

Add Employee Deductions

Modified on: Tue, 14 Dec, 2021 at 2:37 PM

TABLE OF CONTENTS

- **To ADD EMPLOYEE DEDUCTIONS**
- **ADD EMPLOYER CONTRIBUTION**

To ADD EMPLOYEE DEDUCTIONS

Step 1. From 'Payroll Employee Card' select 'PROCESS' then 'Deductions'

← PAYROLL EMPLOYEE CARD   

EMP10002

New **Process** Report Show Attached | Navigate Report Less options

 Salary  PTO Hours  Create PTO Hours from Template  Create Employee Salary

 Deductions  Create Deductions from Template  Create HR Tracking Info

First Name	Gwen	State	CA
Middle Name		Statutory Employee	☒
Last Name	Stefani	Job Title	
Suffix		Blocked	☒
Initials		Comment	
Address	123 Heartbreak Rd	Comment 2	
Zip Code	90210	Last Review Date	

Step 2. The 'Employee Deductions' table will open. Click '+New' to add a new Deduction.

←

Employee Deductions

 Search **+ New** Manage Show Attached  Open in Excel  

CODE	DESCRIPTION	AMOUNT FORMULA	AMOUNT / PERCENT	EMPLOYER CONTRIBUTI CODE	EMPLOYER CONTRIBUTIO DESCRIPTION	EMPLOYER CONTRIBU AMOUNT FORMULA	EMPLOYER CONTRIBUTI AMOUNT / PERCENT	STARTING DATE	ENDING DATE
(There is nothing to show in this view)									

Step 3. The 'Payroll Employee Deduction Card' will open.

← PAYROLL EMPLOYEE DEDUCTION CARD

EMP10002 · Deduction

Show Attached

Employee Deduction Setup

Show more

Code		Employee Deduction Limit	
Description		Employee Deduction Balance	0.00
Amount Formula	% of Gross Wages	Total Contribution Limit	0.00
Amount / Percent	0.00	Total Contribution Balance	0.00
Limit Does Not Reset Annually	☐	Max Percent of Net Income	0.00

Employer Contribution Setup

Show more

Employer Contribution	☐	Employer Contribution Amount	% of Gross Wages
Employer Contribution Code		Employer Contribution Amount	0.00
Employer Contribution Description		Employer Contribution Balance	0.00

AED-3

Step 4. Select a deduction code from the drop down menu in the 'Code' field.

← PAYROLL EMPLOYEE DEDUCTION CARD

EMP10002 · Deduction

Show Attached

Employee Deduction Setup

Show more

Code		Employee Deduction Limit	
Description		Employee Deduction Balance	0.00
Amount Formula	% of Gross Wages	Total Contribution Limit	0.00
Amount / Percent	0.00	Total Contribution Balance	0.00
Limit Does Not Reset Annually	☐	Max Percent of Net Income	0.00

Employer Contribution Setup

Show more

Employer Contribution	☐	Employer Contribution Amount	% of Gross Wages
Employer Contribution Code		Employer Contribution Amount	0.00
Employer Contribution Description		Employer Contribution Balance	0.00

Step 5. The 'Description' field will auto-populate after you select a code.

← PAYROLL EMPLOYEE DEDUCTION CARD   

EMP10002 · Deduction

Show Attached 

Employee Deduction Setup Show more

Code	401KPLAN	Employee Deduction Limit	18,500.00
Description	401K Plan	Employee Deduction Balance	0.00
Amount Formula	% of Gross Wages	Total Contribution Limit	55,000.00
Amount / Percent	0.00	Total Contribution Balance	0.00
Limit Does Not Reset Annually	☒	Max Percent of Net Income	0.00

Employer Contribution Setup Show more

Employer Contribution	☒	Employer Contribution Amount...	% of Gross Wages
-----------------------	-------------------------------------	---------------------------------	------------------

Step 6.
Select the formula for calculating the deduction amount from the employee's wages from the available options in the drop down menu.

← PAYROLL EMPLOYEE DEDUCTION CARD   

EMP10002 · Deduction

Show Attached 

Employee Deduction Setup Show more

Code	401KPLAN	Employee Deduction Limit	18,500.00
Description	401K Plan	Employee Deduction Balance	0.00
Amount Formula	% of Gross Wages Fixed Amount Union Deduction Table Spouse/Dependent Table	Total Contribution Limit	55,000.00
Amount / Percent		Total Contribution Balance	0.00
Limit Does Not Reset Annually	☒	Max Percent of Net Income	0.00

Employer Contribution Setup Show more

Employer Contribution	☒	Employer Contribution Amount...	% of Gross Wages
-----------------------	-------------------------------------	---------------------------------	------------------

Step 7.

Enter an amount or percent to calculate deduction amount based on the formula you just selected.

← PAYROLL EMPLOYEE DEDUCTION CARD   

EMP10002 · Deduction

Show Attached 

Employee Deduction Setup Show more

Code	401KPLAN	Employee Deduction Limit	18,500.00
Description	401K Plan	Employee Deduction Balance	0.00
Amount Formula	% of Gross Wages	Total Contribution Limit	55,000.00
Amount / Percent	3.00	Total Contribution Balance	0.00
Limit Does Not Reset Annually	☐	Max Percent of Net Income	0.00

Employer Contribution Setup Show more

Employer Contribution	☐	Employer Contribution Amount...	% of Gross Wages
Employer Contribution Code		Employer Contribution Amount...	0.00

Step 8.

Set the 'Limit Does Not Reset Annually' to True if the deduction will not reset annually. This will usually be set to False. But for certain deductions such as garnishments or loan repayments it may need to be set to True

← PAYROLL EMPLOYEE DEDUCTION CARD

EMP10002 · Deduction

Show Attached

Employee Deduction Setup Show more

Code	401KPLAN	Employee Deduction Limit	18,500.00
Description	401K Plan	Employee Deduction Balance	0.00
Amount Formula	% of Gross Wages	Total Contribution Limit	55,000.00
Amount / Percent	3.00	Total Contribution Balance	0.00
Limit Does Not Reset Annually	☒	Max Percent of Net Income	0.00

Employer Contribution Setup Show more

Employer Contribution	☒	Employer Contribution Amount...	% of Gross Wages
Employer Contribution Code		Employer Contribution Amount...	0.00
Employer Contribution Descripti...		Employer Contribution Balance	0.00

NOTE:

If applicable to the deduction the 'Employee Deduction Limit' and 'Total Contribution Limit' will pre-populate with information from the D365 Payroll tax table. You don't have to worry about tracking deduction and contribution limits for 401k, HSA, FSA etc.

The 'Employee Deduction Balance' and 'Total Contribution Balance' (the blue numbers) will automatically calculate after every posted payroll document for this employee.

← PAYROLL EMPLOYEE DEDUCTION CARD

EMP10002 · Deduction

Show Attached

Employee Deduction Setup Show more

Code	401KPLAN	Employee Deduction Limit	18,500.00
Description	401K Plan	Employee Deduction Balance	0.00
Amount Formula	% of Gross Wages	Total Contribution Limit	55,000.00
Amount / Percent	3.00	Total Contribution Balance	0.00
Limit Does Not Reset Annually	☐	Max Percent of Net Income	0.00

Employer Contribution Setup Show more

Employer Contribution	☐	Employer Contribution Amount...	% of Gross Wages
Employer Contribution Code		Employer Contribution Amount...	0.00
Employer Contribution Descripti...		Employer Contribution Balance	0.00

ADD EMPLOYER CONTRIBUTION

Step 9.

If there is an employer contribution associated with this deduction, set the 'Employer Contribution' to TRUE. Once selected, the 'Employer Contribution Code' and 'Employer Contribution Description' will become editable.

PAYROLL EMPLOYEE DEDUCTION CARD

EMP10002 · Deduction

Show Attached

Employee Deduction Setup

Show more

Code	401KPLAN	Employee Deduction Limit	18,500.00
Description	401K Plan	Employee Deduction Balance	0.00
Amount Formula	% of Gross Wages	Total Contribution Limit	55,000.00
Amount / Percent	3.00	Total Contribution Balance	0.00
Limit Does Not Reset Annually	☐	Max Percent of Net Income	0.00

Employer Contribution Setup

Show more

Employer Contribution	☒	Employer Contribution Amount...	% of Gross Wages
Employer Contribution Code		Employer Contribution Amount...	0.00
Employer Contribution Descripti...		Employer Contribution Balance	0.00

Step 10.

Select the appropriate contribution code from the drop down menu in the 'Employer Contribution Code' field

PAYROLL EMPLOYEE DEDUCTION CARD

EMP10002 · Deduction

Show Attached

Employee Deduction Setup

show more

Code

401KPLAN

Employee Deduction Limit

18,500.00

Description

401K Plan

Employee Deduction Balance

0.00

Amount Formula

% of Gross Wages

Total Contribution Limit

55,000.00

Amount / Percent

3.00

Total Contribution Balance

0.00

Limit Does Not Reset Annually

☐

Max Percent of Net Income

0.00

CODE

DESCRIPTION

E-HEALTH_CO...

Employer Health Contribution

E-RETIREMENT...

Employer Retirement Contribution

Employer Contribution Setup

show more

Employer Contribution

+ New

Select from full list

Employer Contribution Amount

% of Gross Wages

Employer Contribution Code

Employer Contribution Amount

0.00

Employer Contribution Descripti...

Employer Contribution Balance

0.00

Step 11.

After selecting a contribution code, the 'Employer Contribution Description' will automatically populate.

EMP10002 · Deduction

Show Attached

Employee Deduction Setup

Show more

Code	401KPLAN	Employee Deduction Limit	18,500.00
Description	401K Plan	Employee Deduction Balance	0.00
Amount Formula	% of Gross Wages	Total Contribution Limit	55,000.00
Amount / Percent	3.00	Total Contribution Balance	0.00
Limit Does Not Reset Annually	☐	Max Percent of Net Income	0.00

Employer Contribution Setup

Show more

Employer Contribution	☒	Employer Contribution Amount...	% of Gross Wages
Employer Contribution Code	E-RETIREMENT_CONT	Employer Contribution Amount...	0.00
Employer Contribution Description	Employer Retirement Contribution	Employer Contribution Balance	0.00

Step 12.

Select a formula for calculating the employer contribution from the drop down menu in the 'Employer Contribution Amount Formula' field and then enter an 'Employer Contribution Amount / Percent'

EMP10002 · Deduction

Show Attached

Employee Deduction Setup

Show more

Code	401KPLAN	Employee Deduction Limit	18,500.00
Description	401K Plan	Employee Deduction Balance	0.00
Amount Formula	% of Gross Wages	Total Contribution Limit	55,000.00
Amount / Percent	3.00	Total Contribution Balance	0.00
Limit Does Not Reset Annually	☐	Max Percent of Net Income	0.00

Employer Contribution Setup

Show more

Employer Contribution	☒	Employer Contribution Amount...	% of Gross Wages
Employer Contribution Code	E-RETIREMENT_CONT	Employer Contribution Amount...	3.00
Employer Contribution Description	Employer Retirement Contribution	Employer Contribution Balance	0.00

Step 13. Click the 'Back' button to save the deduction

← PAYROLL EMPLOYEE DEDUCTION CARD

EMP10002 · Deduction

Show Attached

Employee Deduction Setup

Code	401KPLAN	Employee Deduction Limit	18,500.00
Description	401K Plan	Employee Deduction Balance	0.00
Amount Formula	% of Gross Wages	Total Contribution Limit	55,000.00
Amount / Percent	3.00	Total Contribution Balance	0.00
Limit Does Not Reset Annually	☐	Max Percent of Net Income	0.00

Employer Contribution Setup

Employer Contribution	☒	Employer Contribution Amount	% of Gross Wages
Employer Contribution Code	E-RETIREMENT_CONT	Employer Contribution Amount	3.00
Employer Contribution Description	Employer Retirement Contribution	Employer Contribution Balance	0.00

Step 14. Review the new deduction in the 'Employee Deductions' table then click the 'Back' button

←

Employee Deductions

Search + New Manage Show Attached Open in Excel

CODE	DESCRIPTION	AMOUNT FORMULA	AMOUNT / PERCENT	EMPLOYER CONTRIBUTION CODE	EMPLOYER CONTRIBUTION DESCRIPTION	EMPLOYER CONTRIBUTION AMOUNT FORMULA	EMPLOYER CONTRIBUTION AMOUNT / PERCENT	STARTING DATE	ENDING DATE
401KPLAN	401K Plan	% of Gross...	3.00	E-RETIREMEN...	Employer Retirement Cont...	% of Gross...	3.00		

Note on: Deduction Priority Order

This allows you to make your deductions run in a specific order. It can be set in the Employee Deduction Card. This feature only works when you are using the 'Suggest Lines' page action to create payroll documents. If you manually adjust lines in a payroll document then the sorting order won't be applied.

PAYROLL EMPLOYEE DEDUCTION CARD



✓ SAVED



EMP10007 · Deduction · HEALTH INSURANCE · 1/7/2019

Employee Deduction Setup

[Show less](#)

Code	HEALTH INSURANCE	Starting Date	1/7/2019
Description	Health Insurance	Ending Date	
Amount Formula	% of Gross Wages	Garnishment Case Number	
Amount / Percent	0.00	Garnishment Cause No.	
Benefit Procedure Amount	0.00	Max Percent of Net Income	
Limit Does Not Reset Annually	☐	Custom Deduction Limit Code	
Employee Deduction Limit		Benefit / Coverage Amount	
Employee Deduction Balance	0.00	Benefit Category	
Total Contribution Limit		Benefit Status Code	EMP ONLY
Total Contribution Balance	0.00	Deduction Priority Order	0
Minimum Net Pay			