

Process Procedure Definitions

Modified on: Fri, 19 Aug, 2022 at 2:47 PM

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OPTION 1 PROCEDURES

Header Calc. Earnings

Looks to header of process procedure to know what payroll codes to use in the line of the process procedure for this payroll document for the employee. If the Earnings Calculation says Actual Earnings, then all earnings are used. If the Earnings Calculation says Selected Payroll Codes, then it will use whatever payroll codes are marked ACTIVE in SET ACTIVE PAYROLL CODES.

Process Procedure Header

401K ER MATCH · 1/1/2021

Copy From Process Procedure Header | **Set Active Payroll Codes** | More options

General

Use this list to set the payroll codes that will be analyzed to set the amount calculated in the "Selected Payroll Codes" process step.

Code	401K ER MATCH	Earnings Calculation	Actual Earnings	Age Calculation Fixed Date	
Description	401K ER Match	Payroll Header Date to Use	Payment Date	Procedure Audit Enabled	☐
Starting Date	1/1/2021	Apply to All Employees	☒	Use Amount Sign Returned from...	☐
Ending Date		Use Fixed Date in Age Calculation	☐	Blocked	☐

YTD Header Calc. Earnings

Looks to header of process procedure to know what payroll codes to use in the line of the process procedure for all the posted payroll documents for the year for the employee. If the Earnings Calculation says Actual Earnings, then all earnings are used. If the Earnings Calculation says Selected Payroll Codes, then it will use whatever payroll codes are marked ACTIVE in SET ACTIVE PAYROLL CODES.

YTD Total Earnings

Calculates the YTD earnings amount from all earnings codes to the process procedure

Curr. Total Earnings

Calculates all earnings inside the current payroll document

Divide by Curr. Hours

Divides by current hours in the payroll document

Divide by Selected Payroll Code Hours

Divides by payroll code hours if they are in the current payroll document and checked off in SET ACTIVE PAYROLL CODES

Curr. Total Hours

Calculates the current total hours from within the payroll document

Fixed Amount

Fixed Amount will insert the amount entered in the "Amount" field

Divide by Pay Cycle

This will divide the current calculation by the number of pay cycles in a year

Add

Will add by the amount in "Amount" field.

Subtract

Will subtract by the amount in “Amount” field.

Multiply By

Will multiply by the amount in “Amount” field.

Divide By

Will divide by the amount in the “Amount” field.

Add Result from Procedure

Adds the result from a previously calculated procedure, you use this option in conjunction with ‘result from procedure’ column

Calculation Order ↑	Procedure Operation	Procedure Operation 2	Amount	Go to Calculation No. if True	Go to Calculation No. if False	Result From Procedure
10	Advanced Filter			0	0	0
20	If Greater or Equal To		0.001	1000	30	0
30	Reset to Zero			0	0	0
40	Header Calc. Earnings			0	0	0
50	Reset to Zero			0	0	0
60	Add Result from Procedure			0	0	10
70	Divide by Result from Proced...			0	0	40

Subtract Result from Procedure

Subtracts the result from a previously calculated procedure, you use this option in conjunction with ‘result from procedure’ column

Multiply by Result from Procedure

Multiplies the result from a previously calculated procedure, you use this option in conjunction with ‘result from procedure’ column

Divide by Result from Procedure

Divides the result from a previously calculated procedure, you use this option in conjunction with ‘result from procedure’ column

If Greater Set Equal To

If the amount calculated from the previous operation is greater than the amount in the ‘amount’ column, then it will set the amount to the value in the ‘amount’ column

If Less Set Equal To

If the amount calculated from the previous operation is less than the amount in the ‘amount’ column, then it will set the amount to the value in the ‘amount’ column

Subtract Result From

When this procedure is selected, an amount from a previous procedure will be subtracted from the amount calculated in the previous operation, you use this option in conjunction with 'result from procedure' column

Reverse Sign

This will reverse the (+/-) of the calculation result.

Event

Custom event, must be configured by Payroll Now because it involves an event publisher that we will subscribe to

Company YTD Earnings

Calculates all YTD earnings of the company

Company YTD Earnings by Location

Calculates all YTD earnings of the company by location

Multiply by Percentage

This will read the amount entered in the "Amount" field as a percentage. So if you enter '10', it will multiply by '.1'

Calc. YTD Payroll Code Amount

Calculates the YTD total amount of the payroll code on the payroll line that triggered the process procedure, this does NOT filter by employee, so the result will be for the total company YTD payroll code amount.

If Greater than Result from Procedure

If the "Amount" column is greater than the result from a specified procedure, it will go to the calculation no. in the 'go to calculation no. if true' column, if it is less than the result from the specified procedure, it will go to the calculation no. in the 'go to calculation no. if false' column

If Less than Result from Procedure

If the "Amount" column is less than the result from a specified procedure, it will go to the calculation no. in the 'go to calculation no. if true' column, if it is greater than the result from the specified procedure, it will go to the calculation no. in the 'go to calculation no. if false' column

If Less or Equal To

This is used with the 'go to procedure if true/false' columns. If less or equal to the 'amount' column it will go to the procedure that is true. If greater than the 'amount' column it will go to the procedure that is set in the 'go to procedure if false' column

If Greater or Equal To

This is used with the 'go to procedure if true/false' columns. If greater or equal to the 'amount' column it will go to the procedure that is true. If less than the 'amount' column it will go to the procedure that is set in the 'go to procedure if false' column

Convert from Weekly to Pay Cycle

Converts a weekly result into the pay cycle specified in the payroll document. For example, if the result is 10 and the pay cycle is semimonthly, it would do this calculation: $10 * 52 / 24 = 21.66667$

Annualize Based on Pay Cycle

Takes the amount from the pay cycle and multiplies it by the number of pay cycles in a full year. For example a bi-weekly pay cycle will be multiplied by 26, a weekly pay cycle by 52.

Value from Table / Field ID

Pulls the value from the selected Table / Field ID, must be used with the employee filter field ID, date and custom text filters are optional

Years of Employment

Inputs the years of employment based on hire date

Reset to Zero

Resets the amount to zero

Advanced Filter

Looks to the advanced filter procedure for the Amount

Rate from Age Table

Finds the correct rate in the age / rate table based on the employee's age

Emp. Age

This will insert the employee's age based on birth date from the employee card

Spouse Age

This will insert spouse's age based on the birthdate from the employee dependents table

Benefit Amt.

Pulls in the benefit amt from the employee's deduction card

Multiply by Benefit Amt.

This will multiply the "Amount" value by the benefit amount.

Salary Record Annual Salary

Annual salary from the salary record. This is different than the 'estimated salary' because the estimated salary comes from the process procedure line attached to the employee. In some cases they can be different

Bracket Table Result Based on Annualized Amount

Finds the correct record in the bracket table based on the calculated amount in the previous operations, the bracket is found by annualizing the amount from the previous operations using the pay cycle in the document

Bracket Table Result Based on Actual YTD Amount

Finds the correct record in the bracket table based on the actual amount of YTD earnings. The calculation will not step up to the next bracket until the YTD earnings is actually greater than the bottom of the next bracket (this operation does not annualize the amount like the previous operation)

Sal. Type

Returns a 1 for salary, 0 (2?) for hourly, 3 for piece rate

Hourly Rate

Returns the hourly rate from the employee's salary record

Round To

Rounds the result based on the decimals you put in the "Amount" field; .01 will round to the penny

End Processing

Ends processing and exits the procedure with the current result

Option 2 Procedure

Looks to the option 2 procedure list to find the operation to execute

OPTION 2 PROCEDURES

Custom Emp. Amt.

Custom Employee Amount will look to the 'custom employee amounts' table for any records containing the payroll code and employee in the payroll document

YTD Total Comp. Active Codes With Open Docs

YTD Total company amount based on the active codes selected in the active codes table behind the procedure and will include all open payroll documents

YTD Total Comp. Active Codes Ledger Only

YTD Total company amount based on the active codes selected in the active codes table behind the procedure and will only include ledger entries, it will not include open documents

[Check for Active Garnishment](#)

This procedure will count the employees active garnishments, this is useful when a company wants to deduct money from the employee if they have to process garnishments on their behalf

[Get Deduct. Value From Emp. Cont. Code](#)

This will find the deduction value that is linked to the employer contribution code. This is useful when a company calculates their employer contribution based on the deduction amount or percentage

[YTD Cust. Range Earn.](#)

This will calculate the employees earnings in the payroll ledger based on the custom range start and end dates in the process procedure line

[YTD Cust. Range Earn. Actv. Codes](#)

This will calculate the amount based on the set active codes from the payroll ledger based on the custom range start and end dates in the process procedure line

[Count Month Entries](#)

This will count the amount of entries of the payroll code that have been posted in the payroll ledger during the current month. The current month is found based on the date selected in the process procedure header.

[Count YTD Entries](#)

This will count the amount of entries of the payroll code that have been posted in the payroll ledger during the current year. The current year is found based on the date selected in the process procedure header.

[Prl Code Month Amount](#)

This will sum the amount of the current payroll code that has posted in the payroll ledger during the current month. The current month is found based on the date selected in the process procedure header.

[Selected Prl. Code Hrs.](#)

This will sum the hours from the payroll codes selected active payroll code table that are in the current payroll document

[Get Workers Comp ER Rate](#)

The procedure will find the ER workers comp rate in the workers comp code table based on the state, date, and workers comp code set on the employee

[Get Pay Matrix Rate](#)

This procedure will find the pay matrix rate based on the employee's default settings. If you need to replace the employee's default settings of position, union, position code, and/or position department, you can set an advanced filter on the process procedure line and it will replace those values with the advanced filter's values before finding the pay matrix rate.

Get Dependent Status

This procedure will return a 1 for employee only, 2 for employee spouse, 3 for employee child, and 4 for family. This is calculated using the employee dependent table

Get Benefit Status Code Amt.

This will find the appropriate deduction or employer contribution based on the benefit status code linked to the employee's deduction card and the amounts in the benefit rate details table

YTD Pay Code Amt. by Emp.

This will find the YTD payroll code amount and filter the ledger by the employee number (the procedure in the option 1 field does the same thing but does not filter by employee).

Get Union Earnings

This procedure will sum the amount of earnings in the current payroll document associated with the union code filter in the process procedure line; this can also be done with an advanced filter

Get Union Hours

This procedure will sum the hours in the current payroll document associated with the union code filter in the process procedure line; this can also be done with an advanced filter

Find Pay Cycle No

This will find the number of the current payroll document's pay cycle in the month. The current month is found based on the date set in the process procedure header. If it is the first pay cycle of the month this operation returns 1, the 2nd pay cycle in the current month returns 2, etc. This is helpful when a deduction should be taken on certain pay cycles.

Max Perc. Reduction

This will reduce the deduction based on the max percentage set in the amount field of the process procedure line. There are several inputs to this operation, they are the earnings that should come into the calculation need to be brought in using the 'result from procedure'. This way you can bring in gross earnings or net them down using the active payroll code table. The percentage of gross/net that is the maximum for the deduction should be set in the amount field. The amount that comes into the procedure line should be the deduction amount, which can be entered into the employee's deduction card using a UDF field. An example screenshot is below of the proper setup:

Deduction card setup with UDF field utilized and brought into the procedure using the table/field ID operation, please note you must add a caption to the UDF in the additional payroll setup table before it will appear inside the deduction card, they are hidden by default:

Tax Gross Earn. with Limit

This will use the percentage from the current line and the amount that comes into the procedure will be used as the limit. It will adjust the amount down to zero if the limit has already been met. This is useful for SUTA calculations that need to be done through the process procedure because the normal employer tax table will not work due to multiple state / state income tax issues. An example of the setup is below using a 22,000 earnings limit and 1.05% as the tax amount.

Get Workers Comp EE Rate

The procedure will find the EE workers comp rate in the workers comp code table based on the state, date, and workers comp code set on the employee

Get State Earnings

This procedure will sum the amount of earnings in the current payroll document associated with the State filter in the process procedure line; this can also be done with an advanced filter

Get State Hours

This procedure will sum the hours in the current payroll document associated with the State filter in the process procedure line; this can also be done with an advanced filter

Apply Local Tax Rate

It finds the rate attached to the payroll code, then uses the process procedure line advanced filter code to find the advanced filter card and filter by the parameters to get the correct earnings, then multiplies it by the rate found in the local tax table

Convert Pay Cycle to Weekly

Will take the amount and turn it into a weekly amount, i.e. if a monthly pay cycle – $\times 12/52$, if biweekly – $\times 26/52$; if semimonthly – $\times 24/52$

Count Working Days

Counts the actual days worked in the document based on the time entries.

Round Up

Rounds the result UP based on the decimals you put in the “Amount” field; .01 will round to the penny

Round Down

Rounds the result DOWN based on the decimals you put in the “Amount” field; .01 will round to the penny

Month Pay Cycle No.

Will result in the pay cycle of the month based on the Payroll Header Date to Use

Emp. No. Pay Cycle No.

If employee had earnings in the pay cycle the pay cycle gets counted

Get Min Wage

Will return the minimum wage for the employee’s default payroll location

Get Actv. Code Coverage Amt.

This will find the coverage amount from the deduction card

Net Pay

Will result in the net pay amount

[Get Opposite Bene. Rate Code Amt.](#)

This will find the employer contribution amount for a deduction code or a deduction amount for an employer contribution code based on the benefit status code linked to the employee's deduction card and the amounts in the benefit rate details table