Process Procedures

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Synopsis:
Process procedure are used to configure unique calculation requirements to payroll codes based on client specifications. This manual walks through the different aspects of the Process Procedures section.

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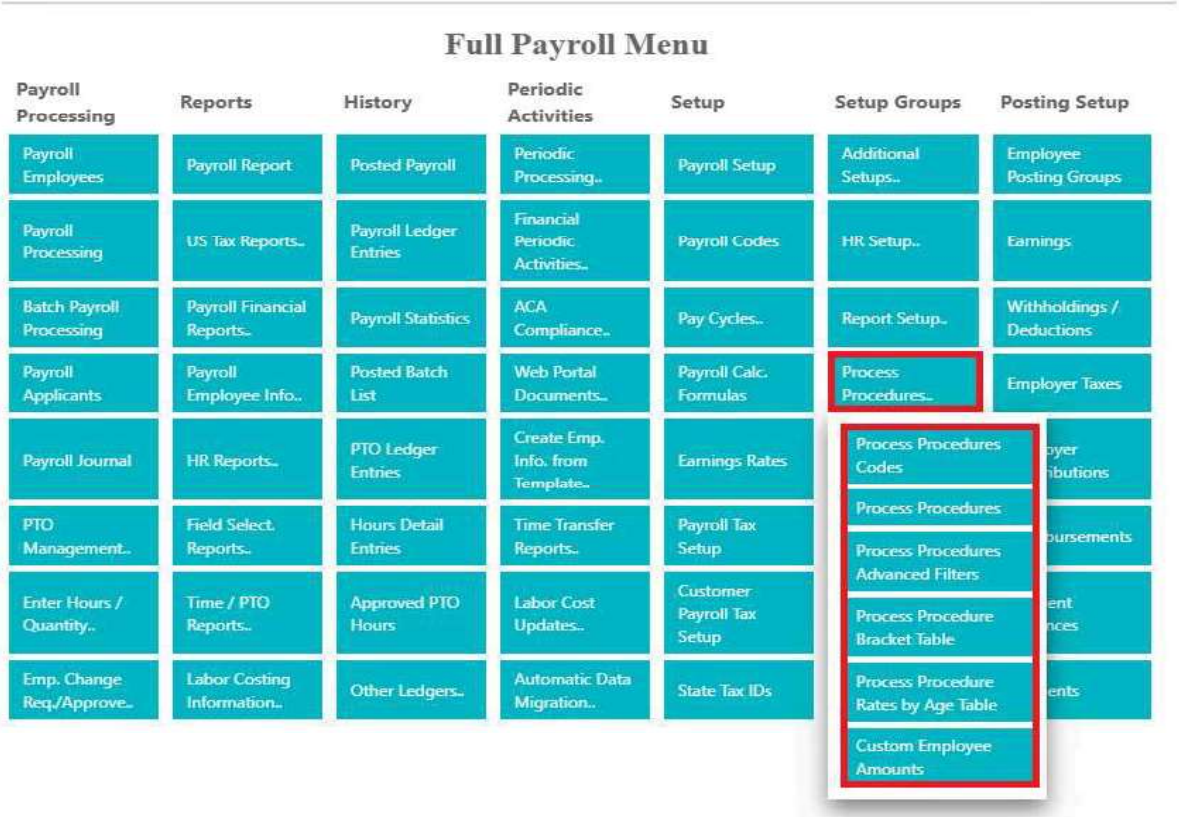
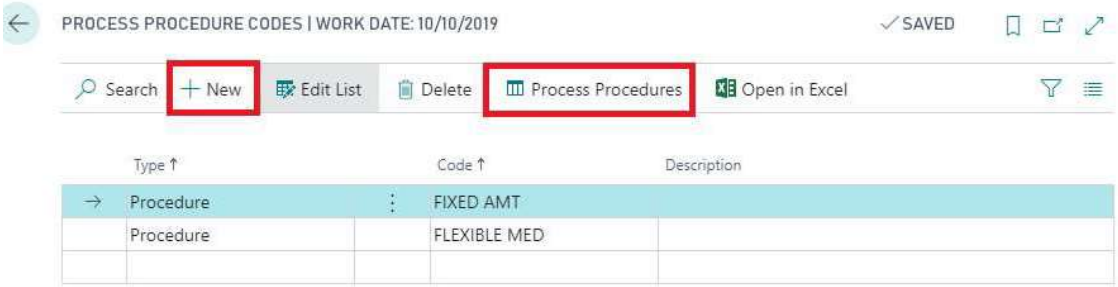
ACCESS PROCESS PROCEDURES

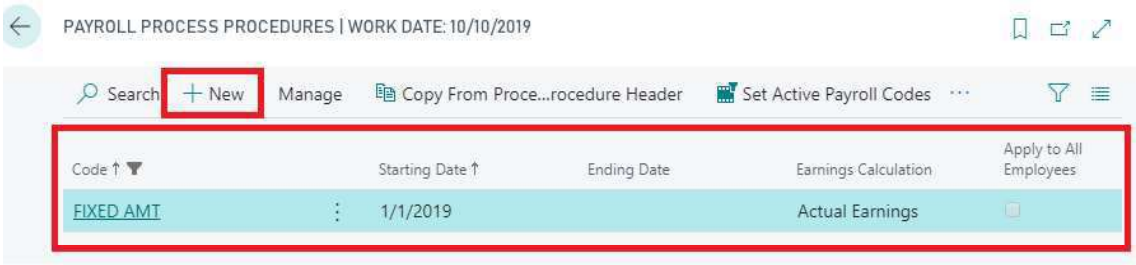
- Full Payroll Menu
- Setup Groups Column
- Process Procedures



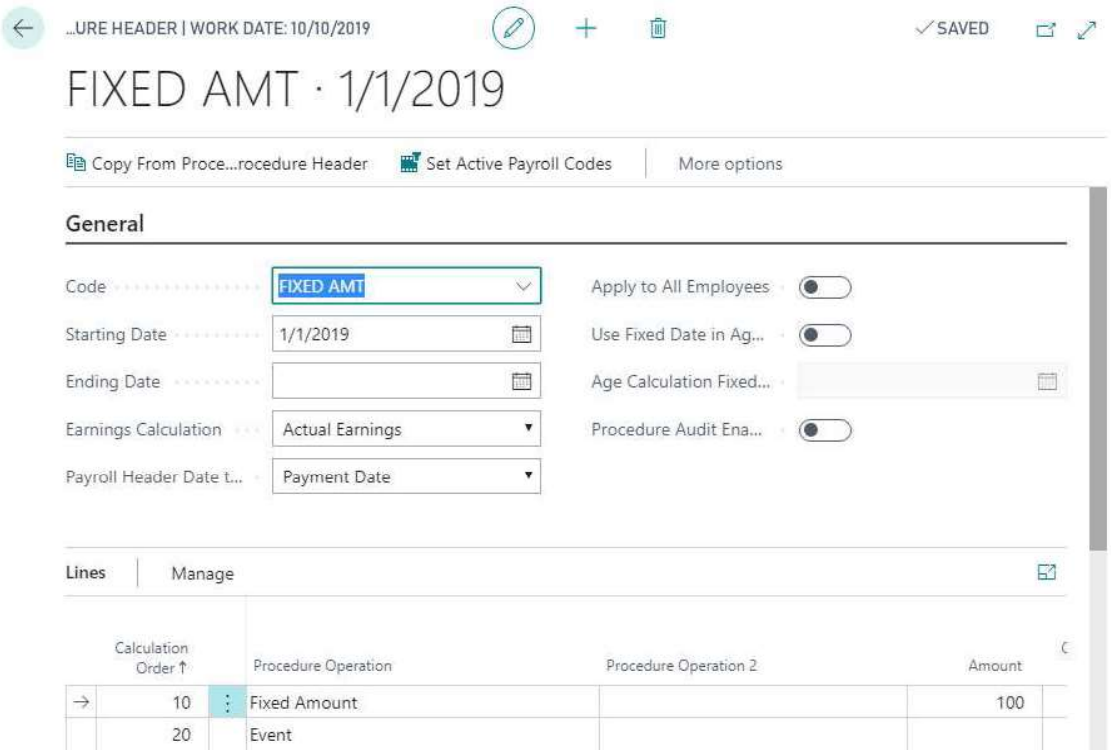
PROCESS PROCEDURE CODES

Process Procedure Codes is where you can create or edit Process Procedure Codes. Click 'New' page action to create a new Process Procedure Code. Click 'Process Procedures' page action to navigate to the Payroll Process Procedures.



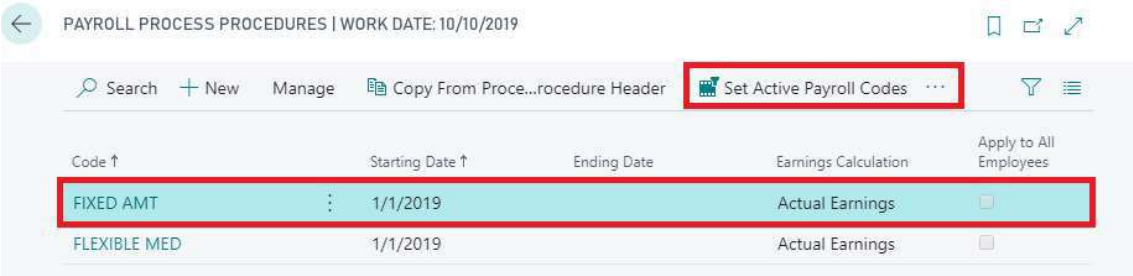


You can then click 'New' to create a new process procedure or on an existing process procedure to open Payroll Process Procedure Header:



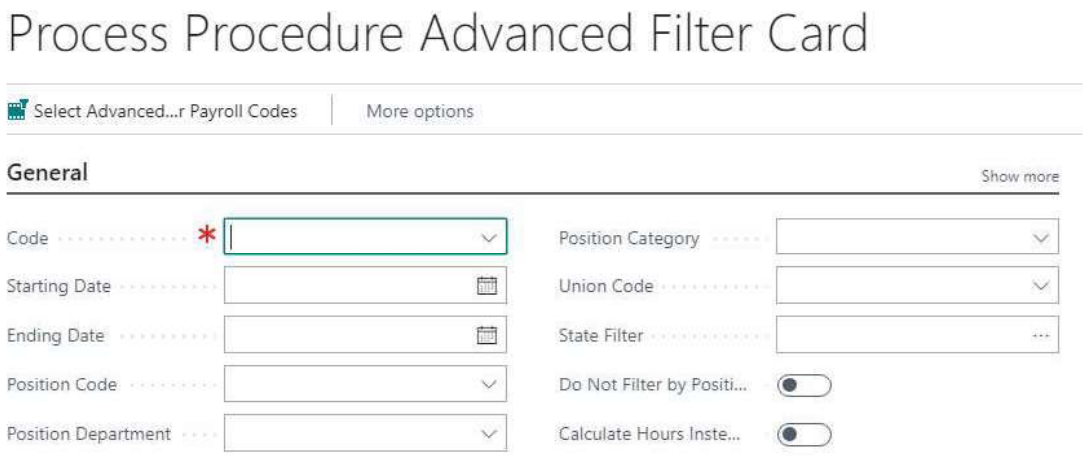
PROCESS PROCEDURES

From Process Procedures you can add process procedures to the previously created 'Payroll Process Procedure Codes'. You can also click 'Set Active Payroll Codes' to assign the active payroll codes you would like to include or exclude to the payroll process procedure:



PROCESS PROCEDURE ADVANCED FILTERS

With 'Process Procedure Advanced Filters' you are filtering earnings down (with the available filters) to a subset of earnings. That earnings subset would then be used in a process procedure calculation.



PROCESS PROCEDURE BRACKET TABLE

This is where you can build a custom bracket tax. For example, if you have a state tax that grows as the earnings grow, you could set that up in the process procedure bracket table. Basically, it gives you the ability to create your own bracketed tax table and then bring that into a process procedure.

PROCESS PROCEDURE BRACKET TABLE | WORK DATE: 10/10/2019 ✓SAVED

Search + New Edit List Delete Open in Excel

Payroll Type	Payroll Code	Starting Date	Ending Date	Greater Than	But Not Greater Than	Percentage	Base Amou
Withholdi	STATE	1/1/2019		1,000.00	10,000.00	1.00	5.(
Withholding	STATE	1/1/2019		10,000.01	20,000.00	1.50	90.(

PROCESS PROCEDURE RATES BY AGE TABLE

From here you can set a rate for an age range that can be pulled into a process procedure. The Age Table is typically used when setting up process procedures for Life Insurance.

PROCESS PROCEDURE RATES BY AGE | WORK DATE: 10/10/2019 ✓SAVED

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Payroll Type	Payroll Code	Starting Date	Age Low Limit	Age High Limit	Rate
Earnings	REGULAR	1/1/2019	45	55	55.00

CUSTOM EMPLOYEE AMOUNTS

Custom Employee Amounts is where you can put in an employee, a date , a payroll code and an amount. Then on the pay cycle that includes the date entered, the custom amount will be inserted into the designated employee payroll document.

CUSTOM EMPLOYEE AMOUNTS | WORK DATE: 10/10/2019 ✓SAVED

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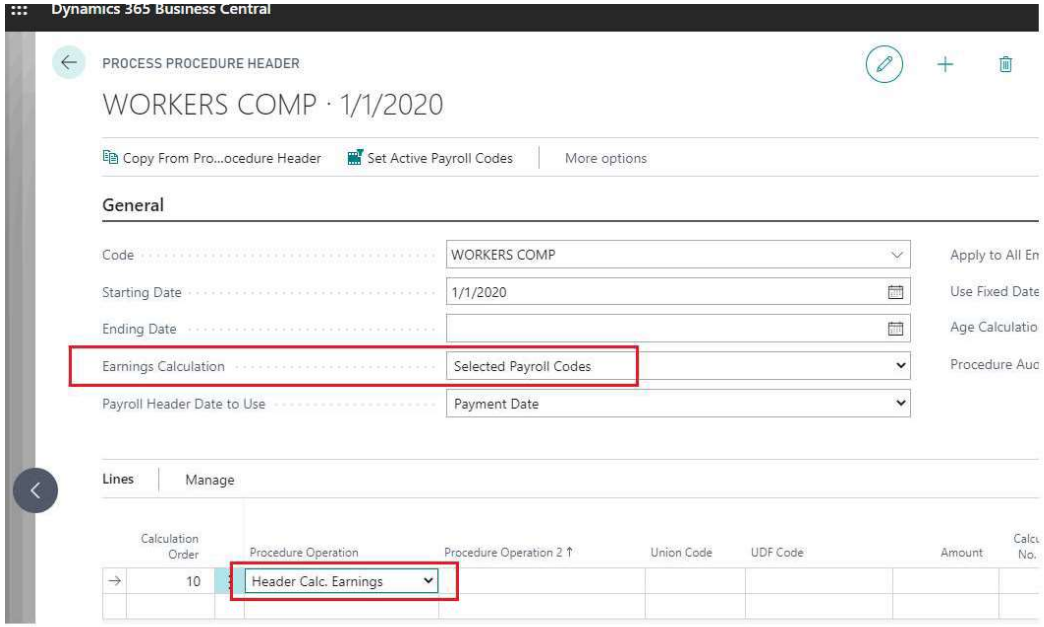
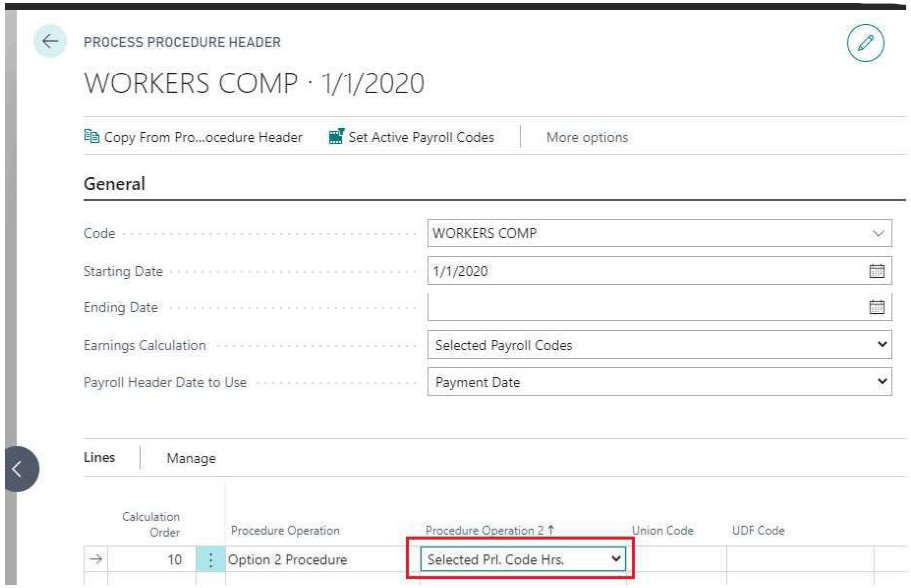
Payroll Employee No.	Date	Payroll Type	Payroll Code	Amount	Payroll Reason Code	First Name
TEST-EMP	11/20/2019	Deduction	IN-HOUSE ST...	15.00	FAILED DRUG...	Test

SET ACTIVE PAYCODES

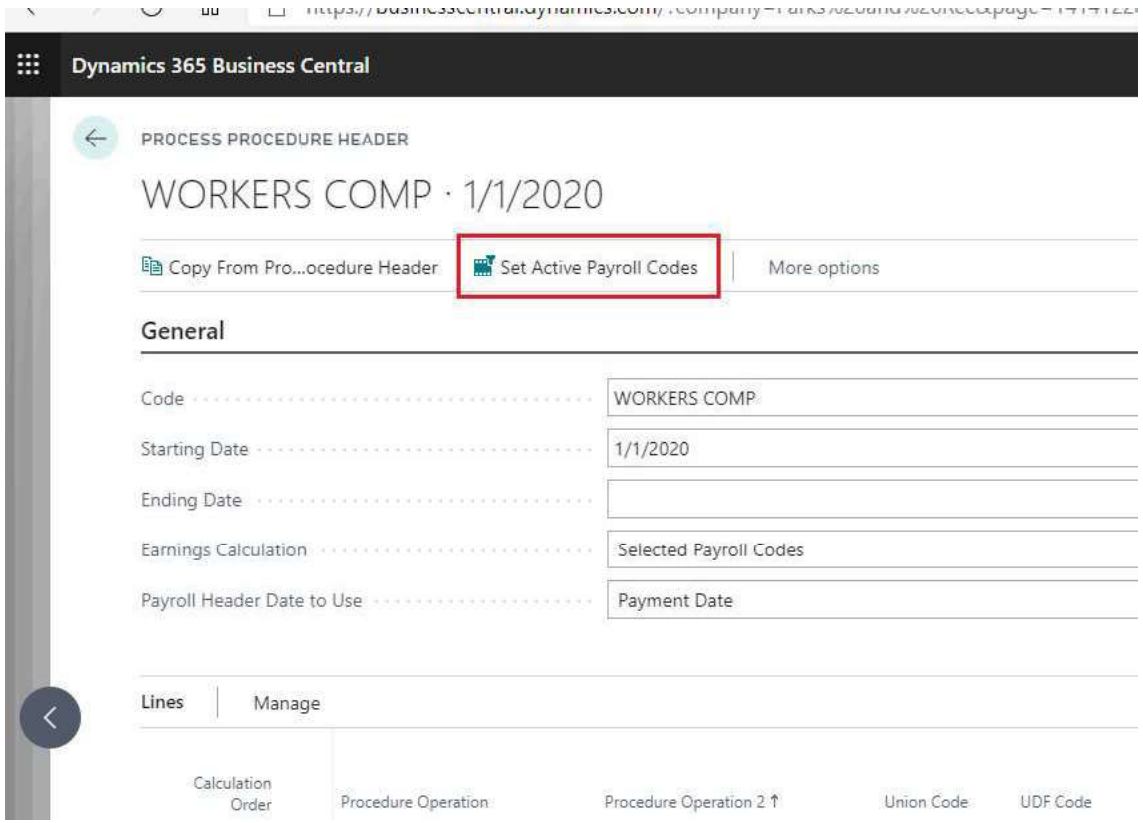
Some of the process procedure operations work in conjunction with the 'Active Payroll Codes' table that can be opened from the ribbon.
The operation 'Header Calc. Earnings' will look to the Earnings Calculation in the header to know what type of earnings should be brought into the process procedure.



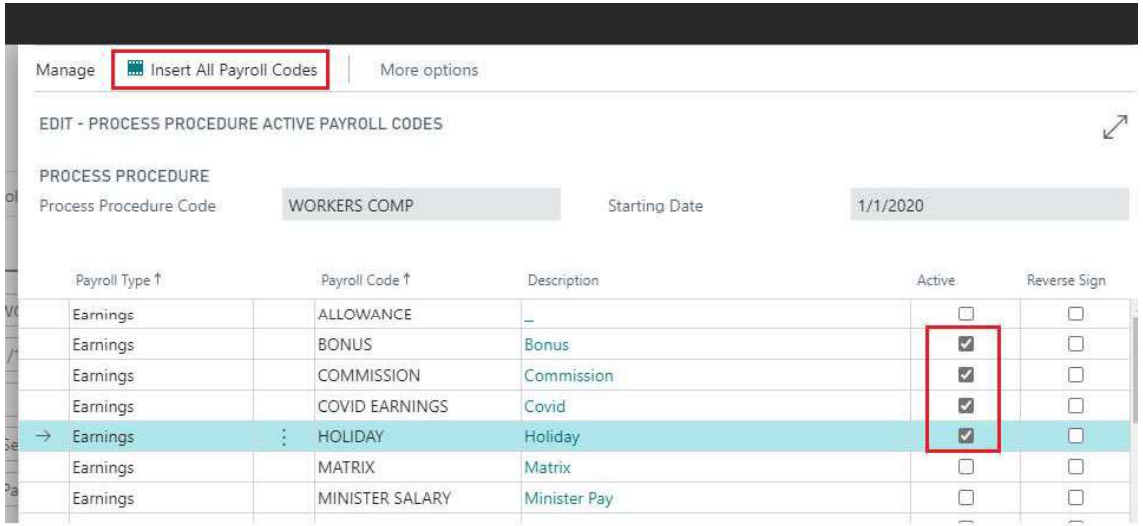
The operation 2 procedure 'Selected Prl. Code Hours' will look to the Active payroll Codes table and return the total hours based on the codes selected as Active.



All operations that mention Active/Selected Codes is referring to the payroll codes being in this table attached to the process procedure.
In order to select/activate the codes that will sum in these operations, click the page action ‘Set Active Payroll Codes’



Then check off the active codes. Also, you can use the insert all payroll codes button so you do not have to manually add each payroll code that should be marked as active.


Manage
Insert All Payroll Codes
More options
EDIT - PROCESS PROCEDURE ACTIVE PAYROLL CODES
PROCESS PROCEDURE
Process Procedure Code
WORKERS COMP
Starting Date
1/1/2020
Payroll Type
Payroll Code
Description
Active
Reverse Sign
Earnings ALLOWANCE
Earnings BONUS Bonus
Earnings COMMISSION Commission
Earnings COVID EARNINGS Covid
Earnings HOLIDAY Holiday
Earnings MATRIX Matrix
Earnings MINISTER SALARY Minister Pay

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