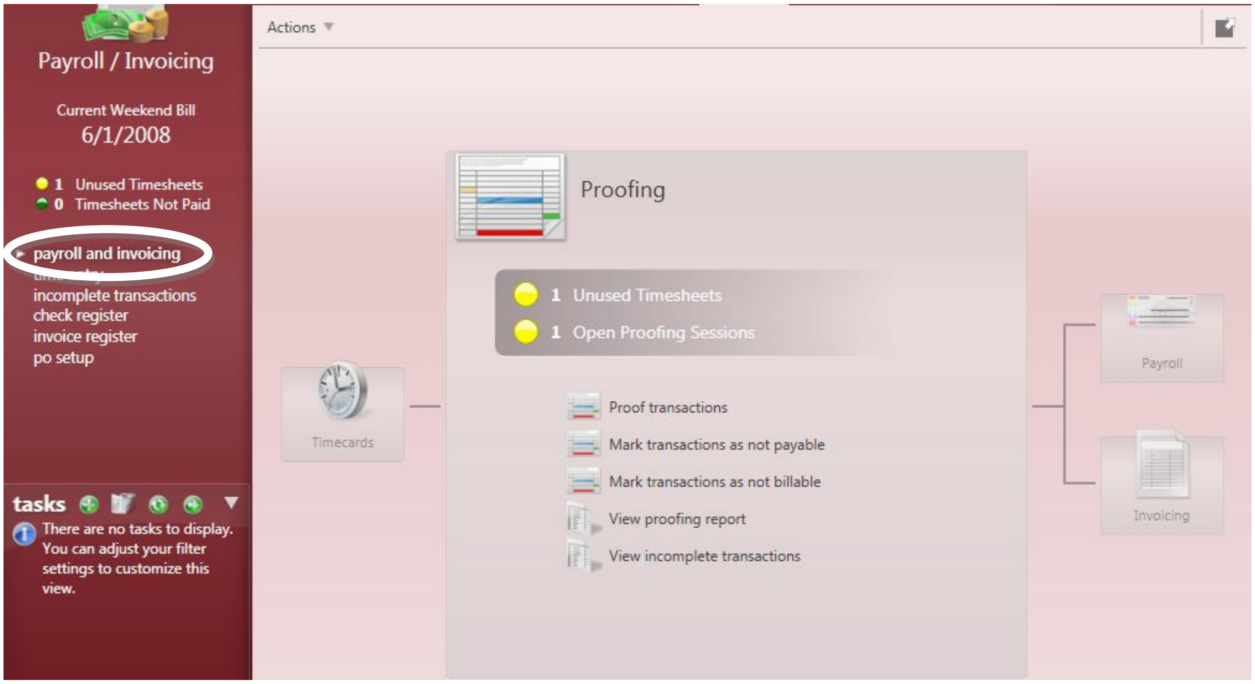
If an **Employee** should be paid commission, right-click on their *Transaction* line from the **Time Entry** spreadsheet then select *Create Duplicate Timesheet* from the drop down menu. This will insert another *Transaction* line for the **Employee** with the same information from their **Assignment**.



In the Detailed Timecard for the newly created *Transaction* change the *Salary* to "$0", enter "1" in the *Units*, enter the commission amount in the *Unit Pay* field and change the *Pay Code* to "Comm" ("Commission"). A bonus is handled the same way except that the *Pay Code* will be "Bonus".

Proofing Internal Staff Time Entry

Once all of the **Time Entry** (includes entering hours, approving salary, adding one-time *Adjustments*, bonuses, commissions, PTO, vacation, etc.) has been completed click on the **Payroll and Invoicing** option from the menu on the left and then select the ***Proofing*** option.



Choose *Proof Transactions* from the ***Proofing*** box. This will open to display the **Time Entry** sessions of any users that have access to the "Staff" *Branch*.

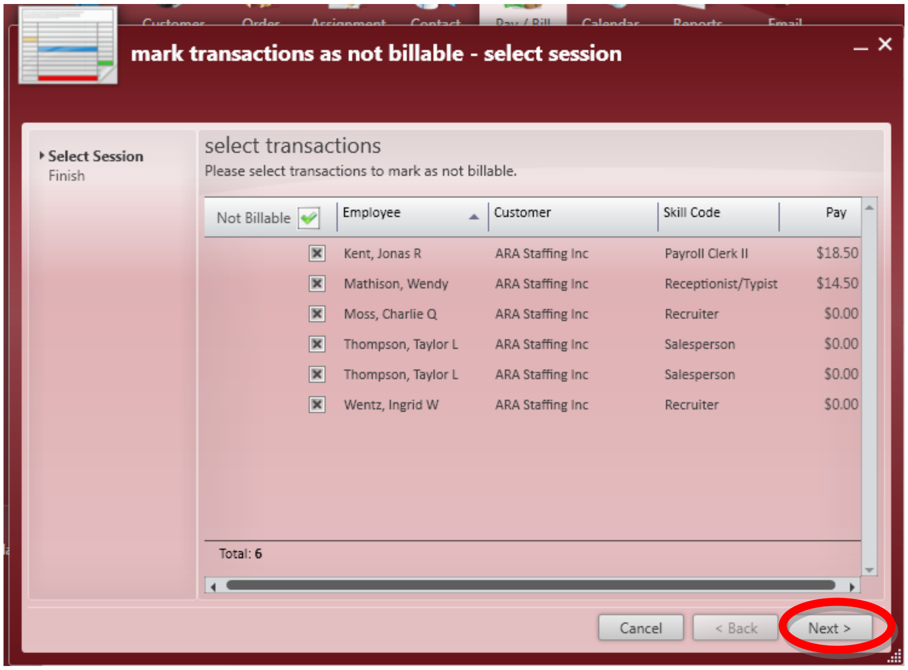
*Note – Until some type of input has been entered in the **Time Entry** form, the *Transaction* will not be added to the user's session. If the **Employee** is only being paid their *Salary* (no bonuses, commission, one-time *Adjustments*, etc.) for the pay period, then the *Salary Approved* check box must be checked off before the *Transaction* will show up in a **Proofing** session.

Follow the steps for **Proofing** as shown in the 12R8 Enterprise Back Office Training Manual.

*Note - If you receive an error that states "Nonzero salary or salary bill unapproved", navigate to the *Transaction*, expand the Detailed Timecard and click in the *Salary Approved* check box in the *Salary* form if the *Salary* is correct. If not, enter the corrected amount.

Once the **Proofing** has been completed, follow the steps for **Payroll** as detailed in the 12R8 Enterprise Back Office Training Manual. This manual can be downloaded from the following link: http://www.tempworks.com/ClientServices/documents/12R8EnterpriseBackOfficeTrainingManual.pdf

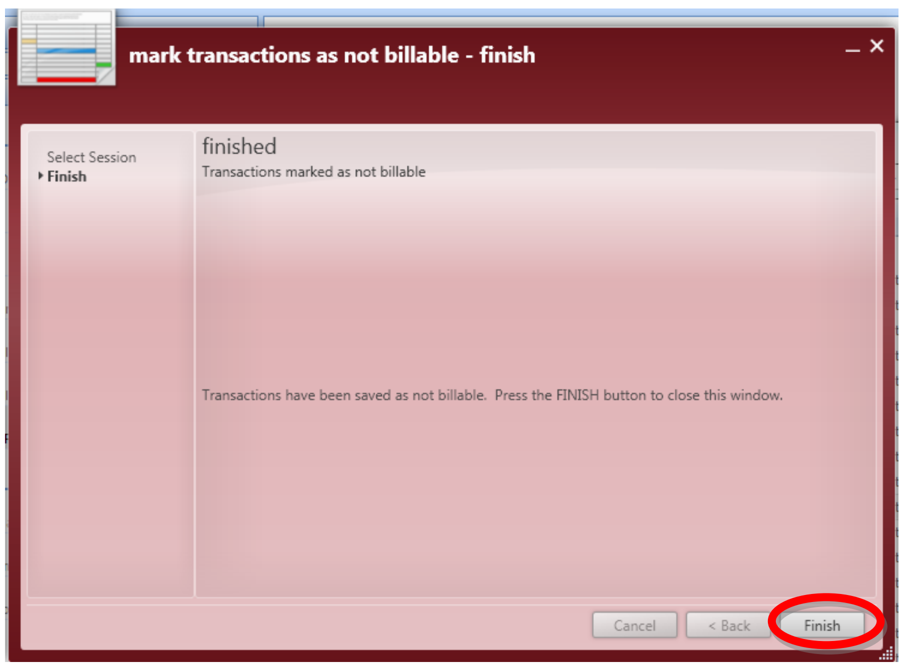
Prior to Closing the Week



Before the week can be closed the internal staff **Time Entry** *Transactions* need to be flagged as "Invoice Complete". To do this, open the ***Proofing*** option from the **Payroll and Invoicing** form in the **Pay/Bill** tab. Then select *Mark Transactions as not Billable* to open the form displayed to the left.

Click on the button to select all internal staff **Payroll** *Transactions* and then click *Next*.

The form to the right will be displayed to indicate that the *Transactions* have been posted as "not billable". Click the *Finish* button to close the form.



Still Have Questions?

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

To schedule training on internal staff payroll, 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.

