

16R1 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.

Selecting the Branch

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*.

You will choose the appropriate hierarchy level for your company and then select the *Branch* listed under the "Staff" entity. Then click *Next* at the bottom of the form.

summary	
Please verify the information below is correct.	
Hierarchy Level	Entity
Branch	Memphis SE - 5

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".

Natalie Brewer
123 Linden St. S
Saint Paul, MN 55121
ID: 4294969664
SSN: xxx-xx-8584

There are no tasks to display. You can adjust your filter settings to customize this view.

tasks calendar email

visifile
details
contact methods
past jobs
work experience
education
work interests
trak 1
direct hire
candidacy
assignment restrictions
interpersonal
required docs
transportation
test scores
unemployment
pay setup
employee
customer
order
assignment
contact
pay / bill
calendar
reports
all options

personal information
Last Name: Brewer
First Name: Natalie Initial:
Nickname:
SSN: 654-81-8584
ID: 4294969664 Contact:
Act. Date: 8/15/2011 1:08:00 PM Deact. Date:

address
Street: 123 Linden St. S
Street 2:
City: Saint Paul
State: MN Zip: 55121-
County: Ramsey School:
Country: United States of America

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

background information
Convictions:
Security Clearance:
equal opportunity
Birth Day:
Nationality:
Gender:
 Disabled
 Veteran

The **Employee Details** form above shows the *Branch* is "Memphis SE". 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.

tempworks software

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tasks calendar email

visifile
details
pay setup
electronic pay
adjustments
arrears
accruals
taxes
pay history
documents
messages
custom data
search

employee
customer
order
assignment
contact
pay / bill
calendar
reports
all options

general information
Pay Setup Complete
Employee ID 4294969664

temporary address
Use Temporary Address
Street
City
State
Country

required tax information
Federal Exemptions 0
State Exemptions 0
Federal Add. Withholding \$0.00
Dependents 0
Marital Tax Status Single
Tax State MN
State Juris
Tax By Employee State

payment options
Electronic Pay Setup Complete
Mail Check and/or Stub
Paycheck Delivery Code
Default Pay Rate
Note to Payroll

local taxes
Local taxes are automatically determined by the employee's zip code. Manual changes should not be necessary.
County Tax Exempt
City Tax Exempt
School Tax Exempt

automatic delivery method change
Use these options to automatically change check delivery on the specified activation date.
Activation Date
New Delivery Code
Mail to Permanent Address

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 Employee State* check box. Using the *Tax By Employee 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.

Setting up the Company Customer Record

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).

Logitech Staffing (Primary)
5423 Lexington Ave N
Saint Paul, MN 55121
(568) 415-8631
ID: 4294969349

There are no tasks to display. You can adjust your filter settings to customize this view.

tasks calendar email

visifile
details
contact methods
departments
worksites
sales & service
interest codes
assignment restrictions
vendor management
invoicing
defaults
messages
documents
custom data
search

employee
customer
order
assignment
contact
pay / bill
calendar
reports
all options

customer information
Customer Name Logitech Staffing
Department Primary
Customer ID 4294969349
Parent ID

customer status
Status Z Non A/R Transactions. Do not invoice
Activation Date 8/15/2011
Date Created 8/15/2011 3:03:00 PM

contact information
Street 1 5423 Lexington Ave N
Street 2
City Saint Paul
State MN Zip 55121-
Country United States of America
Website

billing address
Attention To
Street 1
Street 2
City
State Zip
Country United States of America

contact roles
No Records Found

sales tax
No Records Found

default worksite
Work Site Primary
5423 Lexington Ave N
Saint Paul, MN 55121

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).

Logitech Staffing (Primary)
5423 Lexington Ave N
Saint Paul, MN 55121
(568) 415-8631
ID: 4294969349

There are no tasks to display. You can adjust your filter settings to customize this view.

tasks calendar email

visifile
details
contact methods
departments
worksites
sales & service
interest codes
assignment restrictions

Drag a column header here to group by that column.

ID	Active	Description	Street	City	State	Zip
6902	<input checked="" type="checkbox"/>	Logitech NE	6548 Jackson St. NE	New Brighton	MN	55112
6901	<input checked="" type="checkbox"/>	Primary	5423 Lexington Ave N	Saint Paul	MN	55121

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**).

Creating Staff Orders

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 screenshot shows the 'Logitech Staffing, Primary' customer record. The 'Order Details' tab is selected, displaying the following information:

- Customer Information:** Customer: Logitech Staffing, Department: Primary, Customer ID: 4294969349, Work Site: Primary (5423 Lexington Ave N, Saint Paul, MN 55121), Worker Comp: 8810.
- Job Information:** Required: 1, Assigned: 2, Order Type: PR Payrolled, Job Title: Unknown, Description: (empty), Dress Code: (empty), Safety Notes: (empty), Start Date: (empty), Duration: Indef, Est. End Date: (empty), Shift: (empty), Start Time: (empty), End Time: (empty), Shift Notes: (empty).
- Financial Details:** Pay Rate: \$0.00, Bill Rate: \$0.00, Overtime Bill: \$0.00, Doubletime Bill: \$0.00, Overtime Plan: Salary, Multiplier: 1.5325 Alpine, Pay Periods: 24, GP Percent: %, GP Estimate: \$0.00, Desired GM %: (empty).
- Other Information:** Status: Filled, Taken By: stephanie, Sales Team: Default, Branch: Memphis SE (highlighted with a red box), Do Not Auto-Close: (checkbox), Notes: (empty).

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**.

The screenshot displays the TempWorks software interface for an employee assignment. The top header shows the employee's name, Logitech Staffing, Recruiter, and various IDs. The main content area is divided into several sections: assignment information, financial details, job information, and other information. The 'Salary' field in the financial details section is highlighted with a red box, showing a value of \$1,653.85. The 'Status' is set to 'Open', and the 'Job Title' is 'Recruiter'. The 'Start Date' is 4/11/2011. The 'Company' is 'High Tech Staffing'. The 'Sales Team' is 'Default', and the 'Service Rep' is 'stephanie'. The 'Branch' is 'Memphis SE'. The 'Perf Note' field is empty.

assignment information		financial details	
Employee	Brewer, Natalie	Multiplier	1.5325 Alpine
Aldent	4294969666	Overtime Factor	1.5000
Customer	Logitech Staffing	Bill Rate	\$0.00
Department	Primary	Pay Rate	\$0.00
Order ID	4294969634	Salary Bill	\$0.00
Assignment ID	4294986061	Salary	\$1,653.85
Temp Phone	(215) 354-8654	Unit Bill	\$0.00
Status	Open	Unit Pay Rate	\$0.00
		Other Agency Pay	
		Overtime Bill	\$0.00
		Overtime Pay	\$0.00
		Doubletime Bill	\$0.00
		Doubletime Pay	\$0.00
job information		other information	
Job Title	Recruiter	Company	High Tech Staffing
Business Code		EINC	0 W2
Start Date	4/11/2011	Worker Comp Code	8810
Expected End Date	Original Start 4/11/2011	PO Number	
Actual Date Ended		Payroll Notes	
Shift		Sales Team	Default
Start Time	End Time	Assigned	8/15/2011 4:03:00 PM
Shift Notes		Service Rep	stephanie
		Entered By	stephanie
		Branch	Memphis SE
		No Auto Close	<input type="checkbox"/>
		Perf Note	

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 screenshot displays the TempWorks software interface for an assignment. The top header shows the user's name (Brewer, Natalie), company (Logitech Staffing, Recruiter), and assignment details (Assignment ID: 4294986060, Order ID: 4294969634, Employee ID: 2368). The main content area is divided into several sections:

- assignment information:** Fields for Employee (Brewer, Natalie), Aldent (4294969664), Customer (Logitech Staffing), Department (Primary), Order ID (4294969634), Assignment ID (4294986060), Temp Phone ((651) 123-5468), and Status (Open).
- financial details:** Fields for Multiplier (1.5325 All), Overtime Factor (1.5000), Bill Rate (\$22.22), Pay Rate (\$14.50), Salary Bill (\$0.00), Salary (\$0.00), Unit Bill (\$0.00), Unit Pay Rate (\$0.00), Other Agency Pay, Overtime Bill (\$33.33), Overtime Pay (\$21.75), and Doubletime Bill (\$43.50), Doubletime Pay (\$29.00).
- job information:** Fields for Job Title (Recruiter), Business Code, Start Date (8/15/2011), Expected End Date, Original Start (8/15/2011), Actual Date Ended, Shift (Morning), Start Time (08:00), End Time (16:00), and Shift Notes.
- other information:** Fields for Sales Team (Default), Assigned (8/15/2011 3:20:00 PM), Service Rep (stephanie), Entered By (stephanie), Branch (Memphis!), and No Auto Close.

The screen shot above displays an **Assignment** created for a non-exempt (hourly) staff **Employee**. The *Hourly Pay Rate* is entered (outlined in red), the *Hourly Bill Rate* does NOT need to be entered on the **Order** or the **Assignment** for a staff **Employee**. During **Time Entry** the number of hours that the **Employee** worked will be input.

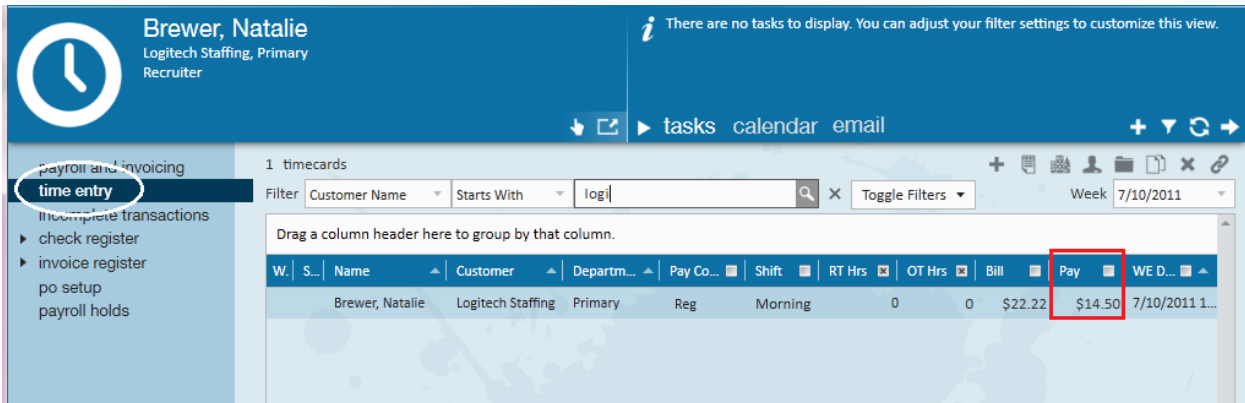
If a staff **Employee** leaves or is let go, enter the last day of their employment with your company in the *Actual Date Ended* field and change the *Status* to "Complete".

***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 "Assignment Rate Changes" from the following link: <http://www.tempworks.com/documents/15R1EnterpriseAssignmentRateChanges.pdf>

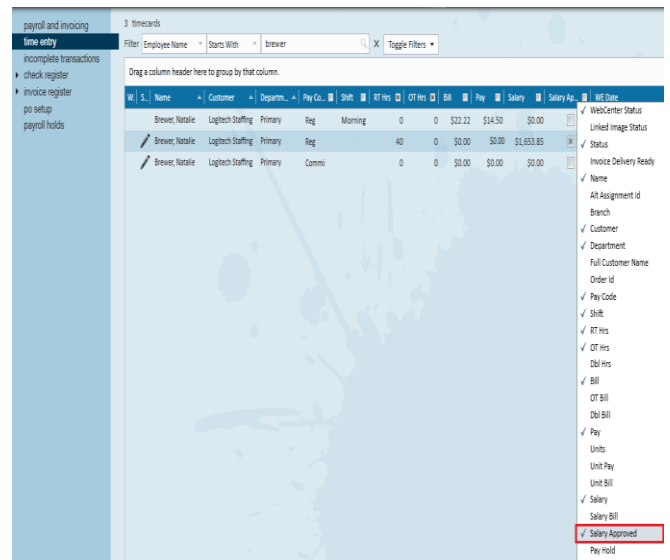
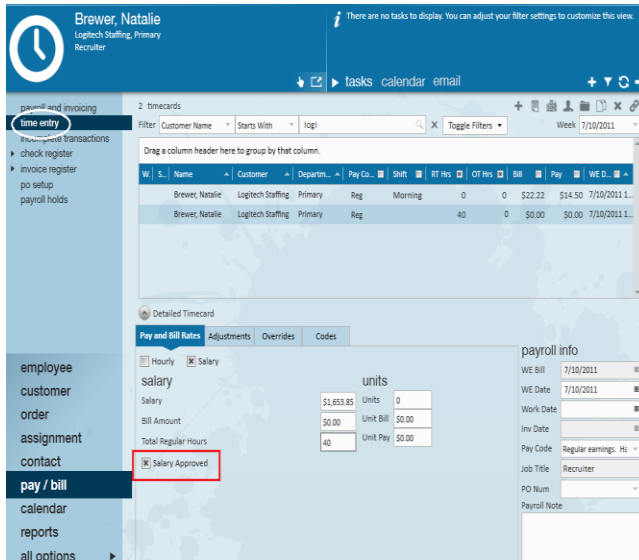
Paying Staff Employees

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.

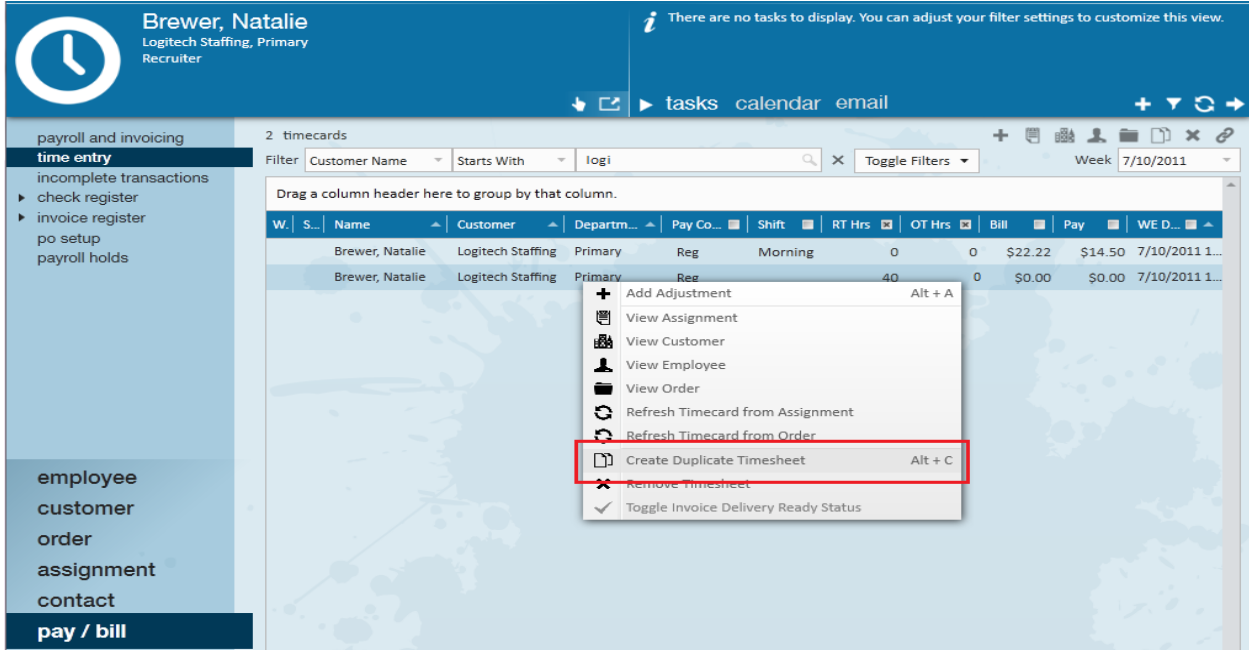


Follow the steps listed in the 15R1 Enterprise Back Office Training Manual to create the *Transactions* that appear in the **Time Entry** form. For all non-exempt (hourly) **Employees** enter the *RT Hrs* (regular time) and *OT Hrs* in the appropriate fields.

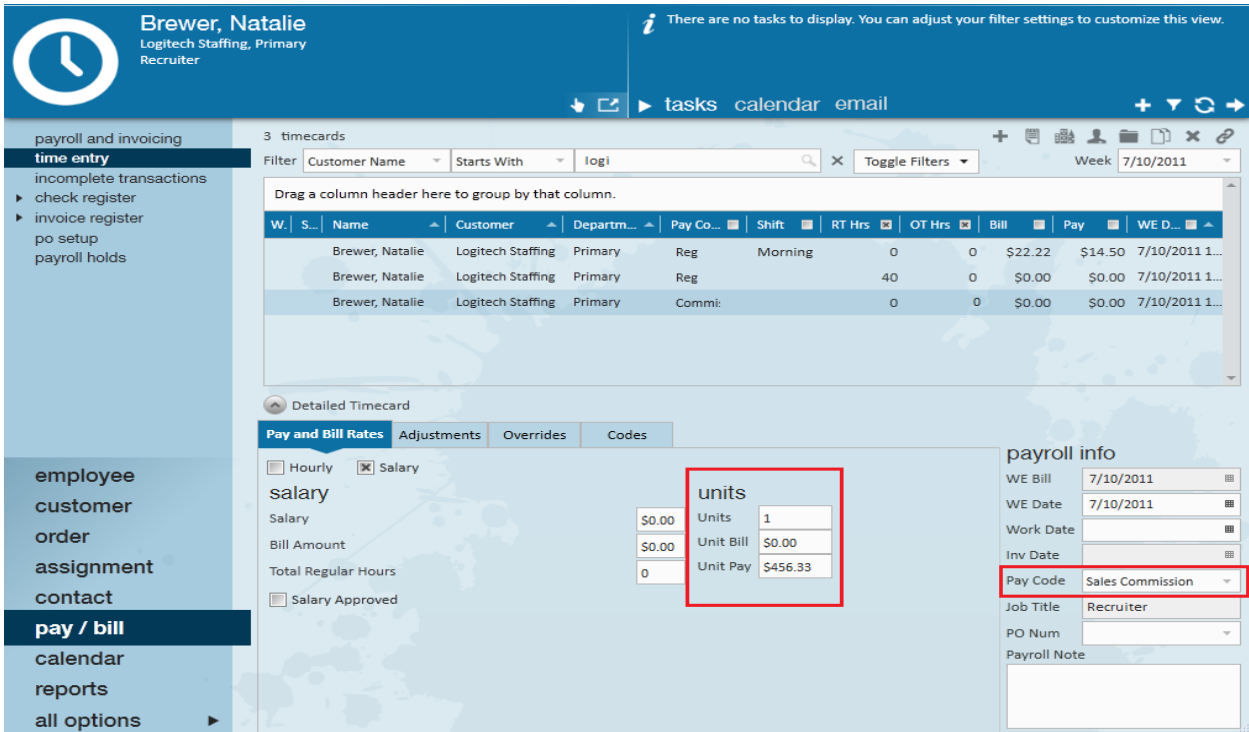
***Note – The non-exempt Employees will have an actual amount in the Pay field. The exempt Employees will have a "\$0" amount listed there.**



For the exempt (salaried) **Employees**, select their *Transaction* line and expand on the Detailed Timecard section (shown above left). 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. Another option to view and approve salary (shown above right) is by right-clicking on the column headers and adding the *Salary* and *Salary Approved* columns (outlined in red). 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.



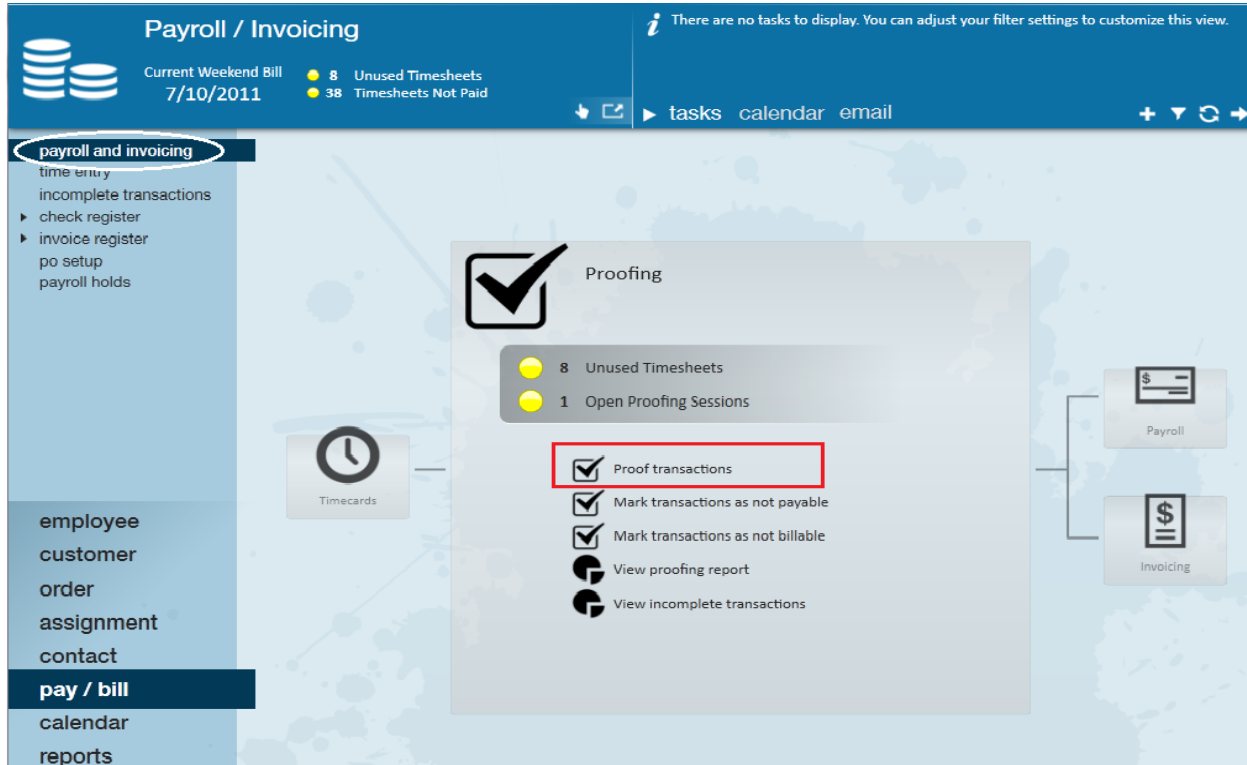
If an **Employee** should be paid commission, right-click on their *Transaction* line from the **Time Entry** spreadsheet then select *Create Duplicate Timesheet* from the drop down menu. This will insert another *Transaction* line for the **Employee** with the same information from their **Assignment**.



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 [15R1 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 [15R1 Enterprise Back Office Training Manual](#). This manual can be downloaded from the following link:
<http://www.tempworks.com/manuals/15R1EnterpriseBackOfficeTrainingManual.pdf>

Prior to Closing the Week

Not Billable	Employee	Customer	Job Title	Pay	Pay Code	Orig W
<input checked="" type="checkbox"/>	Abotina, Susie	Crom Equipment	Access Operator	\$30.00	Reg	1/23/2
<input checked="" type="checkbox"/>	Anderson, Eric	Kickstand Bikes	Unknown	\$10.00	Reg	1/23/2
<input checked="" type="checkbox"/>	Anderson, Eric	Crom Equipment	C#	\$1,500.00	Reg	7/10/2
<input checked="" type="checkbox"/>	Appleseed, John	Thompson Industries Inc	Applicant Respon...	\$15.00	Reg	1/23/2
<input checked="" type="checkbox"/>	Gomez, Marquita	Betty's Bakery	Shipping And Rec...	\$8.00	Reg	7/10/2
<input checked="" type="checkbox"/>	Manole, Jay	Kona	Unknown	\$0.00	Reg	7/10/2

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.

finished
Transactions marked as not billable

Transactions have been saved as not billable. Press the FINISH button to close this window.

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 our training department at trainers@tempworks.com.