MinistryWorks®
by Brotherhood Mutual

EVOLUTION TRAINING MANUAL

Rev. 02/21

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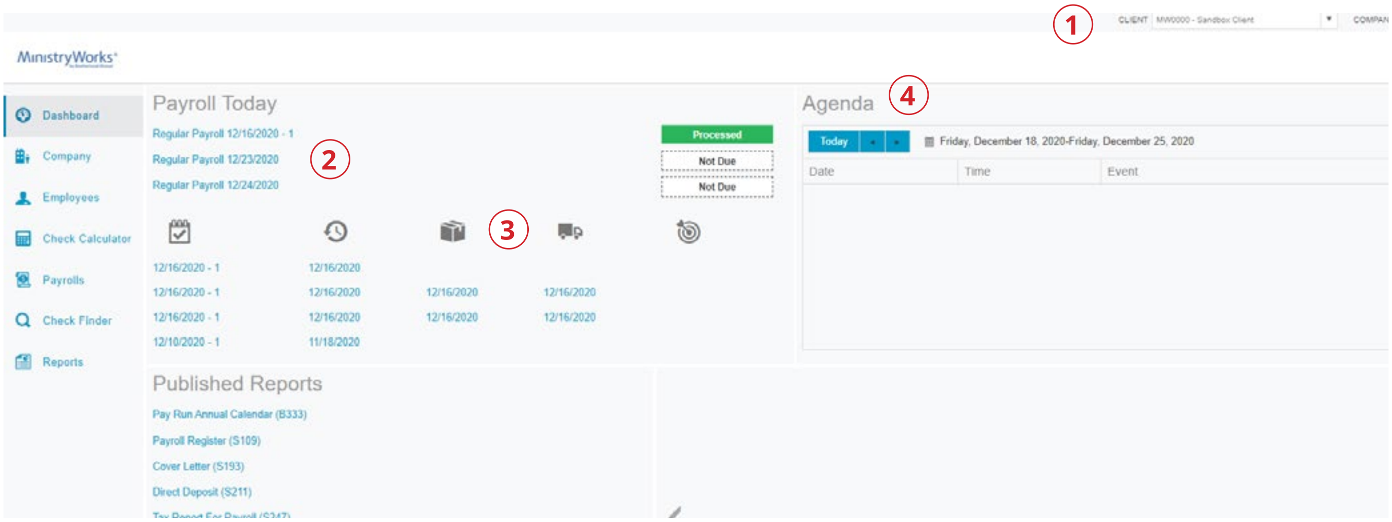
Dashboard



When you log in, the Dashboard appears

1. You can select the Client and Company using the drop-down arrow, if applicable.
2. Snapshot of scheduled payrolls around the time of the viewing. Normally, the first payroll is the most recently run prior to current day. The next are payrolls scheduled to go out on the current day or in the very near future. The status for each payroll is shown to the right of the payrolls. To process payrolls click on Payrolls icon on the left side of the screen.
3. The symbols across the center of the tile are:

    Check date of the payrolls listed below

    Processed date of the payrolls listed below

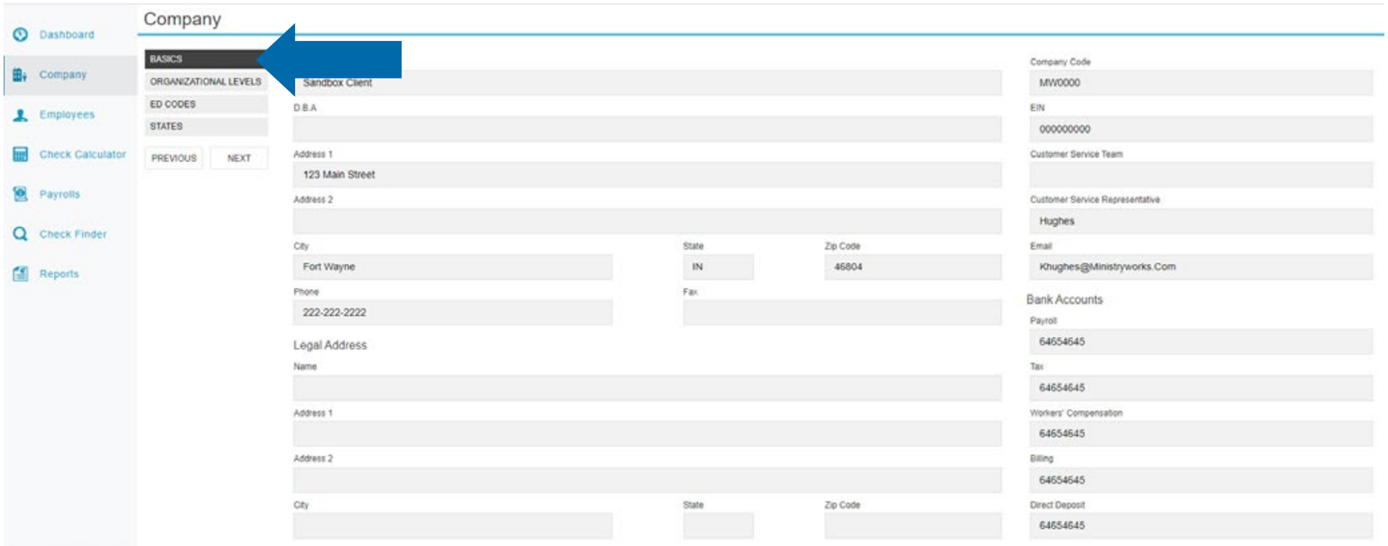
    Packaged date of the payrolls listed below (this is for paper reports which we do not send out)

    In Transit date of the payrolls listed below (this is for paper reports which we do not send out)

    Date delivered of the payroll listed below (this is for paper reports which we do not send out)

4. The Agenda keeps a calendar of all scheduled tasks. Click on “Agenda” and +. “Events” box appears. Fill out fields and click on “Save”. Use the “left” and “right” arrows next to “Today” to change date range.

Company



The data in the Company menu is read-only

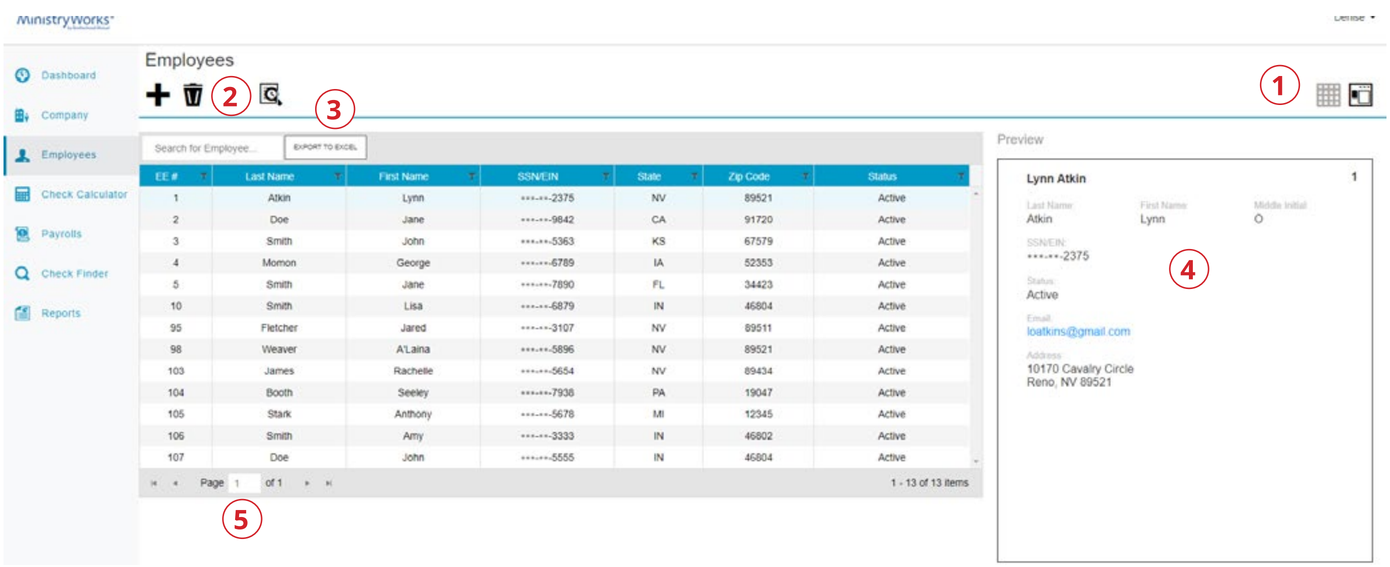
Basics - Overview of company information

Organizational Levels – Displays the Division, Branch, Department and Team Organization level specific information, if applicable. Each company level may have their own payroll bank accounts. When a level is selected on the left, a Payroll Bank Account number, Tax Bank Account number, Billing Bank Account number, and Direct Deposit Account number display on the right, if applicable.

E/D Codes – Displays a list of the E/D codes created and used by the Company. If new codes are needed contact your Payroll Processor.

States – Shows the states in which the company is set up to do business.

Employees



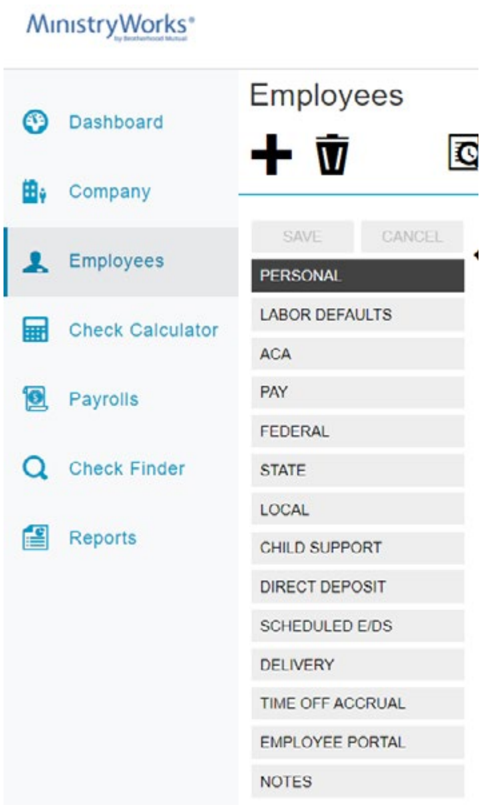
Employees can be added, edited, and viewed under the Employees heading. *An error message will be displayed, and the user will be unable to add new employees or make edits if there are any payrolls with a **Submitted status.**

1. The buttons in the header, far right, are used to toggle between the **Table view** (above) and the **Employee View** in which information shows for one employee.
2. Click on this symbol to add a new employee.

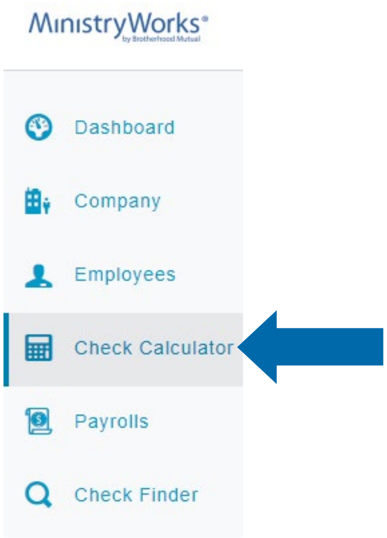
   Click on this symbol, after highlighting employee name, to delete employee. Cannot delete an employee with any pay history.

   Click on this symbol to see audit of all employee information.
3. **Export to Excel** button will create Excel document listing information on Employee grid. The **Search for Employee** field allows you to find an employee when entering the employee name.
4. The **Preview** box allows you to see information of employee that is highlighted on grid.
5. The arrow keys allow you to move from one page of employee list to the next.

6. Click on the name of the employee on the grid and a list of options (blue tabs) appears to the left of the screen. Each option contains fields. Below is the list of fields per option. Refer to your manual for detailed descriptions.



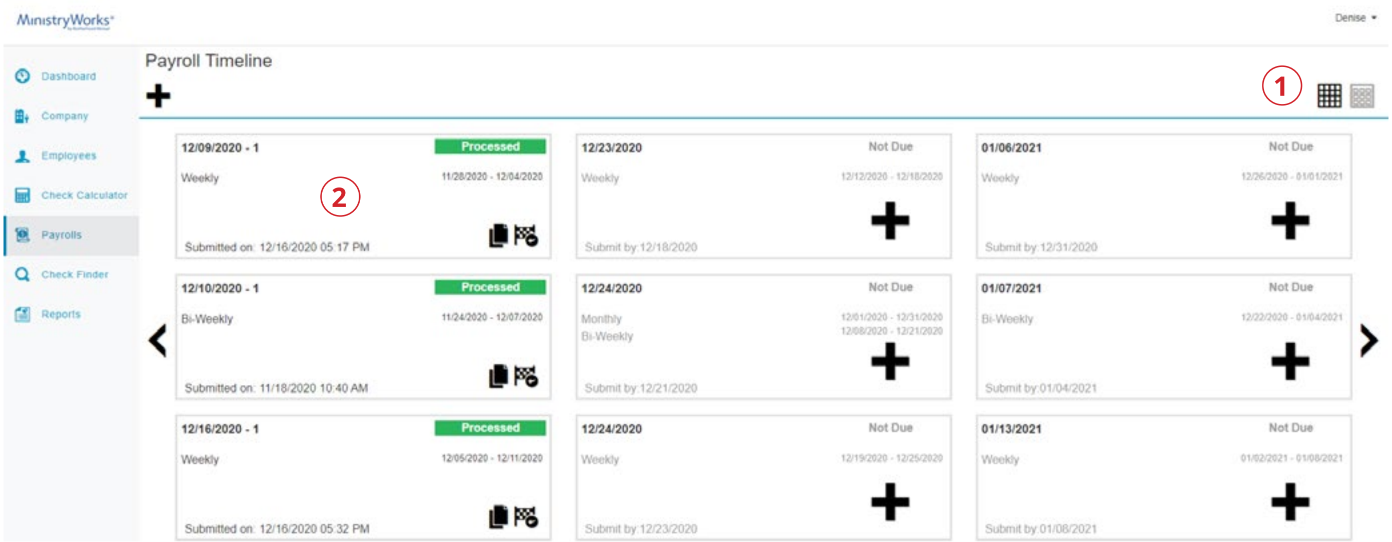
Check Calculator



Check Calculator allows you to compute an employee's net to gross, or gross to net check. This check can be added to a pay run.

For detailed instruction on how to run the Check Calculator, see [page 23](#).

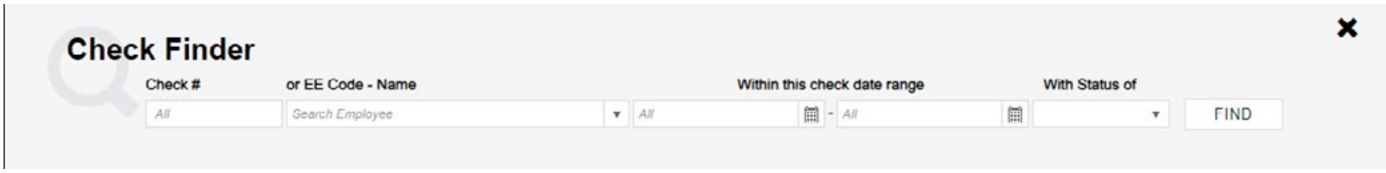
Payrolls



1. Select Table View or Card View (above) for pay runs.
2. Each pay run card has the check date in upper left-hand corner, pay group, submit date, and period start and end dates. Click on the ✚ inside the pay run card to begin processing the pay run. See “Online Payroll Processing” instructions on page 12.

If you wish to create an unscheduled payroll, please contact your payroll processor for assistance.

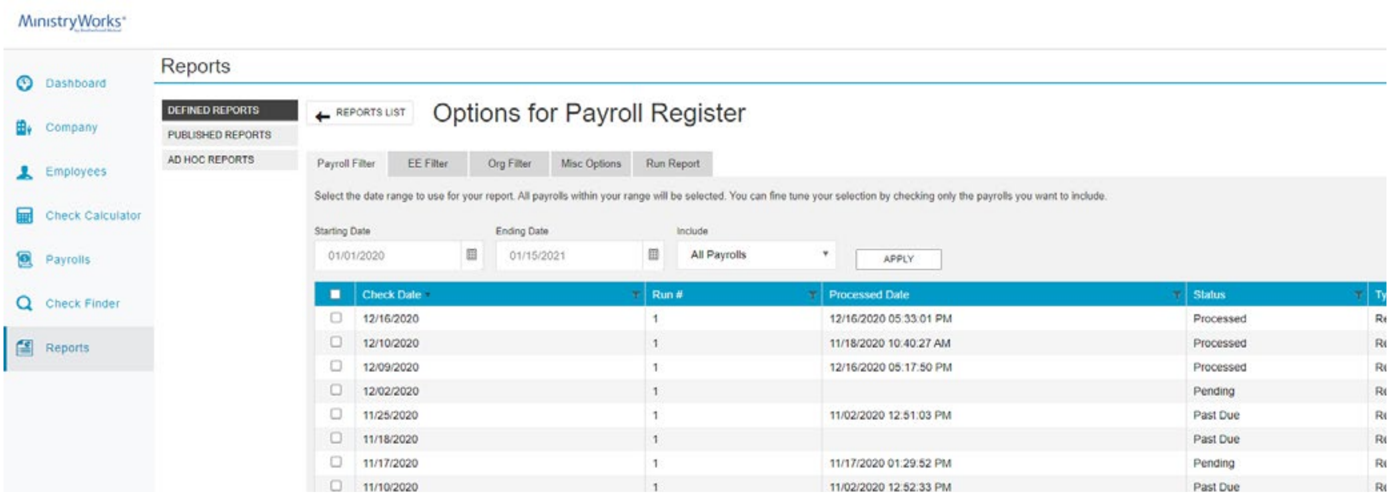
Check Finder



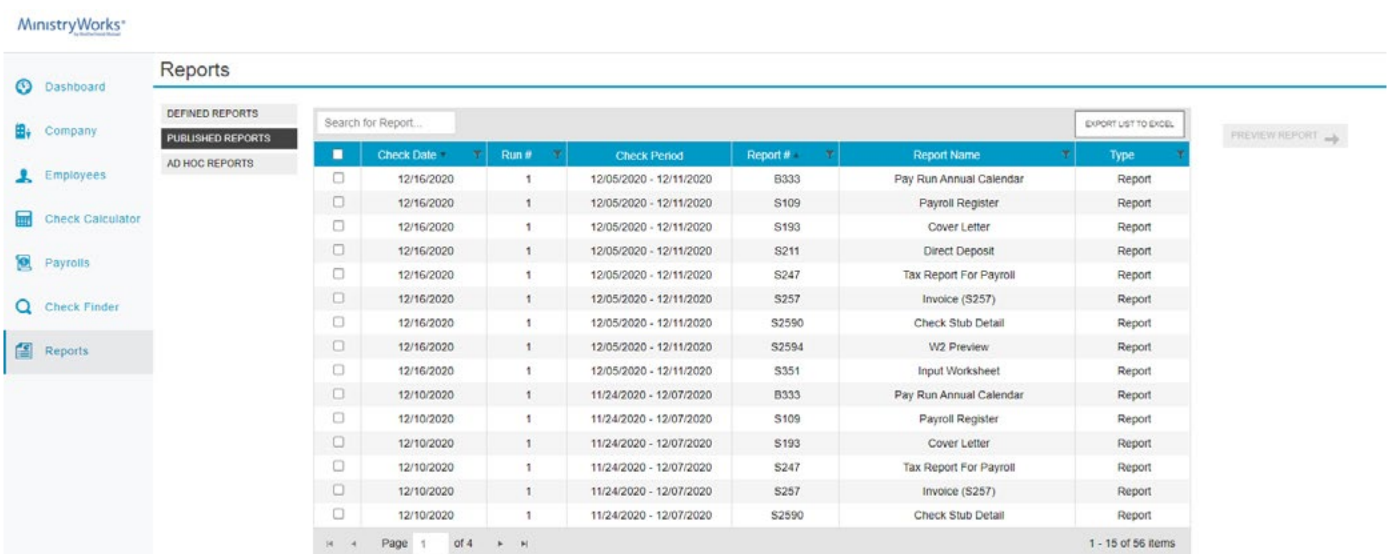
1. Click on **Check Finder** from list on the left hand side of the screen.
2. Enter the **Check number or employee code-name; date range of check and status.**
3. Click on **Find.**

Reports

1. **Defined Reports** - report library; clients can apply filters to reports after selecting the report, clicking on Configure Report and using tabs/filters shown below:



2. **Published Reports** – reports that are printed each time a payroll is processed.



3. **Ad Hoc Reports** – contact your payroll processor

List of Reports – See **Page 35**

Online Payroll Processing

Use Google Chrome™

Logging In:

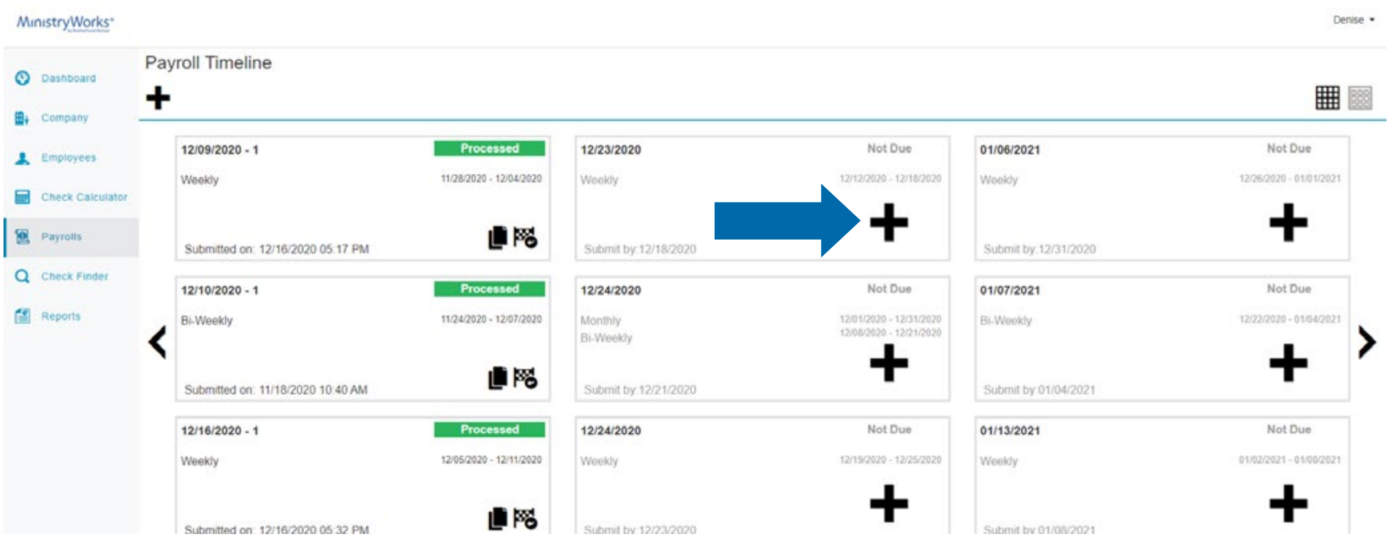
- Go to https://ministryworks.evolutionpayroll.com/hcm/#/
- Enter **Username** and **Password** and click **Sign In**

Create Payroll:

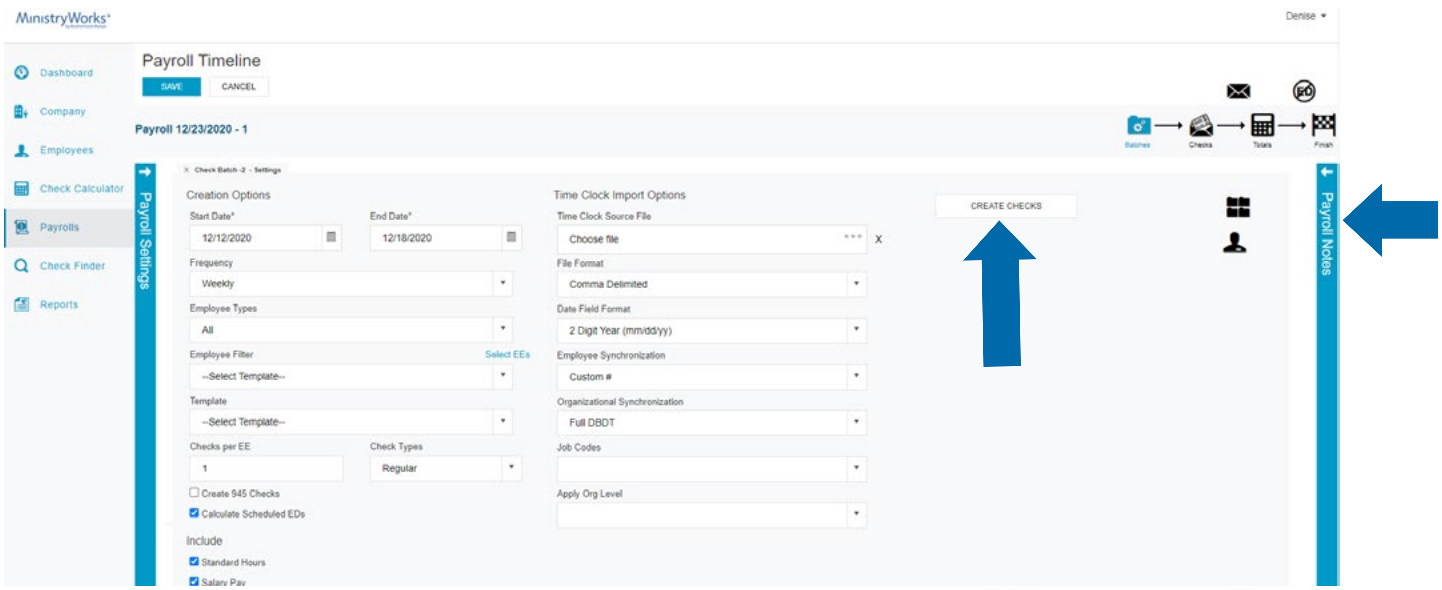
- Click on **Payrolls** from list on left-hand side of screen
- Pay cards will populate with check date in upper left-hand corner

  If you are processing <u>multiple</u> pay groups, go to <u>Processing Multiple Pay Groups</u> instructions on page 16.

- Find the pay card with the check date for the pay run you want to process and click the large **plus sign** + on that card



- If applicable, review Payroll Notes by clicking on **Payroll Notes** section and then hide the note

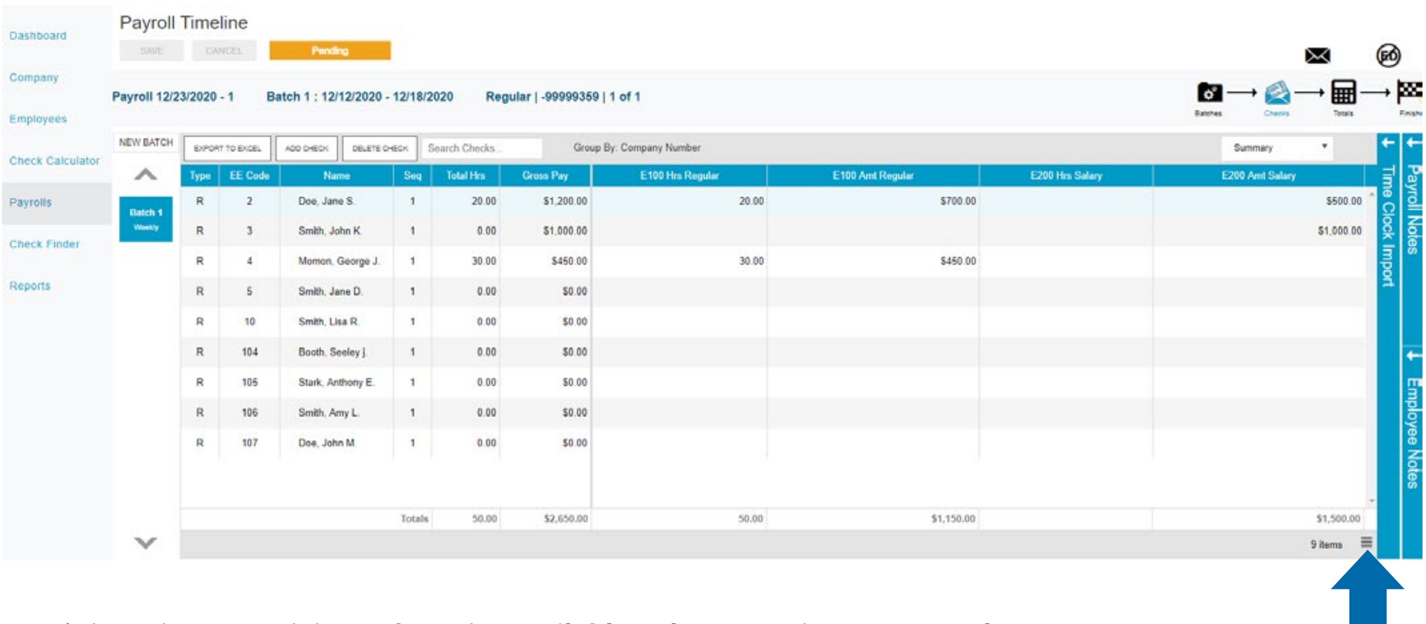


- Review the prepopulated information in the following fields:
  - **Start Date** – beginning of pay period
  - **End Date** – end of pay period
  - **Frequency** – payroll frequency
  - **Employee Types** – employee types to include in the payroll
- Click on **Create Checks** to include *all* employees assigned to that pay group
- Click **OK** when “Checks successfully created” message box appears

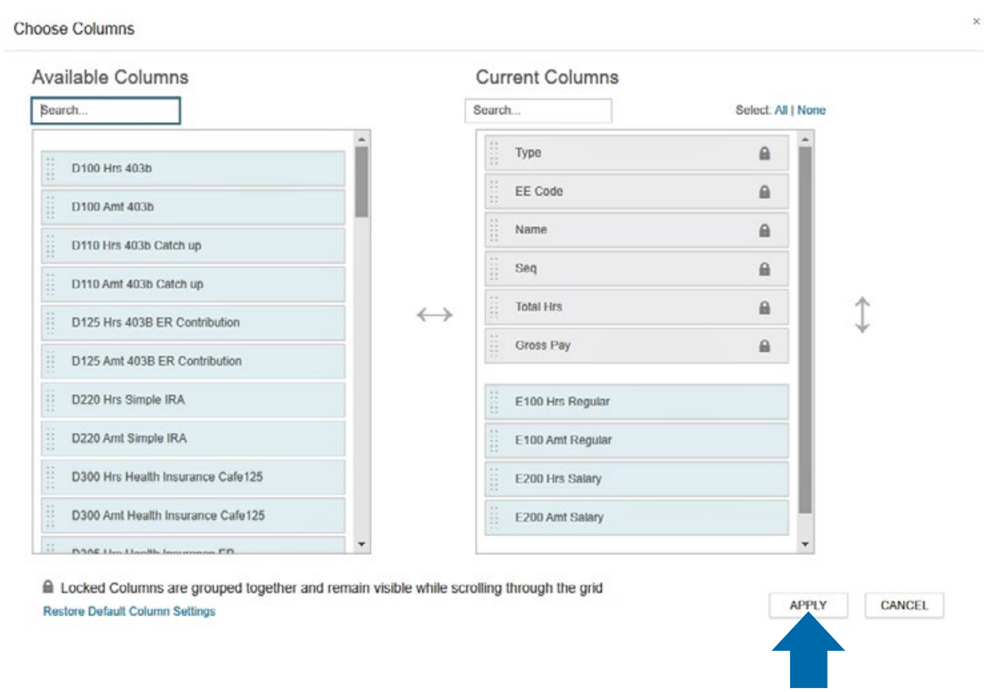
To Add Additional E/D (Earnings and Deductions) Columns

If this is your first payroll, you will not see all the columns for your earnings. Follow the instructions below for adding additional E/D columns on your first payroll, or any other time you are adding a new E/D. This process is workstation and user ID specific. If you use another computer, you will have to recreate your pay grid.

- Click  in the bottom right-hand corner of the screen, and select the E/D codes from the **Available Columns** list



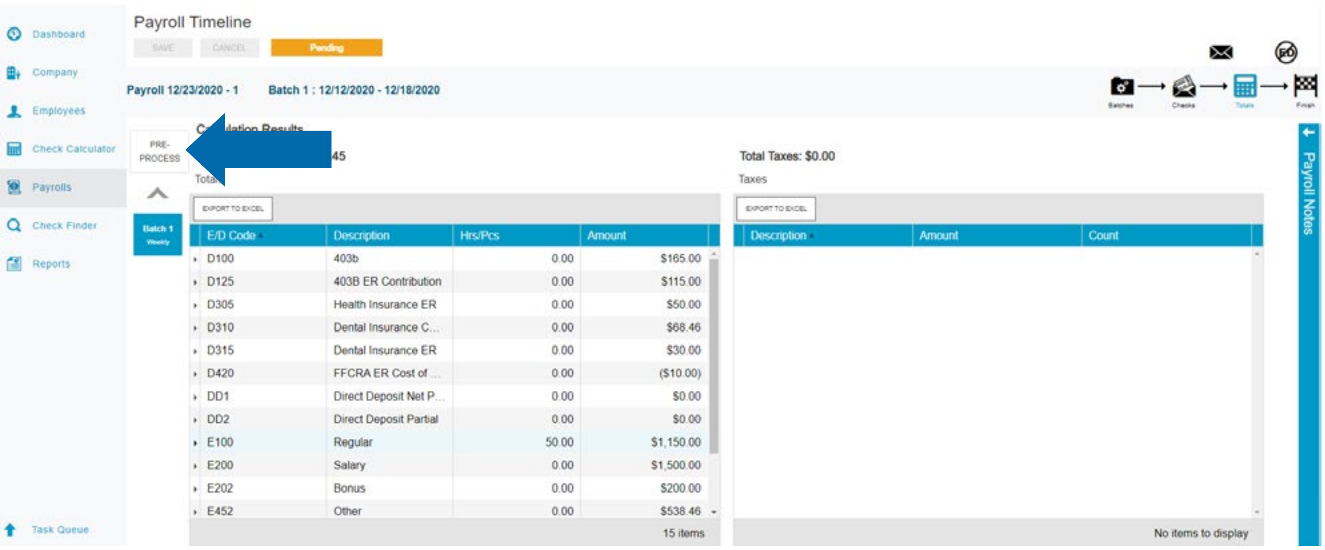
- Click on the E/D and drag it from the **Available Columns** to the **Current Columns**
- Click on **Apply** and the column is added to the pay grid



To Add or Edit Payroll Information

- Click within the column to add/edit the amount/hours. Once finished, click **Save**
- Click on **Totals**
- Click on **Pre-Process**

  This is an important step so that taxes, deductions, and direct deposit will populate!
- The Calculation Results screen appears. Review totals of earnings, deductions and taxes



Preview Check Register:

- Click on **Reports** from menu on left hand side of screen
- Click on **Payroll Register in Defined Reports**
- Click on **Configure Report**
- Check the box with check date of current payroll
- Click on **Run Report** tab
- Click on **Run this Report** option at bottom left hand corner
- Click on **Task Queue** Task Queue (arrow at bottom left hand side of screen)
- View payroll register for accuracy. Click on **Hide** (arrow at top right-hand side of screen) to close report
- If a payroll correction is needed, click on **Payrolls**, click on Pending pay card, and click on the pencil/paper icon. The pay grid appears. **Refer to top of page 15 to add or edit payroll information and continue payroll submission process.** Be sure to click Totals and Calculate again if any changes were made.

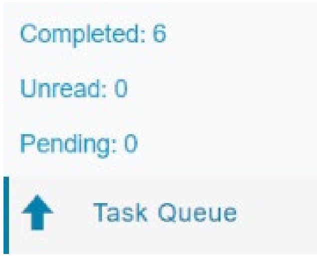
Submit Payroll:

- Click on **Payrolls** from the list on the left side of the screen
- Go back to Pending pay card and click on pencil/paper icon
- Click on **Finish** and Submittal Options screen open   Do not attempt to change Submittal Options

- Click on **Submit Payroll** or **Process Payroll** at the bottom of the screen. Message appears, "Are you sure you want to submit this payroll?" Click on **Yes** and process is complete, or click on **No** to return to payroll.

Submit Payroll will place the payroll in a Queue for your payroll processor to complete. Use this option if you are going to ask your payroll processor at MinistryWorks to review anything in your payroll.

Process Payroll will finalize your payroll and reports will be published shortly after. Go to your **Task Queue** (in the bottom left-hand corner). Once you have 0 pending your payroll is complete. Click on **Task Queue** to see if your payroll message is "Finished Successfully". If you received a message of "Finished with Warnings" or "Finished with Exceptions", please contact your payroll processor for assistance.



If you need to make any corrections after you have processed your payroll, please contact your payroll processor before 3:00 PM EST. Otherwise, the payroll information will be sent to the bank and a correction fee may be charged.

Processing Multiple Pay Groups

If additional functions are needed, go to page 19.

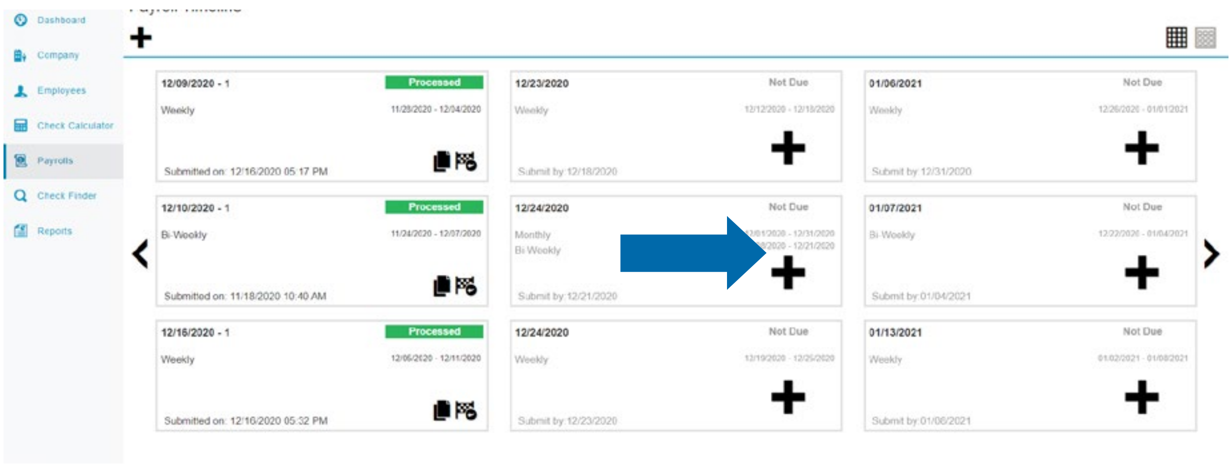
Use Google Chrome™

Logging In:

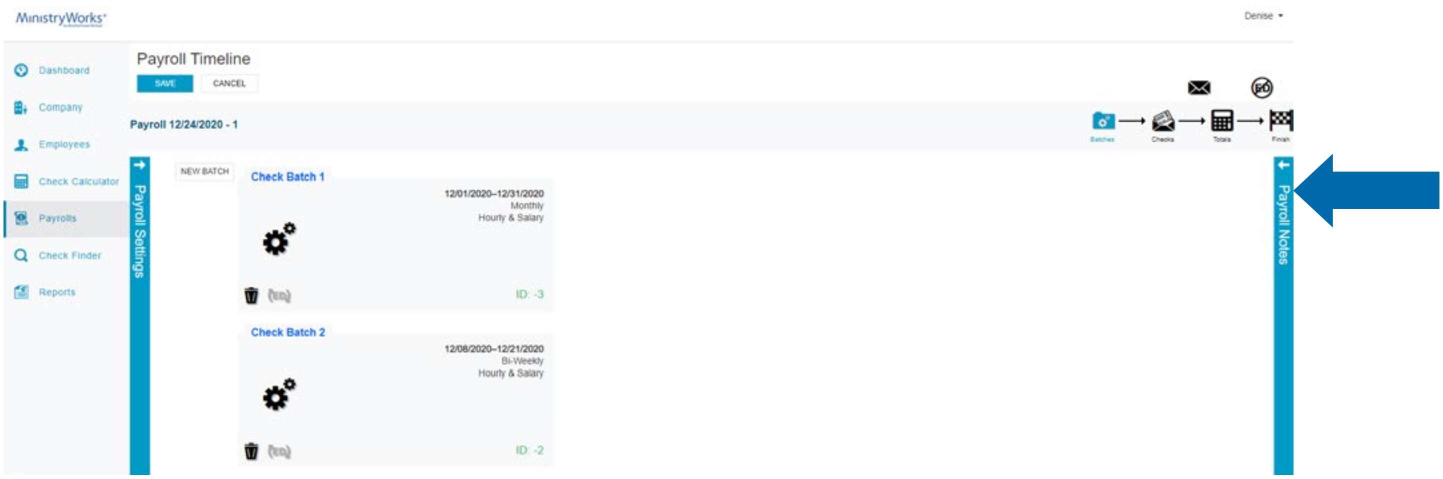
- Go to https://ministryworks.evolutionpayroll.com/hcm/#/
- Enter **User Name** and **Password** and click on **Sign In**

Create Payroll:

- Click on **Payrolls** from list on left hand side of screen
- Pay cards will populate with check date in upper left-hand corner
- Find the **pay card with the check date for the pay run you want to process** and click the large **plus sign** on that card

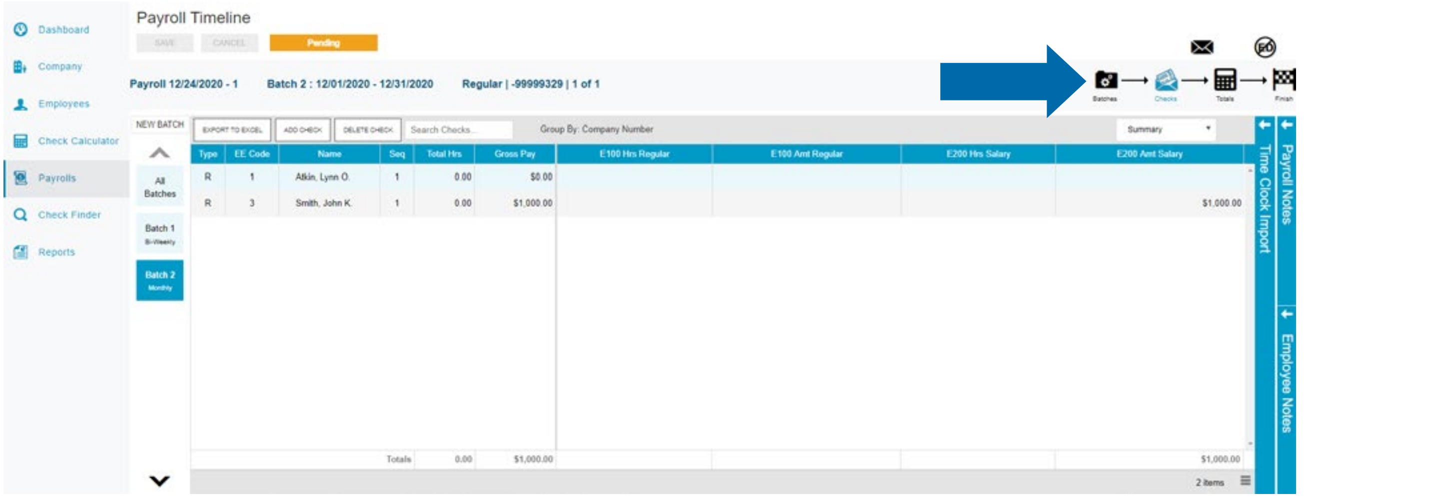


- In the Check Batch Settings screen, if applicable, review Payroll Notes by clicking on **Payroll Notes** section and then hide the note



Create Batch for 1st Pay Group:

- Click on for a **Check Batch** – first pay group
- Review the prepopulated information in the following fields:
  - **Start Date** – beginning of pay period
  - **End Date** – end of pay period
  - **Frequency** – payroll frequency
  - **Employee Types** – employee types to include in the payroll
- Click on **Create Checks** to include *all* employees assigned to that pay group
- When "Checks successfully created" message appears, click on **OK**
- Click on **Batches** icon Batches in upper right- hand corner of screen



To Add Additional E/D (Earnings And Deductions) Columns, see page14

To Add Or Edit Payroll Information, Preview Check Register, or Submit Payroll, see page 15

Create Batch for 2nd Pay Group

- Click on for **Check Batch** – second pay group   Look for batch that has "0 checks" created (shows in top right-hand corner of batch card)
- Review the prepopulated information in the following fields:

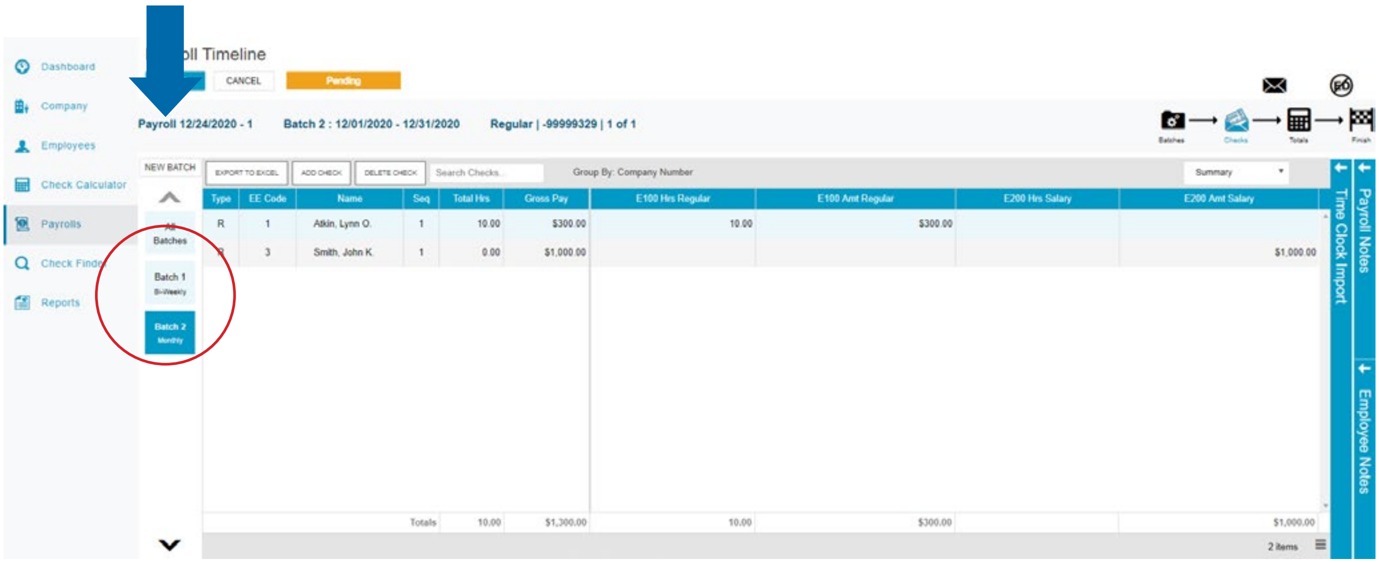
  Start Date – beginning of pay period

  End Date – end of pay period

  Frequency – payroll frequency

  Employee Types – employee types to include in the payroll
- Click on **Create Checks** to include *all* employees assigned to that pay group
- When "Checks successfully created" message appears, click on **OK**

  Repeat these steps above if more pay groups need to be processed
- Click on the **Batch 1** and **Batch 2 folders** to switch between batches
- Do not click **Totals** or **Calculate** until all employee hours/earnings have been entered in **both** batches



To Add Additional E/D (Earnings and Deductions) Columns - page 14
To Add or Edit Payroll Information, Preview Check Register, or Submit Payroll - page 15

Additional Functions

To Add an Employee to Pay Grid or to Add a Second Check to an Employee

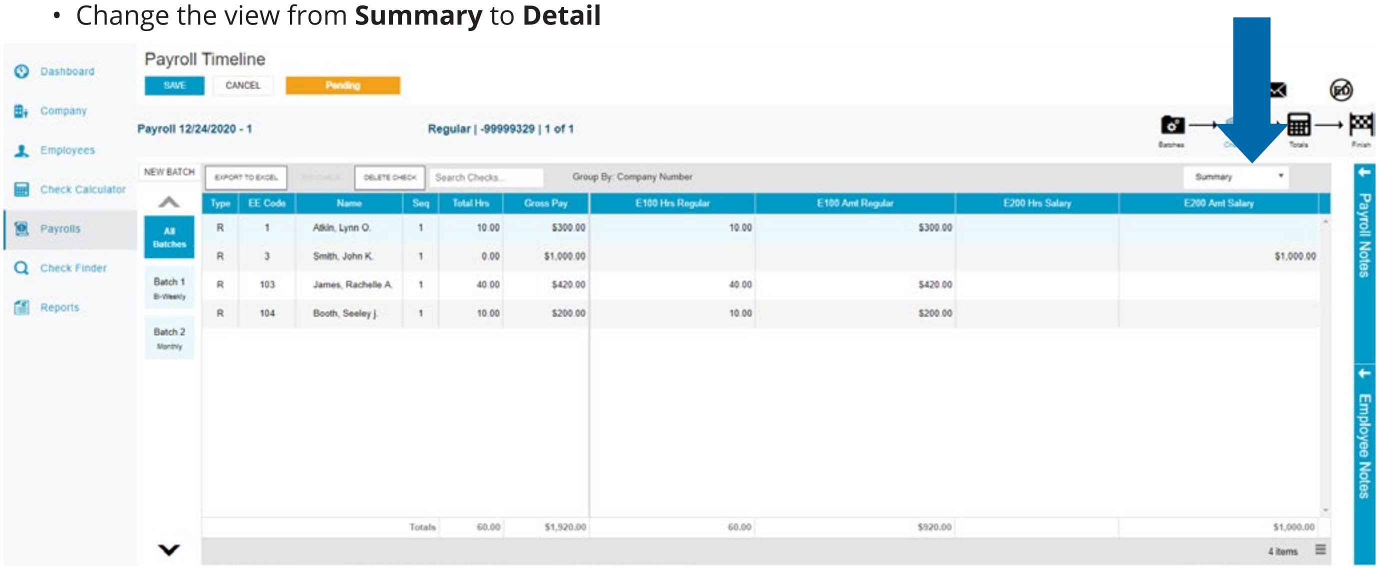
In the pay grid:

- Click the **Add Check** button in the Navigation bar (if you have more than 1 batch showing you must select the correct batch and not "All Batches")
- **Select the Check Type** (Regular) being created
- **Select the employee(s) boxes Standard Hours or Salary Pay in check creation options for those employees that have standard hours or salary**
- Click the **Create Check(s) for Selected EEs** button
- Enter the payroll information in column(s) as needed and click on **Save**

To Add/Delete an E/D (This will only affect the current payroll that is being processed)

In the paygrid:

- Click on employee name
- Change the view from **Summary** to **Detail**



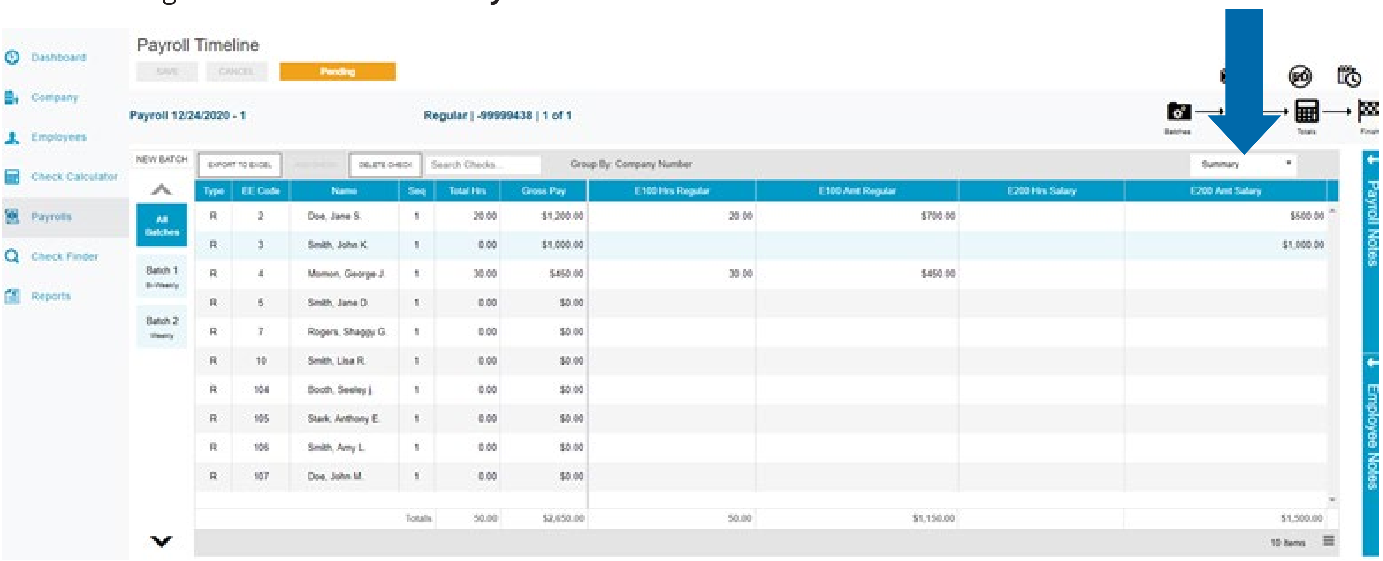
- Click the **Check Lines** button and **Add**
- Select the E/D code and enter pay information in columns
- Click on **Save**
- To **delete** a check line, select the applicable check line and click on **Delete. Click yes to "Are you sure you want to permanently delete this check line?"**
- Click on **Save**
- Change the view from **Detail** back to **Summary**

To Allocate Wages to Division/Branch/Department/Team

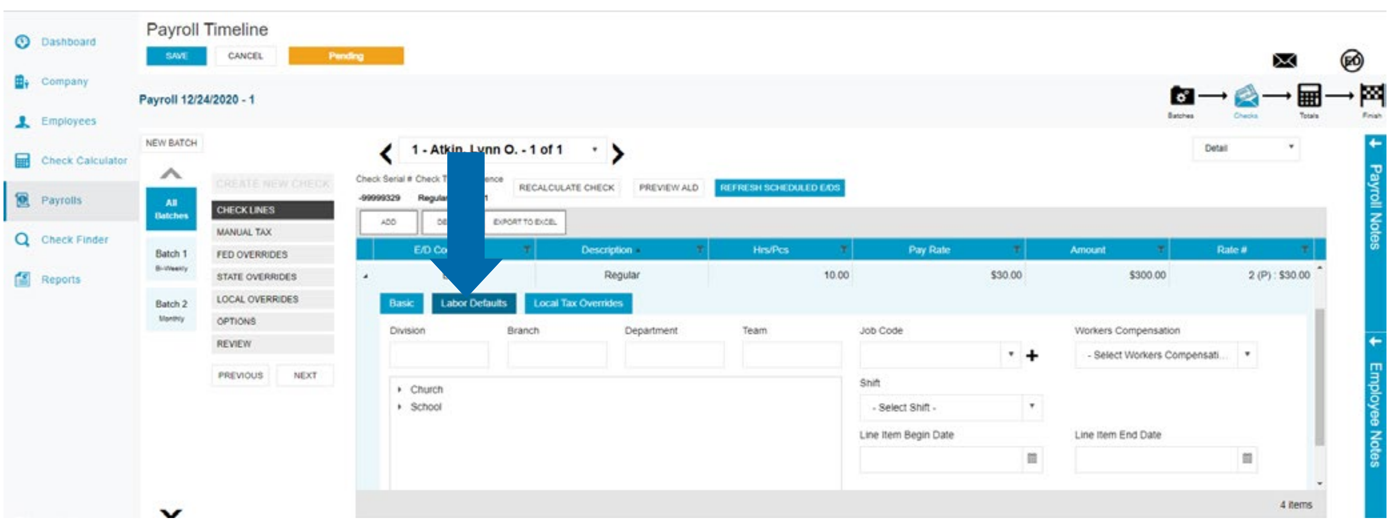
This is specific to your company setup. Not all steps of this allocation process will apply.

In the pay grid:

- Select the employee
- Change the view from **Summary** to **Detail**



- Click on the E/D code/check line that you want to allocate
- Click on the arrow to the left of the E/D code. The following screen appears
- Click on **Labor Defaults** tab

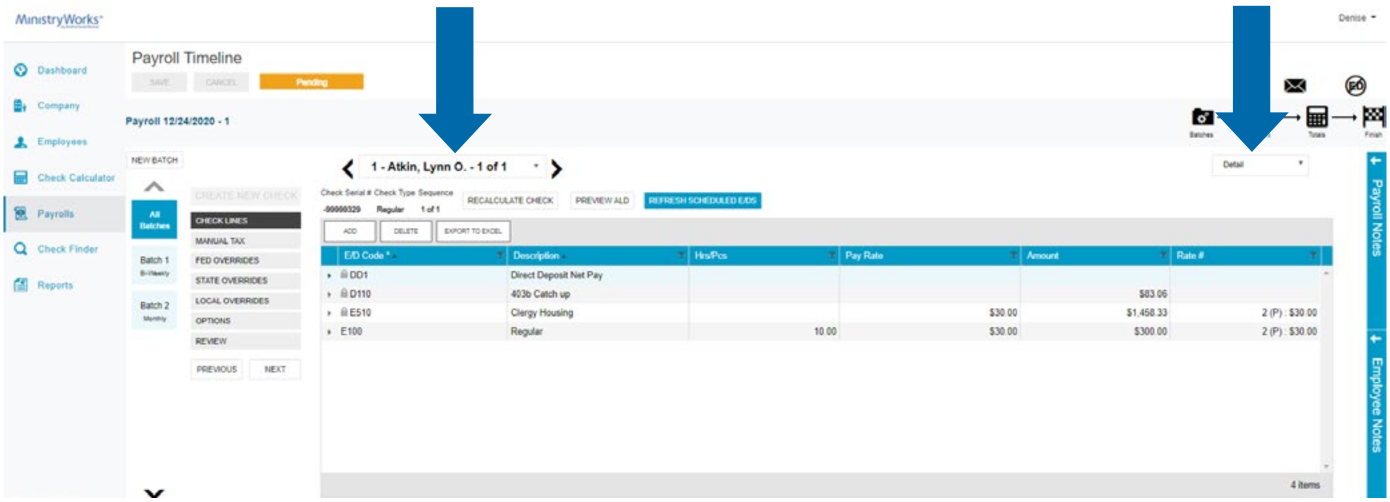


- **Click on the arrow at each level until you are able to select the appropriate Division/Branch/Department/Team.**
- Click on **Save**

Additional Functions in Detail View of Check

Changes in this section pertain to current payroll only and are NOT permanent changes.

- In pay grid screen, change the view from **Summary** to **Detail** on the right side of the screen.
- Select the employee



- In **Check Lines** tab, click on **Add** to add a check line (E/D code) or **Delete** to delete a check line (E/D code) - must have code highlighted to delete - Answer yes to the question "Are you sure you want to permanently delete this check line"
- **Manual Tax, Fed Overrides, State Overrides and Local Overrides** - Please contact your processor to assist with any tax overrides with this check
- **Options** – Add comments or notes for the employee to see on just their check. Options to block certain E/Ds or accruals; please contact your processor to assist with blocking these.
- **Review** – review payroll checks with overrides to verify for accuracy before submitting to payroll.
- **Recalculate Check** – click on this to update information
- **Preview ALD** – click on this to view Auto-Labor distribution group setup
- **Refresh Scheduled E/Ds** – Only use this if changes were made on an Employee set up after the payroll was opened. Check to make sure that duplicate wages were not pulled in

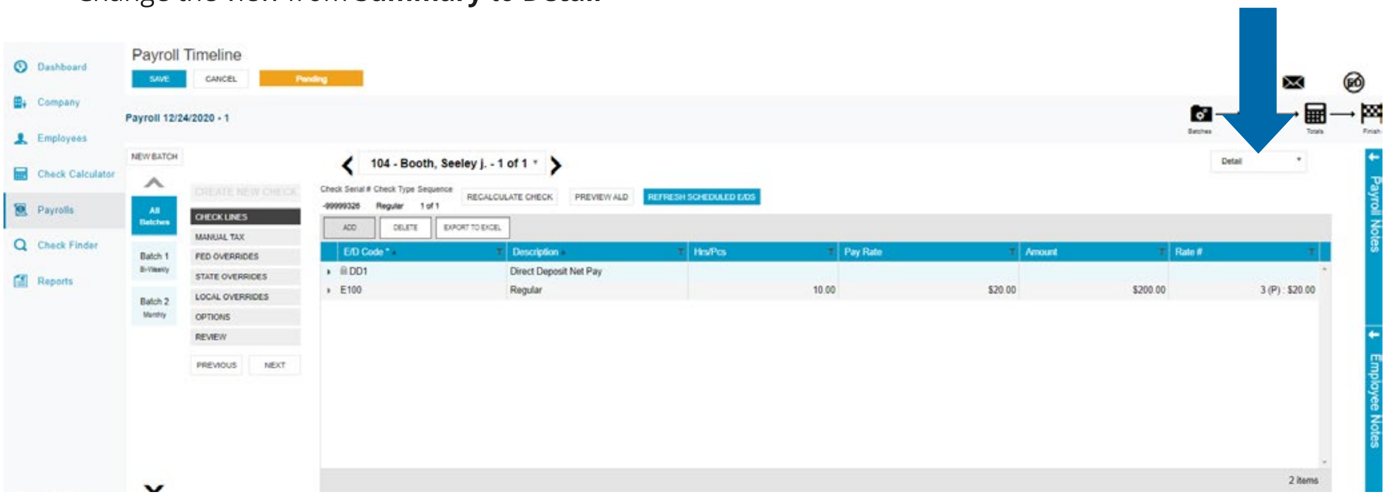
Click on **Save** to save any changes made to the information before switching back to Summary view.

To Add an Additional Hourly Rate and Hours to Pay Grid

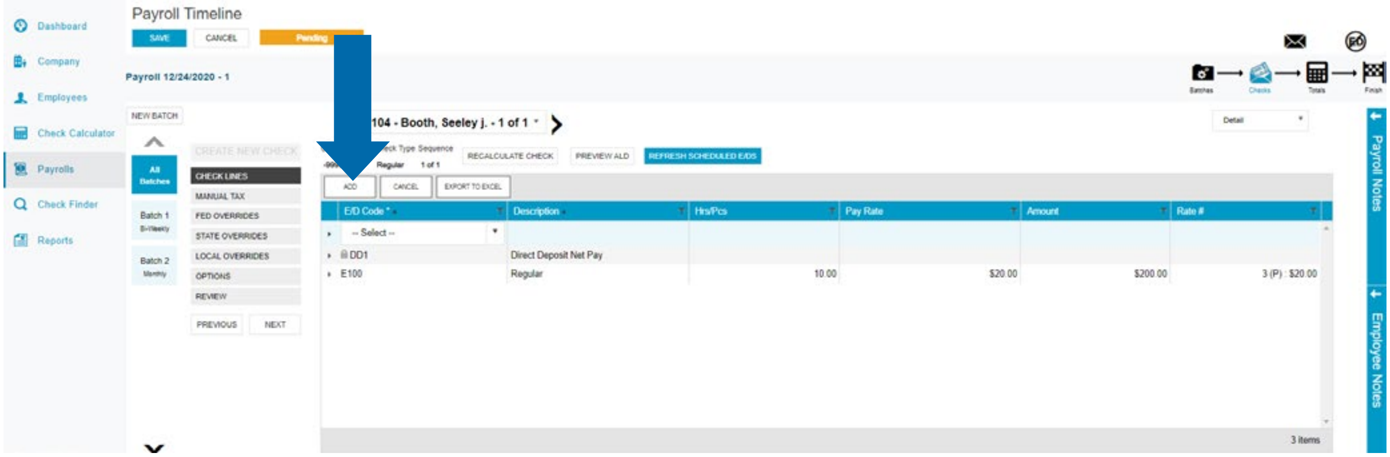
This will pertain to current payroll only and are NOT permanent changes.

In the pay grid:

- Highlight employee line
- Change the view from **Summary** to **Detail**



- Click **Add**

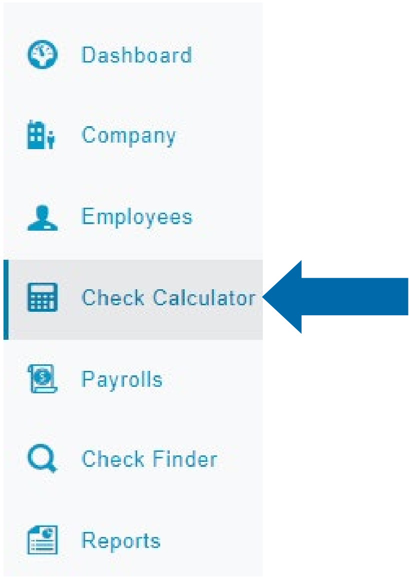


- Click on the drop-down under the E/D code to select the earning. Enter hours in **Hours/Pcs** field
- Click on the drop-down under the **Rate Number** and choose from available options (if multiple rates are not available, enter the new rate under the **Pay Rate** column)
- Click on **Save**
- Information is populated on pay grid (you will see a  indicating there are multiple earning codes/rates)

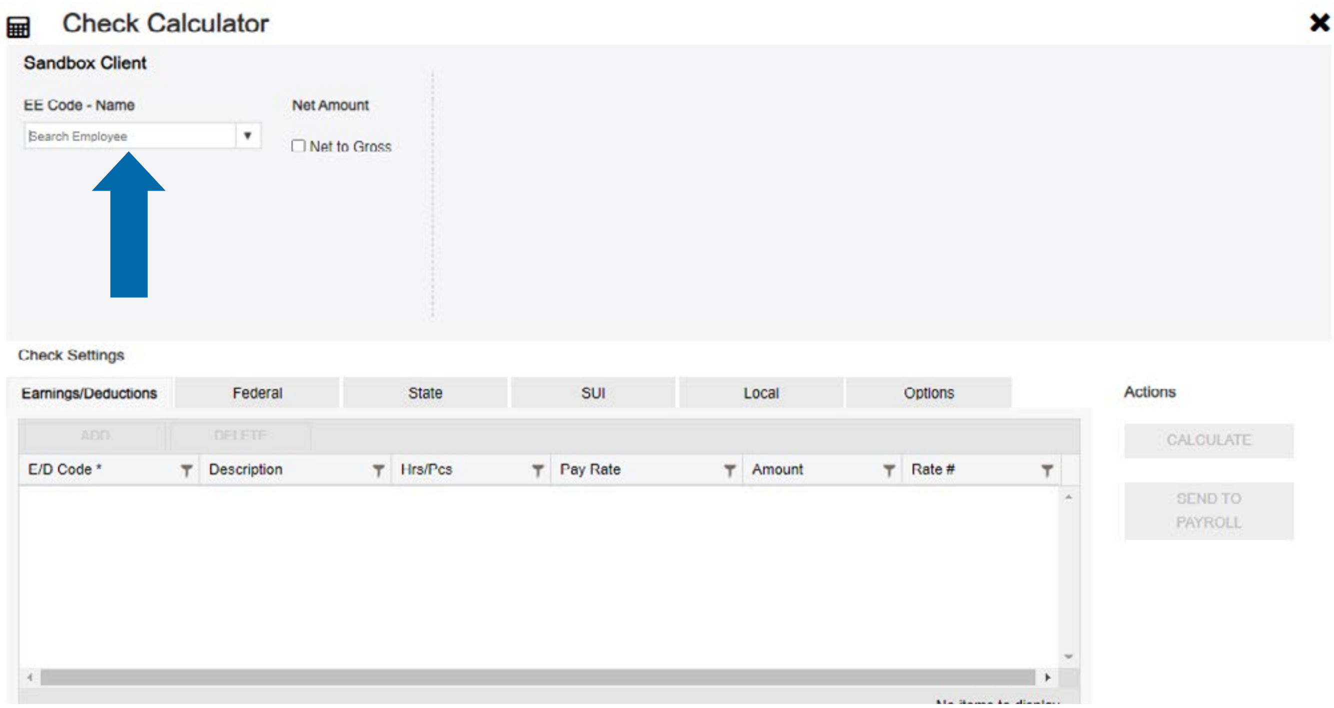
Check Calculator: Gross to Net/Net to Gross

You must have the payroll batch that you want to send this to already opened.

- Click **Check Calculator** from Menu



- Select an employee using drop-down arrow in **EE Code-Name** field



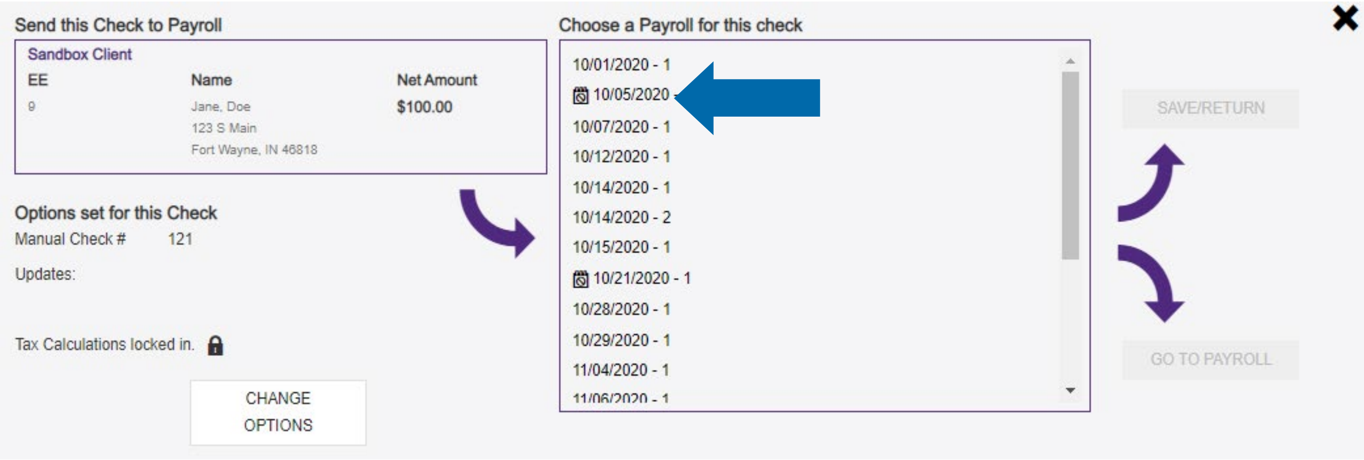
Checks can be calculated from Gross-to-Net or Net-to-Gross.

If calculating a Net to Gross check:

- Check the **Net to Gross** checkbox under **Net Amount**

- Enter the **Net Amount** in the field that opens when selected
- Click the **Delete** button to delete all the earnings or deductions from the check. If a live pay, do not delete the DD1
- Click the **Add** button to add the earning or deductions as needed to the check
- Click the **Federal** tab

- Click the applicable fields to make changes, blocks, or overrides
- Repeat the steps for **State, SUI** and **Local** taxes
- State overrides - to block the state tax select regular in the state type and enter 0 in the amount
- Local overrides - workplace taxes are required and cannot be blocked. Contact your payroll processor if you have questions
- Click on **Options** tab - **If this is a manual check, a check number is required. If this is live check, uncheck "Make this a Manual Check"**
- Click on the Calculate button - review results for accuracy, check the earning code and confirm taxes are correct
- Recalculate if you make any changes
- Click the **Send to Payroll** button to send the check to a payroll batch for processing
- Select the payroll in which to include the check for processing
- Click on **Save/Return** to create another check or **Go To Payroll** to go to pay grid



If calculating a Gross-to-Net check:

- Select an employee using drop-down arrow in **EE Code-Name** field.
- Click the **Delete** button to delete all the earnings or deductions from the check. If a live pay, do not delete the DD1
- Click the **Add** button to add the earning or deductions as needed to the check
- Enter the gross amount in the **Amount** column
- **Federal**, **State**, **SUI** and **Local** tabs - **Do Not** make changes in this area
- Click on **Options** tab - **If this is a manual check, a check number is required. If this is a live check, uncheck "Make this a Manual Check"**
- Click the **Calculate** button
- Click the **Send to Payroll** button to send the check to a payroll batch for processing
- Select the payroll in which to include the check for processing
- Click on **Save/Return** to create another check or **Go To Payroll** to go to pay grid

Entering New Employees Online

If your employee is performing clergy duties and is licensed, commissioned or ordained, please follow the highlighted sections in the appropriate steps below.

1. Click on **Employees** from list on left hand side to open.
2. Click the large "plus **+"** sign in the heading to create a new record – The Add Employee box opens
3. Select whether the Tax ID is a **SSN** or **EIN** and enter the Social Security Number or Employer Identification Number
4. Click **Check ID**

If the Social Security Number or EIN is already in the system, the Employees screen opens with the existing demographic information already copied into the new employee fields. This is NOT the process for rehiring a terminated employee. Please refer to Section 4 - Making Changes to Employee Information - Status on page 31.

Submenu Tiles

Personal

Complete all required fields listed below – You must progress to the Local menu item (if applicable, if there are no locals for the new employee, you must Progress to the State menu item) before the new employee can be saved. If you exit before that, the new employee information that was entered is lost.

Demographics section:

- SSN/EIN #
- Employee Type – select W2 or 1099
- EE Code – employee number (auto filled; can be customized)
- First Name
- Last Name
- Address 1
- City
- State
- Zip
- Gender
- Ethnicity – if applicable
- Birth date - Recommended, Required if you have retirement plans
- Email Address - Used for emailed paystub vouchers (not required)

Hire Status section:

- Status – select status
- Current Hire Date – enter hire date
- Rehire Eligible – defaults to Yes
- Employee Type - select from drop down list (Full time, Part time, 1099, etc.)

Benefits section: Do not complete

Labor Defaults

- Complete the required and applicable fields - Used only if Divisions, Branches, Departments or Teams are set up on the Company

ACA

- Not required - Contact your payroll processor if you have ACA services

Pay

Complete all required fields listed below

Salary Information section:

- Pay Frequency – select pay frequency based on current calendar
- Salary Amount – enter salary amount per pay period
- **Clergy - Salary amount enter $0.00.** Clergy wages will be entered on the **Scheduled E/Ds tab** as Clergy Salary (E500) and/or Clergy Housing (E510)
- Rate Amount – enter the hourly rate – if more than one rate, click on Add button in **Overrides section** and enter additional hourly rates

Position section:

- New Hire Report – defaults to Pending for all new hires or rehires over 60 days; do not change. System will change to Completed once the report is sent.
- FLSA - defaults to NO
- Position - choose from drop-down (contact payroll processor to add if not available)

Federal

Complete all required fields listed below

Taxation section:

- Marital Status – select status. Select from Standard or Higher options if employee is hired after 1/1/2020. Standard should be used if only Step 1 on the W4 is completed. Higher should be used if the box in Step 2c is checked.
- Exemptions – Defaults to zero; not used with 2020 and forward W4's. Do not change
- W4 Total Dependents Tax Credit – If applicable (Step 3 on W4)
- W4 Other Income – If applicable (Step 4(a) on W4)
- W4 Deductions: If applicable (Step 4(b) on W4)
- Tax Type – defaults to None, select option if applicable (Step 4(c) on W4)
    - Additional Amount – enter additional dollar amount to be withheld in Value field
    - Additional Percentage – enter additional percentage amount to be withheld in Value field
    - None – no additional federal tax taken
    - Regular Amount–enter flat dollar amount to be withheld in Value field
    - Regular Percent–enter flat percentage amount to be withheld in Value field
- Value – enter amount/percent of tax type if applicable

EE Tax Statuses section:

- Federal Tax Status –
    - Include-default federal tax will be calculated
    - Block- no federal tax will be calculated or withheld
    - **Exempt- Do not select**
- OASDI Exempt – social security tax, defaults to NO (do not change)
- **Clergy** - OASDI Exempt – social security tax, change to YES. Pastors can't withhold through payroll per IRS guidelines
- Medicare Exempt – defaults to NO (do not change)
- **Clergy** - Medicare Exempt – change to YES. Pastors can't withhold through payroll per IRS guidelines

ER Tax Statuses section:

- FUI exempt – defaults to NO, (do not change)
- OASDI exempt – defaults to NO, (do not change)
- **Clergy** - OASDI exempt – change to YES. Employers can't match social security through the payroll per IRS guidelines
- Medicare Exempt – defaults to NO, (do not change)
- **Clergy** - Medicare Exempt – change to YES. Employers can't match Medicare through the payroll per IRS guidelines

W2 Form section:

- Type – make sure "W-2 & 1099" is selected. Residential State – defaults from Demographic section on Personal Tab
- Do not complete demographic section on this page

W2 Settings Section- Do not change

1099R Section- Do not complete

State: *Required*

- State – Auto populates what was added on the Personal Tab
- SUI – Same as State
- SDI – Same as State
- Home – Defaults to Yes
- Marital Status – Select from options available.
- Tax Exemptions – If applicable.
- Click the small arrow at the far left of the line on the information bar to minimize or maximize the state information. (Set up additional or flat amounts for state withholding)

Local: *if applicable* **Do not remove any locals that automatically populate**

- Click on Add button to add local
- Complete required fields (*)

Click **Save**

Child Support

- Contact your payroll processor if you need a child support deduction

Direct Deposit -2 Step Process

Step 1: Adding Employee Banking Information

- Click the Add button to add new direct deposit information as needed
- ABA# - enter routing number
- Bank Account # - enter account number
- Account Type – select, checking, savings or money market
- In Prenote – if you select “No” the employee will receive a direct deposit on the next pay run. If you select “Yes,” the prenote will be sent with next payroll and employee will receive a paper check. Check and UPS shipping charges will also apply.
- Form on File – This should be Yes; as a completed Direct Deposit Authorization form is required.
- Allow Hyphens – defaults to No; do not change
- Click **Save** when you have completed entering information on this screen

Step 2: Adding DD1 in Scheduled E/Ds

- Click on Scheduled E/Ds tab
- Click the Add button
- Under Code – Select DD1 Direct Deposit Net Pay from the drop down
- Under Send To – Select Direct Deposit from the drop down
- Direct Deposit Account field appears – click on drop down arrow and select bank account number
- Click **Save**
- If employee has more than one Direct Deposit account contact payroll processor to add extra E/D (ex: DD2, DD3)

Scheduled E/Ds

Scheduled E/Ds are earnings and deductions that are scheduled to be processed automatically with their scheduled payroll.

For Clergy employees, we add their wages as E/D codes (Clergy Salary E500 and/or Clergy Housing E510) since these codes are built not to pull FICA taxes.

- Click the Add button
- Under Code – select the earning or deduction
- Calculation Method – defaults to company set up
- Amount $ - enter amount per pay period, if applicable
- E/D Group – if applicable, used with percentage calculations
- Amount % - enter percentage, if applicable
- Click **Save**
- Repeat process to add more E/Ds.
- If E/D code is not available contact your processor to add new E/D code.

Delivery

Completing this section will allow pay stub to be emailed to the employee.

- Add the employee's email address (if added on Personal tab it will populate here)
- Under Print Voucher - Select **Yes**
- Enter a password for VMR deliveries - consider using the last four digits of the employee's social security number

Employee Portal

Highly recommended to give employee access to the Employee Self Service Portal so they can view/ retrieve pay stubs and W2's.

- Username – create unique username (JKSmith, JohnSmith, JSmith) username is case sensitive and email addresses cannot be used
- Password – enter password; use MW[last four digits of social security number]! (i.e. MW1234!)
- Click **Save**
- Once the employee is registered, they will go to the Employee Self Service Website below to log in and change their password.
- Link to website: https://ministryworks.evolutionpayroll.com/ess#/login

Notes

- Payroll Notes – Notes entered here can be viewed by the payroll processor, or other internal colleagues. The information does not appear "publicly" and cannot be viewed by the employees. This will show as in the pay grid next to the employee name.
- General Notes – General notes about the employee and payrolls are stored with the employee data and can also be viewed in the Payroll menu in the Notes fly out tab on the Employees–Payrolls–Payroll View screen.

Making Changes to Employee Information

Make all changes to Employees prior to opening a payroll

Status – Anything other than an Active status will not show up on the pay grid automatically

Rehire an employee

- Click on **Employees** from menu on left-hand side
- To find terminated employees, all filters need to be cleared. Click the **funnel** next to the **Status** heading
- Click **CLEAR** at the bottom of the drop-down. All employees will show in the list now. Select the employee by double-clicking their name
- In the Personal tab under the Hire Status section, change their status to **Active**. Add the original hire date to the Original Hire Date field and add the new hire date to the Current Hire Date field. Delete the Termination Date.
- Click **Save**
  - **Note: Once the employee is rehired, be sure to go through all the employment tabs to ensure all information is still accurate. If anything needs changed be sure to update before opening the next payroll.**

Terminate an employee

- Click on **Employees** from menu on left-hand side
- Select the employee by double-clicking their name. Stay in the **Personal Tab**
- Under the Hire Status section, change their status to **Terminated**. Add a termination date to the **Termination Date** field
- Click **Save**

Pay

- To change the pay information for an employee, click on **Employees** from menu on left hand side
- Double click on employee name
- Click on the **Pay** tab
- Enter the new amount in the **Salary Amount** field or **Rate Amount** field
- Click **Save**

  * For clergy, go to Scheduled E/D's to change Clergy Salary (E500)

To add an Additional Hourly Rate

- Click on **Edit Effective Periods** in *Overrides* section and the *Effective Periods* screen opens
- Click the Add button
- Change the **Begin Effective Date**
- Add **Rate Number - if salaried EE Rate 1 is $0.00 Add Rate 2**
- Add **Rate Amount**
- Click **Save**
- To change information for a rate, in the *Overrides* section, click on the drop-down arrow for rate you want to change.
- Make the changes and click on **Save**

Scheduled E/D's

- To change the information for other earnings and deductions, click on the **Employees** section
- Double click on employee name
- Click on **Scheduled E/Ds** from the menu
- Click on the arrow to the left of the E/D to open up the information for the E/D that will be changed
- Make the changes to information
- Click **Save** or close E/D by clicking on arrow

To Inactivate a scheduled E/D

- Click on the E/D
- Click on the arrow to the left of the E/D that needs stopped
- Click on the **Schedule** tab within the E/D
- Enter the date it should stop in the **Ending** field PRIOR to the upcoming pay run
- Click **Save**

To change a Direct Deposit

- Click on **Employees** from menu on left-hand side
- Double click on Employees name
- Click on **Scheduled E/Ds** tab
- Click on arrow to the left of the DD1 or DD2 that needs changed
- Click on plus sign
- Enter ABA # (Routing #), Bank Account #, Account Type
- **Check** the **In Prenote** box if you want employee to have paper check on next payroll (check and delivery fees apply), leave box **unchecked** if you want employee to have direct deposit on next payroll
- Check the **Form on File** box to indicate the employee has given documentation to support the account change
  - Note: if you receive a bank change request via email, best practice is to verbally confirm the request came from the employee
- Click on **Save button**
- Click **Save**

To deactivate a Direct Deposit in use:

- Go to Scheduled E/Ds
- Click on the arrow to the left of the DD1 or DD2
- Click on Schedule tab
- In Effective section, go to **Ending** field and click on a date PRIOR to the upcoming pay run that the direct deposit should not be active on
- Click **Save**

Taxes

Federal

- Make changes based on how the employee completed the current year W4
- Click on **Employees** from menu
- Double click on the employee name
- Click on **Federal** tab
- Click **Save**

State

- To change *Marital Status*, click on field and select status from drop down menu
- To change *Tax Exemptions*, click on field and type over existing number
- To add additional or flat amounts, click on the arrow to the left to open up the detail of the state.
- Under the *Overrides* section, under **Tax Type**, select options of additional or flat amounts.
- Enter the amount in the Amount field.
- Click **Save**

Local

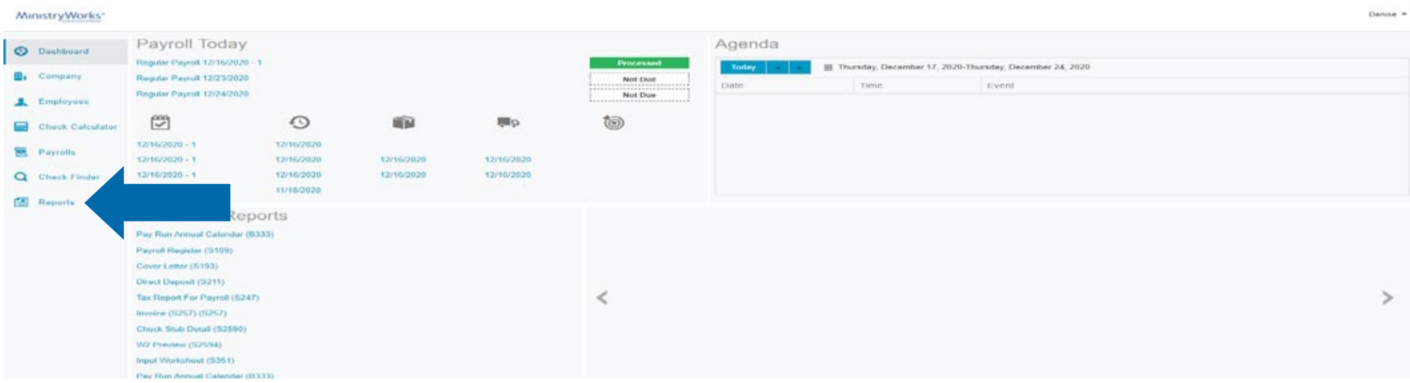
- In **Local**, click on Add to attach a local tax
- Click on field beneath Local section and using drop down arrow, select the local tax
- *Misc. Amount* field - **Do not** make changes
- Click **Save**
- Contact your Processor to review local tax set up after making changes

Viewing Reports

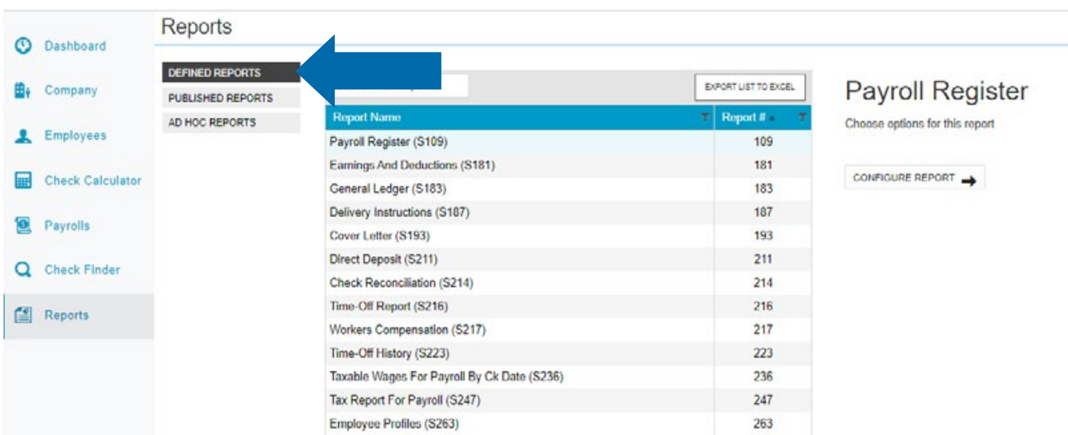
Use Google Chrome™

Go to https://ministryworks.evolutionpayroll.com/hcm/#/**(copy and paste)** and enter your **username (Firstname.Lastname)** and **password (**MW----**)**.

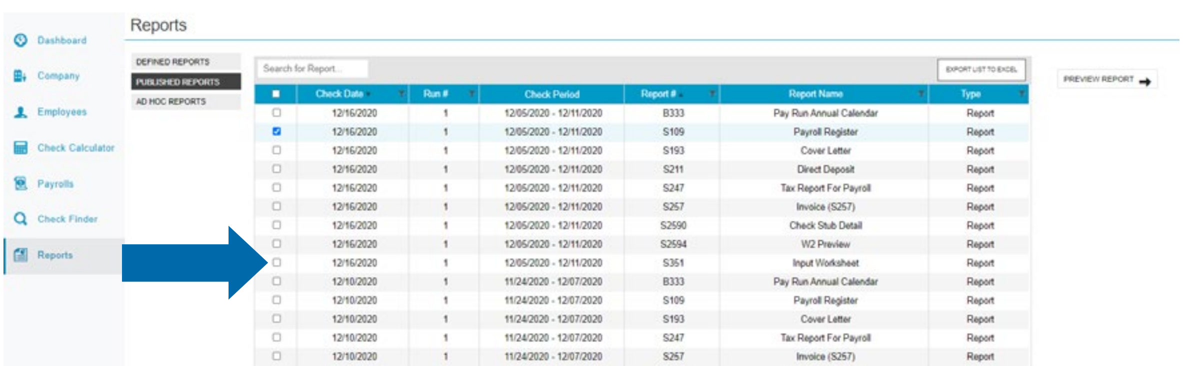
Click on **Reports** from menu on left side (If you are processing your payrolls, you will see all seven headings. If you are not processing your payrolls, you will only see the Dashboard and Reports heading)



Click on Published Reports



Select a payroll and the report for which to view a preview



To preview, save or print a published report:

1. Check the box in the left-hand column of the table to select the report(s) to be viewed, saved or printed.
2. Click the **Preview Report** button to open a full-sized preview on a new screen.
3. Use the Resizing tools in the preview window to zoom in or out to preview the report. If more than one report is selected, use the arrows at the bottom of the Preview window to navigate between reports.
4. Click **Save** at the top of the Preview window to save the report(s) to your hard drive and/or to open the report you are currently working on.
5. To print the report, select **Print** from the **File** menu in the Windows Menu bar.
6. Click on **Reports List button** to return to the screen listing the Published Reports.

Published Reports

- **Pay Run Annual Calendar** -schedule of future payrolls, including the input (payroll submission) dates
- **Payroll Register** – list of employees paid – gross, taxes, deductions and net amounts
- **Cover Letter** – totals for net pay, billing impound, and taxes for current payroll
- **Direct Deposit** – list of employees receiving direct deposit – routing number, account number and deposit amount
- **Tax Report for Payroll** – taxable wages and total withheld for current payroll
- **Invoice** – payroll charges (check fee, per employee charge, quarterly fee, etc.)
- **Check Stub Detail** – employee pay stubs
- **Input Worksheet** – used for recording hours, or additional pay for next scheduled payroll
- **Period Summary Report** – lists each employee's earnings, deductions, and taxes MTD, QTD, and YTD

Defined Reports – Create custom reports for one or multiple pay periods

- **Payroll Register** – list of employees paid – gross, taxes, deductions and net amounts
- **Earnings and Deductions** – totals per earning and deduction on pay run
- **General Ledger** – lists debits and credits (For GL clients only)
- **Delivery Instructions** – when specific delivery instructions are entered
- **Cover Letter** – totals for net pay, billing impound, and taxes for current payroll
- **Direct Deposit** – list of employees receiving direct deposit – routing number, account number and deposit amount
- **Check Reconciliation** – list of employees/check type/check number/direct deposit/net amounts
- **Time Off Report** – type/code/effective date/accrual rate/hours balance/amounts
- **Workers Compensation** – gross/OT/ WC Rate/Premium Amount – Please contact your payroll processor to run report
- **Time Off History** – current Accrual/Balance/Accrued/Used
- **Taxable Wages for Payroll Ck Date** - total earnings/exempt earnings/taxable wages/tax amount

- **Tax Report for Payroll** – breakdown of taxes per payroll
- **Employee Profiles** – employee personal information, pay, taxes, E/Ds, direct deposit
- **Tax Notices** – tax type, deposit frequency, due date, amount, wages, #ee's, quarter
- **General Ledger** – Rapid Export Format – (Custom report for GL clients only)
- **Input Worksheet** – used for recording hours or additional pay for next scheduled payroll
- **Input Worksheet Cover Letter** – cover sheet to send in input worksheet; lists MW fax and phone#
- **Period Summary Report** – earnings, deductions, taxes per MTD, QTD and YTD
- **Individual Earnings Report** – quarterly payroll history per employee
- **Compensation Detail Report** – breakdown of employee pay (hours, earnings, taxes, other, net)
- **Time Off Register** – TOA type, E/D Code/Group, Eff Date, Prev balance, change, new balance
- **Time Off Register with Hours** – TOA type, E/D Code/Group, Eff Date, Prev balance, change, new balance
- **Payroll Impounds** – taxes, fees and direct deposit impound amounts
- **Check Stub Detail** – employee pay stubs