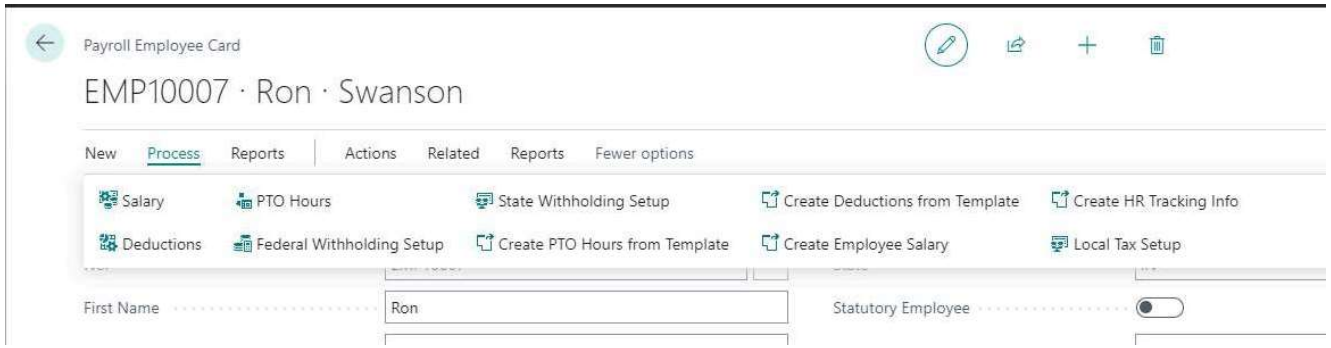
Employee Card Ribbon Definitions

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

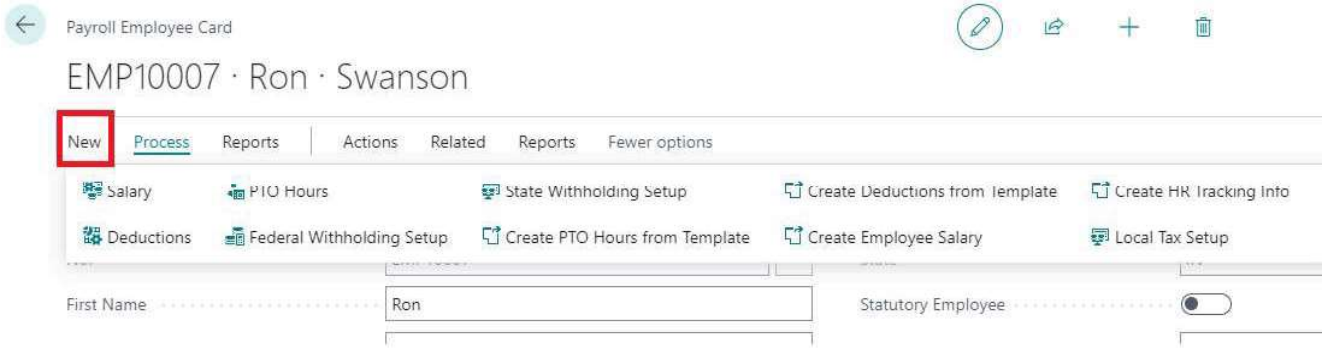
The 'EMPLOYEE CARD' page has 3 available ribbons to select at the top of the page.

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

P RIBBON DEFINED

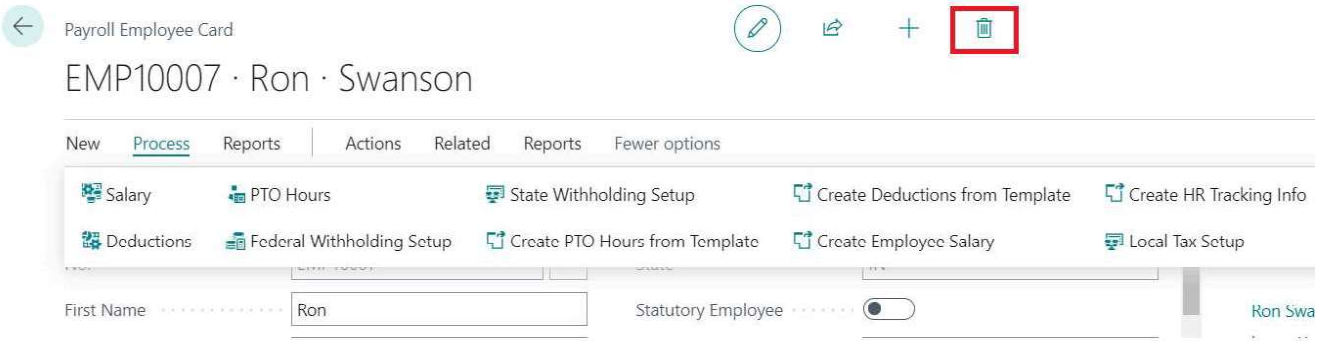


NEW



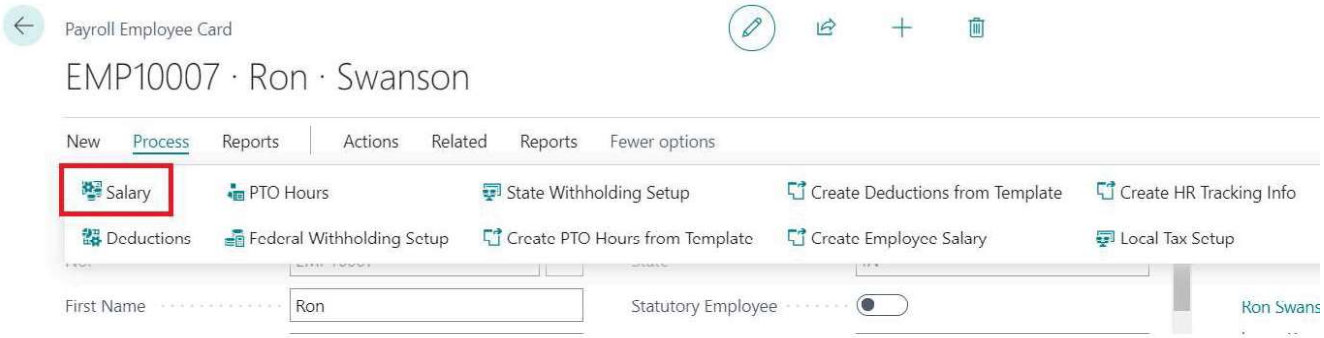
New: The 'NEW' page action creates a new employee card. Unlike the 'CREATE NEW EMPLOYEE WIZARD', the 'NEW' page action will not utilize templates to auto-populate certain fields. It is up to the user to enter the correct data into the employee card.

DELETE



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

SALARY



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.

View - Payroll Employee Salaries

Search | + New | Manage

Pay Cycle	Starting Date	Salary Type	Weekly Hours	Hourly Rate	Annual Salary	Overt... Exem...
Biweekly	1/1/2018	Salary	40.00	38.46154	80,000.00	☑
Biweekly	1/6/2019	Salary	40.00	26.44231	55,000.00	☑

- A new 'Employee Salary Card' will pop up to add new payroll employee salary information

Employee Salary Card

EMP10007

General Show more

Pay Cycle		Weekly Hours	0.00
Starting Date		Use Hours Details	ON
Salary Type	Hourly	Overtime Multiplier	
Hourly Rate	0.00	Overtime Exempt	OFF
Annual Salary	0.00		

Additional Info

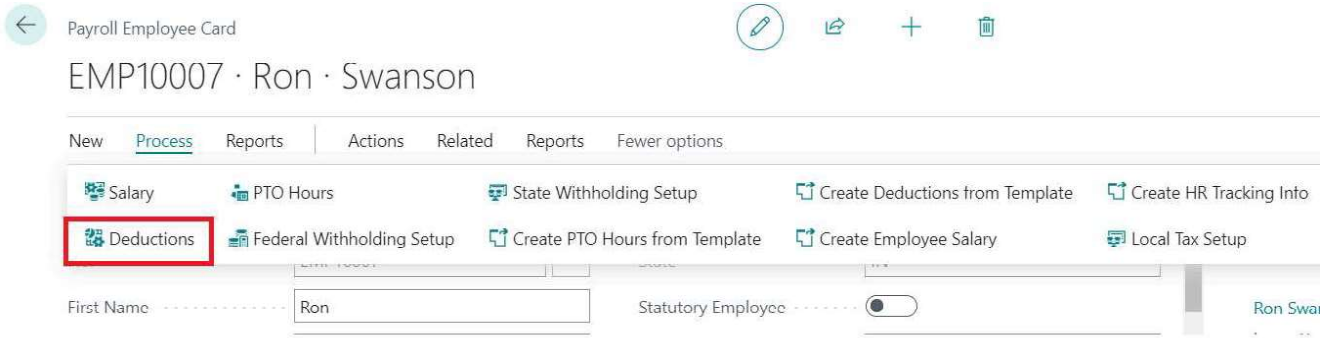
Entered By		Modified By	
Entered On		Modified On	

- Select the drop down arrow for ‘PAY CYCLE’ field and select appropriate Pay Cycle.
- Enter the employee starting date.
- Select ‘Hourly’ or ‘Salary’ from ‘HOURLY/SALARY’ field drop down.
- Enter an ‘HOURLY RATE’ if the employee is hourly.
- Enter an ‘ANNUAL SALARY’ if the employee is salaried.
- Enter the default ‘WEEKLY HOURS’ for the employee.

- 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.

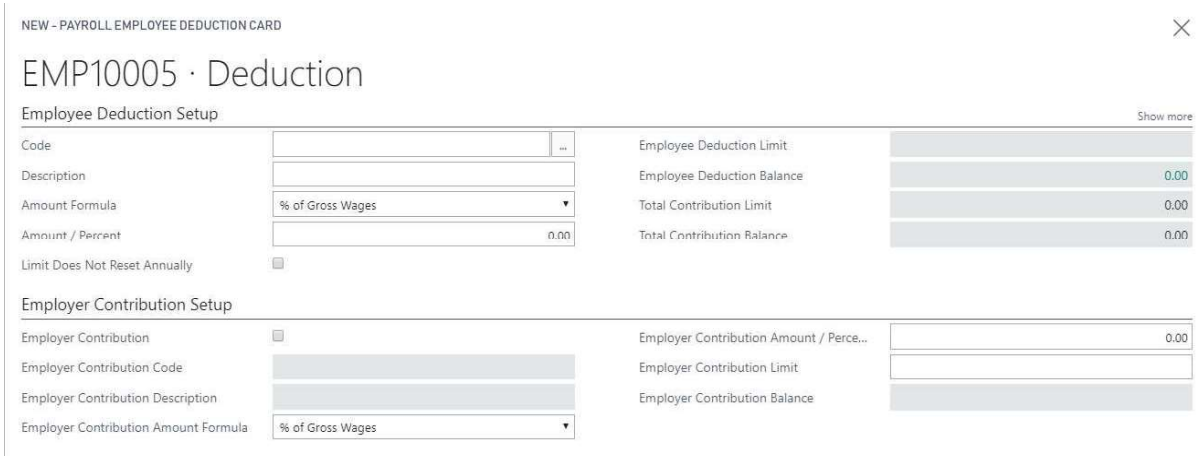


Deductions: Use the 'DEDUCTIONS' page action to apply regular deductions such as 401k or health insurance to the employee's payroll documents.

To ADD EMPLOYEE DEDUCTIONS

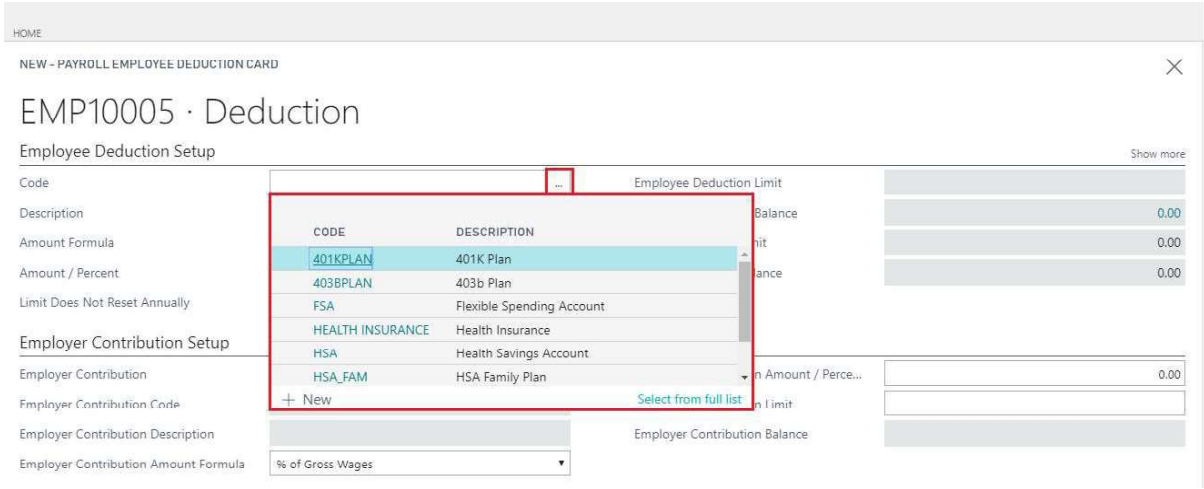
- Select the 'DEDUCTIONS' page action
- Select the '+NEW' page action

- The 'Payroll Employee Deduction Card' will open.



-

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



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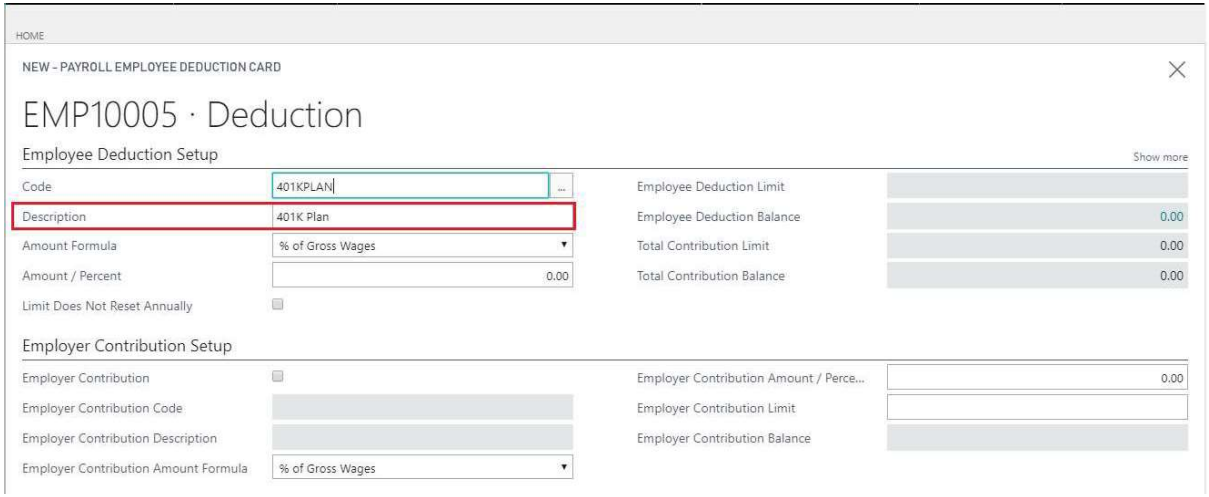
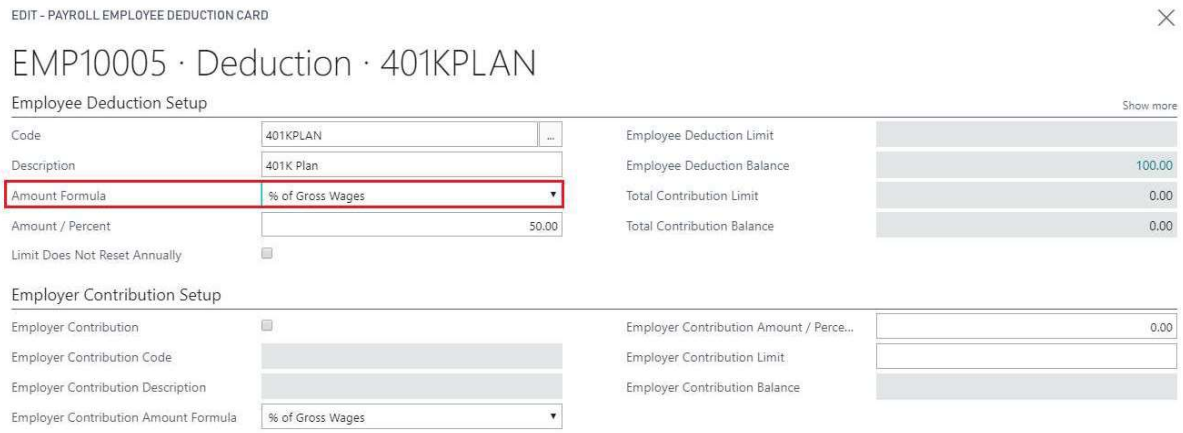
- The ‘Description’ field will auto-populate after you select a code.



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



- 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

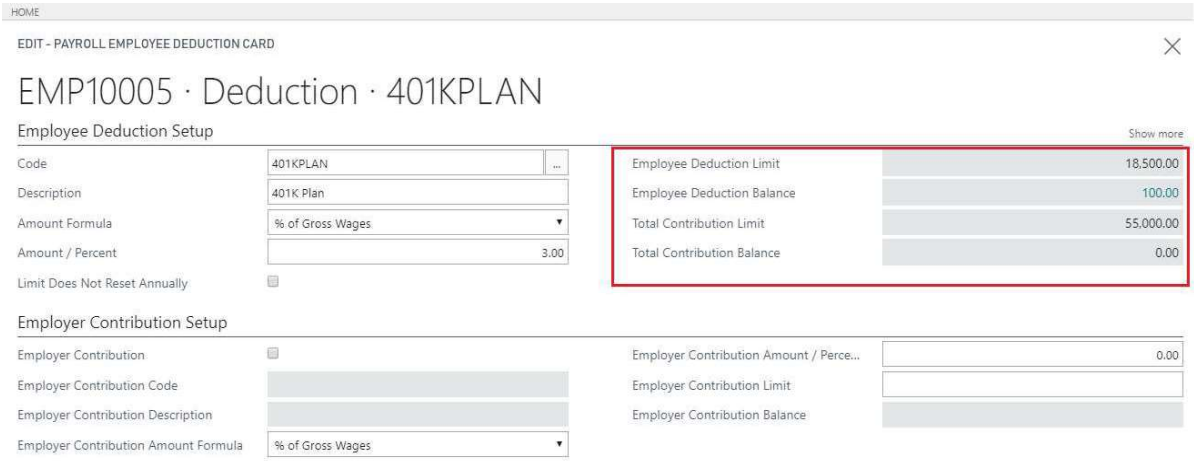
Show more

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

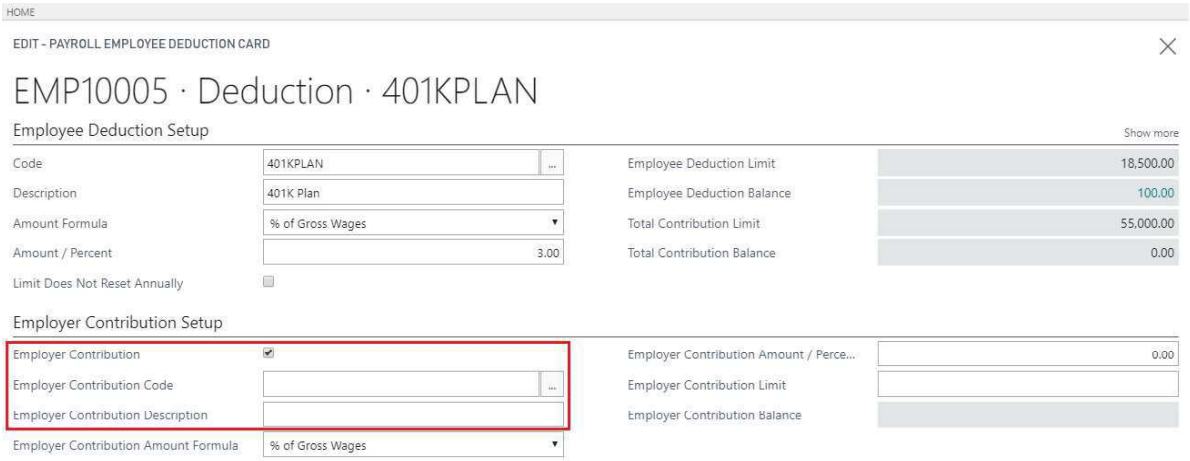
Employer Contribution		Employer Contribution Amount / Perce...	0.00
Employer Contribution Code		Employer Contribution Limit	
Employer Contribution Description		Employer Contribution Balance	
Employer Contribution Amount Formula	% of Gross Wages		

- 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.

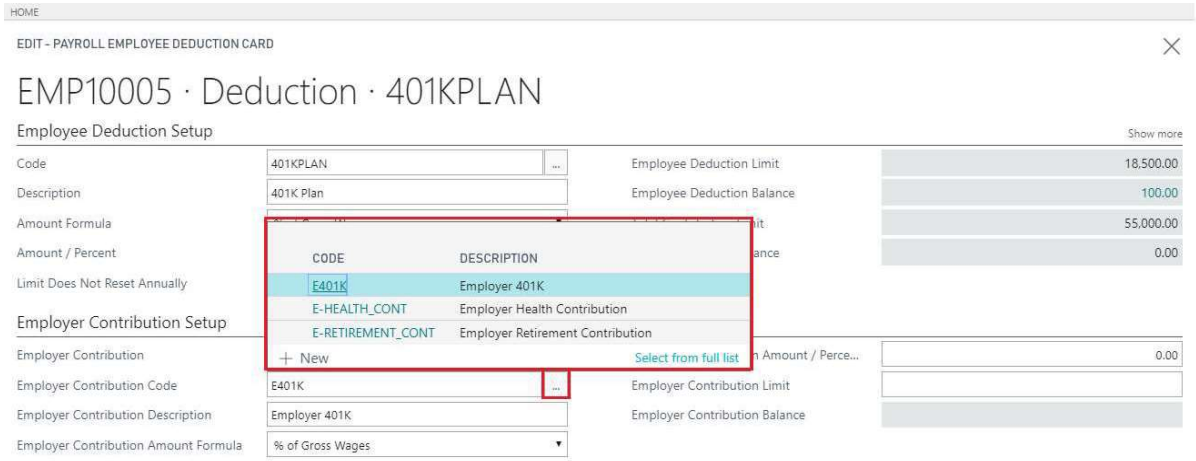


ADD EMPLOYER CONTRIBUTION

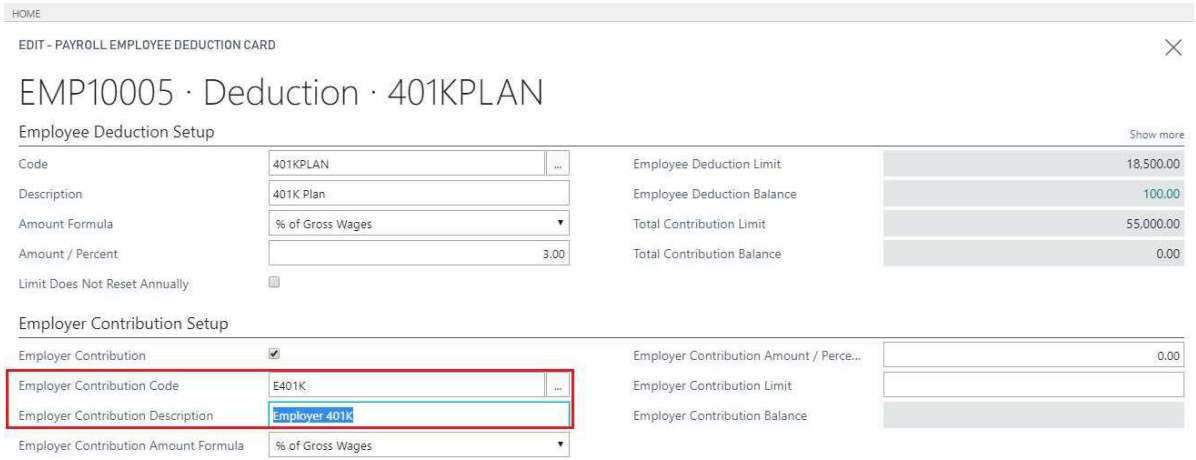
- If there is an employer contribution associated with this deduction, select the 'Employer Contribution' check box. Once selected, the 'Employer Contribution Code' and 'Employer Contribution Description' will become editable.



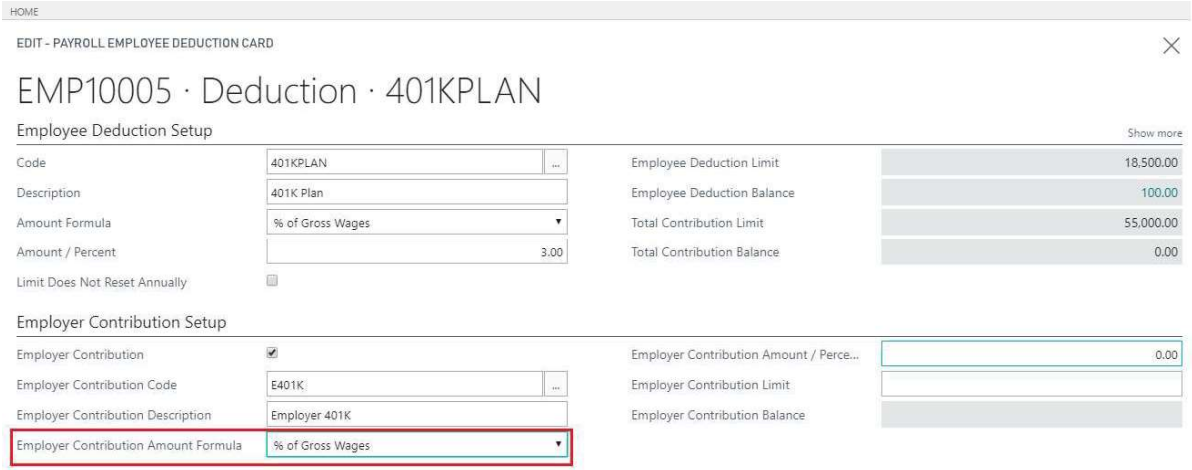
- Select the appropriate contribution code from the drop down menu in the 'Employer Contribution Code' field



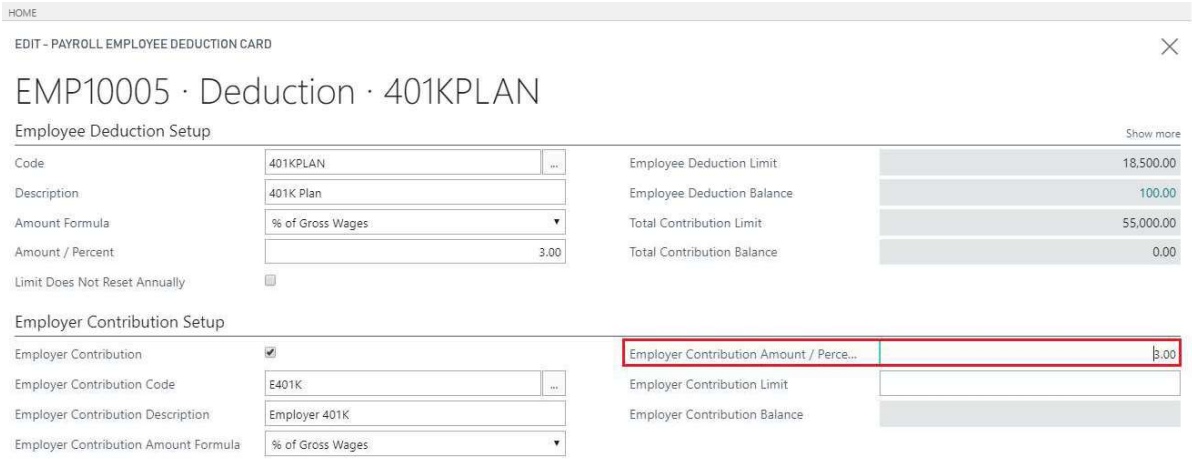
- After selecting a contribution code, the 'Employer Contribution Description' will automatically populate.



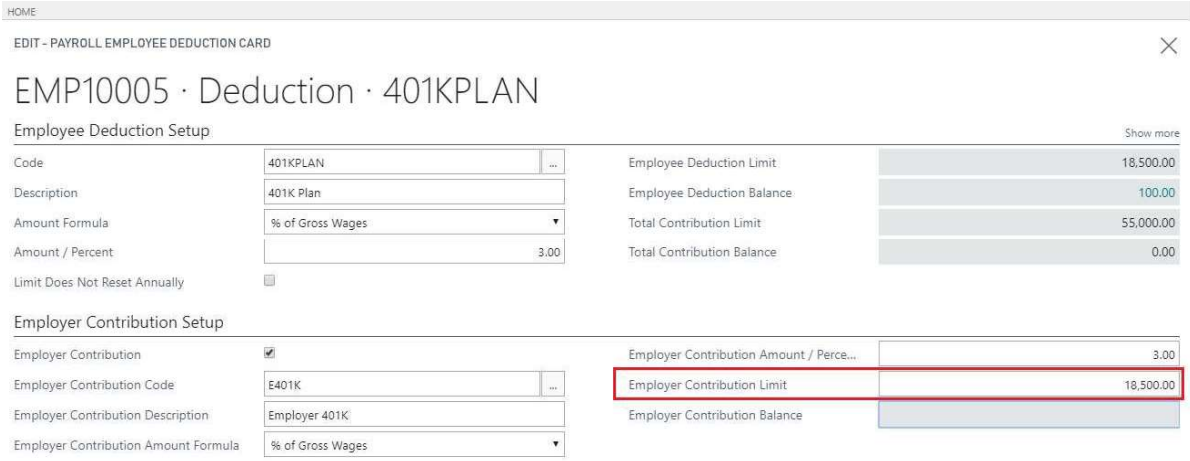
- Select a formula for calculating the employer contribution from the drop down menu in the 'Employer Contribution Amount Formula' field.



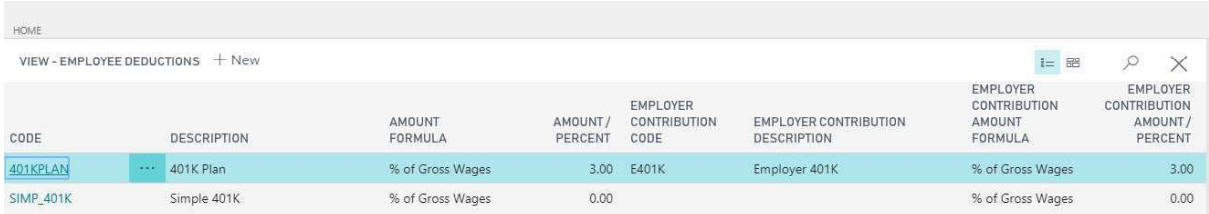
- Enter an amount or percent to calculate employer contributions based on the formula you selected previously.



- Enter an ‘Employer Contribution Limit’ if necessary.



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



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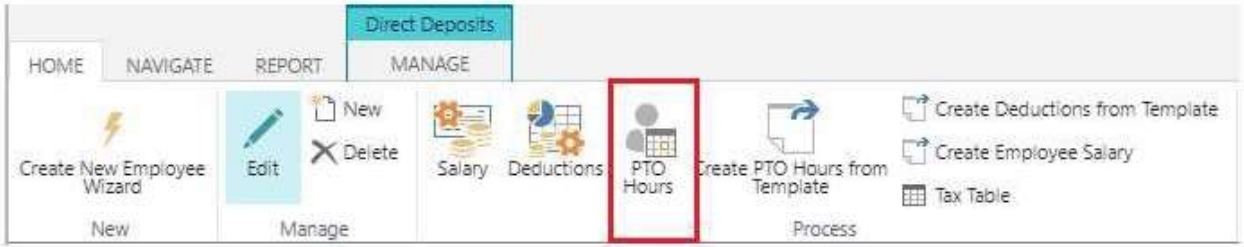
PTO Hours

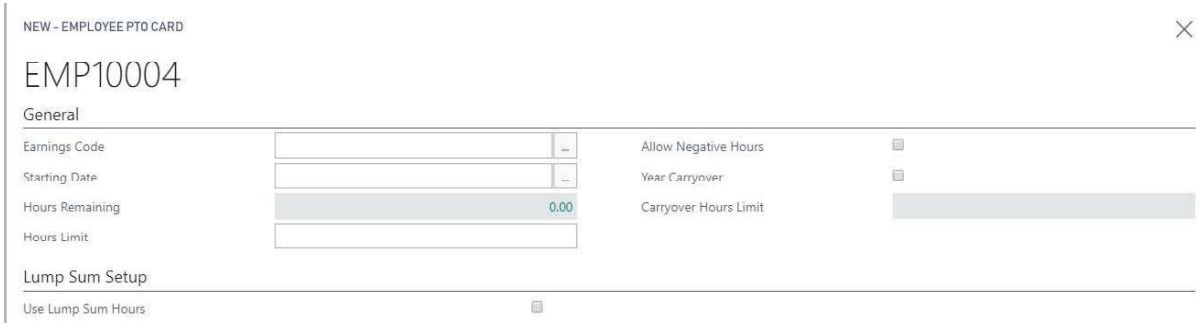


PTO Hours: The 'PTO Hours' page action allows you to set up an employee's PTO Hours. This includes hour limits, the PTO hours accrual starting date and more.

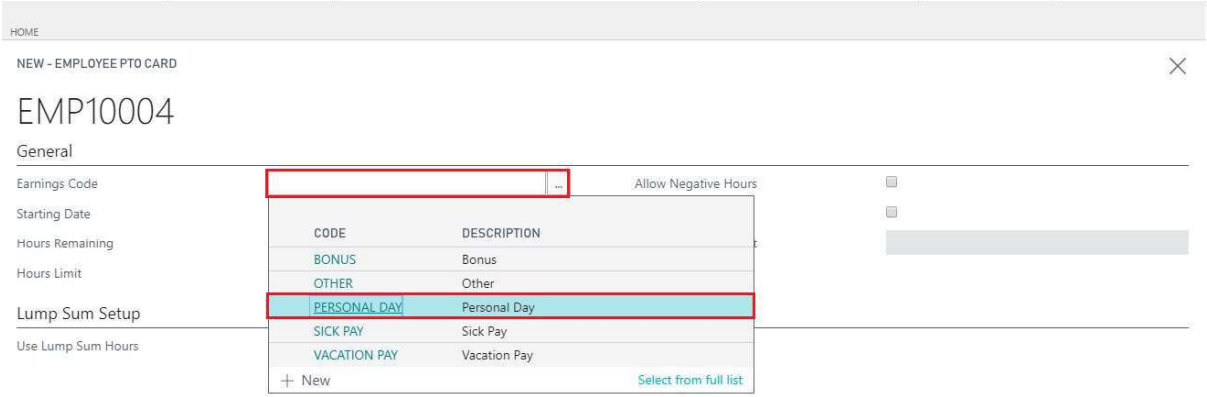
To ADD PTO HOURS

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

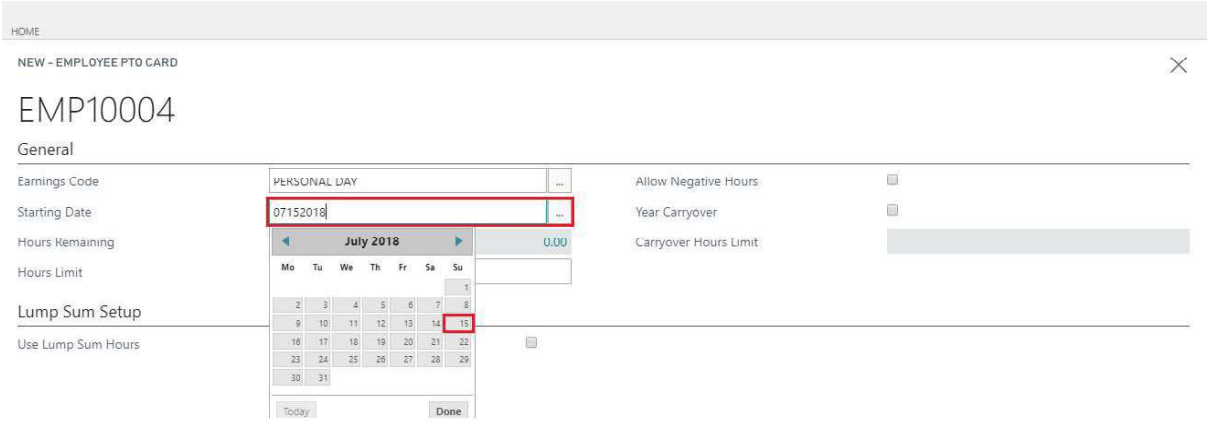
- The 'Employee PTO Card' will appear.



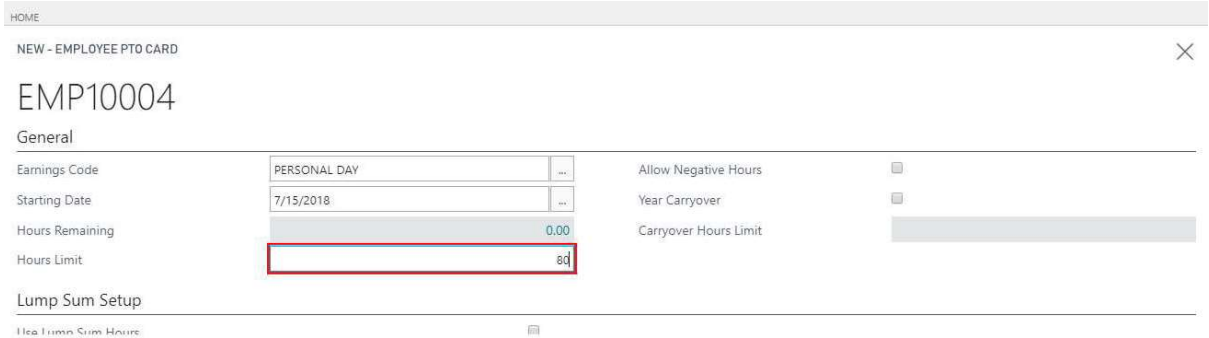
- For the 'Earnings Code' field, select an earnings code from the available options in the drop down menu.



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

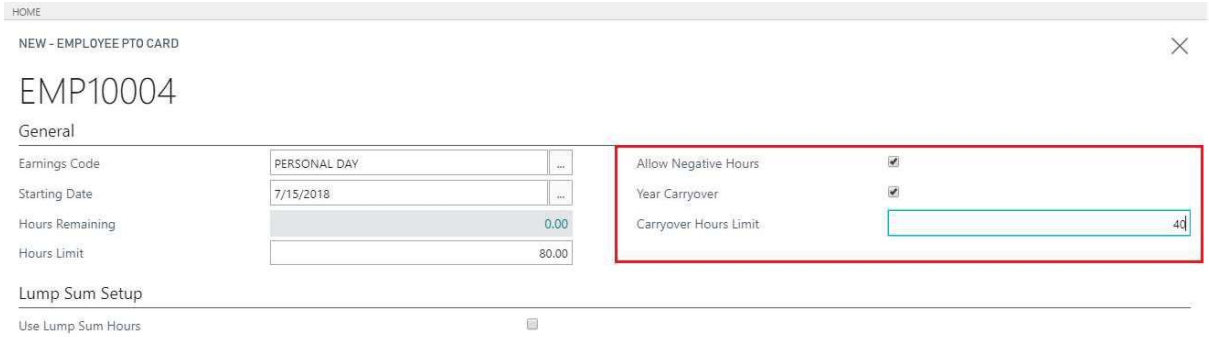


- Enter an 'Hours Limit'. This is the maximum amount of hours that can accrue each year



- 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.

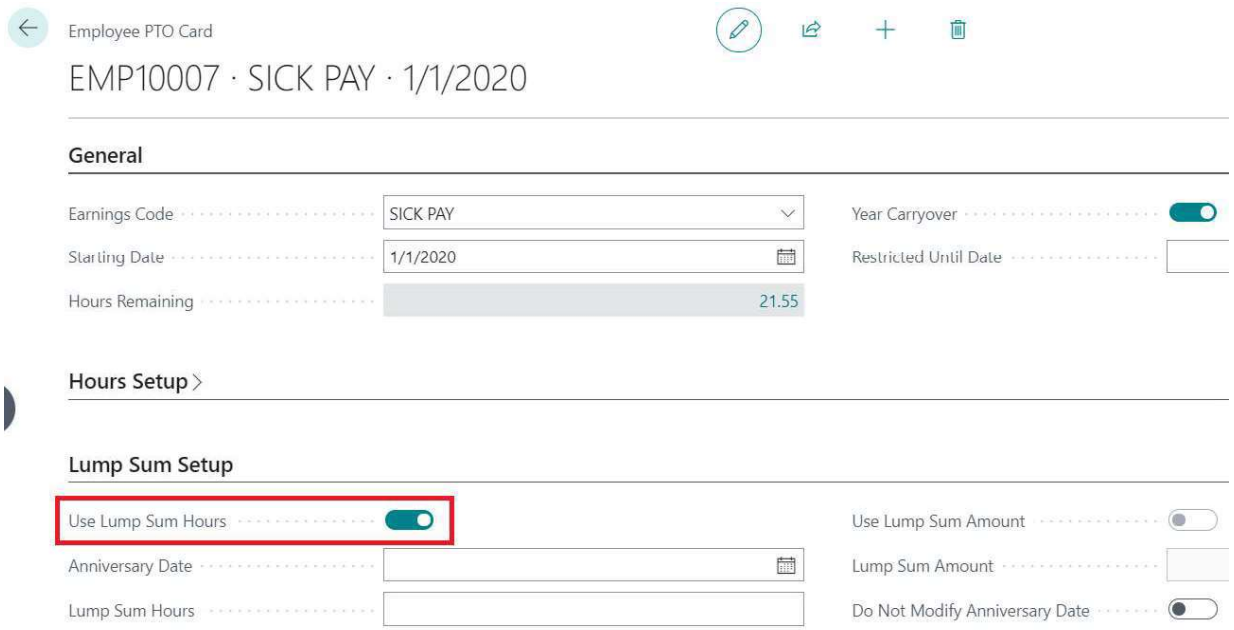
NOTE: 'ALLOW NEGATIVE HOURS' means that an employee can use hours that they have not yet accrued. This is most commonly utilized with Vacation Time for new employees.



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

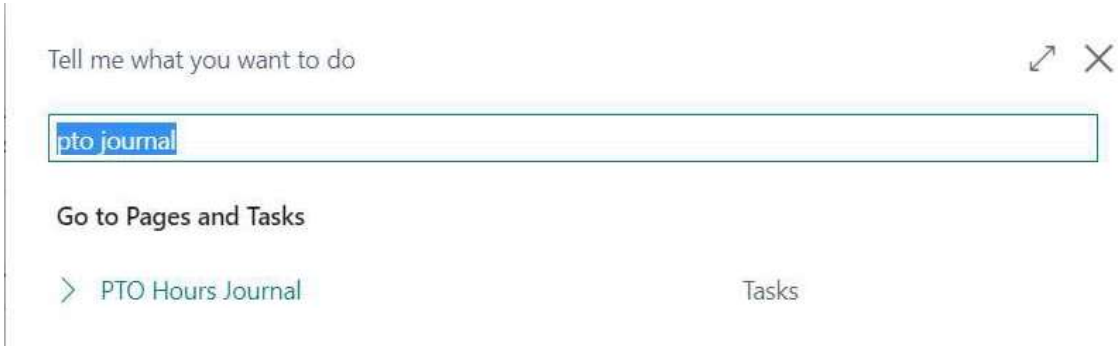
<u>LUMP SUM SETUP PROCEDURE</u>

- 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.

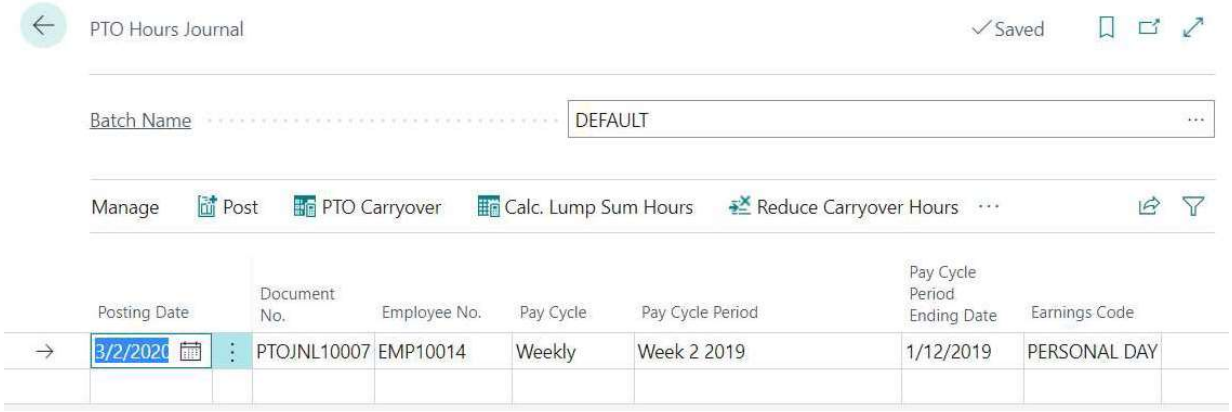


- Enter the lump sum hours and the anniversary date for the hours in the corresponding fields.

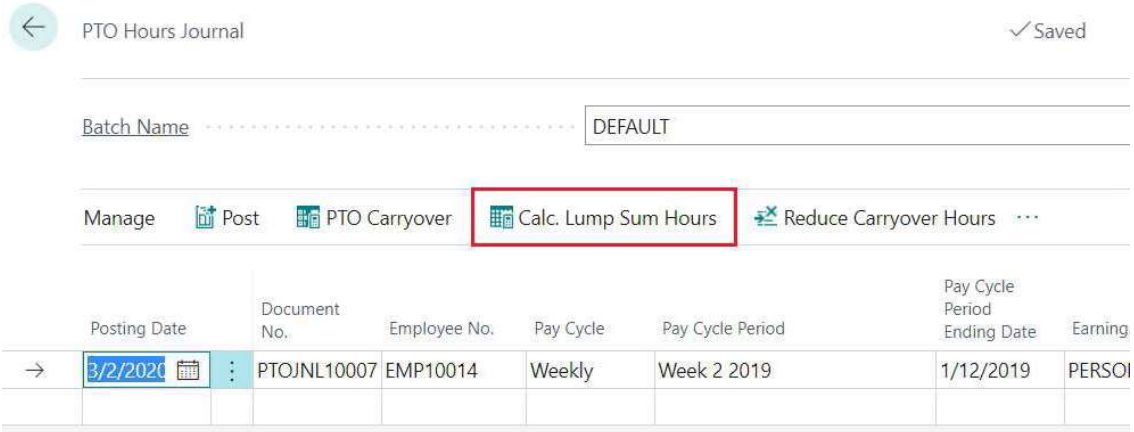
- Click ‘OK’ in bottom right corner.
- Now OPEN the PTO Journal. Enter ‘PTO Journal’ in the SEARCH BAR.



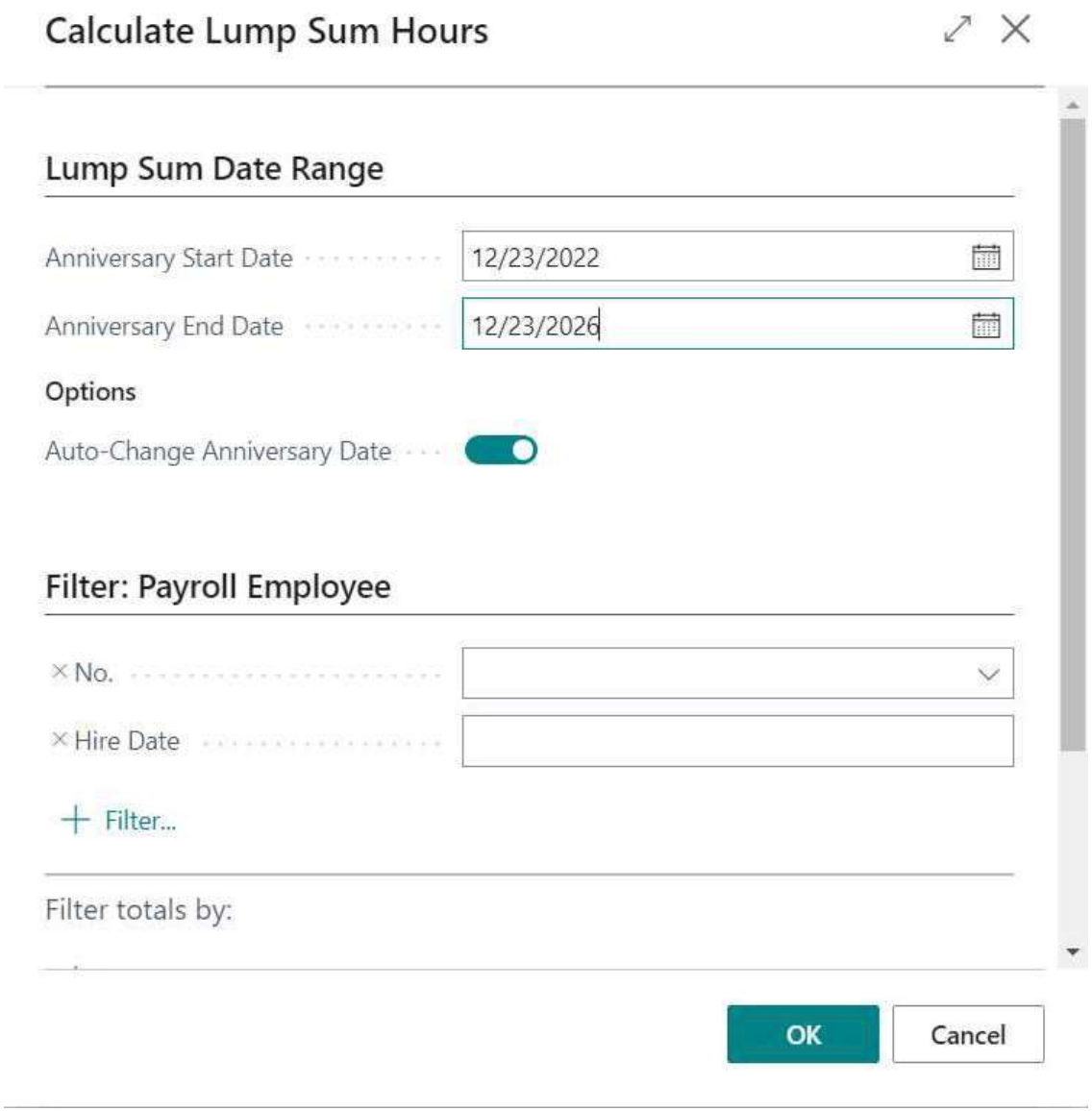
- The 'PTO HOURS JOURNAL' will appear.



- Select 'CALC LUMP SUM HOURS' page action



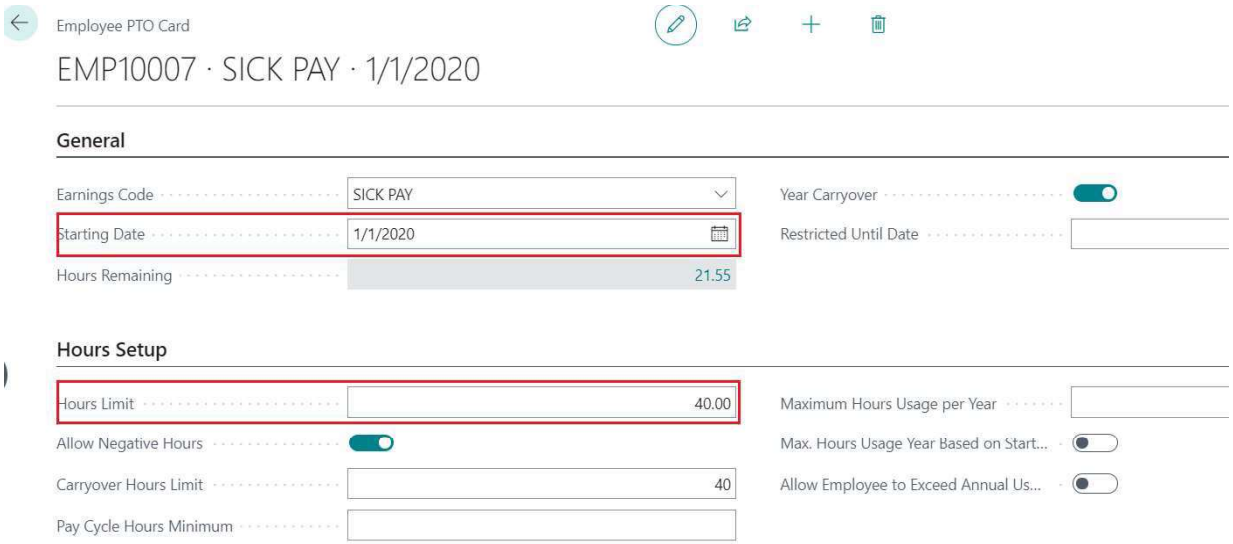
- Enter an ‘Anniversary Start Date’ and ‘Anniversary End Date’ range that includes the lump sum anniversary date you entered in the ‘LUMP SUM SETUP’



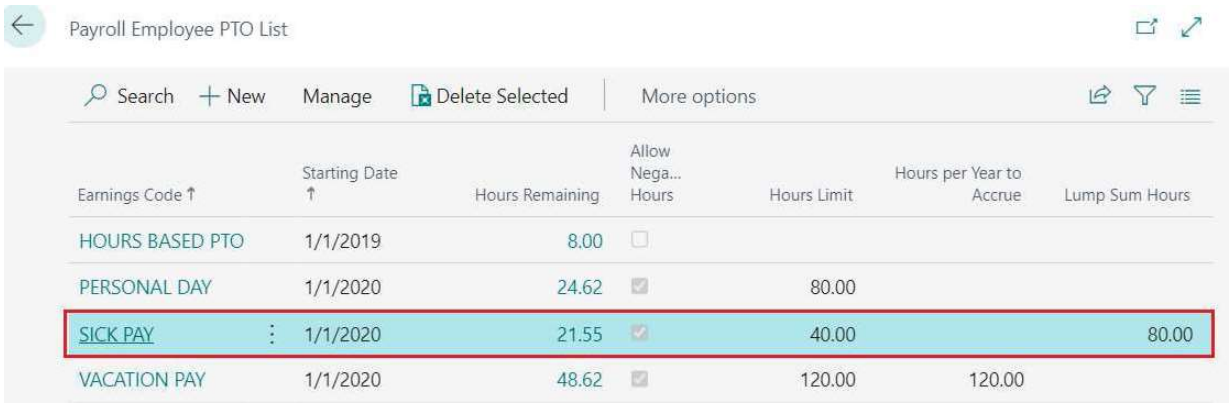
- Click ‘OK’ in bottom right corner.

ACCRUAL PER PAY PERIOD SETUP PROCEDURE

- 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.

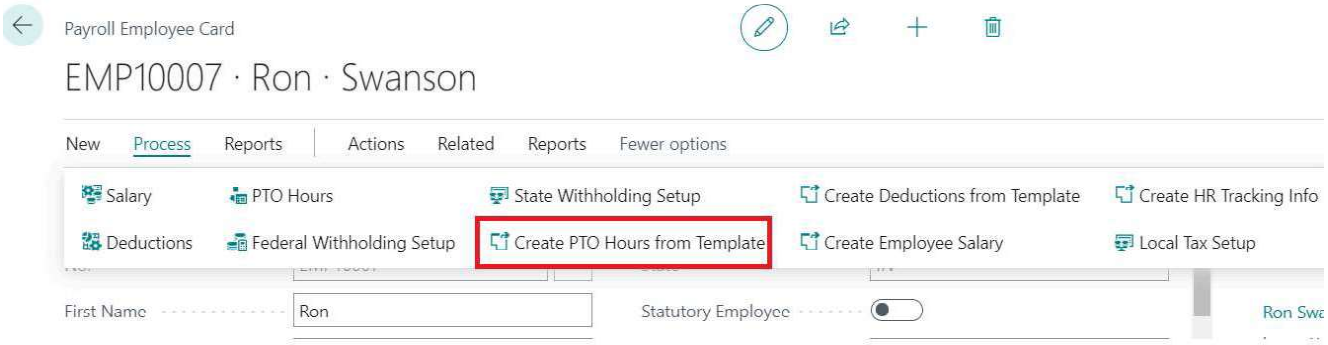


- Click 'OK'
- The PTO Hours will appear in a new line on the 'Payroll Employee PTO List' screen.



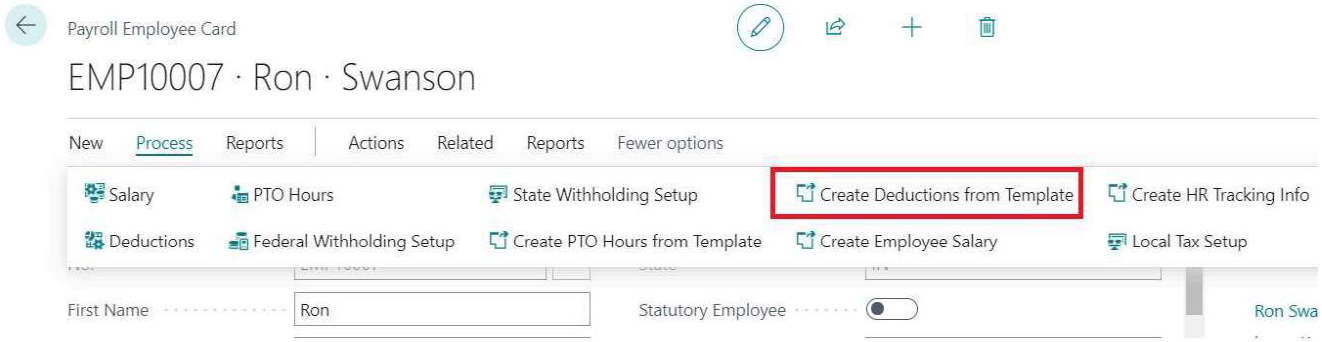
Earnings Code	Starting Date	Hours Remaining	Allow Nega... Hours	Hours Limit	Hours per Year to Accrue	Lump Sum Hours
HOURS BASED PTO	1/1/2019	8.00	☐			
PERSONAL DAY	1/1/2020	24.62	☑	80.00		
SICK PAY	1/1/2020	21.55	☑	40.00		80.00
VACATION PAY	1/1/2020	48.62	☑	120.00	120.00	

CREATE PTO HOURS FROM TEMPLATE



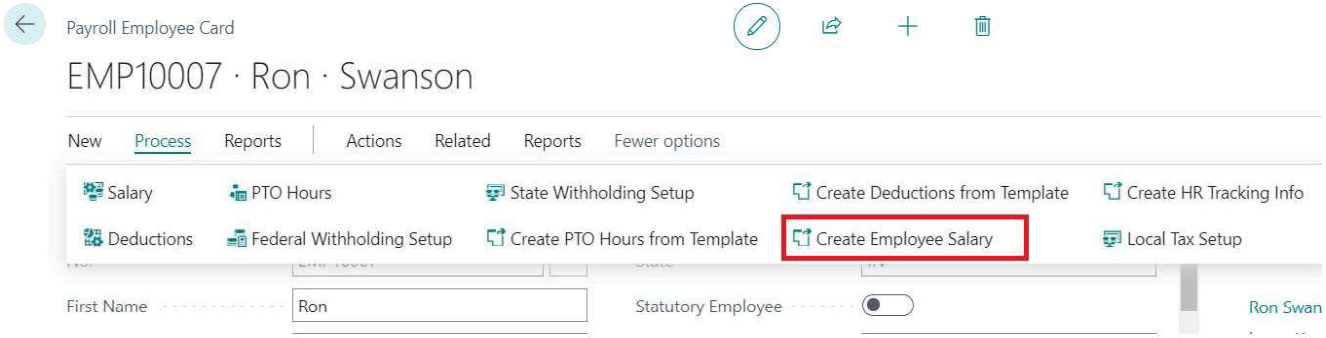
Create PTO Hours from Template: The 'CREATE PTO HOURS FROM TEMPLATE' page action allows you to select a template that will apply specific PTO setups to the employee.

CREATE DEDUCTIONS FROM TEMPLATE



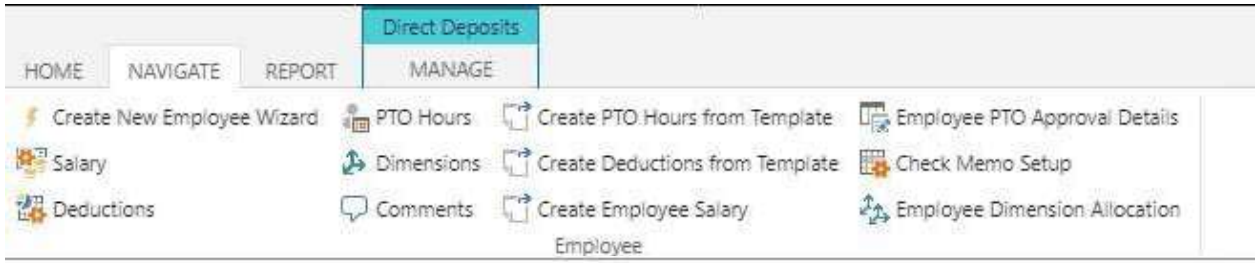
Create Deductions from Template: The 'CREATE DEDUCTIONS FROM TEMPLATE' page action allows you to select a template that will apply predefined Deduction Setups for the employee.

CREATE EMPLOYEE SALARY



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



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'

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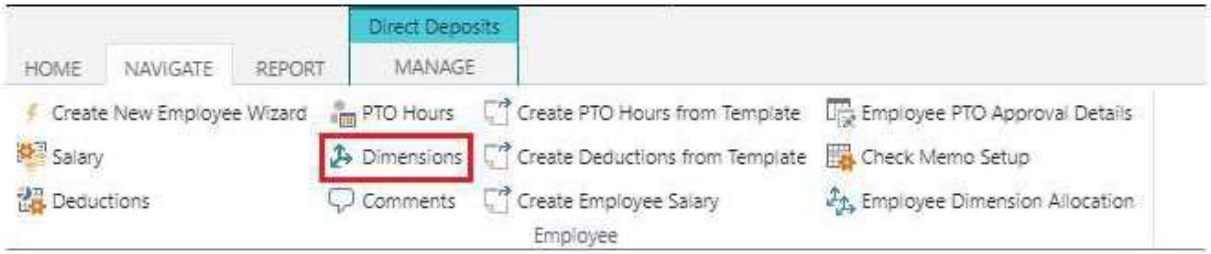
DIMENSIONS



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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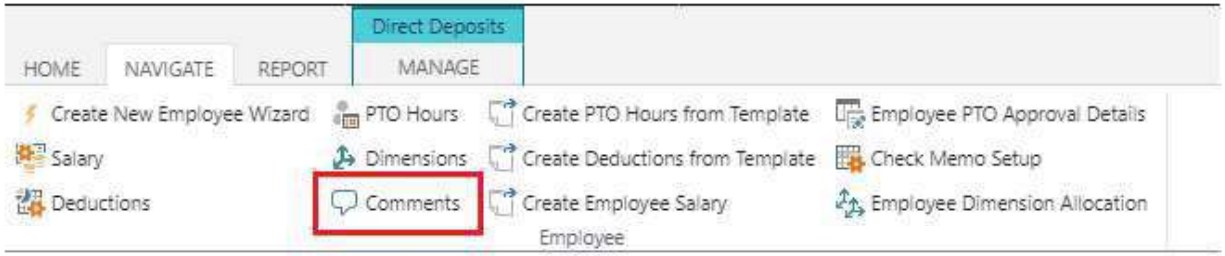
COMMENTS



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

ECR-D1.44

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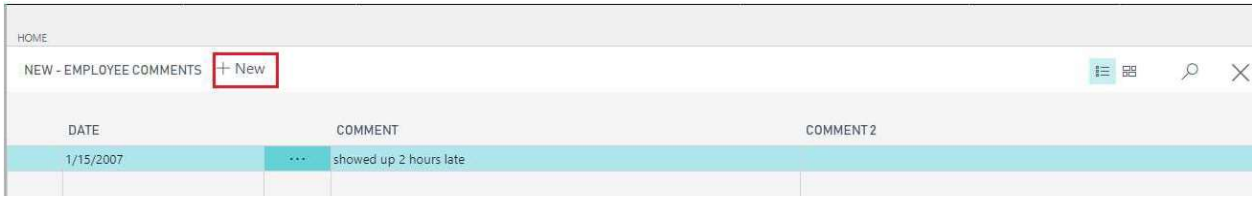
- Select the 'NEW' page action within 'EMPLOYEE COMMENTS' page.



ECR-D1.54

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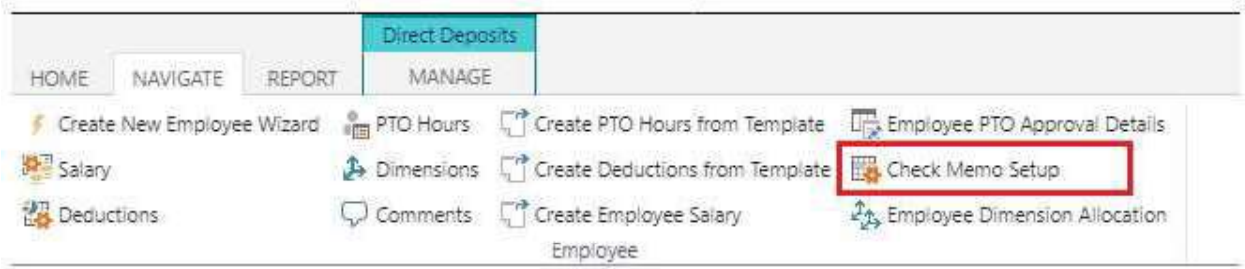
- Select the 'DATE' from the drop down window in 'DATE' field
- Enter a comment in 'COMMENT' field
- Enter a second comment in 'COMMENT 2' field if needed

-

CHECK MEMO SETUP



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.

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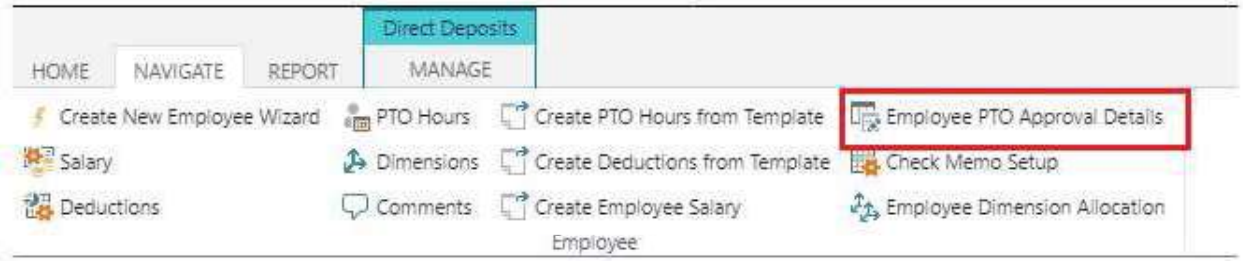
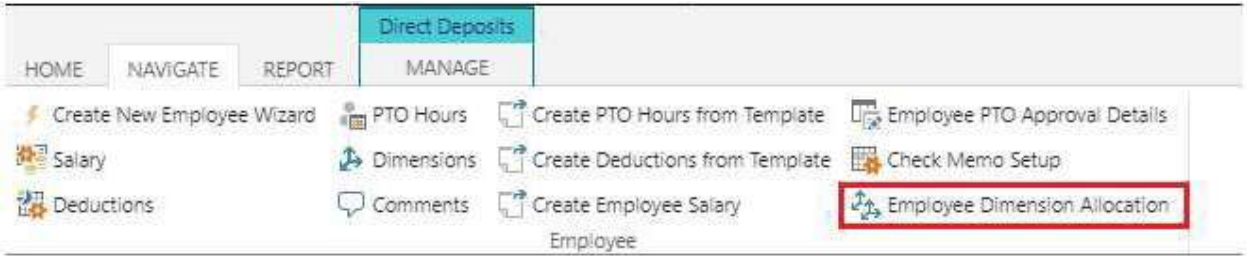
EMPLOYEE PTO APPROVAL DETAILS



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

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REPORT RIBBON DEFINED

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

ECR-D1.50

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ACCRUAL REPORT

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

ECR-D1.55

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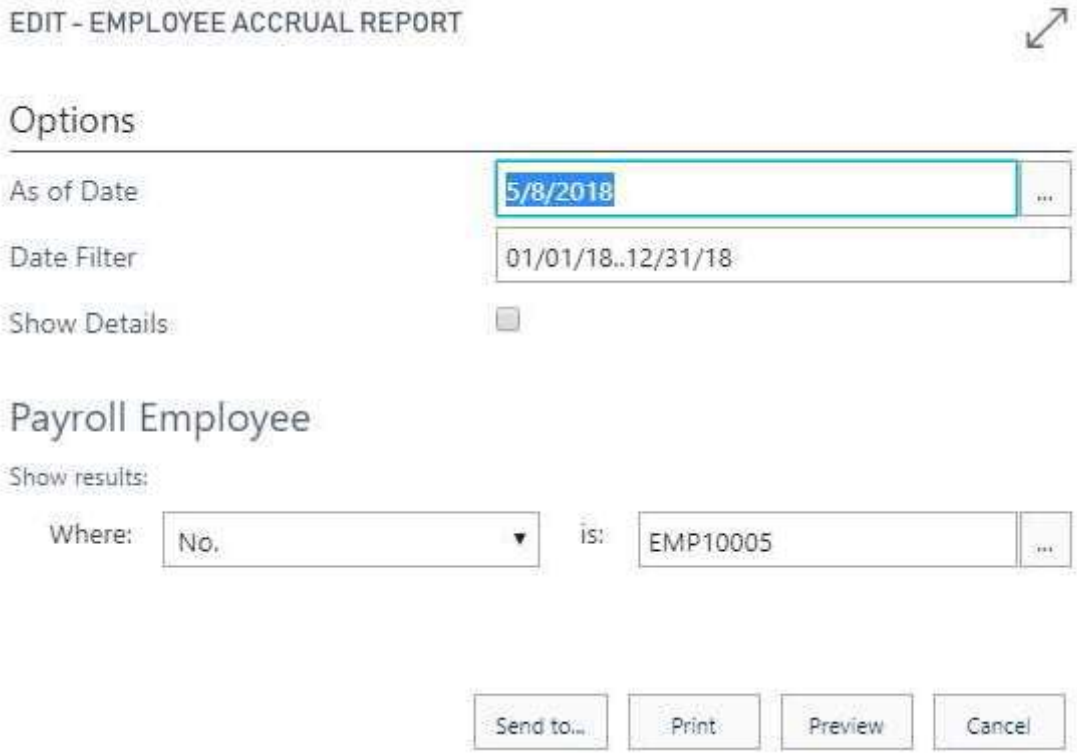
To RUN EMPLOYEE ACCRUAL REPORT

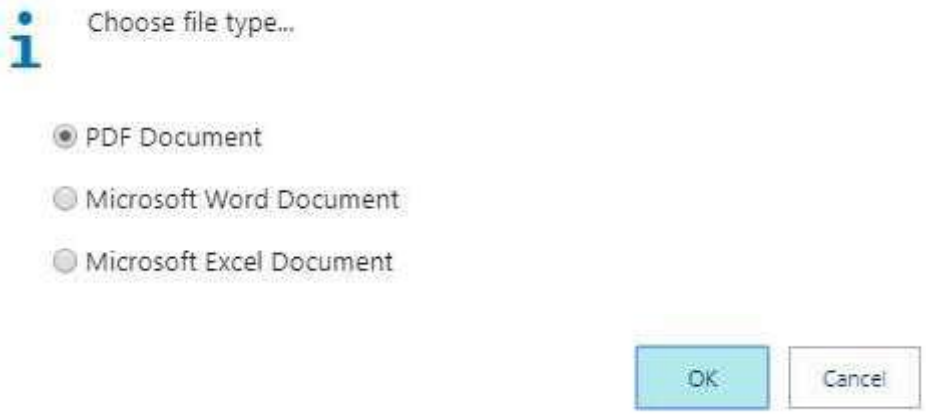
- Select the 'ACCRUAL REPORT' page action



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

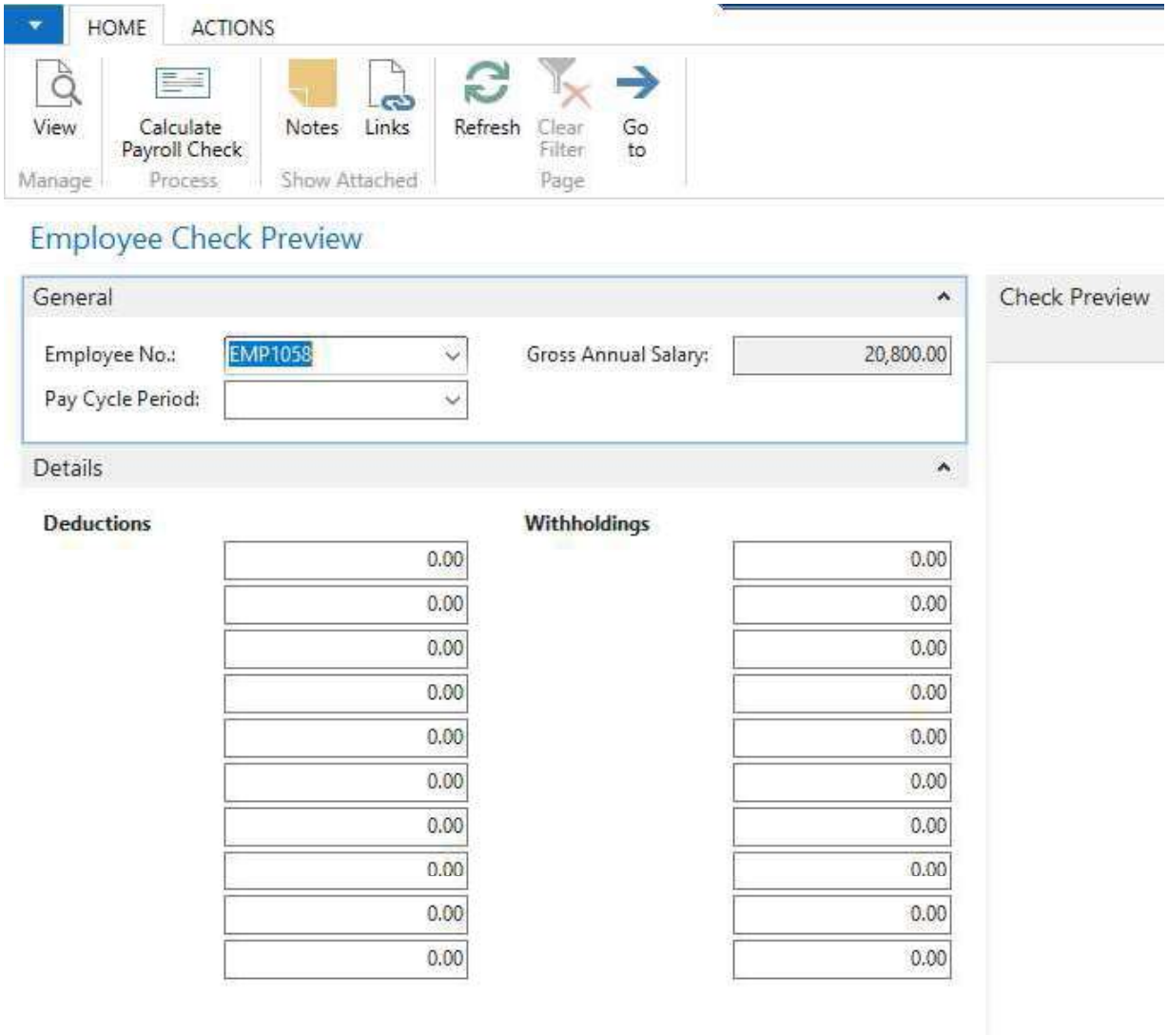
CHECK PREVIEW

ECR-D1.57

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

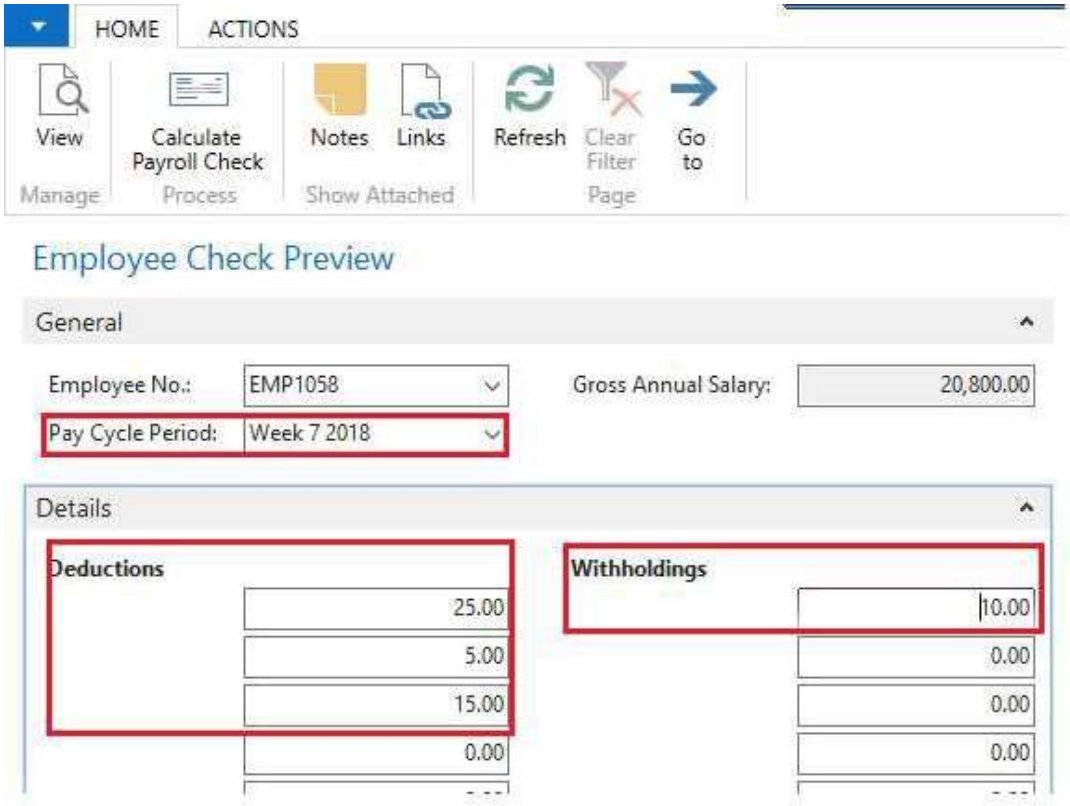
How to PREVIEW CHECK

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



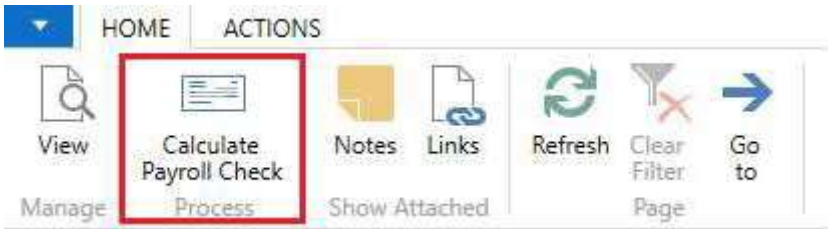
ECR-D1.51

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



ECR-D1.52

- Select 'CALCULATE PAYROLL CHECK' page action



ECR-D1.53

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