

Create Payroll Codes

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Synopsis:

- The Assisted Setup Wizard will automatically setup Payroll Now with the necessary payroll codes to begin utilizing the solution. However, you may need to add additional codes to configure the solution to your specific needs. In this manual, we will walk you through the process of setting up a Deduction Payroll Code via the Deduction Wizard.

WARNING!! The 'Manual Input Allowed', when set to 'True' allows you to manually override the amount calculated in the payroll line IF ACTIVATED AUTOMATIC RE-CALCULATIONS STOP COMPLETELY

Deduction · 401K

 Remove Uneditable Lookup Codes

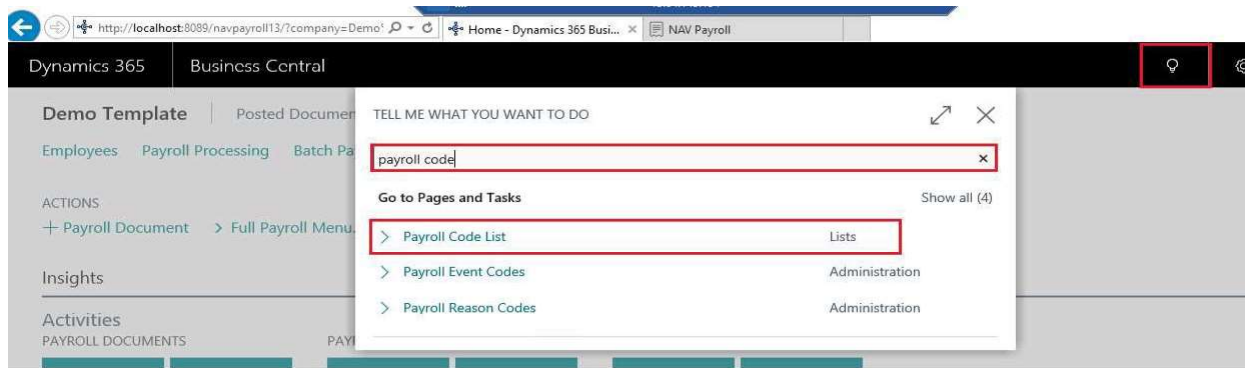
Payroll Code Show less

Type	Deduction	Process Procedure C...	
Code	401K	W2 Classification	
Description		Sorting No.	200
Manual Input Allowed	☒	Blocked	☐
Reverse Sign Allowed	☐		

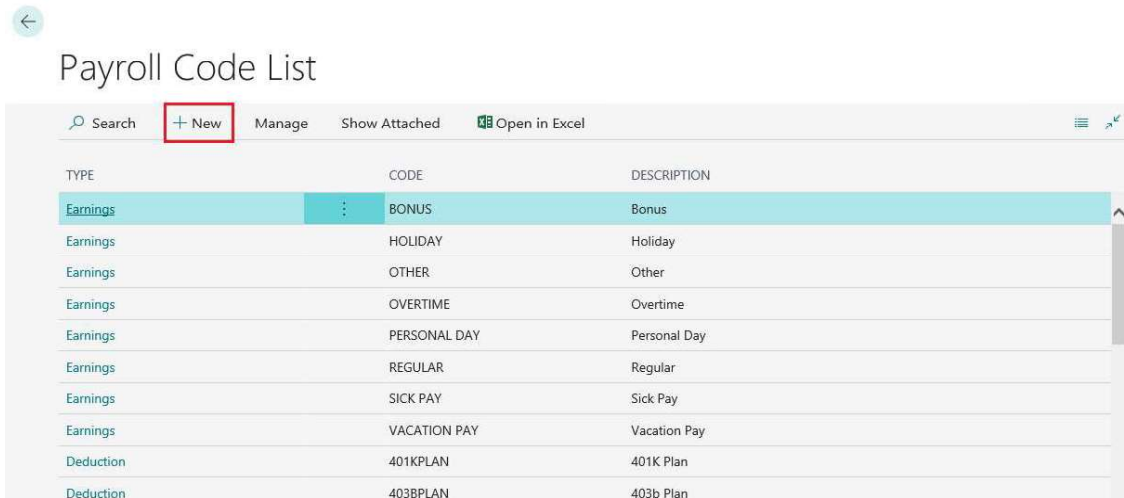
Deduction Setup Show less

How to Create a Deduction Payroll Code

Step 1. Enter 'Payroll Code' in 'Search Bar'. Select 'Payroll Code List'



Step 2. 'Payroll Code List' will open. Select '+New'



Step 3.

'Payroll Code Setup Card' will open. Select 'Deduction' payroll code 'Type' from the drop down menu

Payroll Code Setup Card

Process Show Attached Navigate Less options

Payroll Code Show more

Type
 Code *
 Earnings
 Deduction
 Withholding
 Employer Tax
 Direct Deposit
 Payment
 Employer Contribution
 Reimbursement
 Advance / Loan

Description
 Manual Input Allowed ☐

Step 4.

The 'Deduction Setup' tab will appear below the 'Payroll Code' tab. Enter your desired payroll code in the 'Code' field.

Payroll Code Setup Card

Process Show Attached Navigate Less options

Payroll Code Show more

Type Deduction
 Code 401KFidelity x
 Description
 Manual Input Allowed ☐

Deduction Setup Show less

Deduction Type		Use Arrears Tracking	☐
Deduction Limit	0.00	Arrears Tracking Sequence	
Deduction Catch up Limit	0.00	Custom Deduction Limit Code	...
Total Contribution Limit	0.00	Benefit Term. Date to Use	Actual Employee Term. Date
Compensation Limit	0.00	Use Deduction Earnings Filter	☐
Garnishment	☐	Deduction Earnings Filter	

Step 5.

The 'Deduction Settings Wizard' will open. Select whether the deduction code will be a Pre-Tax or Post-Tax deduction via the 'Pre/Post Tax' field and then select a 'Deduction Type' from the available options.

Manage Show Attached

DEDUCTION SETTINGS

Deduction Options

Pre/Post Tax Pre-Tax ▾ Retirement Type
Deduction Type Retirement Plan
Health Insurance
HSA Plan
FSA Plan
Other

Family Plan ☐

OK Cancel

Step 6. Select a 'Retirement Type' from the drop down menu.

Manage Show Attached

DEDUCTION SETTINGS

Deduction Options

Pre/Post Tax Pre-Tax ▾ Retirement Type 401K
Deduction Type Retirement Plan ▾ 403b
Simple IRA
Simple 401K
SARSEP

Family Plan ☐

OK Cancel

Step 7.

If the Deduction code is affiliated with a 'Family Plan' set 'Family Plan' True. Otherwise leave the 'Family Plan' set to False and click 'OK'

Manage Show Attached

DEDUCTION SETTINGS

Deduction Options

Pre/Post Tax Pre-Tax

Deduction Type Retirement Plan

Retirement Type 401K

Family Plan ☐

OK Cancel

Step 8. Enter a 'Description' in the Description field.

Payroll Code Setup Card

Process Show Attached Navigate Less options

Payroll Code

Type Deduction

Code 401KFIDFIITY

Description Fidelity 401K Plan

Manual Input Allowed ☐

Deduction Setup

Deduction Type 401K

Deduction Limit 0.00

Deduction Catch up Limit 0.00

Total Contribution Limit 0.00

Use Arrears Tracking ☐

Arrears Tracking Sequence

Custom Deduction Limit Code

Benefit Term, Date to Use Actual Employee Term, Date

Step 9.

Review 'Deduction Setup' tab. If you scroll down, you can review the limit settings associated with the Deduction. The 'Deduction Wizard' will automatically populate the limits associated with standard deductions

Deduction Setup

Show less

Deduction Type

401K

Deduction Limit

18,500.00

Deduction Catch up Limit

24,500.00

Total Contribution Limit

55,000.00

Compensation Limit

0.00

Garnishment

☐

Check Deduction/Contribution L...

☒

Use Arrears Tracking

☐

Arrears Tracking Sequence

Custom Deduction Limit Code

...

Benefit Term. Date to Use

Actual Employee Term. Date

Use Deduction Earnings Filter

☐

Deduction Earnings Filter

Exclude Deduction Earnings Codes

☐

Step 10.
Review the ‘Federal Exemptions’ and ‘State Exemptions’. You can scroll down to determine which exemptions are set to True or False. The Deduction Wizard will automatically pre-set the exemptions based on the ‘Deduction Type’ but you can make manual adjustments here if needed.

←

PAYROLL CODE SETUP CARD

✎

+

🗑

Deduction · 401KPLAN

Process

Show Attached

Navigate

Less options

Federal Exemptions

Exempt from Federal WH

☒

Exempt from Social Security

☐

Exempt from FUTA

☐

Exempt from Medicare

☐

State / Local Exemptions

Exempt from SUTA

☐

Exempt from State Unemp. WH

☐

Exempt from State Income Tax

☒

Exempt from Fam. Med. Leave WH

☐

Exempt from Local Tax

☒

Exempt from Workforce Dev. WH

☐

Exempt from State Dis. WH

☐

Step 11. Click the ‘Back’ button to save new Deduction Payroll Code

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PAYROLL CODE SETUP CARD

Deduction · 401KPLAN

Process Show Attached Navigate Less options

Federal Exemptions

Exempt from Federal WH ☒ Exempt from Social Security ☐
 Exempt from FUTA ☒ Exempt from Medicare ☐

State / Local Exemptions

Exempt from SUTA ☒ Exempt from State Unemp. WH ☐
 Exempt from State Income Tax ☒ Exempt from Fam. Med. Leave WH ☐
 Exempt from Local Tax ☒ Exempt from Workforce Dev. WH ☐

Reverse Sign Allowed

When set to True it gives the user the ability to manually adjust the code's amount in the payroll document into a negative or positive number.

PAYROLL CODE SETUP CARD

Deduction · GARNISHMENT

Remove Uneditable Lookup Codes

Payroll Code

Type: Deduction Process Procedure Code: UDF
 Code: GARNISHMENT W2 Classification:
 Description: Garnishment Sorting No.: 200
 Manual Input Allowed: ☐ Blocked: ☐
Reverse Sign Allowed: ☒

Deduction Setup

SAVED

Below you can see an example of a Garnishment Deduction being changed from negative to positive. This feature can also be applied to earnings.



PAYROLL PROCESSING



✓ SAVED



PRP10024

Suggest Lines

Print Check...

Print Check Stub...

Email Check Stub

Post...



First Name	Ron	Direct Deposit Emplo...	☐
Last Name	Swanson	Vacation	0
Pay Cycle Period	Pay Period 7 2020	Sick Leave	0
Payment Date	4/11/2020	Holiday	0
Posting Date	4/11/2020	Personal Day Hours	0
Status	Open	Check Export Status	
Check Printed	☐		

[Lines](#) | [Manage](#) | [Line](#) | [Fewer options](#)

Payroll Type ↑	Description	Hours	Quantity	Rate per Hour	Total Amount
Earnings	Regular	80.00		37.00	2,960.00
→ Deduction	Garnishment				50.00
Withholding	Federal W/H				-457.00
Withholding	FICA - Medicare				-42.92
Withholding	State Income Tax W/H				-95.61
Withholding	FICA - Social Security				-183.52
Employer Tax	Federal Unemployment				-17.76