

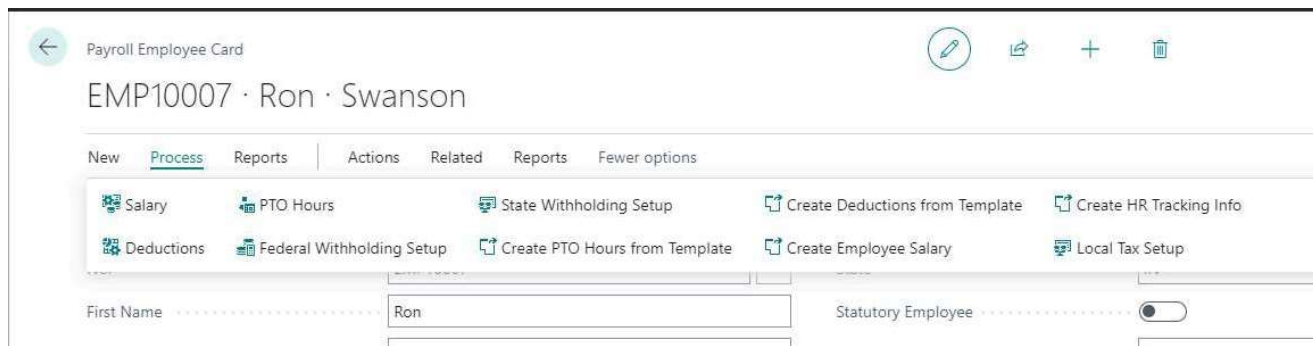
Employee Card Ribbon Definitions

Modified on: Tue, 11 Oct, 2022 at 3:12 PM

The 'EMPLOYEE CARD' page has 3 available ribbons to select at the top of the page.

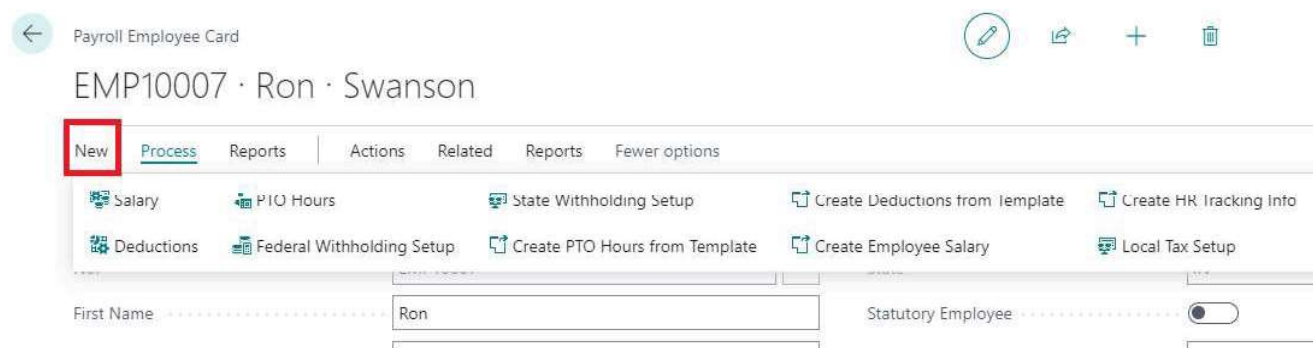
Within the 'HOME' 'NAVIGATE' and 'REPORT' Ribbons of the EMPLOYEE CARD, there are 'PAGE ACTIONS' that are unique to NAV Payroll.

P RIBBON DEFINED



The screenshot shows the 'Payroll Employee Card' page for employee EMP10007 · Ron · Swanson. The 'Process' ribbon is selected, and the 'New' tab is highlighted. The page displays various payroll-related actions and settings, including Salary, PTO Hours, State Withholding Setup, Create Deductions from Template, Create HR Tracking Info, Deductions, Federal Withholding Setup, Create PTO Hours from Template, Create Employee Salary, and Local Tax Setup. The 'First Name' field is populated with 'Ron', and the 'Statutory Employee' toggle is turned on.

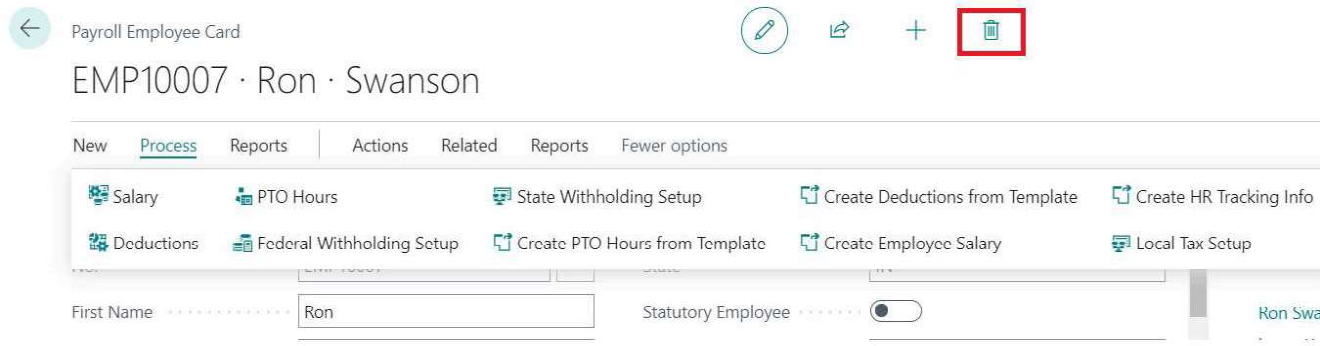
NEW



The screenshot shows the 'Payroll Employee Card' page for employee EMP10007 · Ron · Swanson. The 'New' ribbon is selected, and the 'New' tab is highlighted. The page displays various payroll-related actions and settings, including Salary, PTO Hours, State Withholding Setup, Create Deductions from Template, Create HR Tracking Info, Deductions, Federal Withholding Setup, Create PTO Hours from Template, Create Employee Salary, and Local Tax Setup. The 'First Name' field is populated with 'Ron', and the 'Statutory Employee' toggle is turned on.

New: The 'NEW' page action creates a new employee card. Unlike the 'CREATE NEW EMPLOYEE WIZARD', the 'NEW' page action will not utilize templates to auto-populate certain fields. It is up to the user to enter the correct data into the employee card.

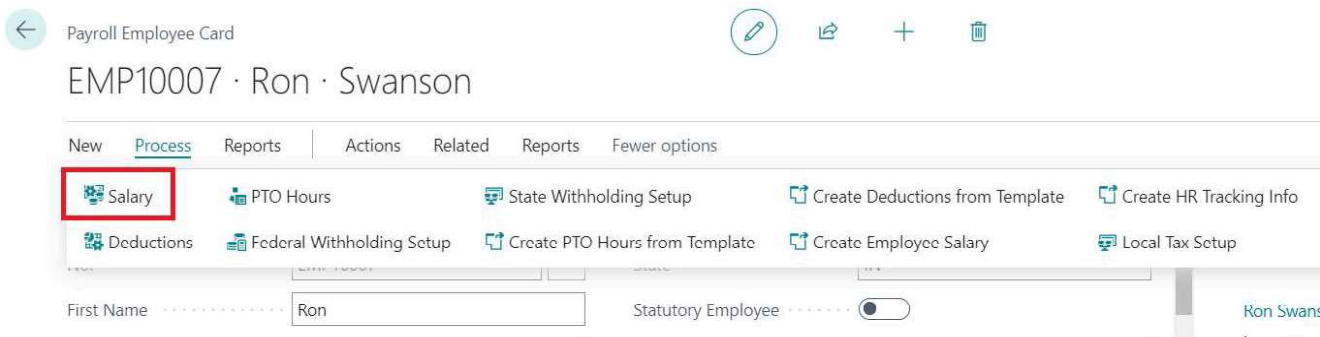
DELETE



The screenshot shows the 'Payroll Employee Card' interface for employee EMP10007 · Ron · Swanson. The 'Process' tab is selected in the ribbon. In the top right corner, the 'DELETE' icon (a trash can) is highlighted with a red rectangle. Below the ribbon, there are various action buttons like 'Salary', 'PTO Hours', 'State Withholding Setup', etc. The 'First Name' field contains 'Ron' and the 'Statutory Employee' toggle is turned off.

Delete: The 'DELETE' page action will delete the employee card that is currently open.

SALARY



The screenshot shows the 'Payroll Employee Card' interface for employee EMP10007 · Ron · Swanson. The 'Process' tab is selected in the ribbon. In the top right corner, the 'DELETE' icon (a trash can) is highlighted with a red rectangle. Below the ribbon, there are various action buttons like 'Salary', 'PTO Hours', 'State Withholding Setup', etc. The 'First Name' field contains 'Ron' and the 'Statutory Employee' toggle is turned off.

Salary: The 'SALARY' page action allows you to create or update an employee's compensation information related to - PAY CYCLE, STARTING DATE, HOURLY / SALARY, HOURLY RATE, ANNUAL SALARY, WEEKLY HOURS, OVERTIME EXEMPT.

To ADD EMPLOYEE SALARY

- Select the 'SALARY' page action
- Select the 'NEW' page action under the 'HOME' ribbon of the 'PAYROLL EMPLOYEE SALARIES' page.

- Select the 'OVERTIME EXEMPT' box if the employee will be Overtime Exempt.
- Enter an 'OVERTIME MULTIPLIER'. *Note: This multiplier will be applied to all hours the employee works that are over the default hours you enter in 'WEEKLY HOURS' field.*
- If you utilize a time clock, selecting the 'USE HOURS DETAIL IMPORT' box will use the time clock data import when processing the employee's payroll document.

DEDUCTIONS

Deductions: The 'DEDUCTIONS' page action allows you to input the employee's payroll deductions.

Payroll Employee Card

EMP10007 · Ron · Swanson

New **Process** Reports Actions Related Reports Fewer options

Salary PTO Hours State Withholding Setup Create Deductions from Template Create HR Tracking Info

Deductions Federal Withholding Setup Create PTO Hours from Template Create Employee Salary Local Tax Setup

First Name: Ron Statutory Employee: ☐

Deductions: Use the 'DEDUCTIONS' page action to apply regular deductions such as 401k or health insurance to the employee's payroll documents.

To ADD EMPLOYEE DEDUCTIONS

- Select the 'DEDUCTIONS' page action
- Select the '+NEW' page action

HOME							
VIEW - EMPLOYEE DEDUCTIONS + New							
CODE	DESCRIPTION	AMOUNT FORMULA	AMOUNT / PERCENT	EMPLOYER CONTRIBUTION CODE	EMPLOYER CONTRIBUTION DESCRIPTION	EMPLOYER CONTRIBUTION AMOUNT FORMULA	EMPLOYER CONTRIBUTION AMOUNT / PERCENT
401KPLAN	401K Plan	Fixed Amount	50.00			% of Gross Wages	0.00

- The 'Payroll Employee Deduction Card' will open.

NEW - PAYROLL EMPLOYEE DEDUCTION CARD

EMP10005 · Deduction

Employee Deduction Setup

Code

...

Description

Amount Formula

% of Gross Wages

Amount / Percent

0.00

Limit Does Not Reset Annually

☐

Employee Deduction Limit

Employee Deduction Balance

0.00

Total Contribution Limit

0.00

Total Contribution Balance

0.00

Show more

Employer Contribution Setup

Employer Contribution

☐

Employer Contribution Code

Employer Contribution Description

Employer Contribution Amount Formula

% of Gross Wages

Employer Contribution Amount / Perce...

0.00

Employer Contribution Limit

Employer Contribution Balance

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

HOME

NEW - PAYROLL EMPLOYEE DEDUCTION CARD

EMP10005 · Deduction

Employee Deduction Setup

Code

...

Description

Amount Formula

% of Gross Wages

Amount / Percent

0.00

Limit Does Not Reset Annually

☐

Employee Deduction Limit

Employee Deduction Balance

0.00

Total Contribution Limit

0.00

Total Contribution Balance

0.00

Show more

Employer Contribution Setup

Employer Contribution

☐

Employer Contribution Code

Employer Contribution Description

Employer Contribution Amount Formula

% of Gross Wages

Employer Contribution Amount / Perce...

0.00

Employer Contribution Limit

Employer Contribution Balance

CODE

DESCRIPTION

401KPLAN

401K Plan

403BPLAN

403b Plan

FSA

Flexible Spending Account

HEALTH INSURANCE

Health Insurance

HSA

Health Savings Account

HSA_FAM

HSA Family Plan

+ New

Select from full list

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

HOME

NEW - PAYROLL EMPLOYEE DEDUCTION CARD

EMP10005 · Deduction

Employee Deduction Setup Show more

Code	401KPLAN	Employee Deduction Limit	
Description	401K Plan	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	☐		

Employer Contribution Setup

Employer Contribution	☐	Employer Contribution Amount / Perce...	0.00
Employer Contribution Code		Employer Contribution Limit	
Employer Contribution Description		Employer Contribution Balance	
Employer Contribution Amount Formula	% of Gross Wages		

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

EDIT - PAYROLL EMPLOYEE DEDUCTION CARD

EMP10005 · Deduction · 401KPLAN

Employee Deduction Setup Show more

Code	401KPLAN	Employee Deduction Limit	
Description	401K Plan	Employee Deduction Balance	100.00
Amount Formula	% of Gross Wages	Total Contribution Limit	0.00
Amount / Percent	50.00	Total Contribution Balance	0.00
Limit Does Not Reset Annually	☐		

Employer Contribution Setup

Employer Contribution	☐	Employer Contribution Amount / Perce...	0.00
Employer Contribution Code		Employer Contribution Limit	
Employer Contribution Description		Employer Contribution Balance	
Employer Contribution Amount Formula	% of Gross Wages		

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

HOME

EDIT - PAYROLL EMPLOYEE DEDUCTION CARD

EMP10005 · Deduction · 401KPLAN

Employee Deduction Setup Show more

Code	401KPLAN	Employee Deduction Limit	18,500.00
Description	401K Plan	Employee Deduction Balance	100.00
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 ☐

Employer Contribution Setup

Employer Contribution	☐	Employer Contribution Amount / Perce...	0.00
Employer Contribution Code		Employer Contribution Limit	
Employer Contribution Description		Employer Contribution Balance	
Employer Contribution Amount Formula	% of Gross Wages		

- Check the 'Limit Does Not Reset Annually' if the deduction will not reset annually. This box will usually be left unchecked. But in for certain deductions such as garnishments or loan repayments it may need to be checked.

HOME

EDIT - PAYROLL EMPLOYEE DEDUCTION CARD

EMP10005 · Deduction · 401KPLAN

Employee Deduction Setup Show more

Code	401KPLAN	Employee Deduction Limit	18,500.00
Description	401K Plan	Employee Deduction Balance	100.00
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 ☒

Employer Contribution Setup

Employer Contribution	☐	Employer Contribution Amount / Perce...	0.00
Employer Contribution Code		Employer Contribution Limit	
Employer Contribution Description		Employer Contribution Balance	
Employer Contribution Amount Formula	% of Gross Wages		

- If applicable to the deduction the 'Employee Deduction Limit' and 'Total Contribution Limit' will pre-populate with information from the NAV 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.

HOME

EDIT - PAYROLL EMPLOYEE DEDUCTION CARD

EMP10005 · Deduction · 401KPLAN

Employee Deduction Setup Show more

Code	401KPLAN	...	Employee Deduction Limit	18,500.00
Description	401K Plan		Employee Deduction Balance	100.00
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	☐			

Employer Contribution Setup

Employer Contribution	☐	Employer Contribution Amount / Perce...	0.00
Employer Contribution Code		Employer Contribution Limit	
Employer Contribution Description		Employer Contribution Balance	
Employer Contribution Amount Formula	% of Gross Wages		

ADD EMPLOYER CONTRIBUTION

- If there is an employer contribution associated with this deduction, select the 'Employer Contribution' check box. Once selected, the 'Employer Contribution Code' and 'Employer Contribution Description' will become editable.

HOME

EDIT - PAYROLL EMPLOYEE DEDUCTION CARD

EMP10005 · Deduction · 401KPLAN

Employee Deduction Setup Show more

Code	401KPLAN	...	Employee Deduction Limit	18,500.00
Description	401K Plan		Employee Deduction Balance	100.00
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	☐			

Employer Contribution Setup

Employer Contribution	☒	Employer Contribution Amount / Perce...	0.00
Employer Contribution Code		Employer Contribution Limit	
Employer Contribution Description		Employer Contribution Balance	
Employer Contribution Amount Formula	% of Gross Wages		

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

HOME

EDIT - PAYROLL EMPLOYEE DEDUCTION CARD

EMP10005 · Deduction · 401KPLAN

Employee Deduction Setup Show more

Code	401KPLAN	Employee Deduction Limit	18,500.00
Description	401K Plan	Employee Deduction Balance	100.00
Amount Formula			55,000.00
Amount / Percent			0.00
Limit Does Not Reset Annually			

Employer Contribution Setup

Employer Contribution	+ New	Select from full list	Amount / Perce...	0.00
Employer Contribution Code	E401K	Employer Contribution Limit		
Employer Contribution Description	Employer 401K	Employer Contribution Balance		
Employer Contribution Amount Formula	% of Gross Wages			

CODE	DESCRIPTION
E401K	Employer 401K
E-HEALTH_CONT	Employer Health Contribution
E-RETIREMENT_CONT	Employer Retirement Contribution

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

HOME

EDIT - PAYROLL EMPLOYEE DEDUCTION CARD

EMP10005 · Deduction · 401KPLAN

Employee Deduction Setup Show more

Code	401KPLAN	Employee Deduction Limit	18,500.00
Description	401K Plan	Employee Deduction Balance	100.00
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	☐		

Employer Contribution Setup

Employer Contribution	☒	Employer Contribution Amount / Perce...	0.00
Employer Contribution Code	E401K	Employer Contribution Limit	
Employer Contribution Description	Employer 401K	Employer Contribution Balance	
Employer Contribution Amount Formula	% of Gross Wages		

- Select a formula for calculating the employer contribution from the drop down menu in the 'Employer Contribution Amount Formula' field.

HOME

EDIT - PAYROLL EMPLOYEE DEDUCTION CARD

EMP10005 · Deduction · 401KPLAN

Employee Deduction Setup Show more

Code	401KPLAN	Employee Deduction Limit	18,500.00
Description	401K Plan	Employee Deduction Balance	100.00
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	☐		

Employer Contribution Setup

Employer Contribution	☒	Employer Contribution Amount / Perce...	0.00
Employer Contribution Code	E401K	Employer Contribution Limit	
Employer Contribution Description	Employer 401K	Employer Contribution Balance	
Employer Contribution Amount Formula	% of Gross Wages		

- Enter an amount or percent to calculate employer contributions based on the formula you selected previously.

HOME

EDIT - PAYROLL EMPLOYEE DEDUCTION CARD

EMP10005 · Deduction · 401KPLAN

Employee Deduction Setup Show more

Code	401KPLAN	Employee Deduction Limit	18,500.00
Description	401K Plan	Employee Deduction Balance	100.00
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	☐		

Employer Contribution Setup

Employer Contribution	☒	Employer Contribution Amount / Perce...	3.00
Employer Contribution Code	E401K	Employer Contribution Limit	
Employer Contribution Description	Employer 401K	Employer Contribution Balance	
Employer Contribution Amount Formula	% of Gross Wages		

- Enter an 'Employer Contribution Limit' if necessary.

HOME

EDIT - PAYROLL EMPLOYEE DEDUCTION CARD

EMP10005 · Deduction · 401KPLAN

Employee Deduction Setup Show more

Code	401KPLAN	Employee Deduction Limit	18,500.00
Description	401K Plan	Employee Deduction Balance	100.00
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	☐		

Employer Contribution Setup

Employer Contribution	☒	Employer Contribution Amount / Perce...	3.00
Employer Contribution Code	E401K	Employer Contribution Limit	18,500.00
Employer Contribution Description	Employer 401K	Employer Contribution Balance	
Employer Contribution Amount Formula	% of Gross Wages		

- Click 'OK' button in bottom right corner.
- The employee deduction will appear as a new line in the 'Employee Deductions' table.

HOME

VIEW - EMPLOYEE DEDUCTIONS + New

CODE	DESCRIPTION	AMOUNT FORMULA	AMOUNT / PERCENT	EMPLOYER CONTRIBUTION CODE	EMPLOYER CONTRIBUTION DESCRIPTION	EMPLOYER CONTRIBUTION AMOUNT / PERCENT	EMPLOYER CONTRIBUTION AMOUNT / PERCENT
401KPLAN	401K Plan	% of Gross Wages	3.00	E401K	Employer 401K	% of Gross Wages	3.00
SIMP_401K	Simple 401K	% of Gross Wages	0.00			% of Gross Wages	0.00

PTO Hours

HOME NAVIGATE REPORT MANAGE

Direct Deposits

Create New Employee Wizard New

Edit Manage

Salary Deductions PTO Hours

Create PTO Hours from Template Process

Create Deductions from Template

Create Employee Salary

Tax Table

PTO Hours: The 'PTO Hours' page action allows you to set up an employee's PTO Hours. This includes hour limits, the PTO hours accrual starting date and more.

To ADD PTO HOURS

- Select the 'PTO HOURS' page action
- In the 'Payroll Employee Setup' select the '+NEW' page action

HOME

VIEW - PAYROLL EMPLOYEE PTO SETUP + New

EARNINGS CODE	ACCRUAL STARTING DATE	HOURS PER YEAR TO ACCRUE	YEAR CARRYO...	ALLOW NEGATIVE HOURS	HOURS LIMIT	USE LUMP SUM HOURS	LUMP SUM HOURS	ANNIVERSARY DATE
VACATION PAY	1/7/2018	40.00		☒	80.00	☐	0.00	

- The 'Employee PTO Card' will appear.

NEW - EMPLOYEE PTO CARD

EMP10004

General

Earnings Code		Allow Negative Hours	☐
Starting Date		Year Carryover	☐
Hours Remaining	0.00	Carryover Hours Limit	
Hours Limit			

Lump Sum Setup

Use Lump Sum Hours ☐

- For the 'Earnings Code' field, select an earnings code from the available options in the drop down menu.

HOME

NEW - EMPLOYEE PTO CARD

EMP10004

General

Earnings Code Allow Negative Hours ☐

Starting Date

Hours Remaining

Hours Limit

Lump Sum Setup

Use Lump Sum Hours ☐

CODE	DESCRIPTION
BONUS	Bonus
OTHER	Other
PERSONAL DAY	Personal Day
SICK PAY	Sick Pay
VACATION PAY	Vacation Pay

+ New [Select from full list](#)

- Enter a 'Starting Date' for the PTO Hours to begin accruing by entering a date or selecting one from the drop down menu

HOME

NEW - EMPLOYEE PTO CARD

EMP10004

General

Earnings Code Allow Negative Hours ☐

Starting Date

Hours Remaining

Hours Limit

Lump Sum Setup

Use Lump Sum Hours ☐

Year Carryover ☐

Carryover Hours Limit

July 2018

Mo	Tu	We	Th	Fr	Sa	Su
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Today Done

- Enter an 'Hours Limit'. This is the maximum amount of hours that can accrue each year

HOME

NEW - EMPLOYEE PTO CARD

EMP10004

General

Earnings Code	PERSONAL DAY	...	Allow Negative Hours	☐
Starting Date	7/15/2018	...	Year Carryover	☐
Hours Remaining		0.00	Carryover Hours Limit	
Hours Limit		80		

Lump Sum Setup

Use Lump Sum Hours ☐

- If you wish to allow negative hours or allow unused PTO Hours to carry over each year amount, check the appropriate boxes. If you select 'Year Carryover' check box you can enter a 'Carryover Hours Limit'. The 'Carryover Hours Limit' is the amount of accrued hours they can carryover from the previous year.

NOTE: 'ALLOW NEGATIVE HOURS' means that an employee can use hours that they have not yet accrued. This is most commonly utilized with Vacation Time for new employees.

HOME

NEW - EMPLOYEE PTO CARD

EMP10004

General

Earnings Code	PERSONAL DAY	...	Allow Negative Hours	☒
Starting Date	7/15/2018	...	Year Carryover	☒
Hours Remaining		0.00	Carryover Hours Limit	40
Hours Limit		80.00		

Lump Sum Setup

Use Lump Sum Hours ☐

NOTE: In most cases, companies will either utilize 'LUMP SUM SETUP' or the 'ACCRUAL PER PAY PERIOD SETUP'.

LUMP SUM SETUP PROCEDURE

- If you wish to utilize the 'LUMP SUM SETUP', select the 'Use Lump Sum Hours' check box. At which point the 'Lump Sum Hours' and 'Anniversary Field' will become editable.

Employee PTO Card

EMP10007 · SICK PAY · 1/1/2020

General

Earnings Code: SICK PAY Year Carryover: ☒

Starting Date: 1/1/2020 Restricted Until Date:

Hours Remaining: 21.55

Hours Setup >

Lump Sum Setup

Use Lump Sum Hours: ☒ Use Lump Sum Amount: ☐

Anniversary Date: Lump Sum Amount:

Lump Sum Hours: Do Not Modify Anniversary Date: ☐

- Enter the lump sum hours and the anniversary date for the hours in the corresponding fields.

Lump Sum Setup

Use Lump Sum Hours: ☒ Use Lump Sum Amount: ☐

Anniversary Date: 12/23/2022 Lump Sum Amount:

Lump Sum Hours: 80.00 Do Not Modify Anniversary Date: ☐

- Click 'OK' in bottom right corner.
- Now OPEN the PTO Journal. Enter 'PTO Journal' in the SEARCH BAR.

Tell me what you want to do  

Go to Pages and Tasks

> PTO Hours Journal Tasks

- o The 'PTO HOURS JOURNAL' will appear.

← PTO Hours Journal ✓ Saved   

Batch Name DEFAULT ...

Manage  Post  PTO Carryover  Calc. Lump Sum Hours  Reduce Carryover Hours ...  

	Posting Date		Document No.	Employee No.	Pay Cycle	Pay Cycle Period	Pay Cycle Period Ending Date	Earnings Code
→	3/2/2020 	:	PTOJNL10007	EMP10014	Weekly	Week 2 2019	1/12/2019	PERSONAL DAY

- o Select 'CALC LUMP SUM HOURS' page action

← PTO Hours Journal ✓ Saved

Batch Name DEFAULT

Manage  Post  PTO Carryover  Calc. Lump Sum Hours  Reduce Carryover Hours ...

	Posting Date		Document No.	Employee No.	Pay Cycle	Pay Cycle Period	Pay Cycle Period Ending Date	Earning
→	3/2/2020 	:	PTOJNL10007	EMP10014	Weekly	Week 2 2019	1/12/2019	PERSOI

- Enter an 'Anniversary Start Date' and 'Anniversary End Date' range that includes the lump sum anniversary date you entered in the 'LUMP SUM SETUP'

Calculate Lump Sum Hours



Lump Sum Date Range

Anniversary Start Date

12/23/2022



Anniversary End Date

12/23/2026



Options

Auto-Change Anniversary Date ...

☒

Filter: Payroll Employee

× No.



× Hire Date

+ Filter...

Filter totals by:

OK

Cancel

- Click 'OK' in bottom right corner.

ACCRUAL PER PAY PERIOD SETUP PROCEDURE

- o If you elect to utilize the 'ACCRUAL PER PAY PERIOD SETUP', enter the date at which point PTO Hours will begin to accrue along with the hours to accrue per year.

Employee PTO Card

EMP10007 · SICK PAY · 1/1/2020

General

Earnings Code: SICK PAY

Starting Date: 1/1/2020

Hours Remaining: 21.55

Year Carryover: ☒

Restricted Until Date:

Hours Setup

Hours Limit: 40.00

Maximum Hours Usage per Year:

Allow Negative Hours: ☒

Max. Hours Usage Year Based on Start...: ☐

Carryover Hours Limit: 40

Allow Employee to Exceed Annual Us...: ☐

Pay Cycle Hours Minimum:

- Click 'OK'
- The PTO Hours will appear in a new line on the 'Payroll Employee PTO List' screen.

Payroll Employee PTO List

Earnings Code ↑	Starting Date ↑	Hours Remaining	Allow Nega... Hours	Hours Limit	Hours per Year to Accrue	Lump Sum Hours
HOURS BASED PTO	1/1/2019	8.00	☐			
PERSONAL DAY	1/1/2020	24.62	☒	80.00		
SICK PAY	1/1/2020	21.55	☒	40.00		80.00
VACATION PAY	1/1/2020	48.62	☒	120.00	120.00	

CREATE PTO HOURS FROM TEMPLATE

Payroll Employee Card

EMP10007 · Ron · Swanson

New Process Reports Actions Related Reports Fewer options

Salary PTO Hours State Withholding Setup Create Deductions from Template Create HR Tracking Info
Deductions Federal Withholding Setup **Create PTO Hours from Template** Create Employee Salary Local Tax Setup

First Name: Ron Statutory Employee: ☐ Ron Swa

Create PTO Hours from Template: The 'CREATE PTO HOURS FROM TEMPLATE' page action allows you to select a template that will apply specific PTO setups to the employee.

CREATE DEDUCTIONS FROM TEMPLATE

Payroll Employee Card

EMP10007 · Ron · Swanson

New Process Reports Actions Related Reports Fewer options

Salary PTO Hours State Withholding Setup **Create Deductions from Template** Create HR Tracking Info
Deductions Federal Withholding Setup Create PTO Hours from Template Create Employee Salary Local Tax Setup

First Name: Ron Statutory Employee: ☐ Ron Swa

Create Deductions from Template: The 'CREATE DEDUCTIONS FROM TEMPLATE' page action allows you to select a template that will apply predefined Deduction Setups for the employee.

CREATE EMPLOYEE SALARY

Payroll Employee Card

EMP10007 · Ron · Swanson

New Process Reports Actions Related Reports Fewer options

Salary PTO Hours State Withholding Setup Create Deductions from Template Create HR Tracking Info

Deductions Federal Withholding Setup Create PTO Hours from Template **Create Employee Salary** Local Tax Setup

First Name Ron Statutory Employee ☐ Ron Swan

Create Employee Salary: The 'CREATE EMPLOYEE SALARY' page action allows you to select a template that will apply predefined Salary Setups for the employee.

NAVIGATE RIBBON DEFINED

HOME NAVIGATE REPORT **MANAGE**

Create New Employee Wizard PTO Hours Create PTO Hours from Template Employee PTO Approval Details

Salary Dimensions Create Deductions from Template Check Memo Setup

Deductions Comments Create Employee Salary Employee Dimension Allocation

Employee

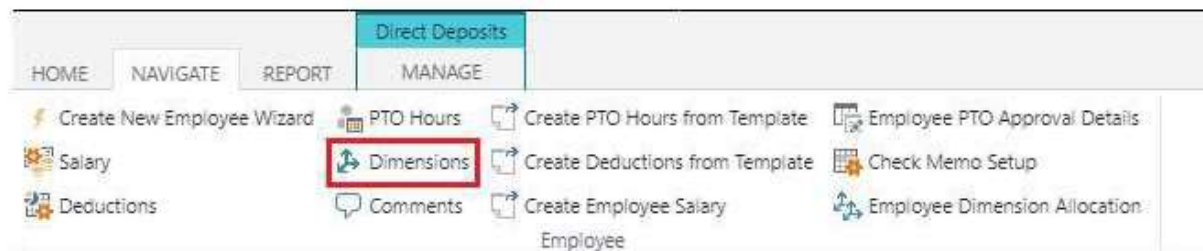
ECR-D1.41

NOTE: See 'HOME RIBBON DEFINED' for 'CREATE NEW EMPLOYEE WIZARD', 'SALARY', 'DEDUCTIONS', 'PTO HOURS', 'CREATE PTO HOURS FROM TEMPLATE', 'CREATE DEDUCTIONS FROM TEMPLATE', 'CREATE EMPLOYEE SALARY', 'COMMENTS' and 'TAX TABLE'

-

-

DIMENSIONS

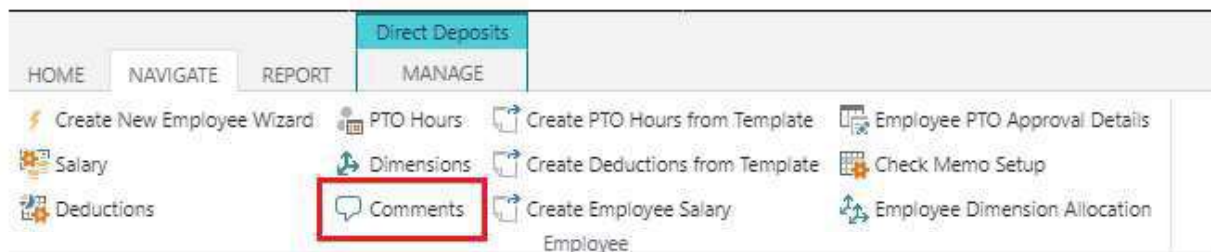


ECR-D1.42

Dimensions: The 'DIMENSIONS' page action allows you to group employees based on their department, function, or some other characteristic. NAV will allow you to filter these groups or explode them into columns so you can analyze one or more employee groups without having to create separate GL accounts for every employee department.

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-
-

COMMENTS



ECR-D1.43

Employee Comments: The 'EMPLOYEE COMMENTS' page action is different from the 'COMMENT' and 'COMMENT 2' fields within the 'GENERAL' tab of the 'EMPLOYEE CARD'. The 'EMPLOYEE COMMENTS' page action allows you to keep track of employee comments or notes and organize those comments by date.

To ADD COMMENTS

- Select the 'COMMENTS' page action.
- The 'EMPLOYEE COMMENTS' table will appear

HOME			
NEW - EMPLOYEE COMMENTS + New			
DATE	COMMENT	COMMENT 2	
1/15/2007	...	showed up 2 hours late	

ECR-D1.44

- Select the 'NEW' page action within 'EMPLOYEE COMMENTS' page.

HOME			
NEW - EMPLOYEE COMMENTS + New			
DATE	COMMENT	COMMENT 2	
1/15/2007	...	showed up 2 hours late	

ECR-D1.54

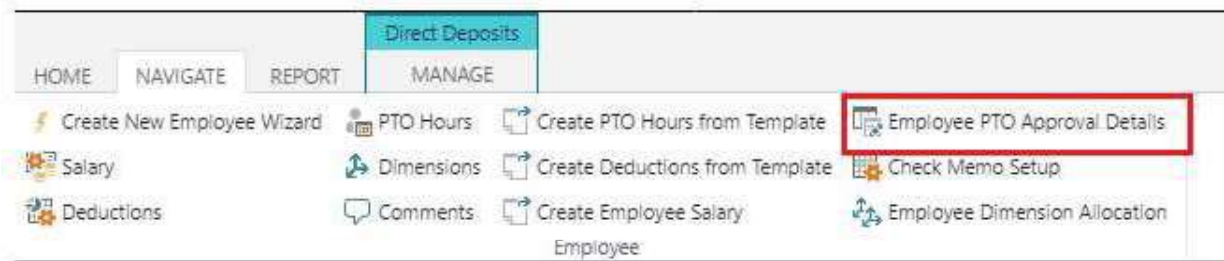
- Select the 'DATE' from the drop down window in 'DATE' field
- Enter a comment in 'COMMENT' field
- Enter a second comment in 'COMMENT 2' field if needed

CHECK MEMO SETUP

HOME			
NAVIGATE			
REPORT			
Direct Deposits			
MANAGE			
Create New Employee Wizard	PTO Hours	Create PTO Hours from Template	Employee PTO Approval Details
Salary	Dimensions	Create Deductions from Template	Check Memo Setup
Deductions	Comments	Create Employee Salary	Employee Dimension Allocation
Employee			

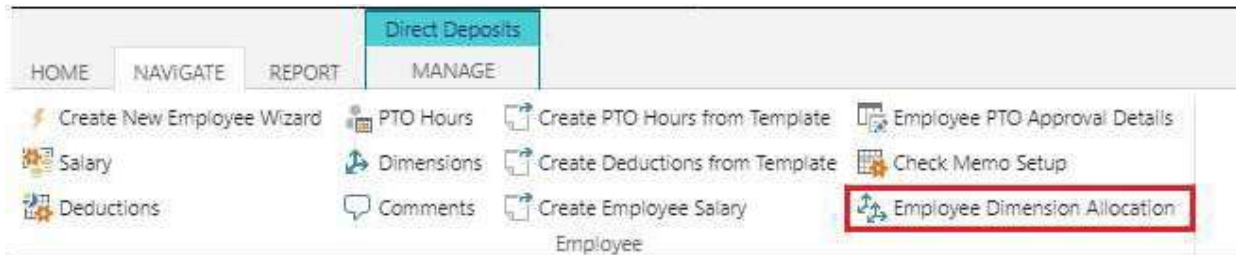
ECR-D1.45

Check Memo Setup: The 'CHECK MEMO SETUP' page actions allows you to record memo fields to be printed on accounts payable checks, such as for a 401k vendor.

EMPLOYEE PTO APPROVAL DETAILS

ECR-D1.46

Employee PTO Approval Details: Navigates user to 'EMPLOYEE PTO DETAILS' table which shows the user information related to the employee's PTO requests and usage.

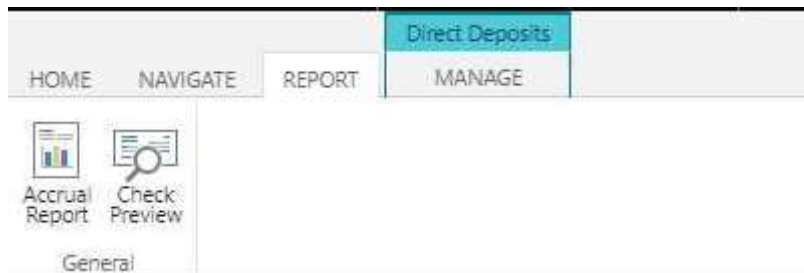
EMPLOYEE DIMENSION ALLOCATION

ECR-D1.47

Employee Dimension Allocation: View or edit the single set of dimensions that are set up for the selected template

REPORT RIBBON DEFINED

The 'REPORT' ribbon contains the employee's 'ACCRUAL REPORT' and 'CHECK PREVIEW' page action.



ECR-D1.50

-
-
-
-

ACCRUAL REPORT

Accrual Report: This page action allows you to run an employee accrual report based on a defined date range.



ECR-D1.55

-

To RUN EMPLOYEE ACCRUAL REPORT

- Select the 'ACCRUAL REPORT' page action

EDIT - EMPLOYEE ACCRUAL REPORT



Options

As of Date

5/8/2018

Date Filter

01/01/18..12/31/18

Show Details

☐

Payroll Employee

Show results:

Where:

No.

is:

EMP10005

Send to...

Print

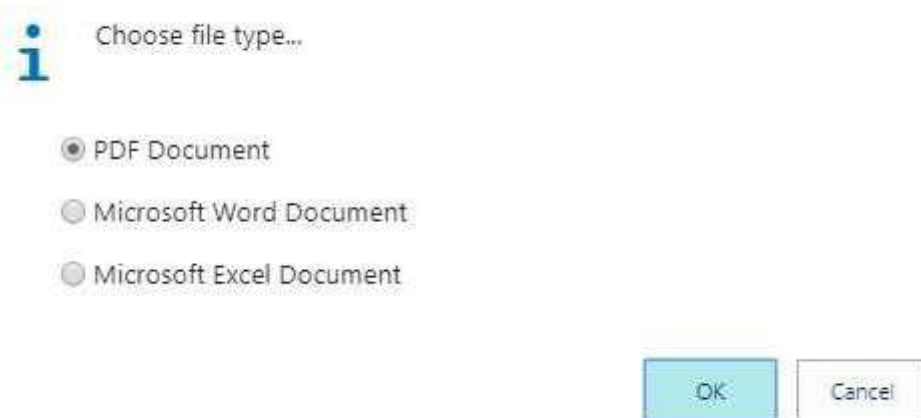
Preview

Cancel

ECR-D14

- Input 'AS OF DATE'
- Enter 'DATE FILTER'
- Select 'SHOW DETAILS' box if you need report to show details.
- Select 'PREVIEW' to preview report
- Select 'PRINT' to print report **OR**
- Click 'SEND TO...' and choose file type to export via pdf, word doc or excel.

SEND TO screenshot:



ECR-D15

CHECK PREVIEW



ECR-D1.57

Check Preview: Allows you to review a sample of the employee's check with all withholdings and deductions

How to PREVIEW CHECK

- Select the 'CHECK PREVIEW' page action
- The 'EMPLOYEE CHECK PREVIEW' screen appears

▼

HOME

ACTIONS

View
Manage

Calculate Payroll Check
Process

Notes
Show Attached

Links

Refresh

Clear Filter
Page

Go to

Employee Check Preview

General

Employee No.: EMP1058

Pay Cycle Period:

Gross Annual Salary: 20,800.00

Details

Deductions

	0.00
	0.00
	0.00
	0.00
	0.00
	0.00
	0.00
	0.00
	0.00
	0.00
	0.00

Withholdings

	0.00
	0.00
	0.00
	0.00
	0.00
	0.00
	0.00
	0.00
	0.00
	0.00
	0.00

Check Preview

ECR-D1.51

- Select a 'Pay Cycle Period' from the drop down menu and enter all applicable Deductions and Withholdings

HOME ACTIONS

View Calculate Payroll Check Notes Links Refresh Clear Filter Go to

Manage Process Show Attached Page

Employee Check Preview

General

Employee No.: EMP1058 Gross Annual Salary: 20,800.00

Pay Cycle Period: Week 7 2018

Details

Deductions		Withholdings	
	25.00		10.00
	5.00		0.00
	15.00		0.00
	0.00		0.00
	---		---

ECR-D1.52

- Select 'CALCULATE PAYROLL CHECK' page action

HOME ACTIONS

View Calculate Payroll Check Notes Links Refresh Clear Filter Go to

Manage Process Show Attached Page

ECR-D1.53

- A sample of the employee check will appear on the right side of your screen.