MinistryWorks®
by Brotherhood Mutual

Evolution + HCM Training Manual

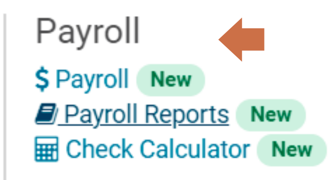
Rev. 11/22

Contents

Section 1: HCM – Payroll

Log In

- https://ministryworks.evolutionadvancedhr.com – be sure to bookmark this link in Google Chrome™ after you enter your log in information



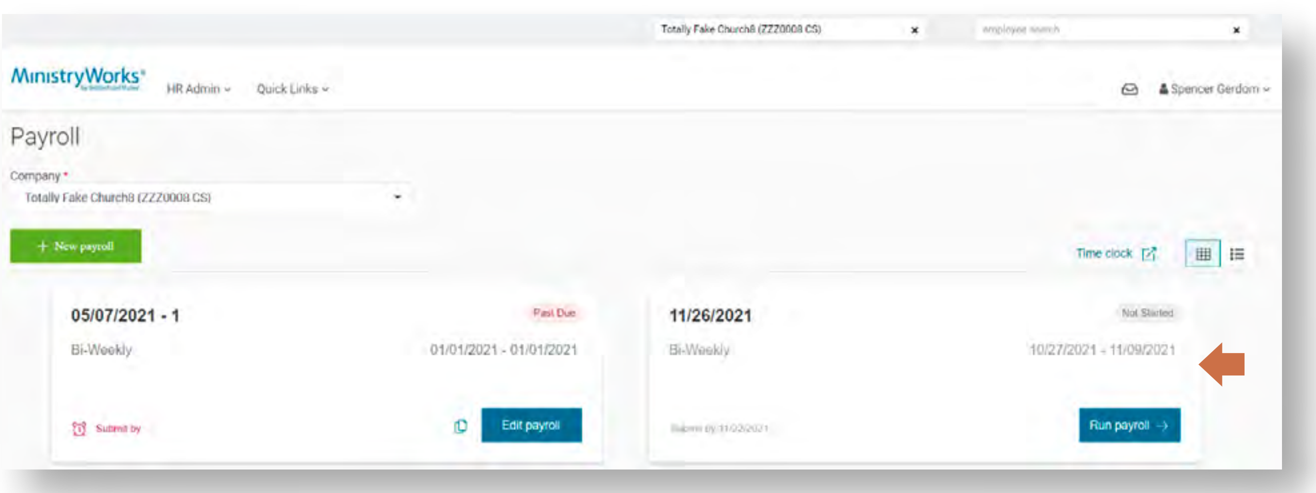
- Go to **HR Admin > Payroll > $ Payroll**.

Create Payroll

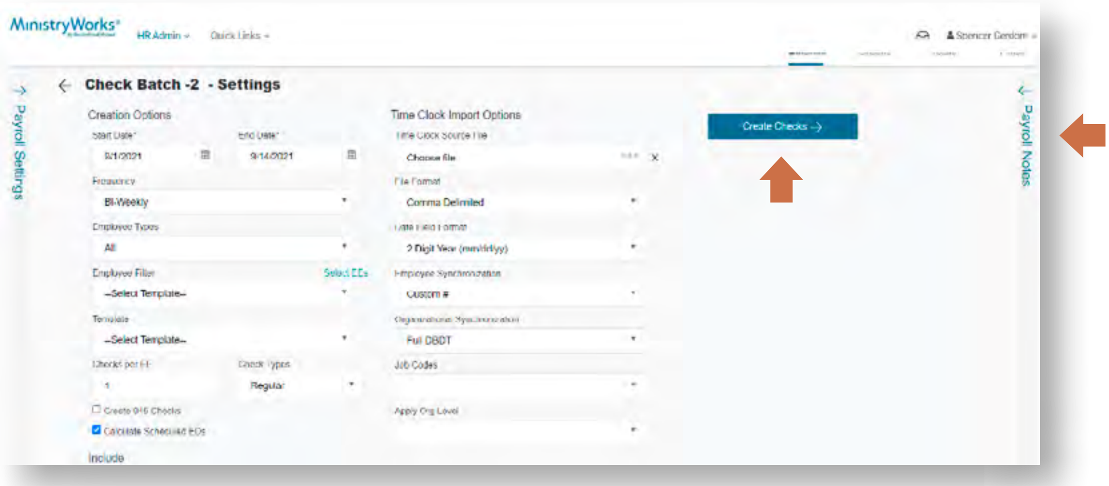
- Pay cards will populate with check date in upper left-hand corner.

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

- Find the **pay card with the check date for the pay run you want to process** and click the **Run payroll** button in the bottom right-hand corner.



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



- Review the prepopulated information in the following fields: *(This information is populated based on your Pay Run Annual Calendar; if it needs changed please contact your payroll processor)*

  Start Date – beginning of pay period.

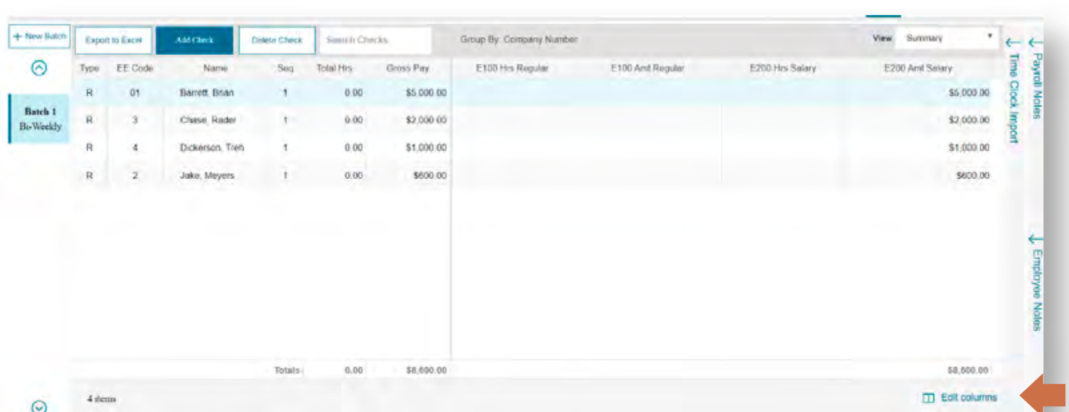
  End Date – end of pay period.

  Frequency – payroll frequency.

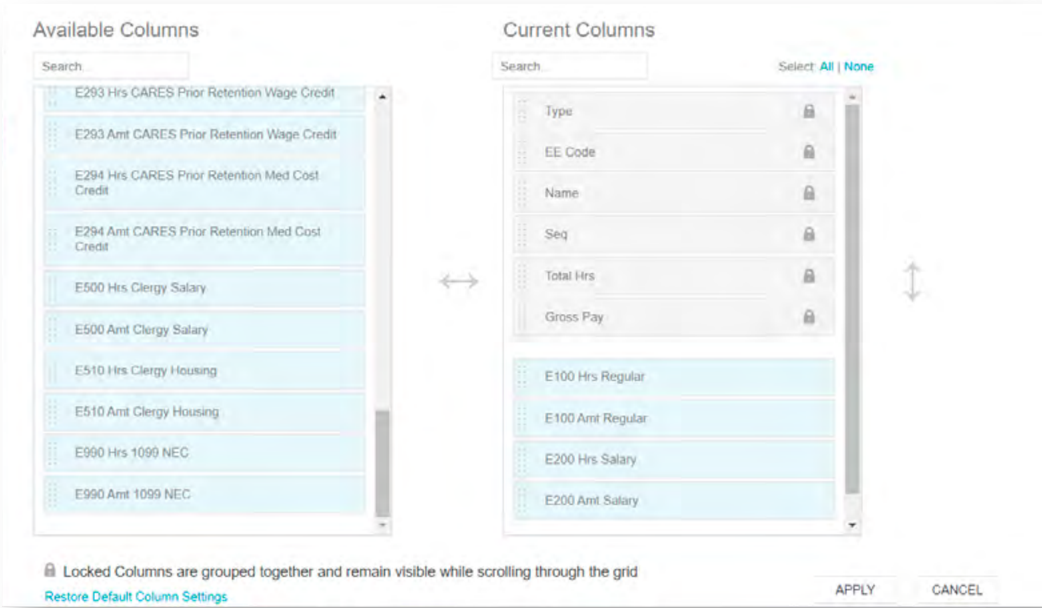
  Employee Types – employee types to include in the payroll.
- Click on **Create Checks** to include all employees assigned to that pay group.
- Click **OK** when "Checks successfully created" message box appears.

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.



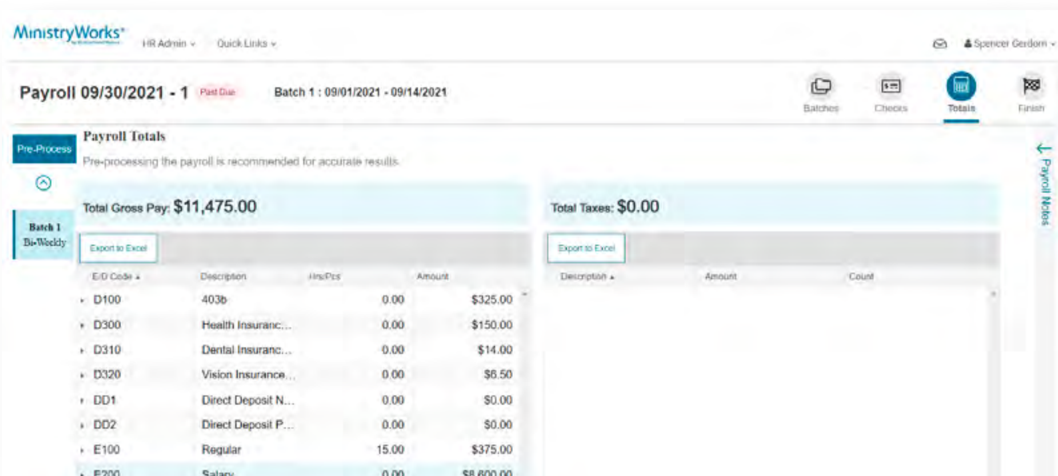
- Click the **Edit columns** in the bottom right-hand corner of the screen, and select the E/D codes from the **Available Columns** list.



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

Add or Edit Payroll Information

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

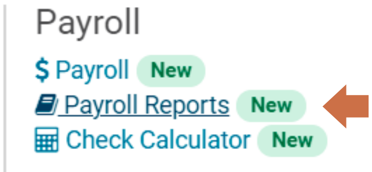


- Click on **Totals**.
- Click on **Pre-Process**.

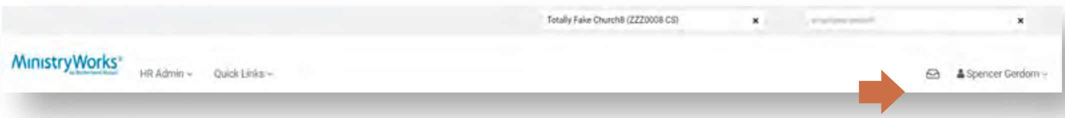
  ****This is an important step so that taxes, deductions, and direct deposit will populate!**
- The **Calculation Results** screen appears. Review totals of earnings, deductions and taxes.

Preview Reports

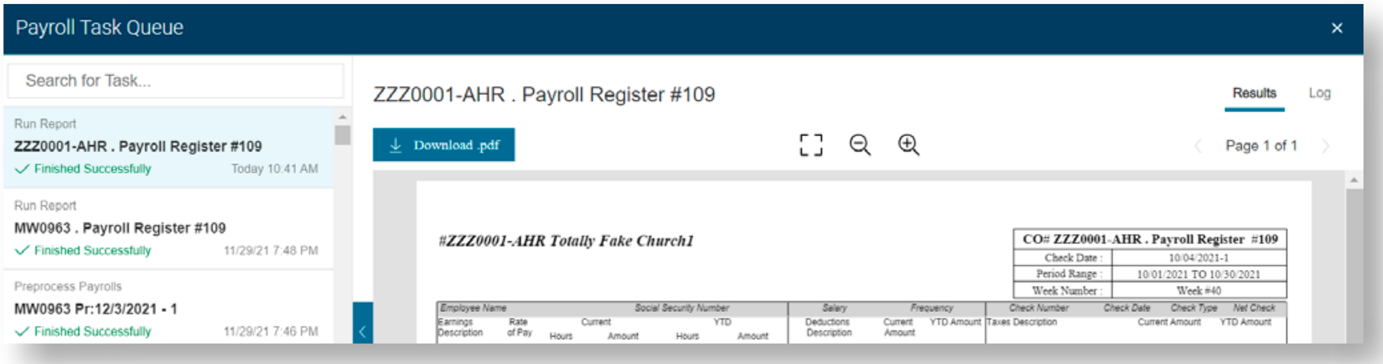
- Go to HR Admin.



- Click on **Payroll Reports**.
- 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** icon in the top right-hand side of screen.



- View payroll register for accuracy. Click on **X** in the top right-hand corner of the screen to close the report.
- If a payroll correction is needed, click on **HR Admin > Payrolls**, click on **Pending** pay card, and click on the **Edit Payroll** button icon. The pay grid appears. **Refer to top of page 6 to add or edit payroll information and continue payroll submission process**. Be sure to click **Totals** and **Pre-Process** again if any changes were made.

Submit Payroll

- Click on **HR Admin > $ Payroll**.
- Go back to **Pending** pay card and click on **Edit Payroll**.
- Click on **Finish** 🏁 and **Submittal Options** screen will open – **Do not attempt to change Submittal Options**.
- Click on **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.

- Click on **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.

  Note – Use Submit Payroll option for any physical checks that need printed. Please contact your payroll processor if you would like to review a specific change to the payroll.

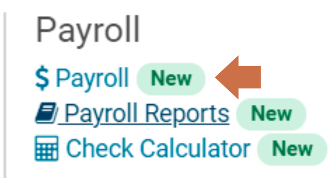
Processing Multiple Pay Groups

If additional functions are needed, go to page 13.

Use Google Chrome™

Log In

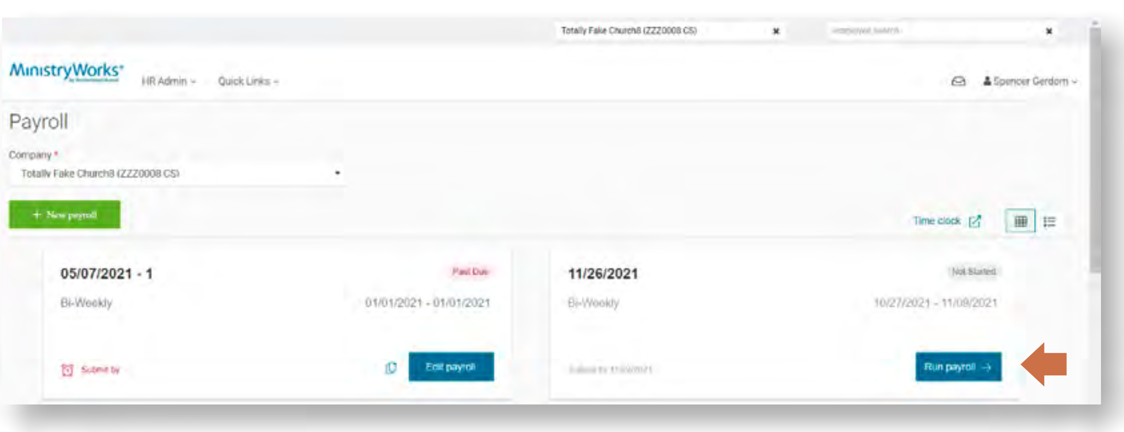
- https://ministryworks.evolutionadvancedhr.com – be sure to bookmark this link in Google Chrome after you enter your log in information.



- Go to **HR Admin > Payroll > $ Payroll**.

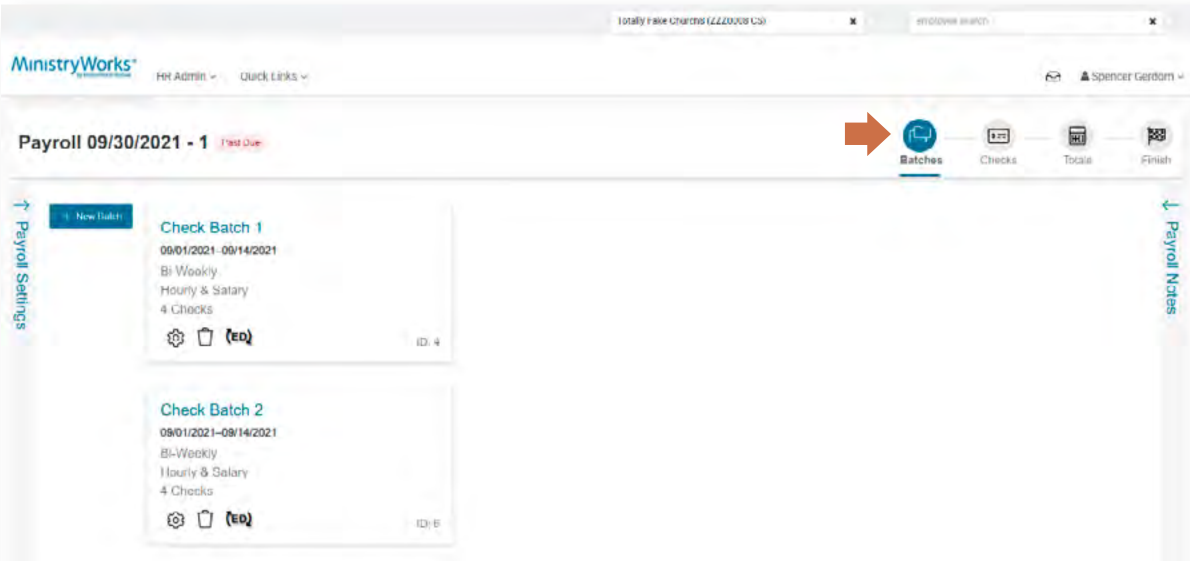
Create Payroll

- Pay cards will populate with check date in upper left-hand corner.



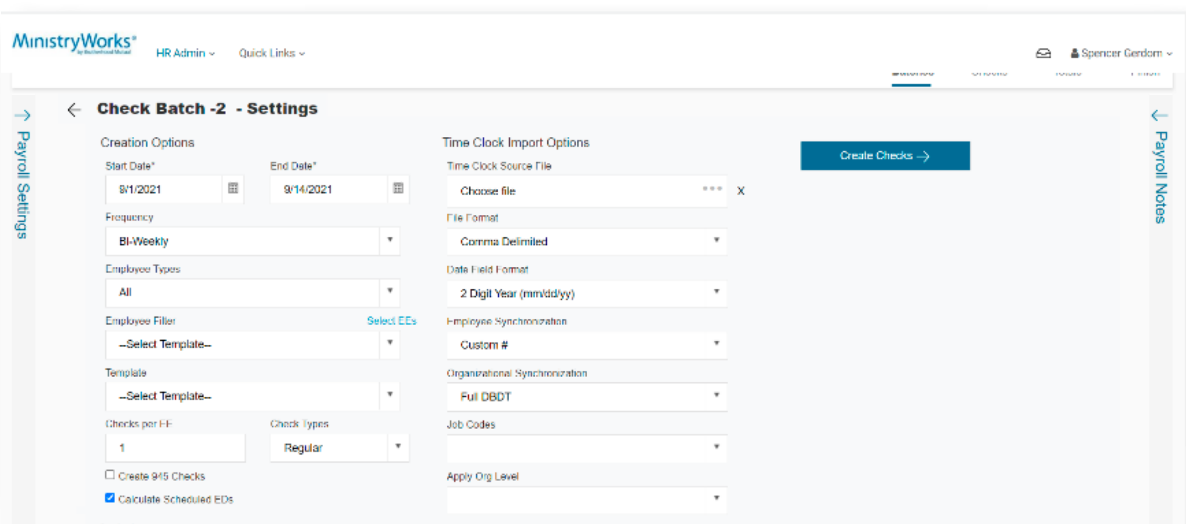
- Find the **pay card with the check date for the pay run you want to process** and click the **Run payroll** button.
- In the Check Batch Settings screen, if applicable, review Payroll Notes by clicking on **Payroll Notes** section and then hide the note.

Create Batch for 1st Pay Group



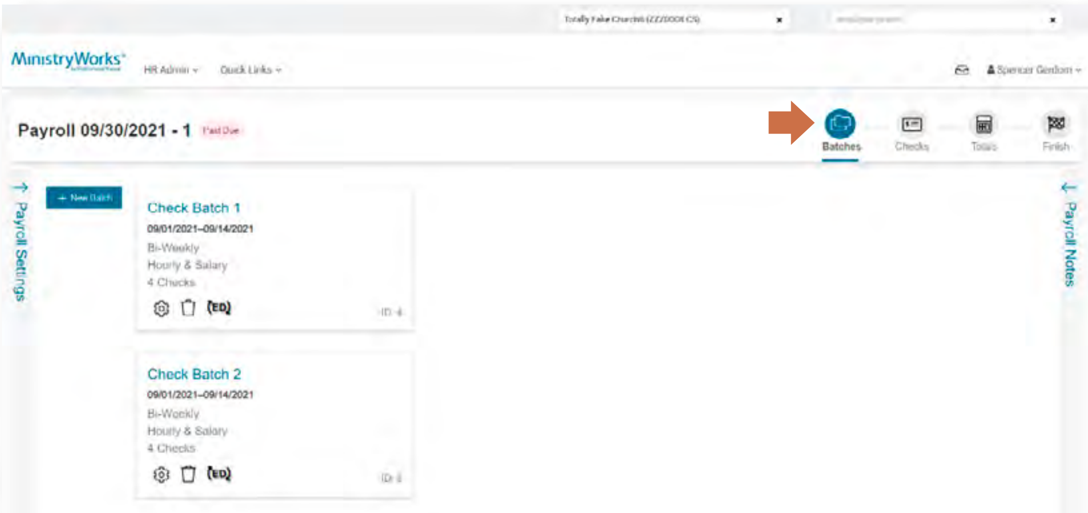
- Click on **Batches** Icon.
- Click on for **Check Batch** – for first pay group.

- 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.

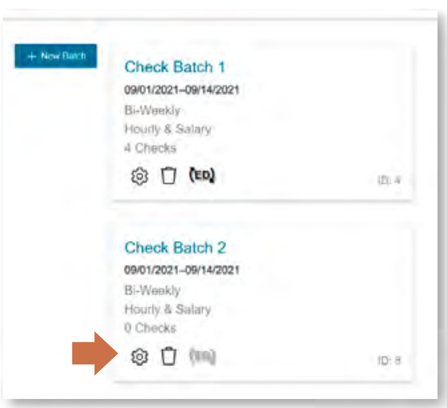


- Click on **Create Checks** to include all employees assigned to that pay group.
- When “Checks successfully created” message appears, click on **OK**.

Create Batch for 2nd Pay Group



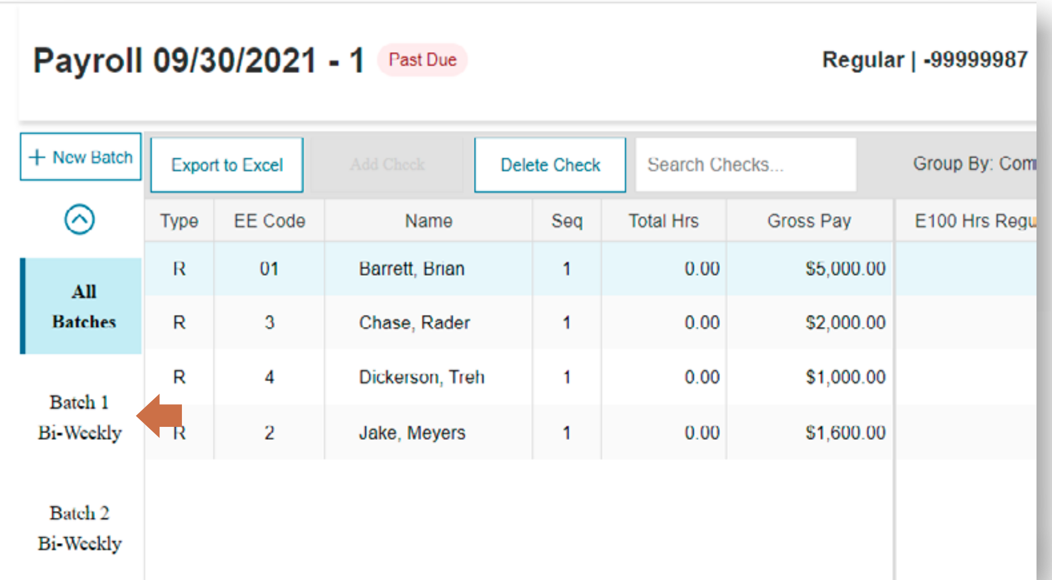
- Click on **Batches** icon.



- 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.

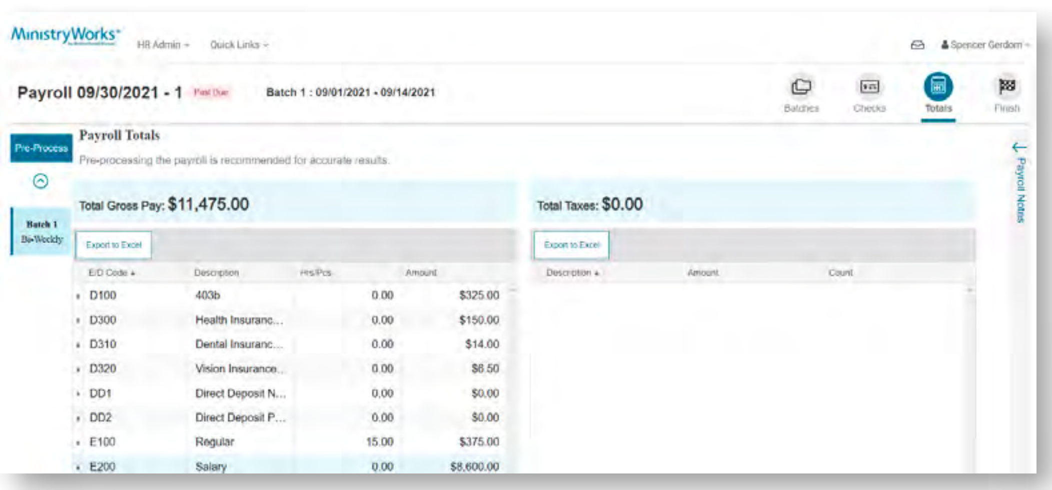


Do not click Totals or Pre-Process until all employee hours/earnings have been entered in both batches.

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**.

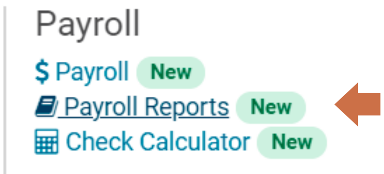
This is an important step so that taxes, deductions, and direct deposit will populate!



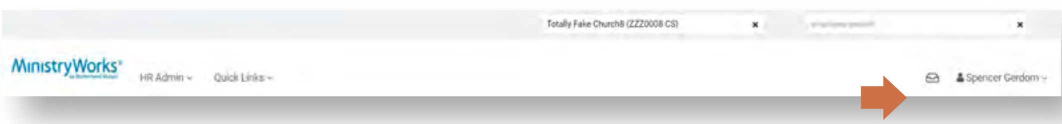
- The **Calculation Results** screen appears. Review totals of earnings, deductions and taxes.

Preview Reports

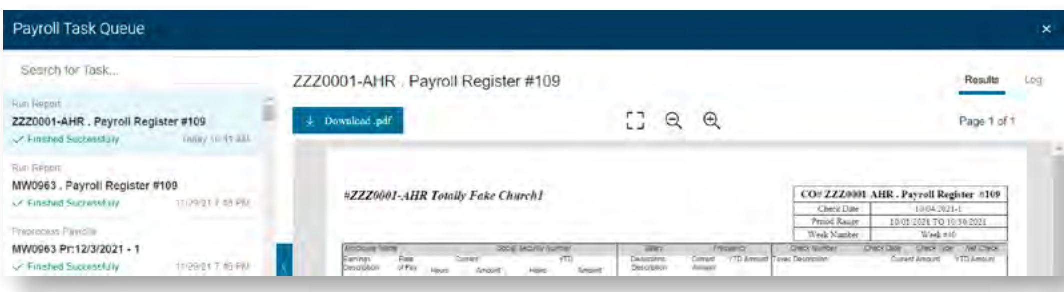
- Go to HR Admin.



- Click on **Payroll Reports**.
- 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** icon in the top right-hand side of screen.



- View payroll register for accuracy. Click on **X** in the top right-hand corner of the screen to close the report.
- If a payroll correction is needed, click on **HR Admin > $Payroll**, click on **Pending** pay card, and click on the **Edit Payroll** button icon. The pay grid appears. **Refer to top of page 6 to add or edit payroll information and continue payroll submission process**. Be sure to click **Totals** and **Pre-Process** again if any changes were made.

Submit Payrolls:

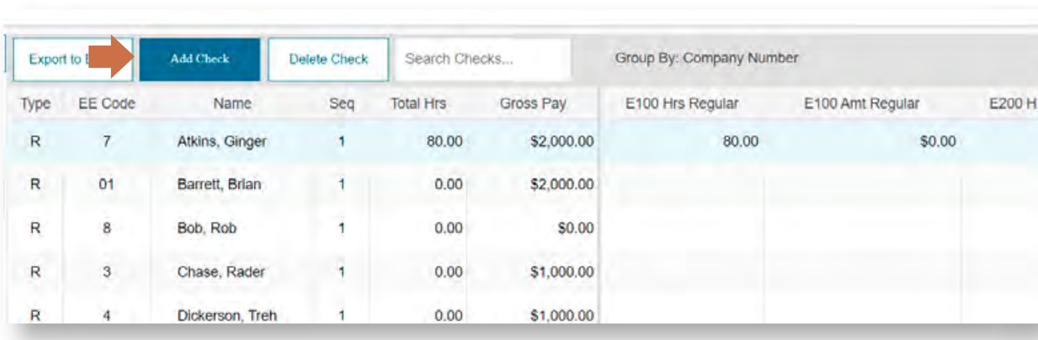
- Click on **HR Admin > $ Payroll**.
- Go back to **Pending** pay card and click on **Edit Payroll**.
- Click on **Finish** and **Submittal Options** screen will open – **Do not attempt to change Submittal Options.**

- Click on **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.

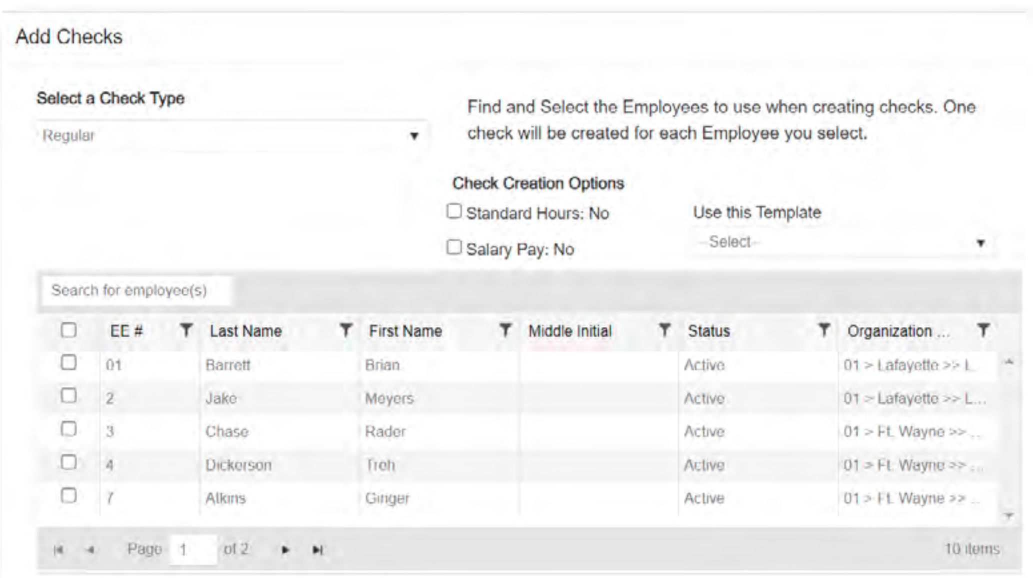
  Note – Use Submit Payroll option for any physical checks that need printed. Please contact your payroll processor if you would like to review a specific change to the payroll.

Additional Functions

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

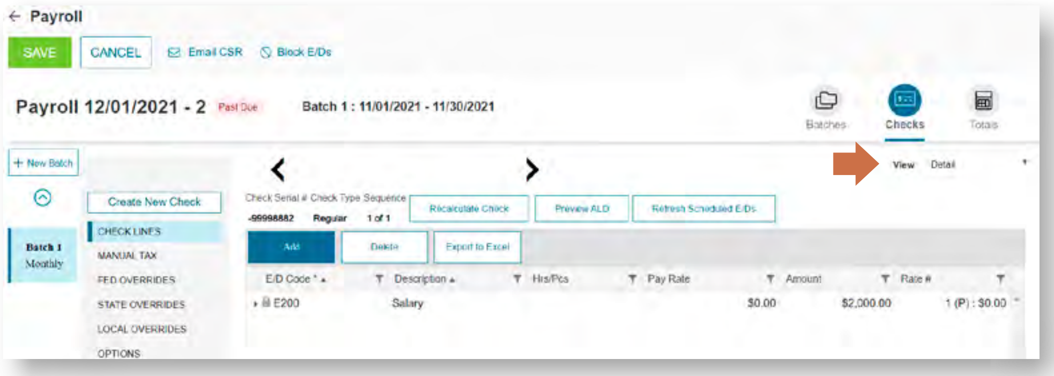


- Click the **Add Check** button in the **Navigation** bar (if you have more than 1 batch showing you must select the correct batch and not "All Batches").



- **Select the Check Type** (Regular or Manual) 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**.

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



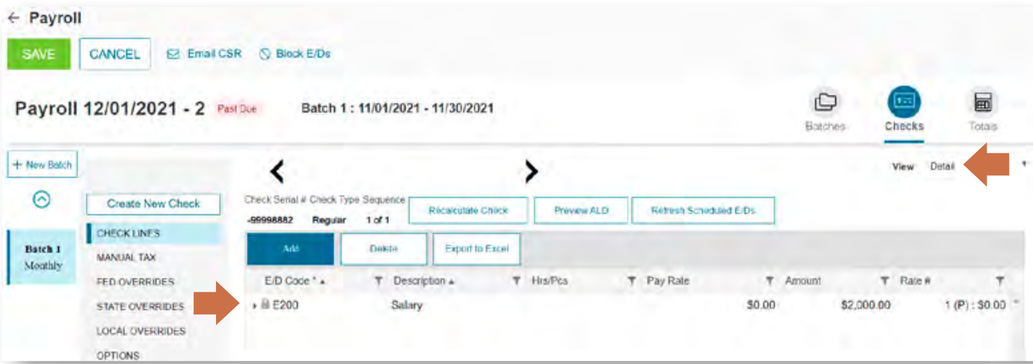
- Click on employee name.
- Change view from **Summary** to **Detail**.
- Be sure **Check Lines** is highlighted and click **Add**.
- Select the E/D code and enter pay information in columns.
- Click on **Save** in the top left-hand corner.
- To delete a check line, select the applicable E/D Code and 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**.

Allocate Wages to Division/Branch/Department/Team

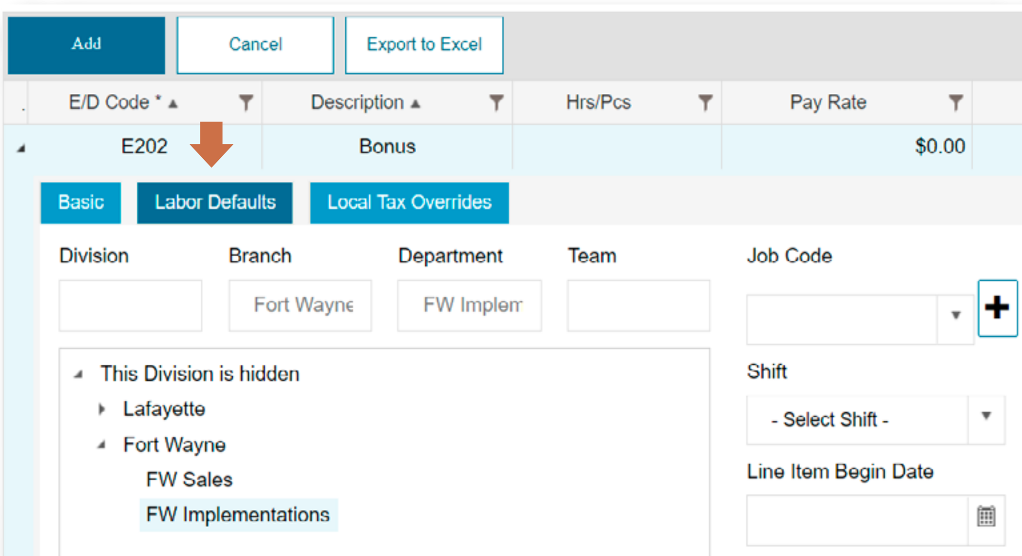
This is specific to your company setup. Not all steps of this allocation process will apply.

In the pay grid:

- Select the employee.
- Change 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:

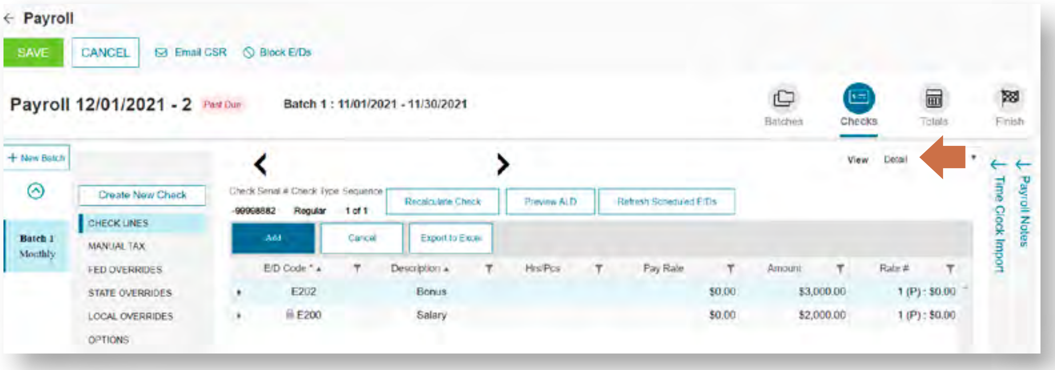


- Click on **Labor Defaults** tab.
- Click on the arrow at each level until you are able to select the appropriate Division/Branch/Department/ Team.
- Click on **Save** button in the top left-hand corner.

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). You 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/D's** – **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.**

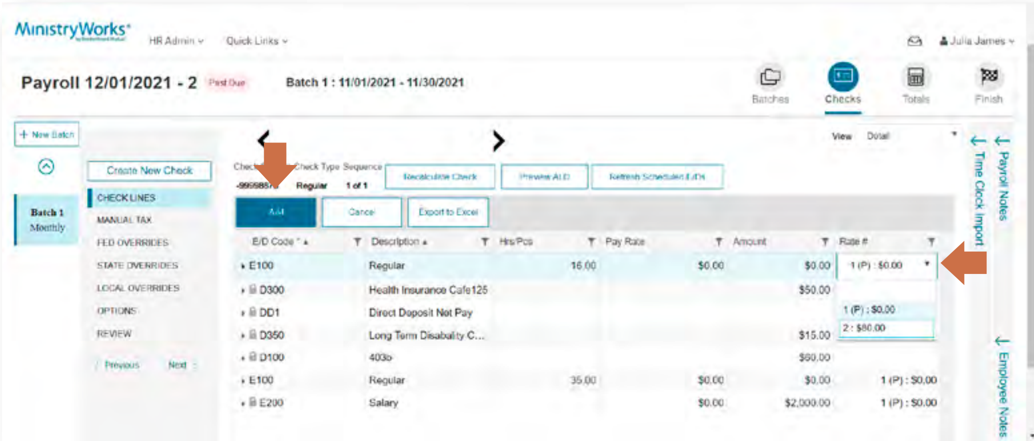
Click **Save** to save any changes made to the information before switching back to **Summary** view.

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:

- Select the employee.
- Change the view from **Summary** to **Detail**.
- Click **Add**.



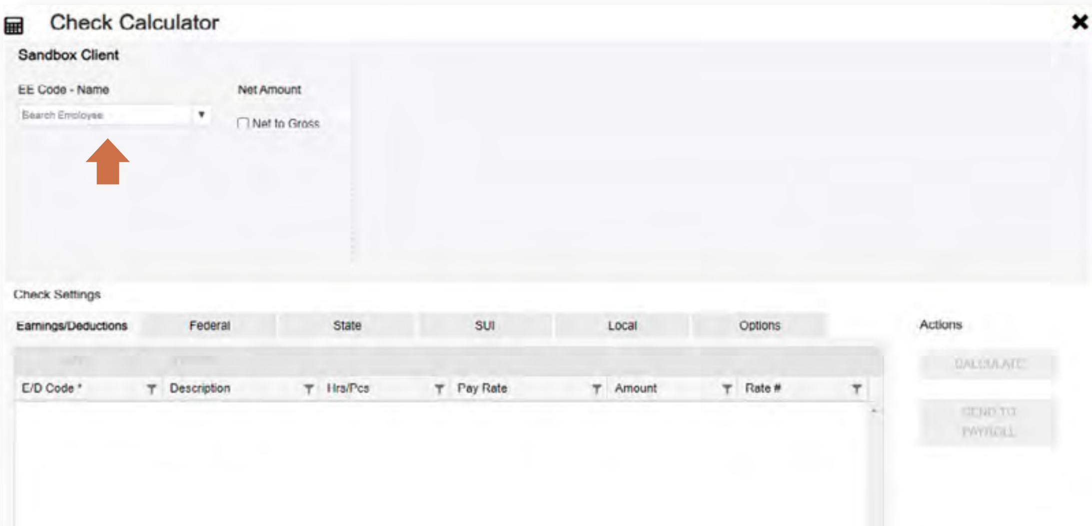
- Click on the drop-down menu under the E/D code to select the earning. Enter hours In **Hours/Pcs** field.
- Click the drop-down menu under the **Rate #** and choose from available options (if multiple rates are not available, enter the new rate under the **Pay Rate** column).
- Click on **Save**.
- 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.

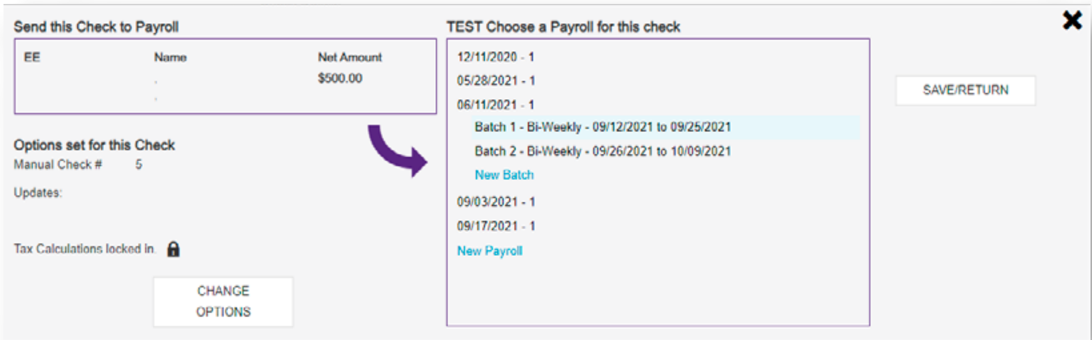


Checks can be calculated from Gross-to-Net or Net-to-Gross.

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.

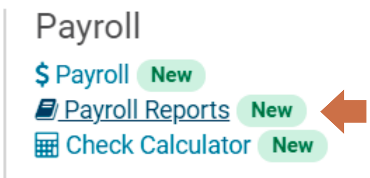


If calculating a Gross-to-Net check:

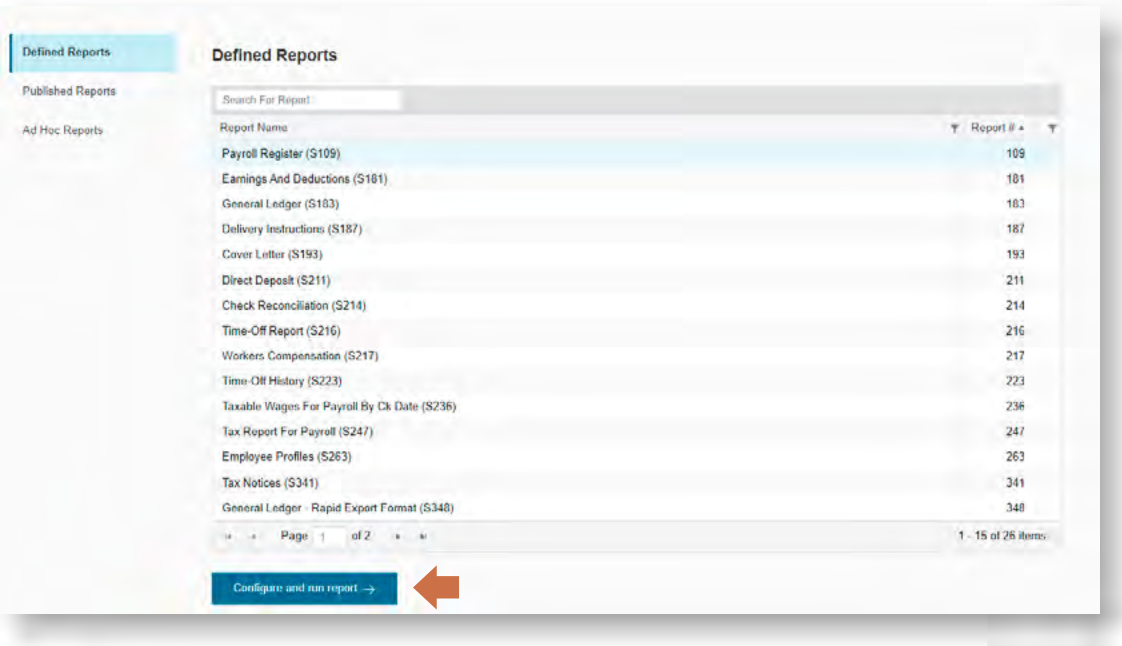
- Select an employee using drop-down arrow in **EE Code-Name** field.
- Click the **Delete** button to delete all the earnings or deductions from the check. If a live pay, do not delete the DD1.
- Click the **Add** button to add the earning or deductions as needed to the check.
- Enter the gross amount 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.

Viewing Reports

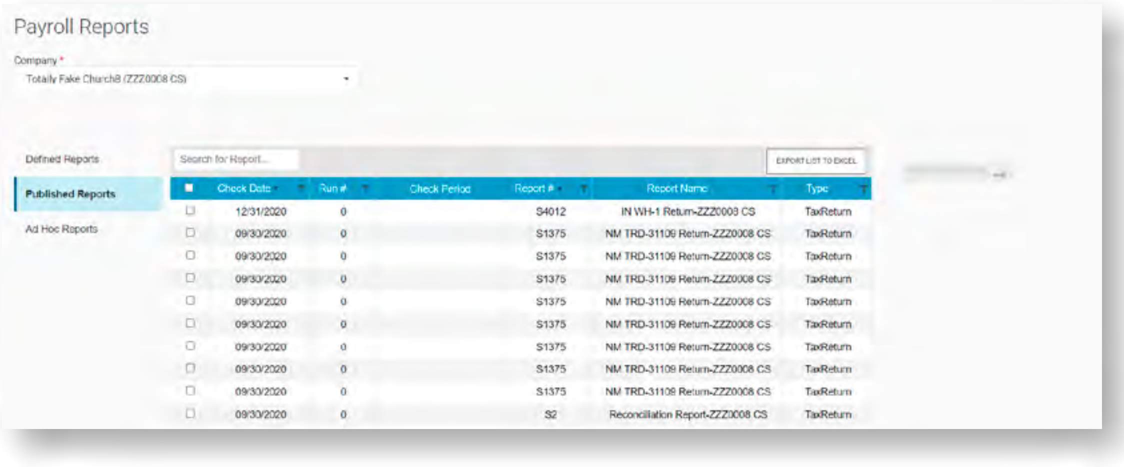
Use Google Chrome™



- Click on **Payroll Reports**.



- Click on **Defined Reports**.
- Select a payroll and the report for which to view a preview.
- Click on **Configure and run report**.



- Click on **Published Reports**.
- Click in the box next to the report you wish to preview.
- Click **Preview Report**.

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

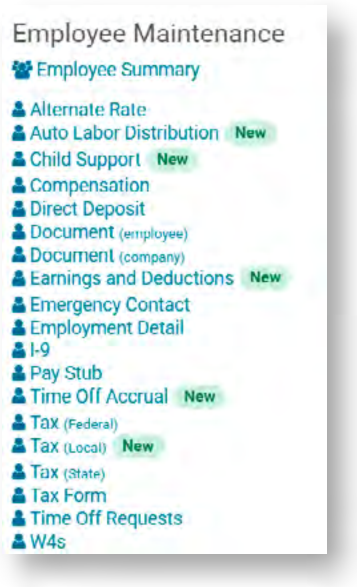
- **Pay Run Annual Calendar** – schedule of future payrolls, including the input (payroll submission) dates.
- **Payroll Register** – list of employees paid – gross, taxes, deductions and net amounts.
- **Cover Letter** – totals for net pay, billing impound, and taxes for current payroll.
- **Direct 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; list MinistryWorks fax and phone number.
- **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.

Section 2: HCM - Employee Maintenance

Employee Maintenance

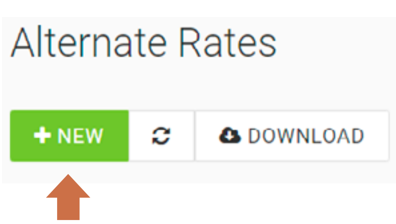


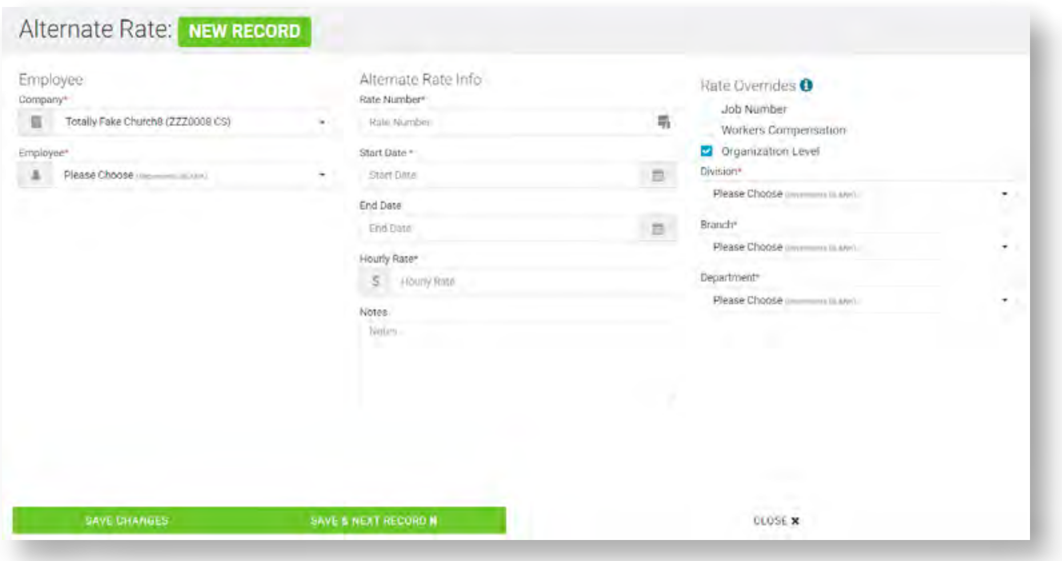
Employee Summary

- Go to **HR Admin > Employee Maintenance > Employee Summary**.
- Employee demographic information/pay frequency will be updated here.
  - If client has AsureForce, you will update the Pay Group and TLM Accrual Group

Alternate Rate

- Go to **HR Admin > Employee Maintenance > Alternate Rate**.
- Click on the + **NEW** button.





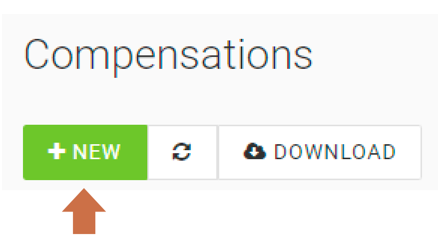
- The system displays the **Alternate Rate: New Record** screen.
- Under the **Employee** section, select the employee from the **Employee** drop-down menu if you don't have one selected yet.
- Under the **Alternate Rate Info** section; enter the rate number, start date, end date (if applicable), the hourly rate and any additional notes.
- Under the **Rate Overrides**, click **Organization Level** and select appropriate Division, Branch, and Department.
- Once all the information is added; click the **SAVE CHANGES** button.

  Note: Any alternate rates you enter on this screen will by default not be set as the Primary Rate. The Rate Amount is 0.00 if nothing is entered

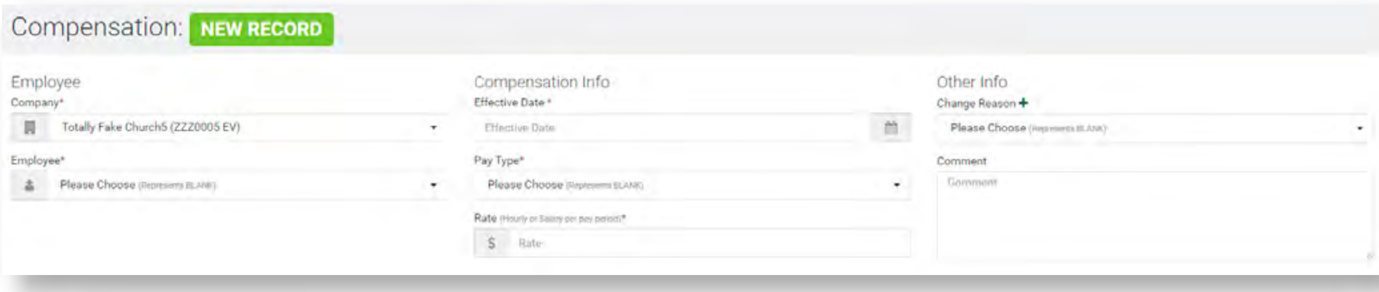
Auto Labor Distribution

If you have a need to separate out labor distribution for multiple departments, please contact your payroll processor for assistance.

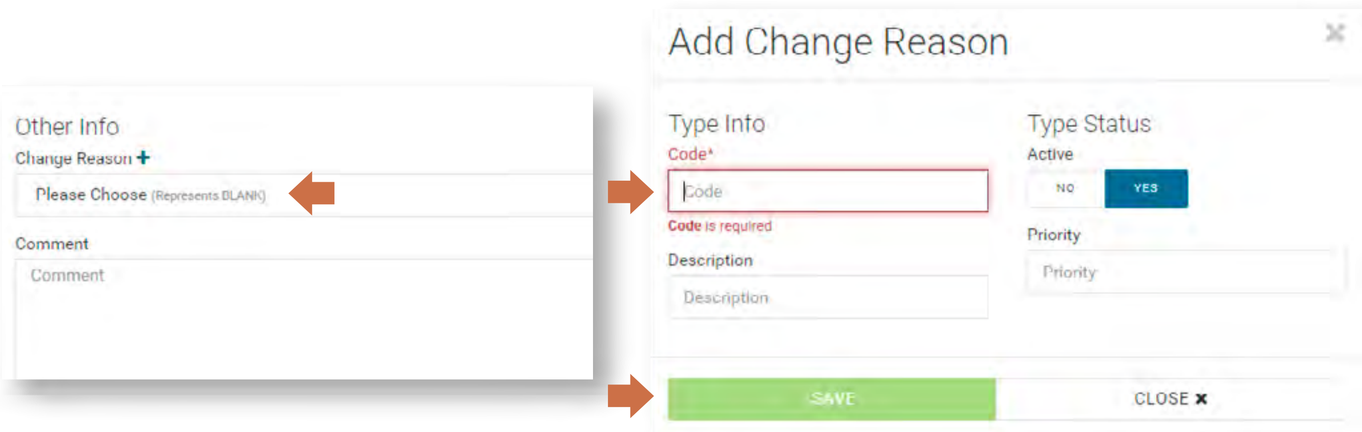
Compensation



- To change the pay information for an employee, go to **HR Admin > Employee Maintenance > Compensation**.
- Click on the **+ NEW** button.



- The system displays the **Compensation** New Record screen.
- Under the **Employee** section, select the employee from the Employee drop-down menu if you don't have one selected yet.
- Under the **Compensation Info** section, enter the Effective Date of when the compensation rate for the employee will begin.
- Enter the appropriate **Pay Type** (Hourly or Salary).
- Enter the new **Rate** (per pay period amounts).
- Under the **Other Info** section, the Change Reason and Comment section is optional. If you want to add a Change Reason that isn't listed in the drop-down menu, you can add it here by clicking on the **blue +** sign. Add a code and **Save**.

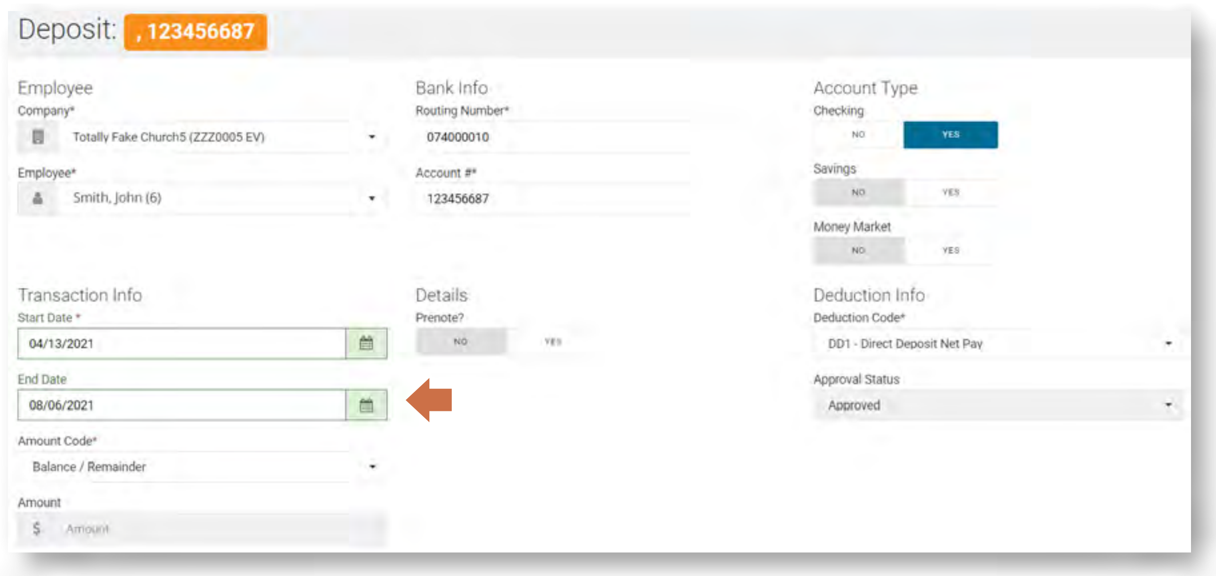


- Once all the information is added; click the **SAVE** button. There will now be two pay rates showing, each with its own effective date. Note that the previous pay rate was automatically end-dated in Payroll for the day before the new effective date.
- **For clergy, go to Earnings and Deductions to change Pay Information.**

Direct Deposit

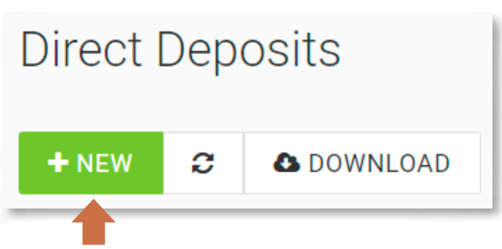
Go to **HR Admin > Employee Maintenance > Direct Deposit**.

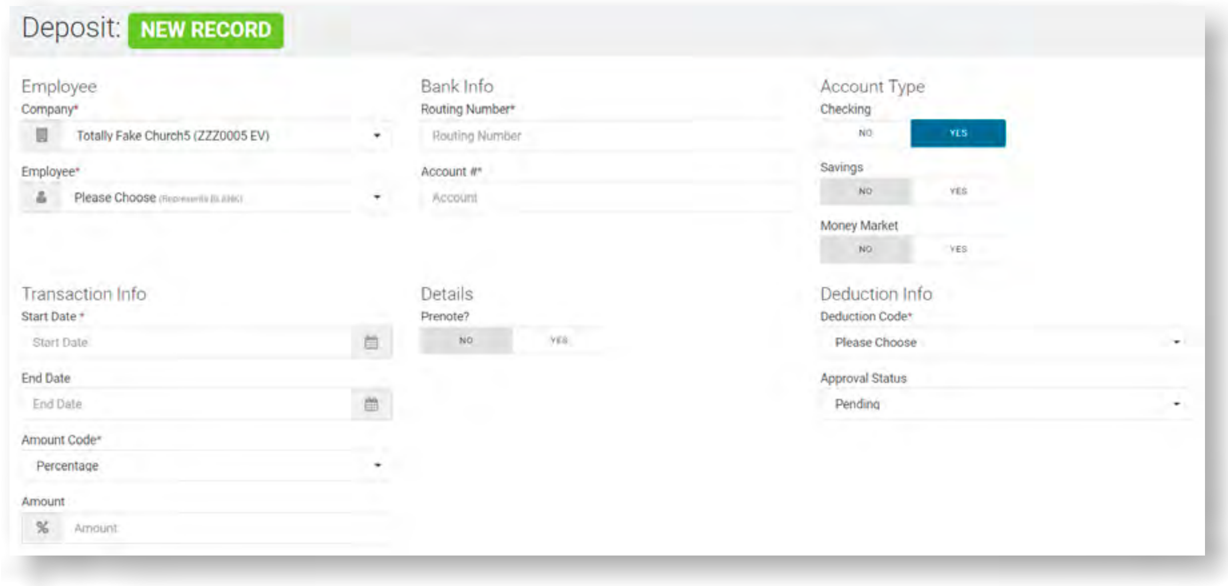
- If the employee is changing their DD1 Direct Deposit you must first end date the current direct deposit that is active.
- Open the **Direct Deposit** details screen of the current direct deposit. Add an **End Date** and click the **Save Changes** button.



Adding a Direct Deposit:

- Click on the **+ NEW** button.



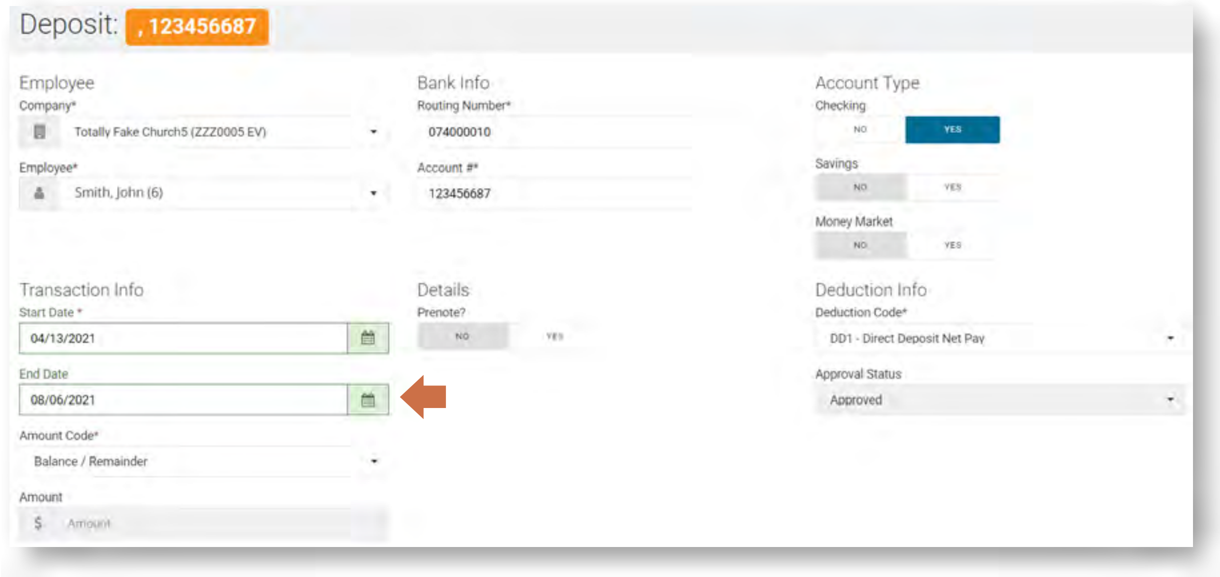


- The system displays the **Compensation** New Record screen.
- Under the **Employee section**, select the employee from the **Employee** drop-down menu if you don't have one selected yet.
- Under the **Transaction Info** section, enter the **Start Date** (date after the end date on the previous direct deposit) and **Amount Code** (for DD1 it would be Balance Remainder).
- Under the **Bank Info** section, enter **Routing Number** and **Account #** based on the banking information provided by the employee.
- Under the **Details** section, Prenote should say NO.
- Under the **Account Type** section, select if it's a Checking, Savings, or Money Market.
- Under the **Deduction Info** section, select the Direct Deposit code that is applicable.
- Change the **Approval Status** from Pending to Approved.
- Once all information has been entered review and check for accuracy and then click the **Save Changes** button.

To Deactivate a Direct Deposit in Use:

Go to **HR Admin > Employee Maintenance > Direct Deposit**.

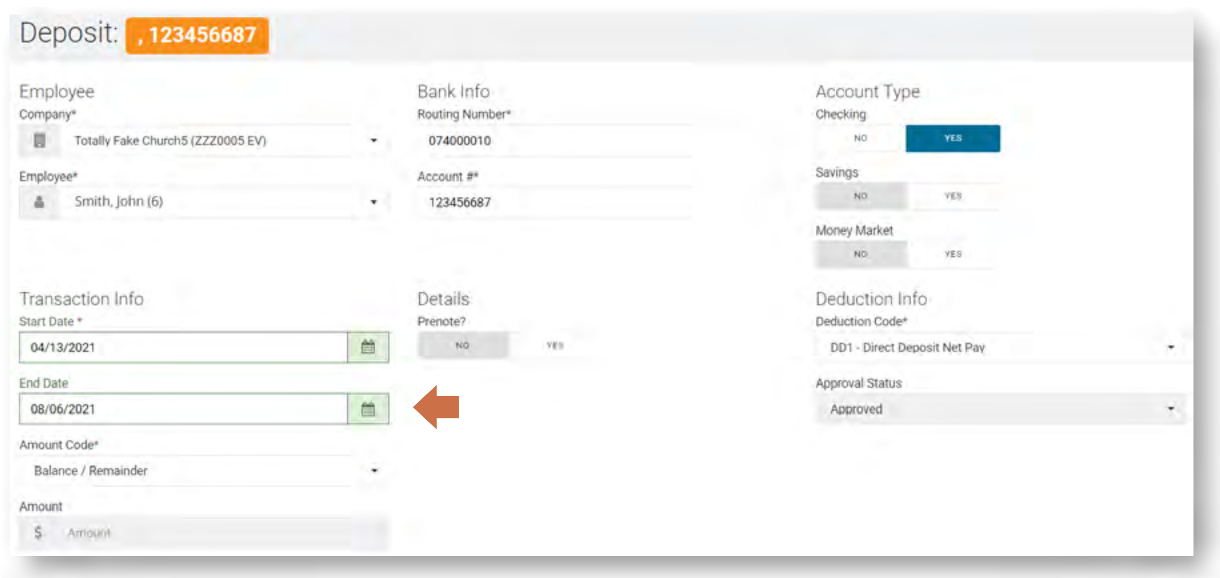
- Open the **Direct Deposit** details screen of the direct deposit that needs ended. Add an **End Date** and click the **Save Changes** button.



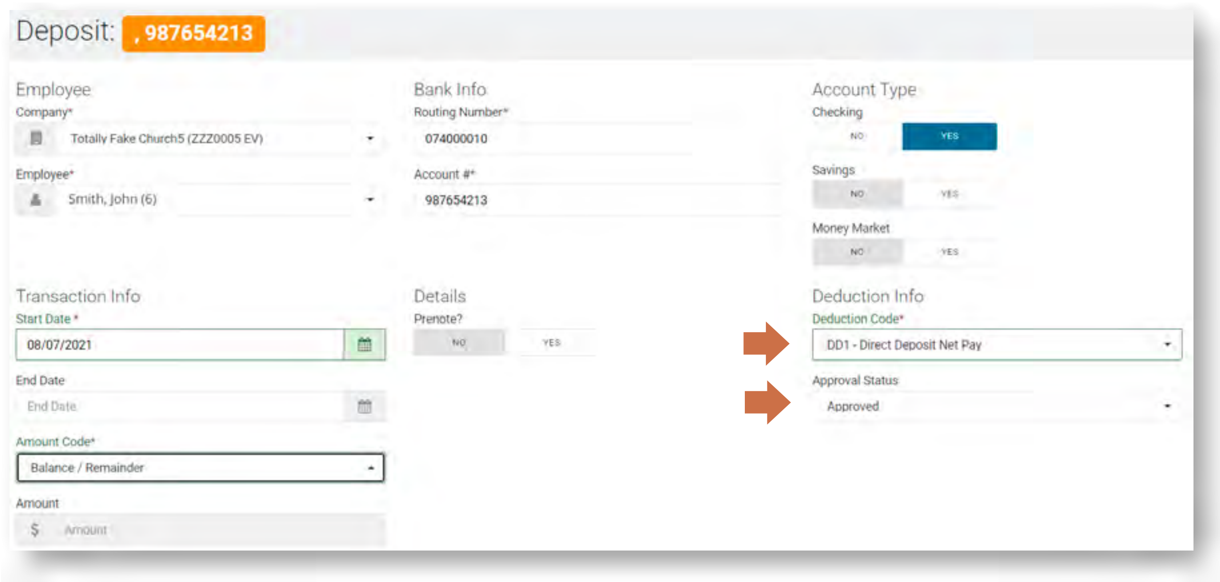
Approving a Direct Deposit Change initiated by the Employee:

Go to **HR Admin > Employee Maintenance > Direct Deposit**.

- Review the email notification that an employee has submitted a Direct Deposit request.
- If the employee is changing their DD1 Direct Deposit you must first end date the current direct deposit that is active.
- Open the **Direct Deposit** details screen of the current direct deposit. Add an **End Date** and click the **Save Changes** button.



- The new direct deposit will have a status of **Pending**.
- Select the pending direct deposit and open the **Direct Deposit** details screen.

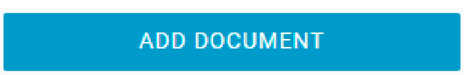


- **Verify the information that the employee has entered is correct.**
  - Start date should be the date after the end date on the previous direct deposit.
  - For a DD1; **Amount Code** should be Balance/Remainder.
  - Prenote should stay NO.
- Under Deduction Information, select **DD1 – Direct Deposit Net Pay** in the **Deduction Code** field. Change the **Approval Status** to Approved. Click the **Save Changes** button.

Document (Employee)

Go to **HR Admin > Employee Maintenance > Document (Employee)**.

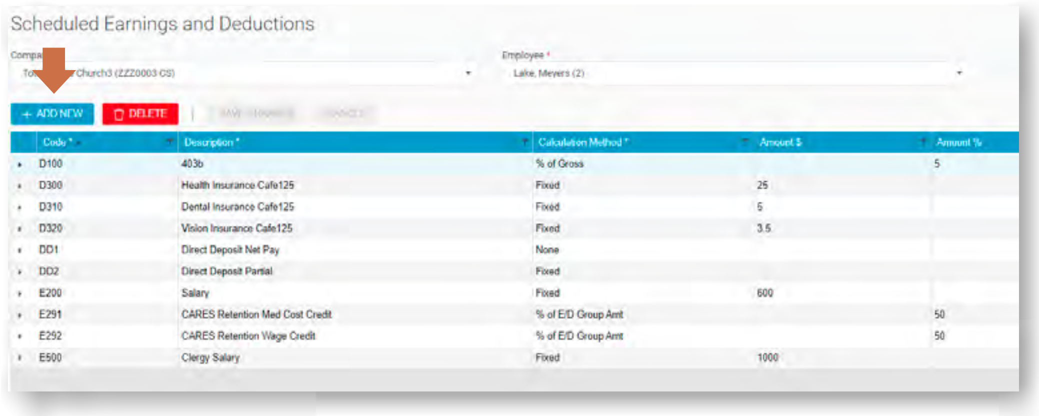
- Click **Add Document** at the top.



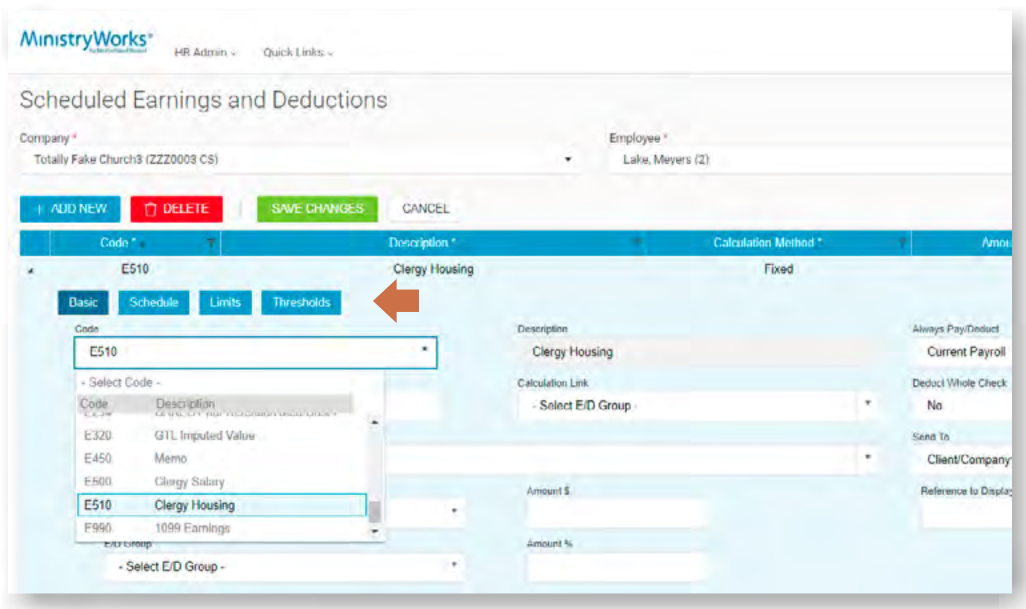
- Select the correct employee.
- Enter the desired display name.
- Select a Category from the drop-down menu.
- Create a new **Category** by typing into the field and pressing the **Enter** key.
- Upload Document:
  - **Private** - If Private is toggled on, only the Admin and the employee's supervisor can see the document. The employee will not have the ability to view the document if Private is on.
  - Click **UPLOAD DOCUMENT**.

Earnings and Deductions

Go to **HR Admin > Employee Maintenance > Earnings and Deductions**.



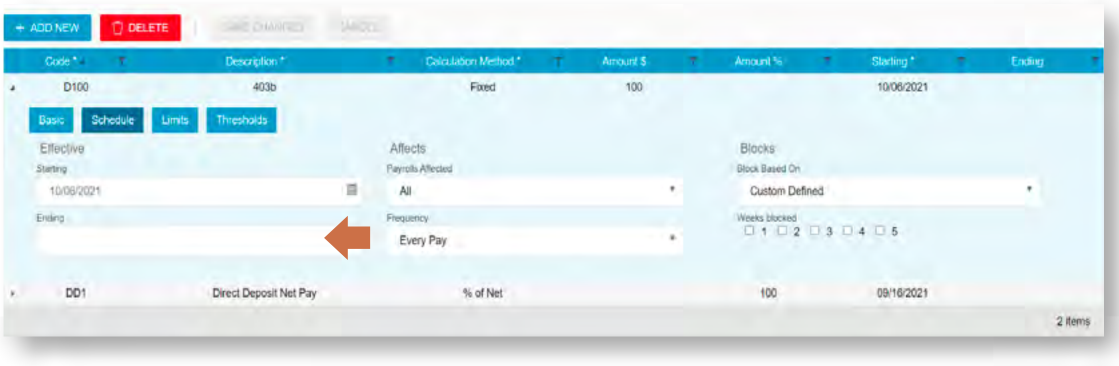
- Select employee name from drop-down menu.
- Click **+ Add New**.



- Select the earning code from the drop-down menu.
- Enter the **per pay period** amount that the employee is to receive.
- Click **SAVE CHANGES**.

To change the information for other earnings and deductions:

- Click on the employee name from the drop-down menu.
- Click on the arrow to the left of the E/D code to open the information that will be changed.
- Make the changes to information.
- Click **SAVE CHANGES** and then close E/D by clicking on arrow.



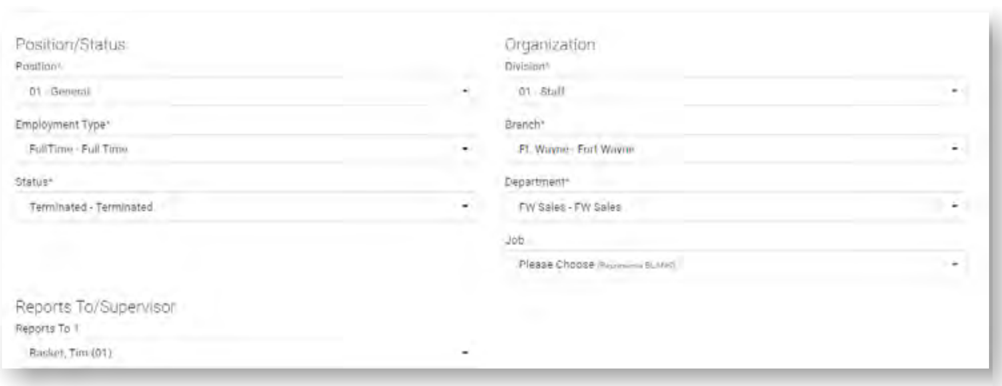
To Inactivate an Earning or Deduction:

- 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 CHANGES**.

Employment Detail

Go to **HR Admin > Employee Maintenance > Employment Detail**.

- Choose employee name from list.



- **Position/Status**
    - Change Position.
    - Change Employment Type.
    - Update Status.
- **Organization**
    - Update Division/Branch/Department.
- **Reports To/Supervisor**
    - Update Reports To 1.

I-9

Go to **HR Admin > Employee Maintenance > I-9**.

- This is where the documents will be stored after the Onboarding process has been completed.

Pay Stub

Go to **HR Admin > Employee Maintenance > Pay Stub**.

- Can obtain copies of employee pay stubs, but should direct employees to use their self-service portal.

Time Off Accrual

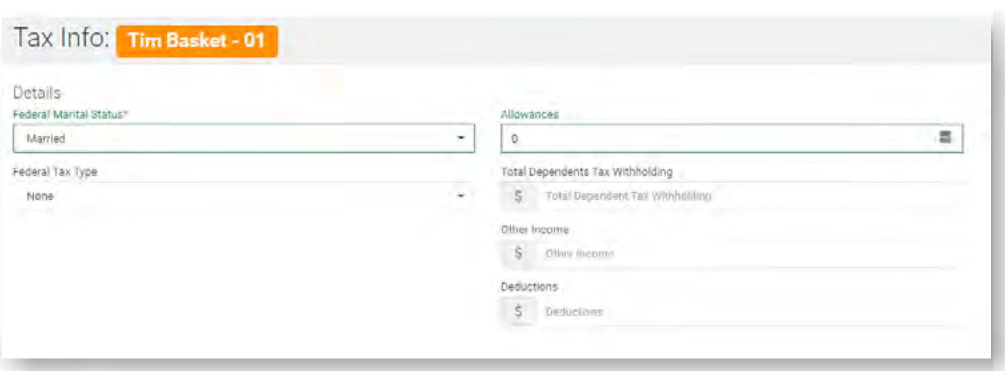
- Will be used only if tracking time off through Evolution Payroll.

Tax (Federal)

Go to **HR Admin > Employee Maintenance > Tax (Federal)**.

Note - Typically, these changes will be initiated by the employee through their self-service portal.

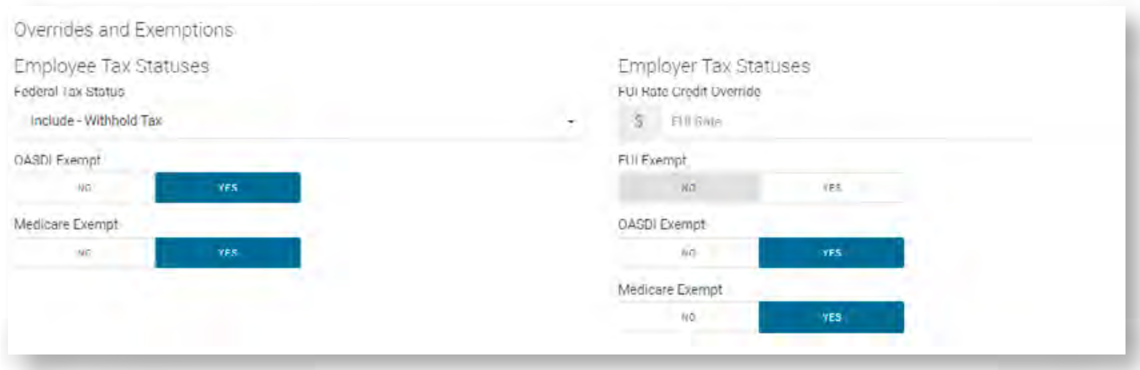
- Choose employee from list.



- Make changes based on how the employee completed the current year W-4.
- **Federal Marital Status** – choose selection from Step 1 on W-4 form:
  - Standard Head of Household – the Standard Filing Status should be used only if completing Step 1.
  - Standard Married Filing Jointly
  - Standard Single or Married Filing Separately
  - Higher Head of Household – the Higher Filing Status should be used if the box in Step 2c is checked.
  - Higher Married Filing Jointly
  - Higher Single or Married Filing Separately

- **Exemptions** box defaults to 0 – Do not change this.
- Step 3: Claim Dependents- enter the amount in **Total Dependents Tax Withholding box**.
- Step 4(a): enter the amount in **Other Income** box.
- Step 4(b): deductions – **Deductions box**.
- Step 4(c): select tax type from drop down in **Federal Tax type** box and enter amount in Value box.
- Be sure to save after entering your updates.

If employee changes from Non-Clergy to Clergy – see steps below.



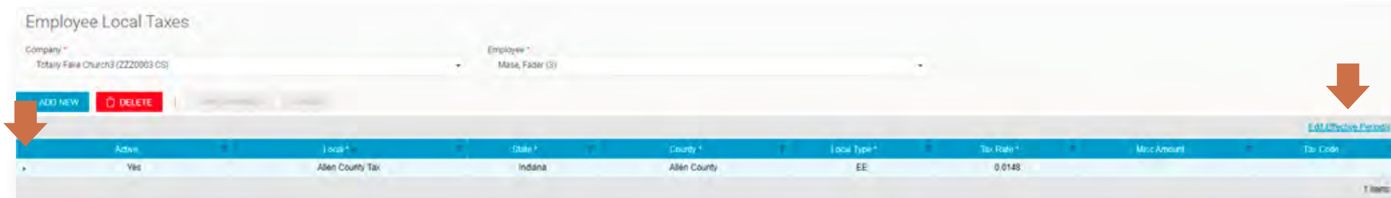
- **Employee Tax Status**
  - Clergy – OASDI Exempt – change to **YES**. Pastors can't withhold through payroll per IRS guidelines.
  - Clergy – Medicare Exempt – change to **YES**. Pastors can't withhold through payroll per IRS guidelines.
- **Employer Tax Status**
  - Clergy – OASDI Exempt – change to **YES**. Pastors can't withhold through payroll per IRS guidelines.
  - Clergy – Medicare Exempt – change to **YES**. Pastors can't withhold through payroll per IRS guidelines.

Note – Please contact your payroll processor so proper effective dates can be entered.

Tax (Local)

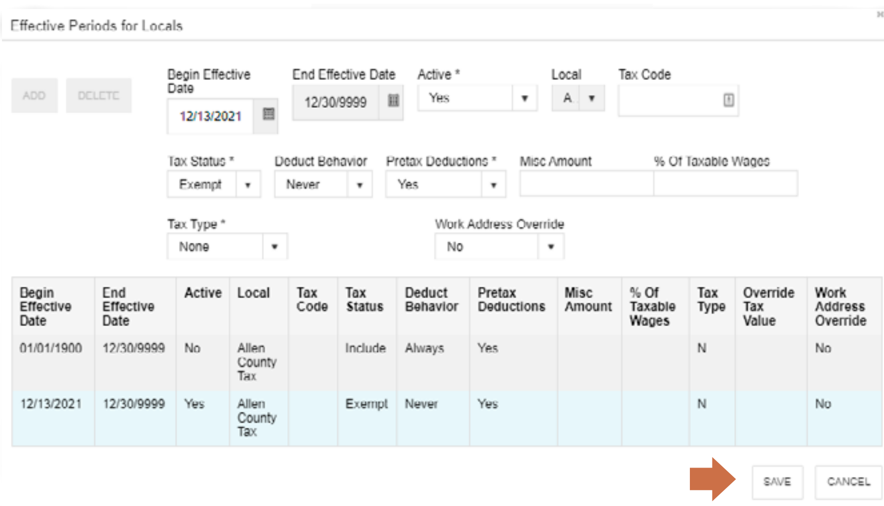
Go to **HR Admin > Employee Maintenance > Tax (Local)**.

- Select Employee name from drop-down menu.

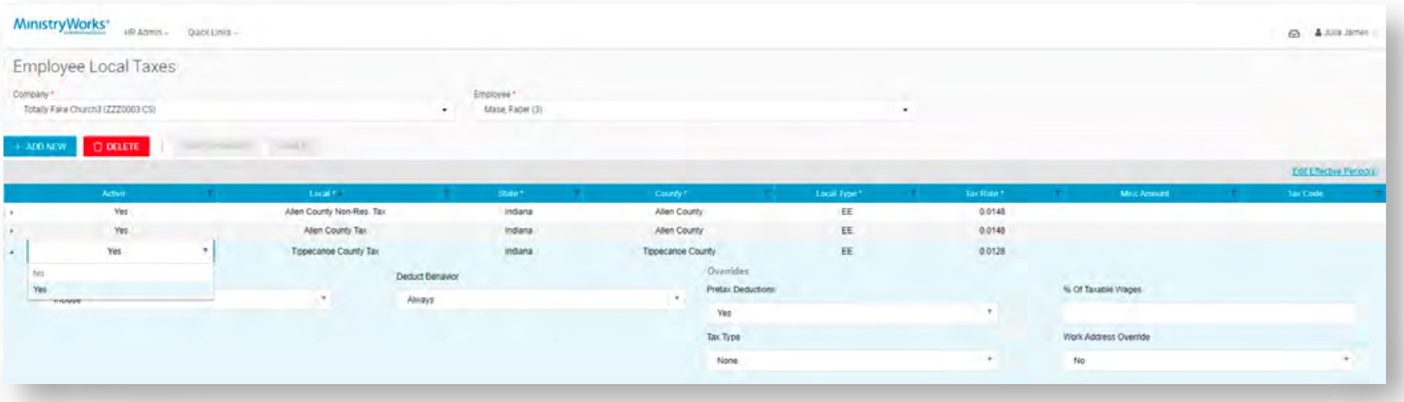


To End Date a Local Resident Tax:

- Click on triangle to the left of the **Resident** code you want to change.
- Click on **Edit Effective Period(s)**.

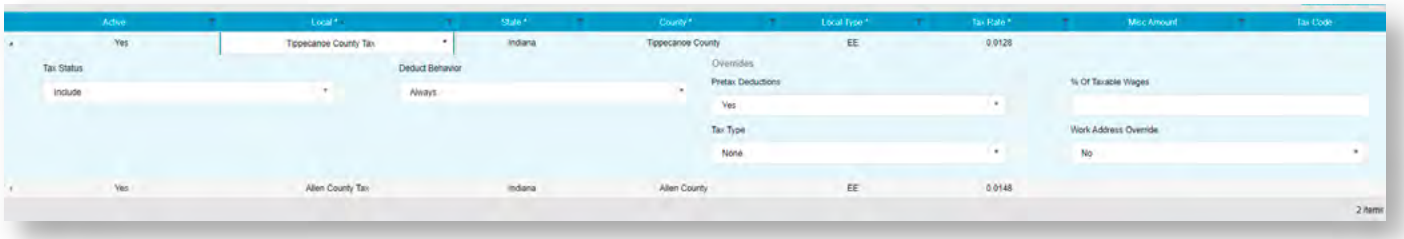


- Click **Add**.
- Enter the **Begin Effective Date** of when you want the old local to stop.
- Change the **Tax Status** to **Exempt**.
- Change **Deduct Behavior** to **Never**.
- Click **SAVE**.



- Click in box under **Active** and change to **NO**.

To Attach a New Resident Local Tax:



- Click + **Add New**.
- Click in the box under **Local** to select the correct Resident tax.
- Click **Save Changes**.

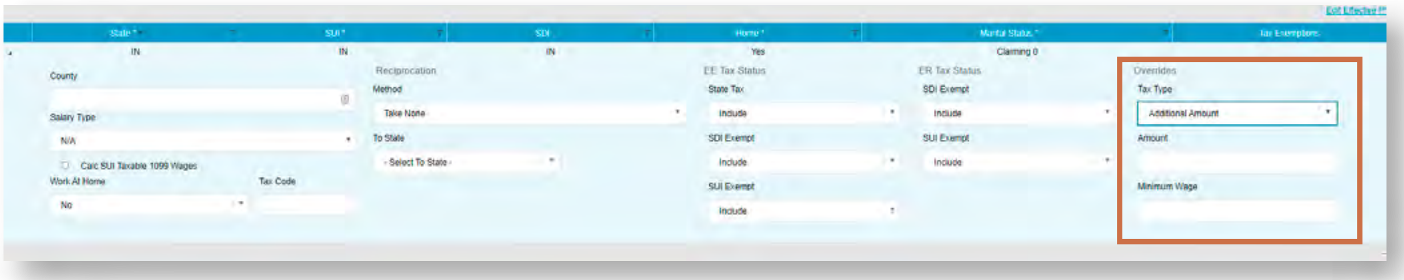
To Add a New Local tax to your ministry, please contact your payroll processor.

Tax (State)

Go to **HR Admin > Employee Maintenance > Tax (State)**.

- Select Employee from drop-down menu.

Additional amount/percentage, regular (flat) amount/percentage:



- Open the detail of the **State** by clicking the arrow next to state.
- Go to the **Overrides** section. Select the **Tax Type** (Additional Amount or Percentage, Regular (Flat) Amount or Percentage). Enter the amount or percentage in the **Amount** field.
- Click **Save Changes**.

To Add a New State Tax withholding, please contact your payroll processor.

Tax Form – Year End Documents (W-2)

Go to **HR Admin > Employee Maintenance > Tax Form**.

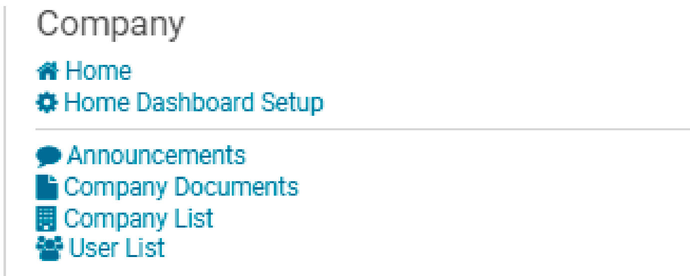
- Year End documentation (W-2s) housed.

W-4's

Go to **HR Admin > Employee Maintenance > W-4's**.

- PDF document of W-4 forms housed here for all employees who have completed the onboarding process.

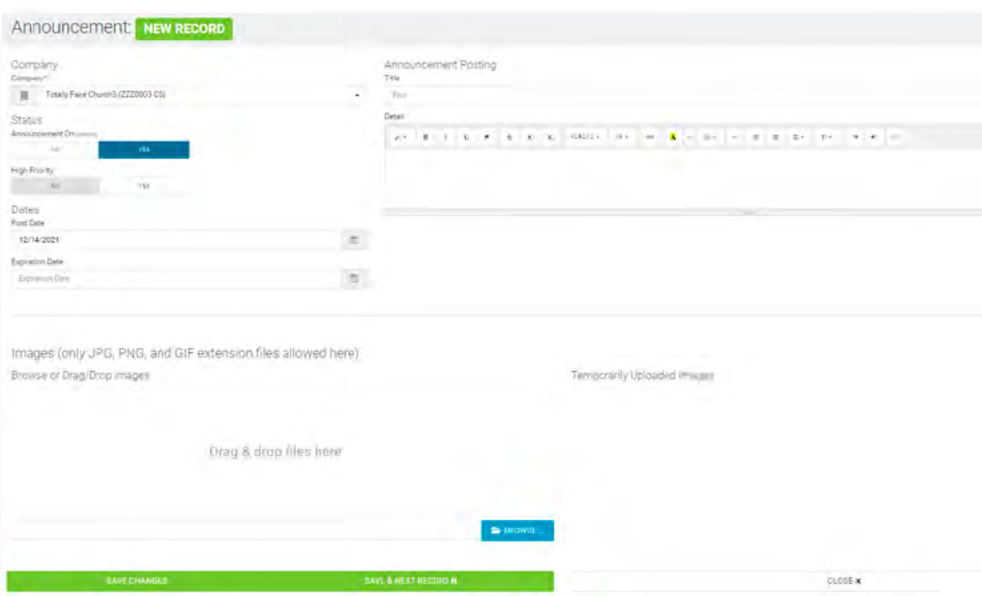
Company



Announcements

Go to **HR Admin > Company > Announcements**.

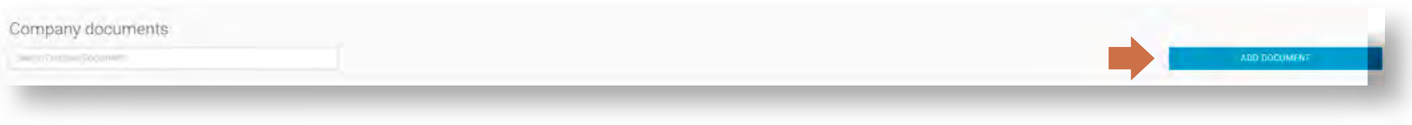
- Click on **+New**



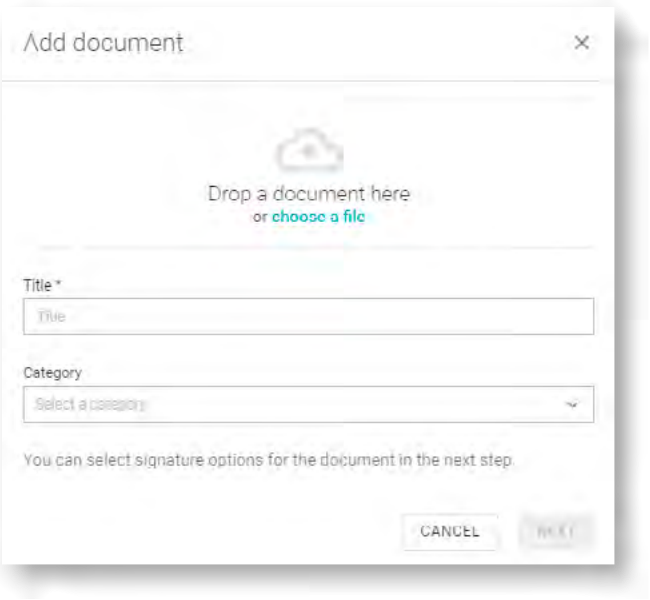
- Enter **Title**.
- Enter **Detail of Announcement** that will be posted.
- Under Dates – enter **Post Date** of when announcement should be posted to the dashboard.
- Enter **Expiration Date** of when announcement should be removed from the dashboard.
- Add Images (if applicable).
- Click **Save Changes**.

Uploading Company Documents

Go to **HR Admin > Company > Company Documents**.



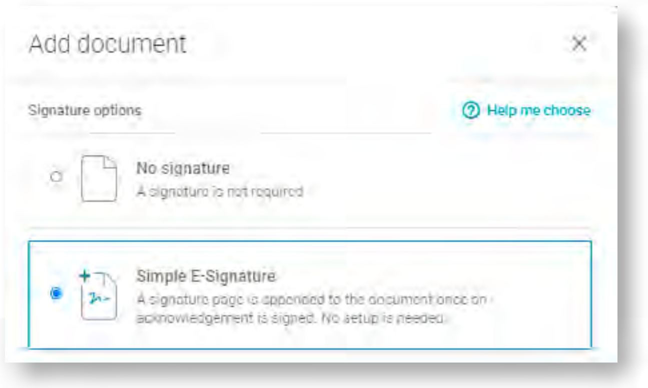
- Click **Add Document**.
- Upload a document.



- Enter a **Title**.
- Category: Select the Category of your choice. Create a new Category by typing into the field and pressing the Enter Key.
- Click **Choose a File**.

Adding E-Signature

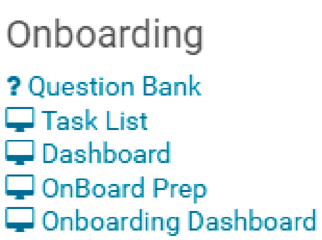
If you would like to get an employee signature on this form, select Simple E-Signature.



This also allows you to send out this document to get signatures from all employees or specific employees you choose.

- Click **Upload**.

Onboarding

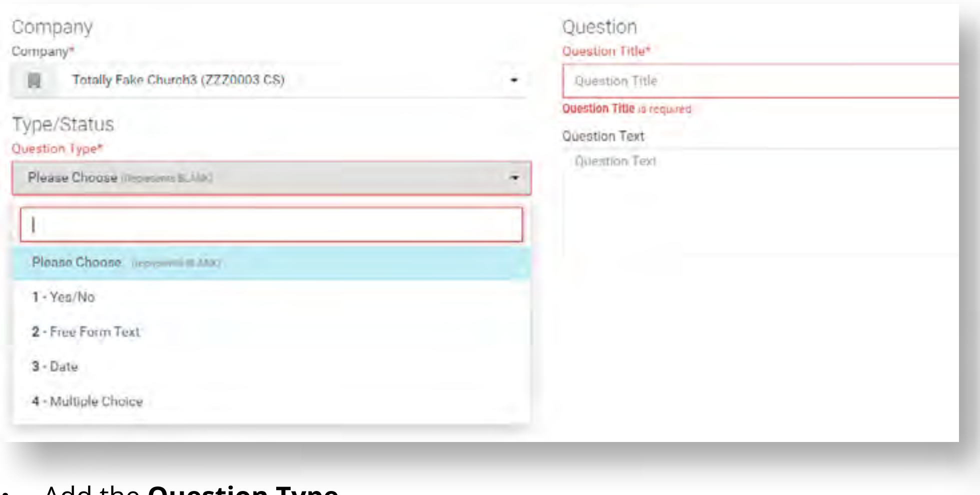


Steps to Complete before onboarding a new hire

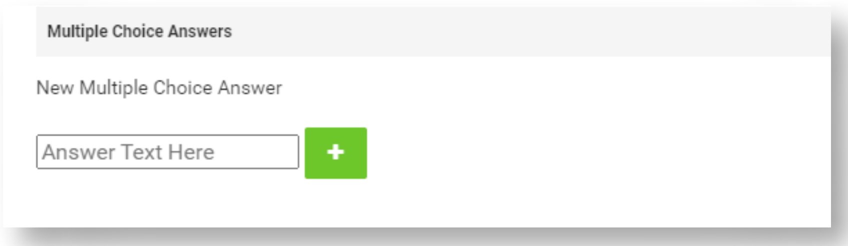
Question Bank

Go to **HR Admin > Onboarding > ? Question Bank**.

- Click **+New**.



- Add the **Question Type**.
- Add the **Question Title**.

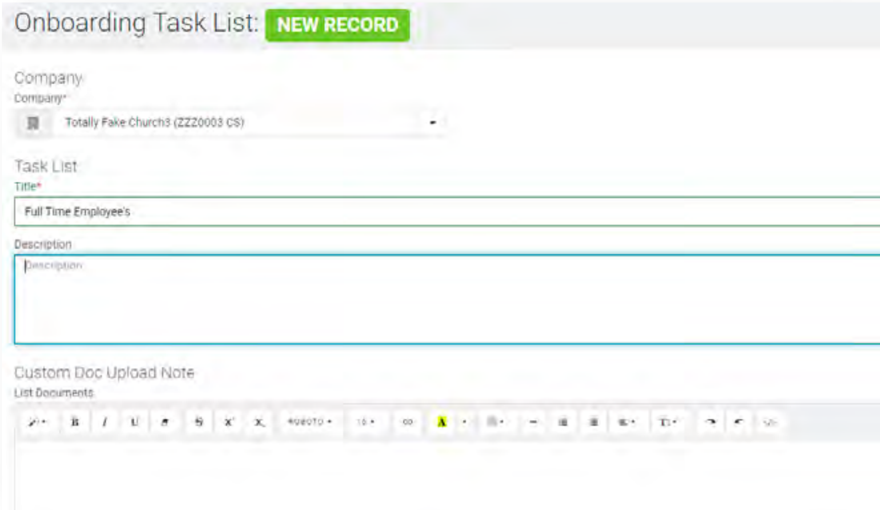


- For **Multiple Choice Answers** – Fill out the desired answers and click the **+** icon. Repeat as necessary.
- **Sequence** – If your questions should be in a specific order, enter the desired order here. 1 will be the first question and so on.
- **Is Required** – If you want to make sure the new hire answers this question, make it required by toggling to YES.
- Click **Save**.

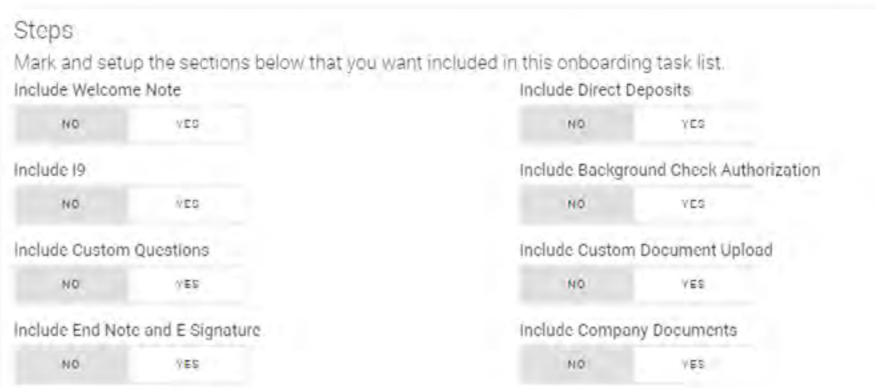
Task List

Go to **HR Admin > Onboarding > Task List**.

- Click **+New**.



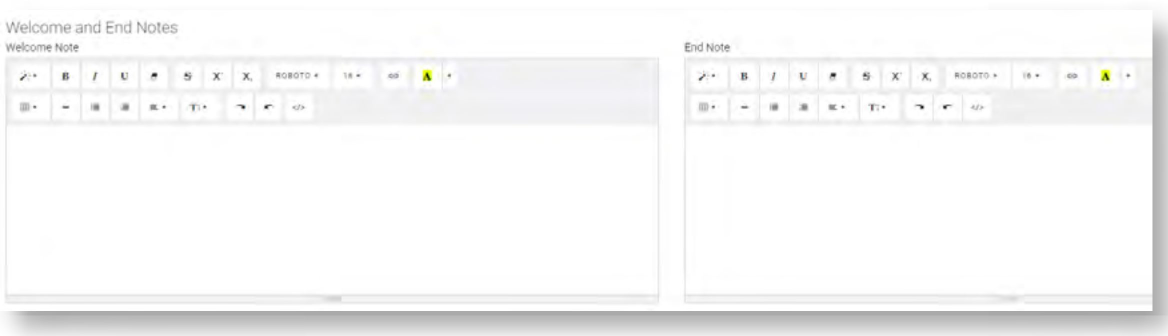
- Enter the title of your **Task List** – You can have more than one task list for employee onboarding. This is only necessary when different types of employees need a different onboarding process.
- **Description** – This field is for reference only.
- **Custom Doc Upload Note** – This is a free text field for you to enter anything you would want the employee to upload during the onboarding process. Note: this only shows when **Include Custom Doc Upload** is enabled in the next step.



- **Steps** – The items you toggle to **Yes** will show up during onboarding.

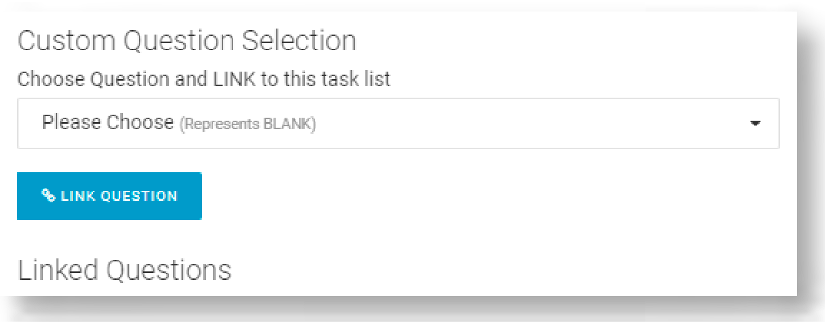
- **Select/Change Company Documents:**
  - Click inside the field and your company documents will be available for upload.

    NOTE: Company document will need to be uploaded first through Company > Company Documents.
  - Select the correct document to upload and it will show up in the **Documents** section. If you want to delete a document, click the X inside the document section.
- **Custom Questions Selection:**
  - The **Task List** must be saved before this section is available.
  - You must create custom questions in **Onboarding > ? Question Bank** before you can add them here.



- **Welcome and End Notes:**
  - The Welcome Note is the first thing the new hire sees upon logging in.
  - The End Note is the last thing the new hire sees upon completion of required fields.

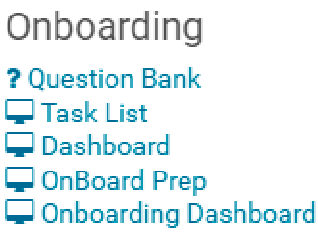
- Click **Save:**
- The **Onboarding Task List** will close. You will see the task list you have created.
- You can use custom questions you create to add to a task list sequence.



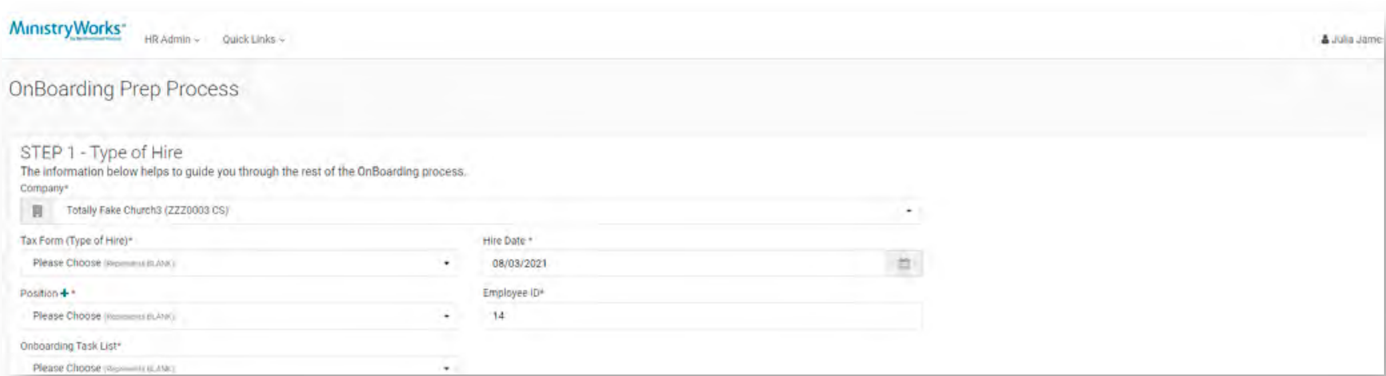
- Click on the task list.
- Scroll down to **Custom Question Section**.
  - Search for your custom question and click **Link Question**.
  - **Save** when done.

Onboard Prep

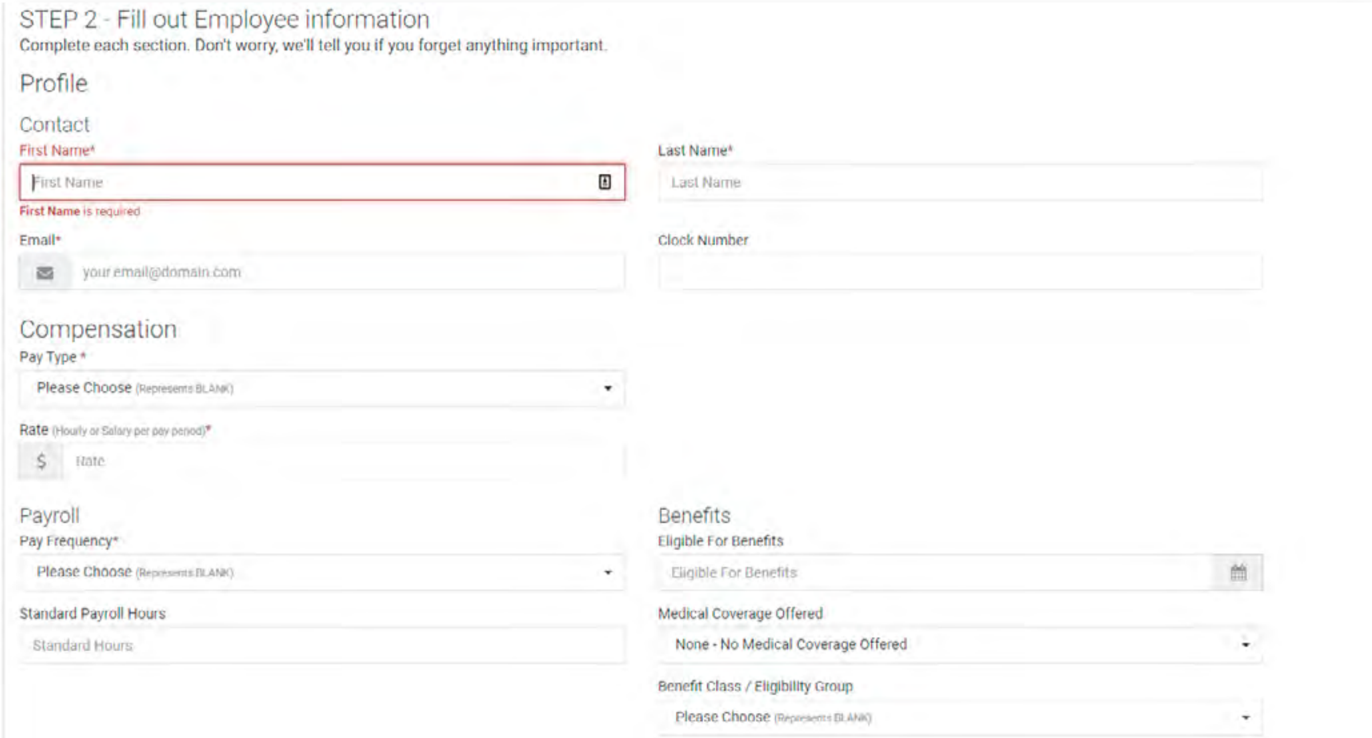
If your employee is performing clergy duties and is licensed, commissioned or ordained, please follow the highlighted sections in the appropriate steps below.



Go to **HR Admin > Onboarding > Onboarding Prep**.



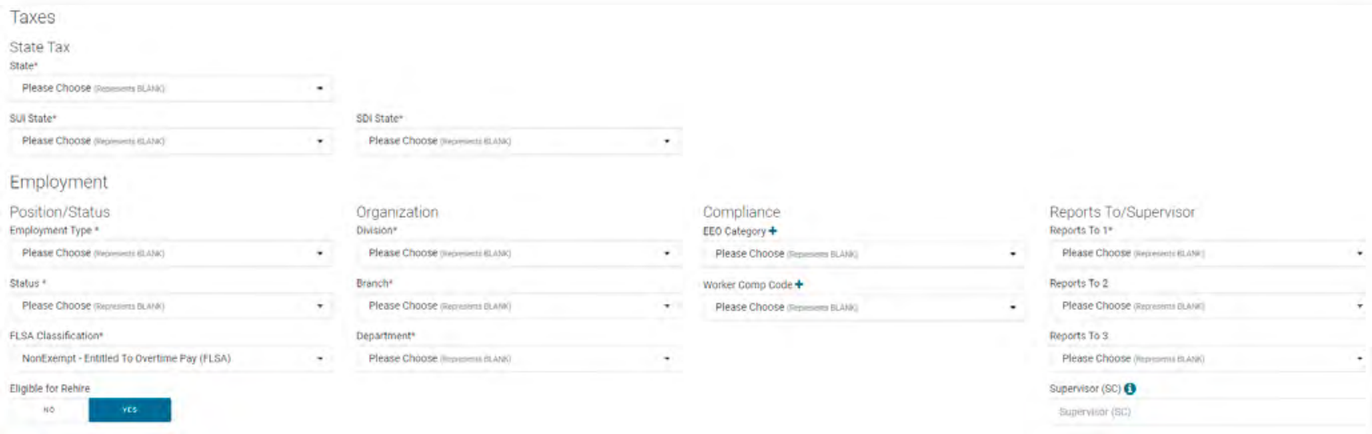
- **Tax Form (Type of Hire)** – W-2 or 1099.
- **Position** – Select from drop-down menu or click Position + * to create a new job title.
- **Onboarding Task List** – Select from drop-down menu.
- **Hire Date**
- **Employee ID**
- Click **Let's Begin Onboarding**



- **First Name**
- **Last Name**
- **Email Address** – required for "My HR portal".
- **Pay Type** – Hourly or Salary.
- **Rate** – Hourly or Salary per pay period amount.

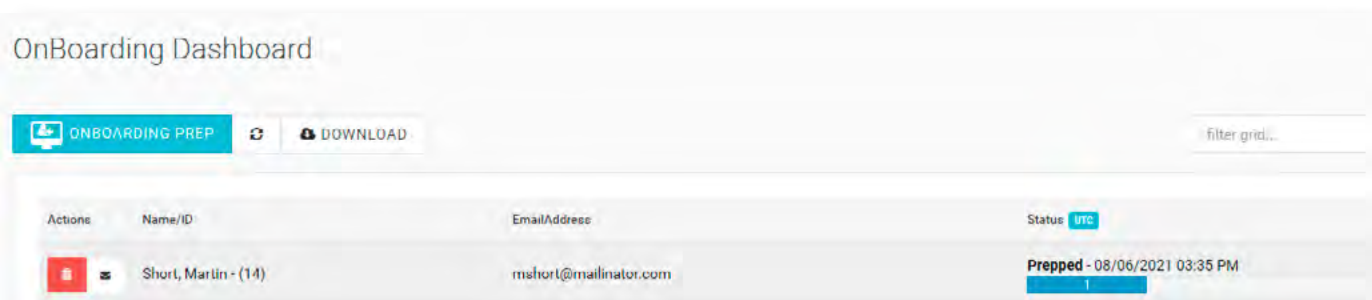
  - **Clergy – Salary amount enter $0.00.** Clergy wages will be entered on the **Earnings and Deductions** tab as Clergy Salary (E500) and/or Clergy Housing (E510).

- **Pay Frequency** – select from active options.
- **Standard Payroll Hours** – if applicable.



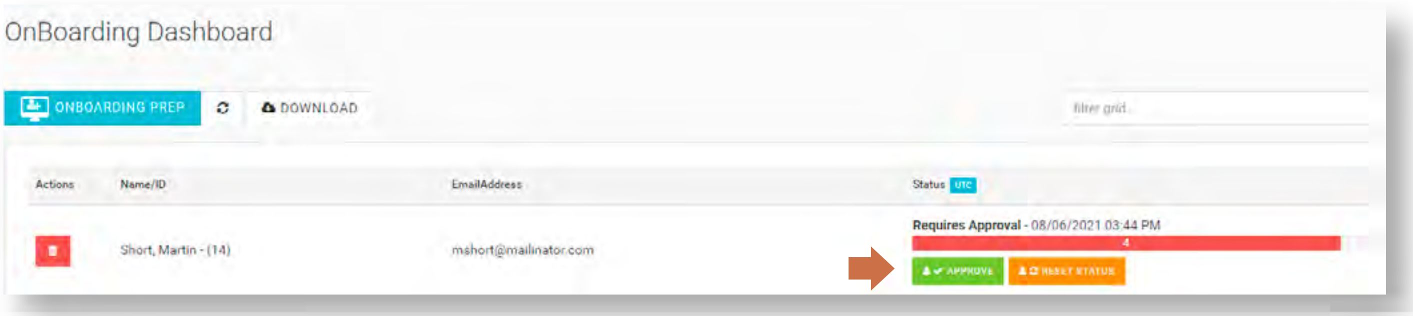
- **State**
- **SUI State**
- **SDI State**
- **Employment Type**
- **Status**
- **Division** – if applicable.
- **Branch** – if applicable.
- **Department** – if applicable.
- **Reports to 1**

- Click **Submit Onboarding Request** – once this step is completed, the employee will receive an email with a link to complete their onboarding process.

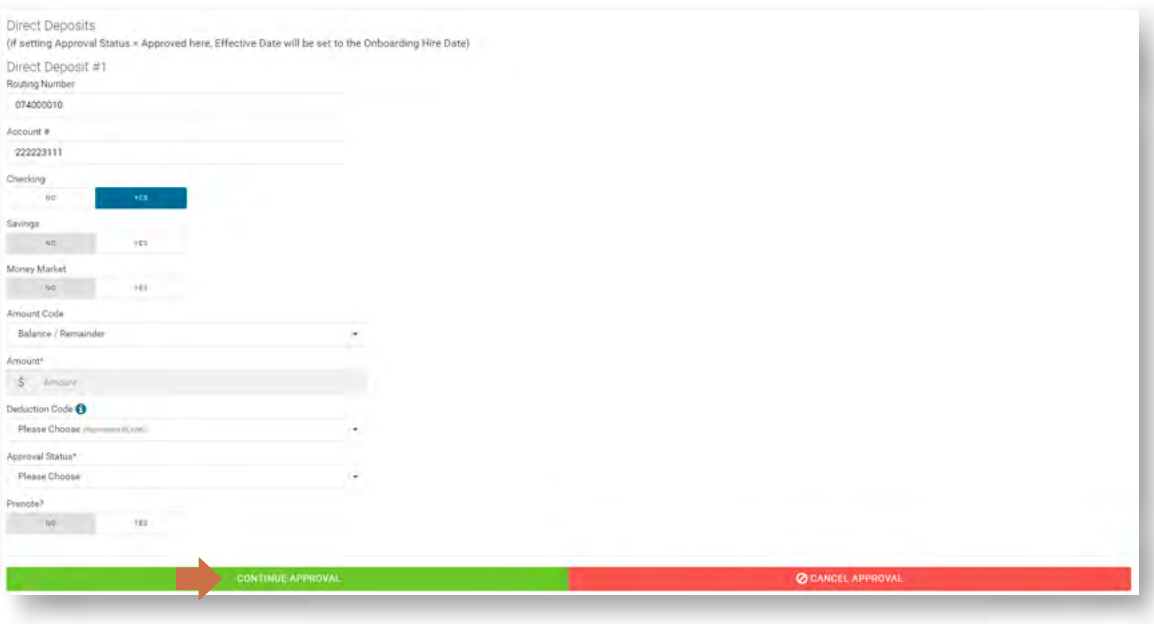


- Once the employee has been successfully onboarded, you can see their status by going to the **Onboarding Dashboard**.

Approving Employee Onboarding

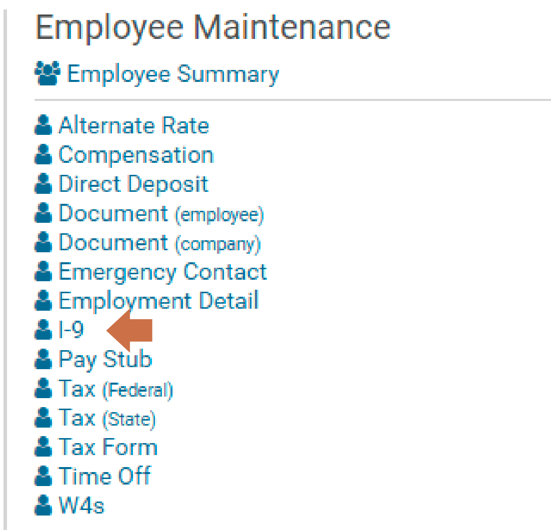


- Once the employee has completed their part of the onboarding process, you will then need to go in and do the final approval for them to be added into Evolution Payroll.
- Click **Approve**.

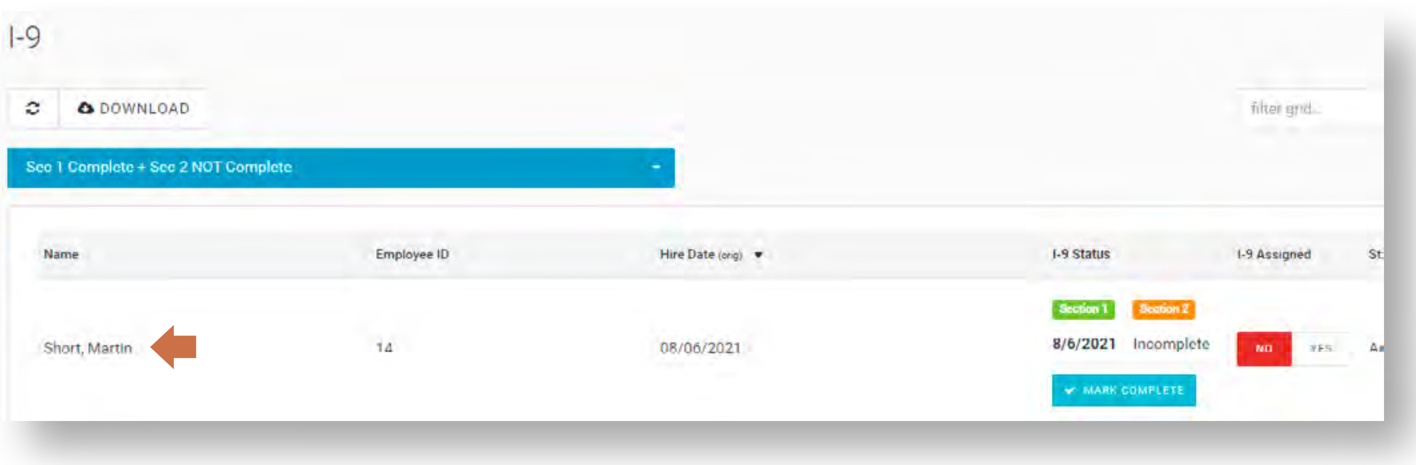


- Review routing/account number with voided check or bank documentation provided by the employee.
- **Amount code** – should be set to Balance/Remainder if only one account is added.
- **Deduction Code** – Select appropriate Direct Deposit code (typically DD1).
- **Approval Status** – Approved.
- **Prenote** – Defaults to **No** (DO NOT CHANGE THIS).
- Click **Continue Approval** – Once this step is completed, the employee will be added in Evolution Payroll.

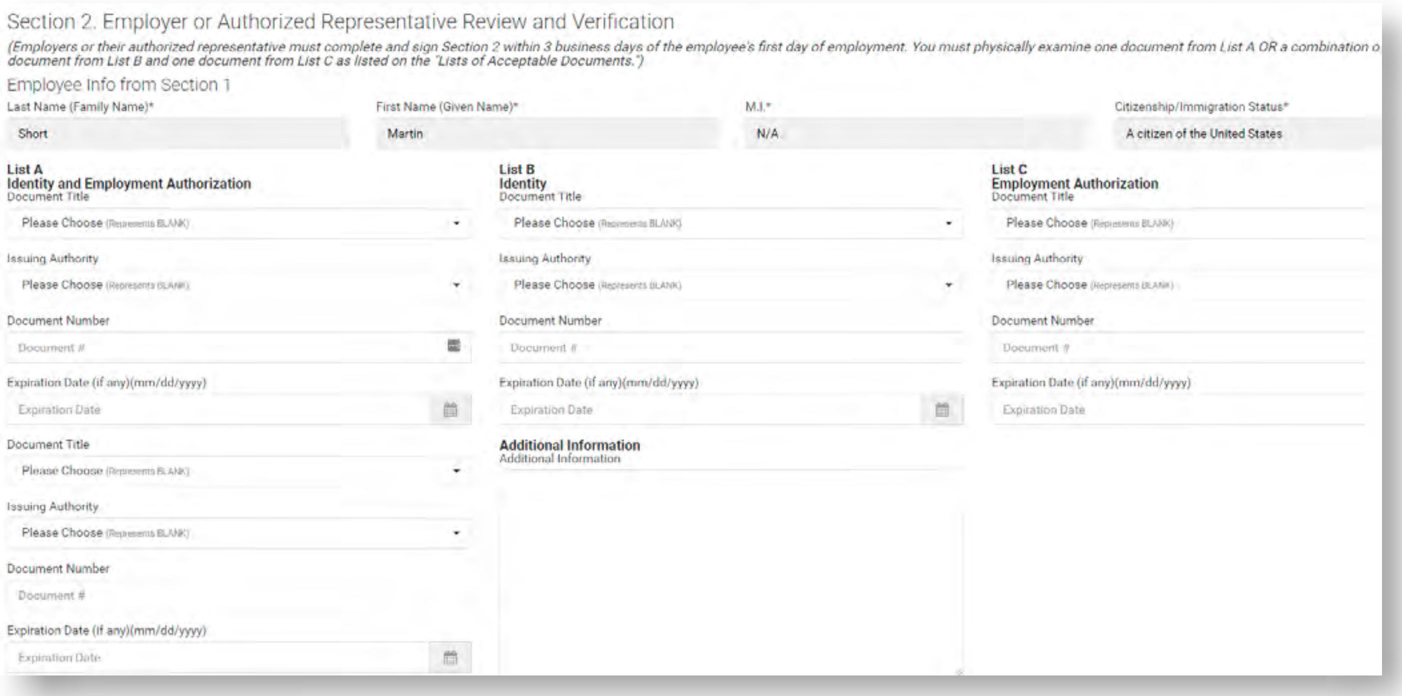
Note – once the employee has been approved, you will need to complete the steps on page 48 to finalize the I-9 documentation



Go to **HR Admin > Employee Maintenance > I-9**.



- Click on the employee's name.



Section 2. Employer or Authorized Representative Review and Verification

(Employers or their authorized representative must complete and sign Section 2 within 3 business days of the employee's first day of employment. You must physically examine one document from List A OR a combination o document from List B and one document from List C as listed on the "Lists of Acceptable Documents.")

Employee Info from Section 1

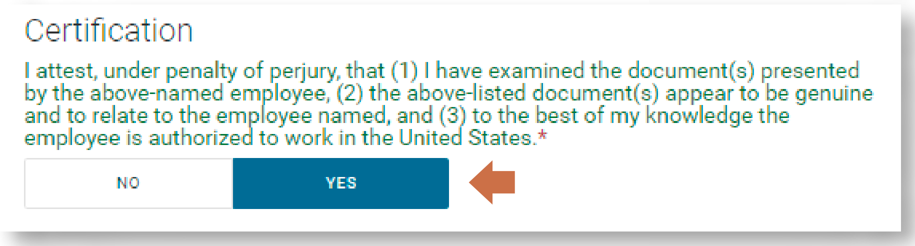
Last Name (Family Name)*: Short
First Name (Given Name)*: Martin
M.I.*: N/A
Citizenship/Immigration Status*: A citizen of the United States

List A
Identity and Employment Authorization
Document Title: Please Choose (Represents BLANK)
Issuing Authority: Please Choose (Represents BLANK)
Document Number: Document #
Expiration Date (if any)(mm/dd/yyyy): Expiration Date
Document Title: Please Choose (Represents BLANK)
Issuing Authority: Please Choose (Represents BLANK)
Document Number: Document #
Expiration Date (if any)(mm/dd/yyyy): Expiration Date

List B
Identity
Document Title: Please Choose (Represents BLANK)
Issuing Authority: Please Choose (Represents BLANK)
Document Number: Document #
Expiration Date (if any)(mm/dd/yyyy): Expiration Date
Additional Information
Additional Information

List C
Employment Authorization
Document Title: Please Choose (Represents BLANK)
Issuing Authority: Please Choose (Represents BLANK)
Document Number: Document #
Expiration Date (if any)(mm/dd/yyyy): Expiration Date

- Scroll down to **Section 2 – Employer or Authorized Representative Review and Verification**.
- **Document Title** – from List A or the Combination of List B and List C.
- **Issuing Authority**
- **Document Number**
- **Expiration Date**

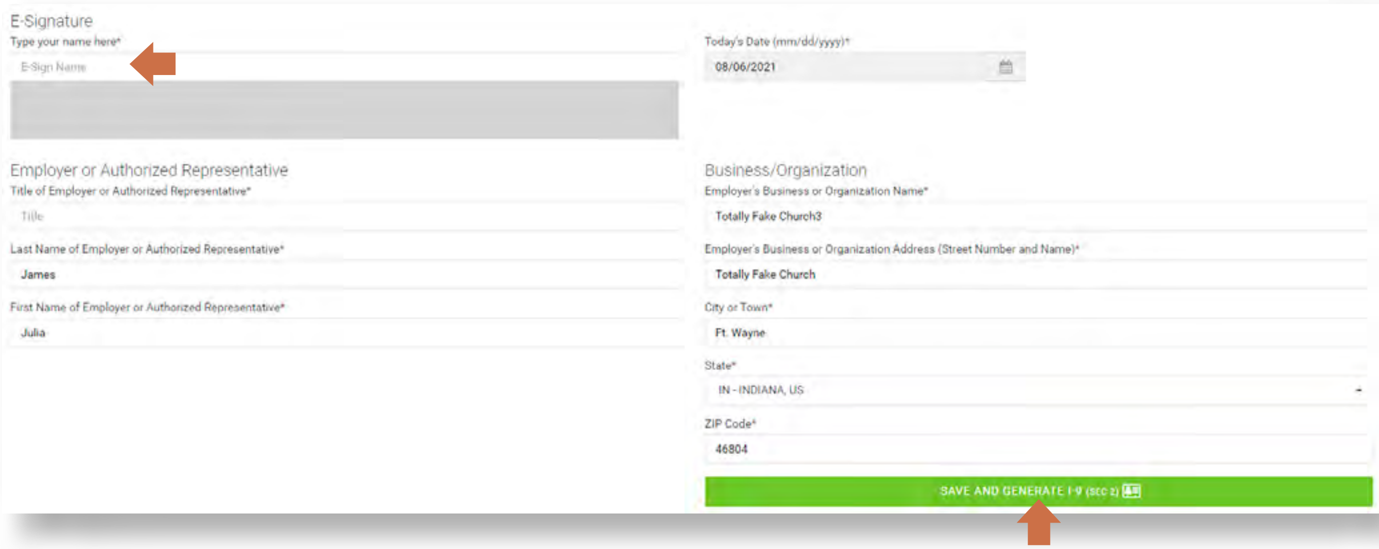


Certification

I attest, under penalty of perjury, that (1) I have examined the document(s) presented by the above-named employee, (2) the above-listed document(s) appear to be genuine and to relate to the employee named, and (3) to the best of my knowledge the employee is authorized to work in the United States.*

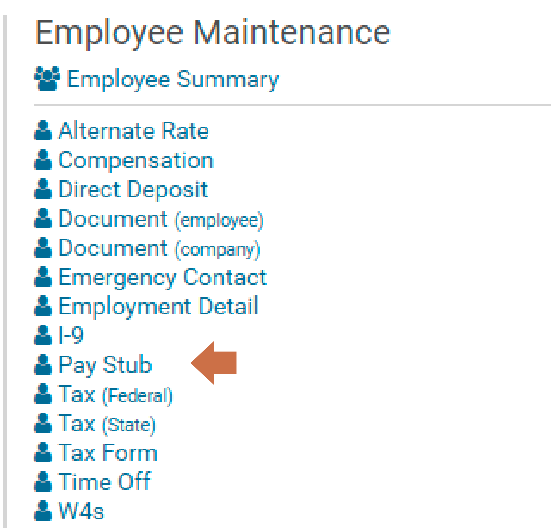
NO YES

- Click on **YES**.

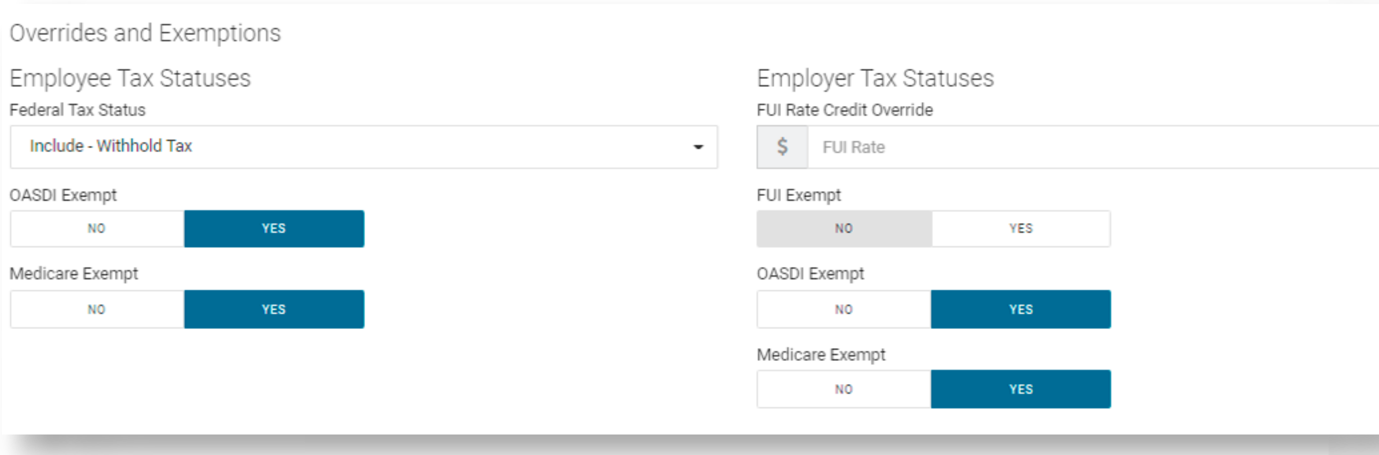


- Type name in the **E-Signature** to sign the document.
- Insert title of **Employer or Authorized Representative**.
- Click on **Save and Generate I-9**.

Note - If the employee is a clergy member, go to Employee Maintenance > Tax (Federal) to complete their tax set up. You will then need to go to Earnings and Deductions to add any salary information or deductions associated. See steps below. If your employee is not clergy, their set up is complete.

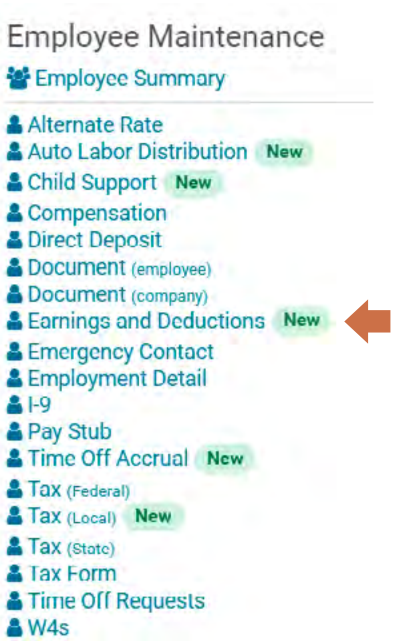


- Click on **Tax (Federal)**.

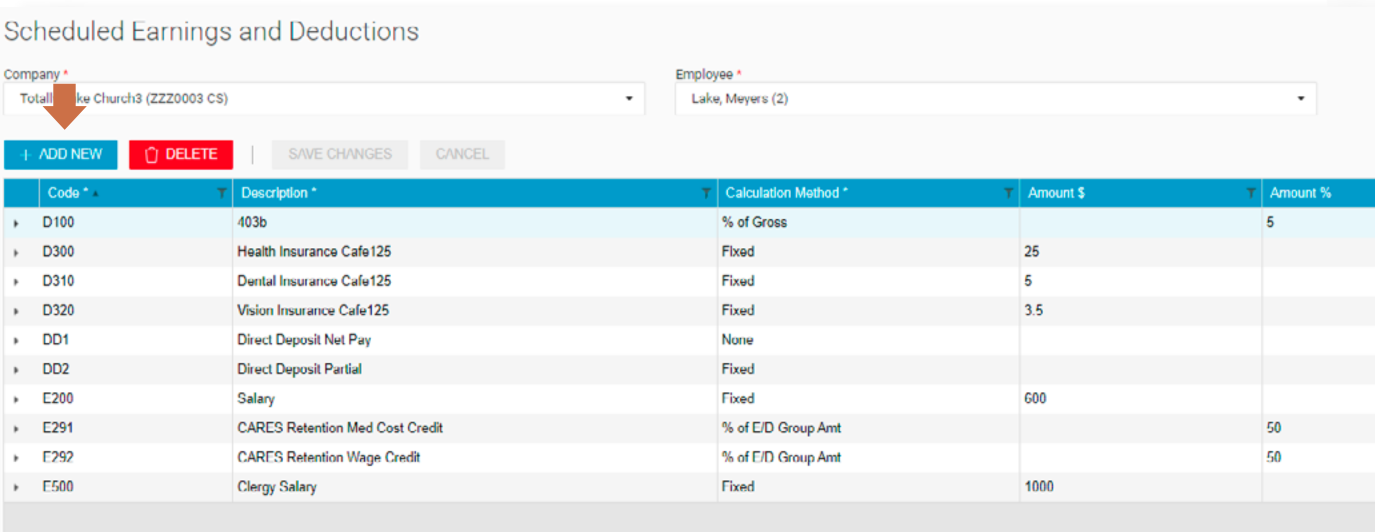


- Employee Tax Statuses
  - **Clergy – OASDI Exempt** – change to **YES**. Pastors can't withhold through payroll per IRS guidelines.
  - **Clergy – Medicare Exempt** – change to **YES**. Pastors can't withhold through payroll per IRS guidelines.
- Employer Tax Statuses
  - **Clergy – OASDI Exempt** – change to **YES**. Pastors can't withhold through payroll per IRS guidelines.
  - **Clergy – Medicare Exempt** – change to **YES**. Pastors can't withhold through payroll per IRS guidelines.

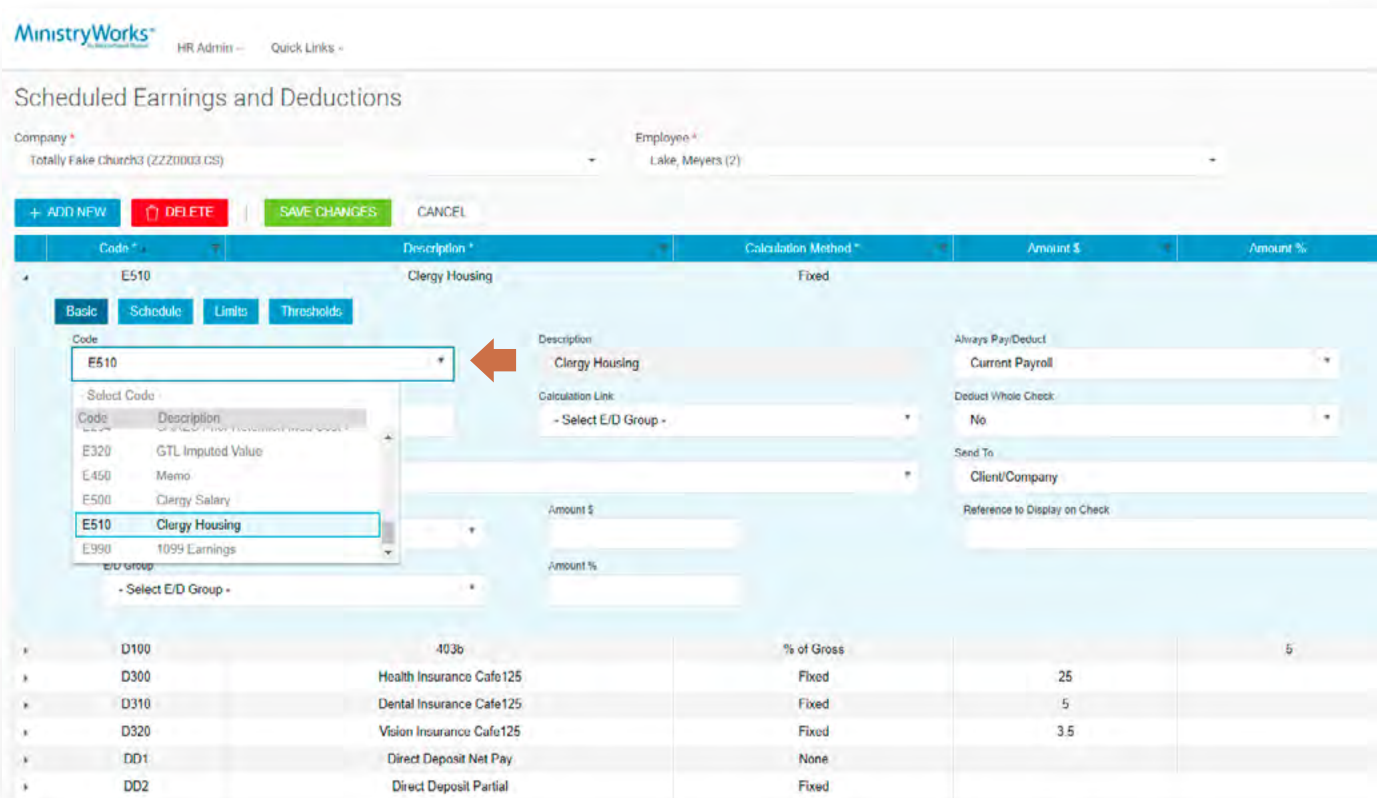
Note – Please contact your payroll processor so proper effective dates can be entered.



- Click on **Earnings and Deductions**.

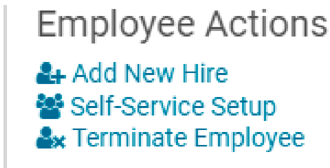


- Select employee name from drop-down menu.
- Click **Add New**.



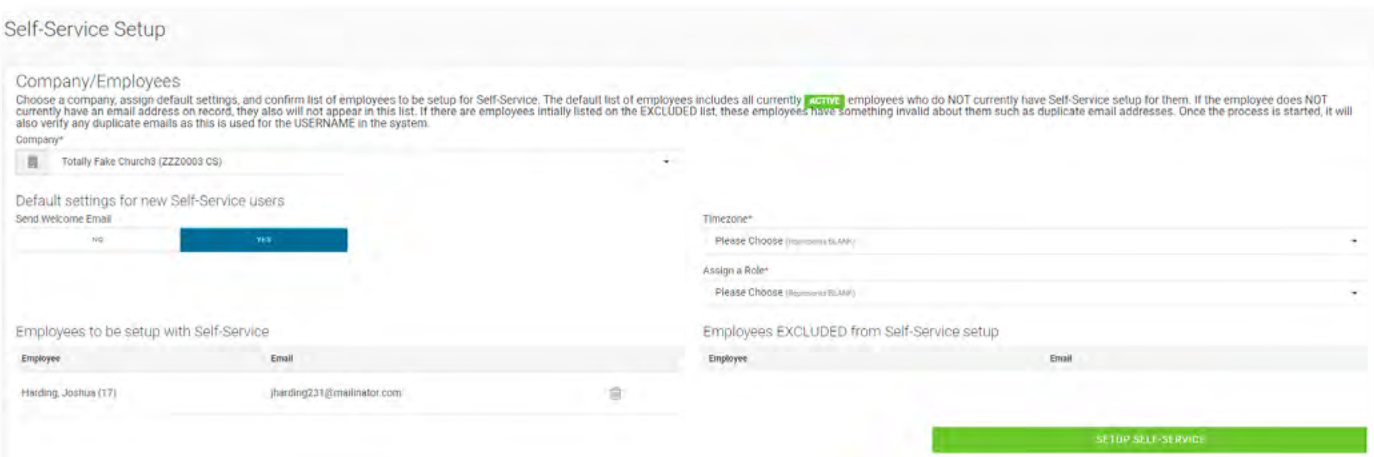
- Select the Earning code from the drop-down menu.
- Enter the **per pay period** amount that the employee is to receive.
- Click **Save Changes**.

Employee Actions



Setting up Employee Self-Service:

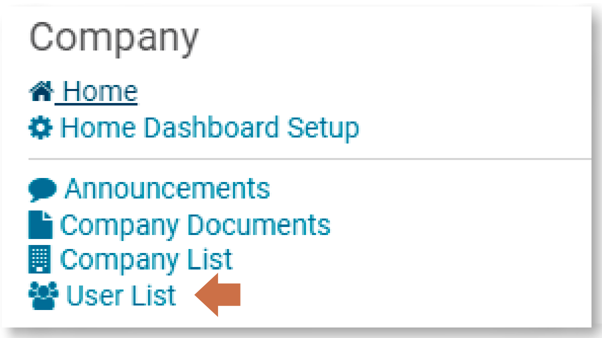
Go to **HR Admin > Employee Actions > Self-Service Setup**.

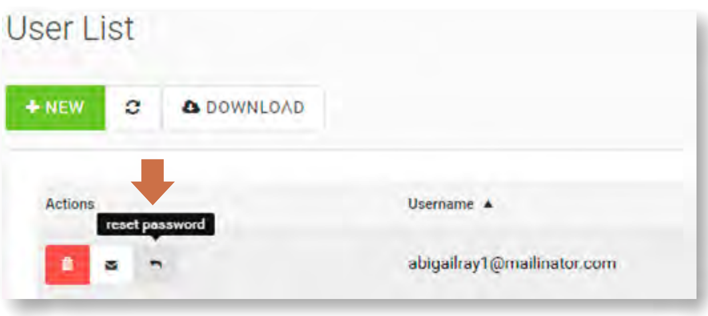


- Ensure your ministry's name is in the **Company** search & **Company** fields.
- **Timezone** – Select Eastern timezone.
- **Assign a Role** – Select **"MWxxxx – Base User (Level =10)**.
- **Employees to be setup with Self-Service:**
  - If you do NOT want the employee set up, click on the trash can next to their email address.
- Click on **Setup Self-Service**.
  - A Welcome Email will be sent immediately to the employees prompting them to register for Self-Service. This is a time sensitive process (2-3 days), so please advise your employees to register quickly. **Time and Attendance employees will not be able to punch in or out until they complete the registration.**

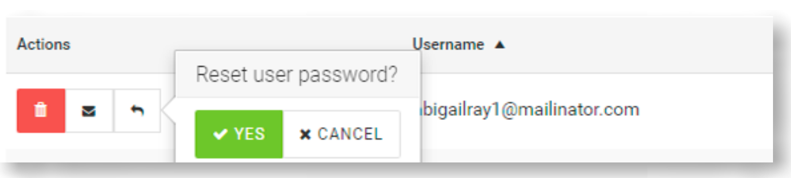
Resetting Passwords

Go to **HR Admin > Company > User List**.





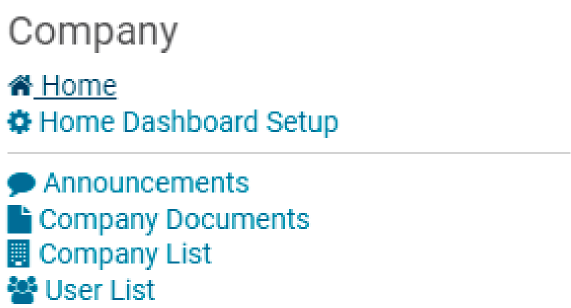
- Select the curved arrow icon to the left of the user who needs their password reset.

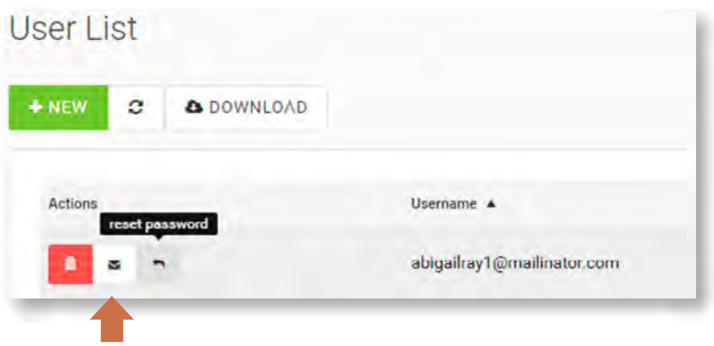


- Select **YES** on the pop up.
- An email will be sent to the employee to change their password and sign in.

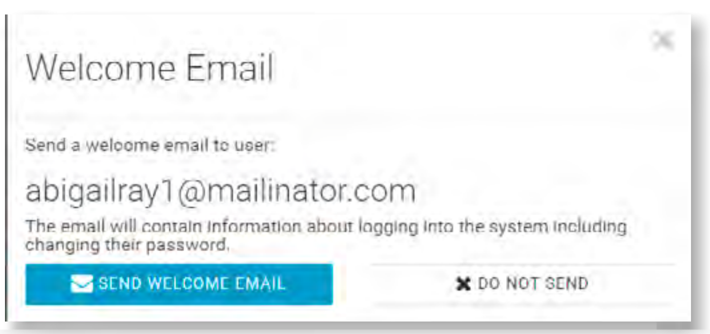
Resending Welcome Email

Go to **HR Admin > Company > User List**.





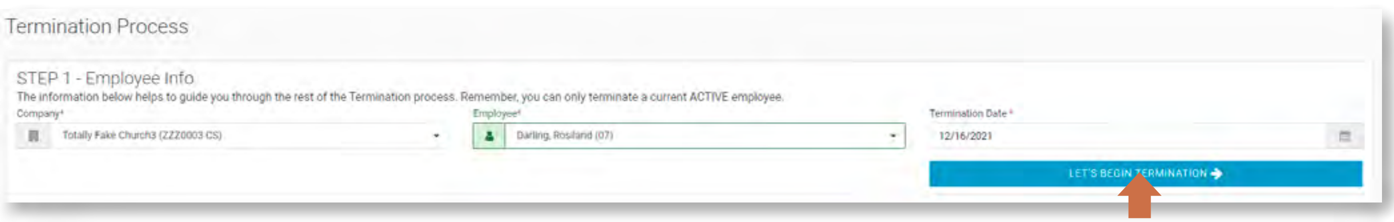
- Select the **envelope icon** to the left of the user.



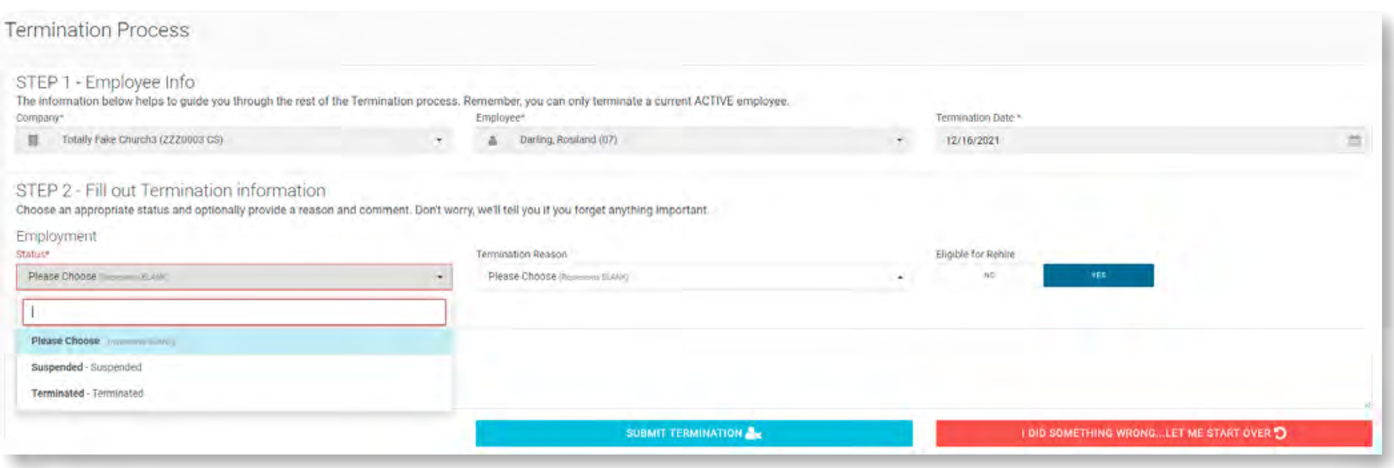
- Select **Send Welcome Email** on the pop-up screen.
  - An email will be sent to the employee in order to set up their self-service portal. Employees have 48 hours to login or you will have to resend the welcome email.

Terminate Employee

Go to **HR Admin > Employee Actions > Terminate Employee**.



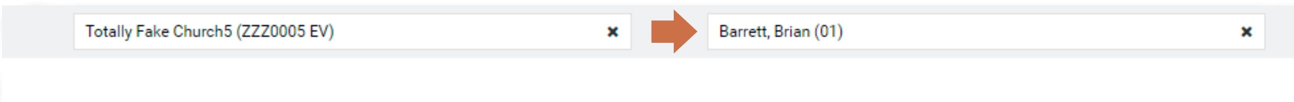
- Select **Employee** from the drop-down menu.
- Ensure **Termination Date** is correct.
- Click **Let's Begin Termination**.



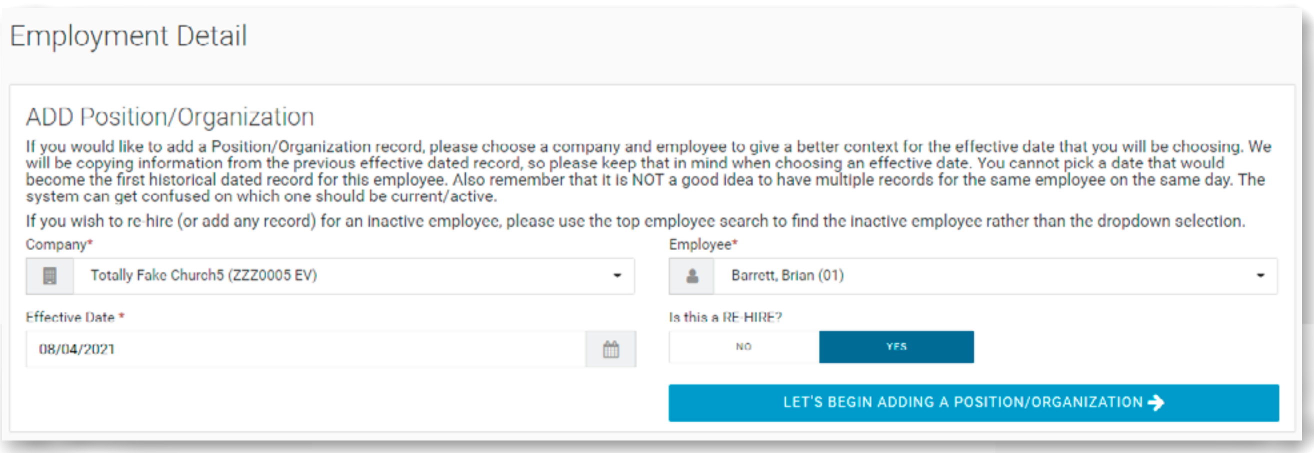
- Select **Status** from drop-down menu.
- Select **Termination Reason** from drop-down menu.
- **Eligible for Rehire** – leave defaulted to **YES**.
- Click **Submit Termination**.

Re-Hire an Employee

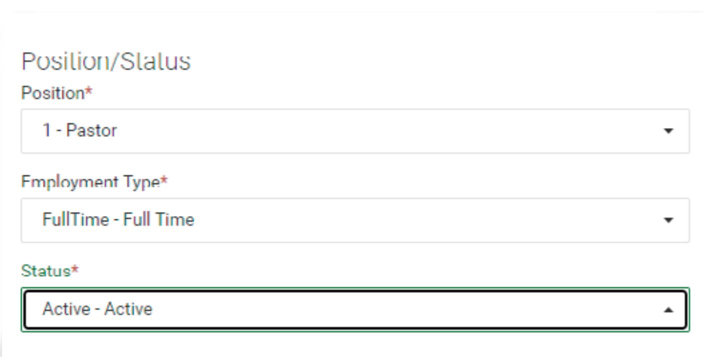
Go to **HR Admin > Employee Maintenance > Employment Detail**.



- To find the terminated employee, type the name into the employee search bar.



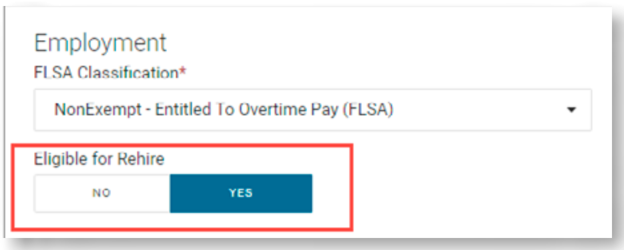
- The name will now show up in the **Employee** field in the **ADD Position/Organization** box.
- Add the effective date (date of rehire) and select **YES** for **Is this a RE-HIRE**. Click **LET'S BEGIN ADDING A POSITION/ORGANIZATION**.



- Update any necessary information for this rehire and change the **Status** to Active. Click **Save Changes**.
- The employee is now an Active employee.
- Verify by going to **HR Admin > Employee Maintenance > Employee Summary**.
- Clear the employee name out of the top search bar by clicking the small **X**. The employe will now show up with the rest of your active employees.

  Note: If you receive an error message stating that the employee is not eligible for rehire, this is because when the employee was terminated, they were marked as not being eligible for rehire.

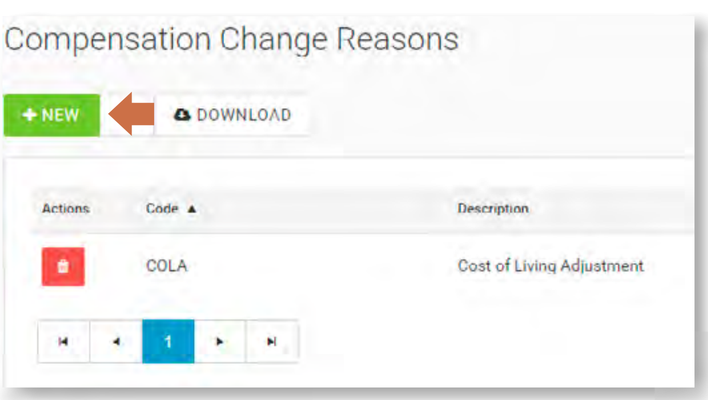
- Update by going to **HR Admin > Employee Maintenance > Employee Summary**.
- Click on the **Advanced Filter Set** button and select **ALL**.
- Click **Apply Filter**.
- Select your terminated employee.
- Scroll down to the **Employment** section and change the **Eligible for Rehire** toggle switch from No to Yes.



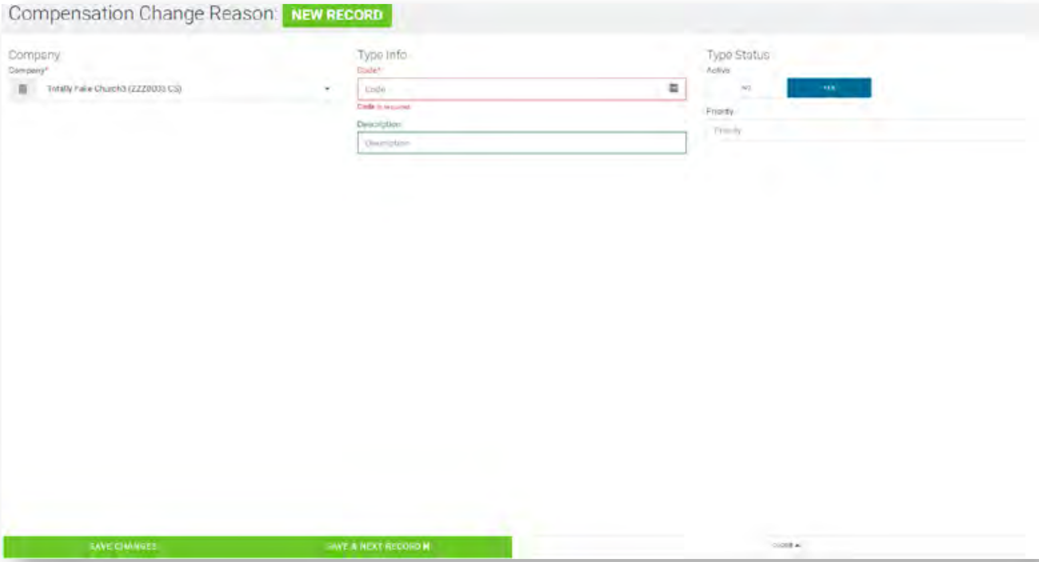
Company Setup

Compensation Change Reason

Go to **HR Admin > Company Setup > Compensation Change Reason**.



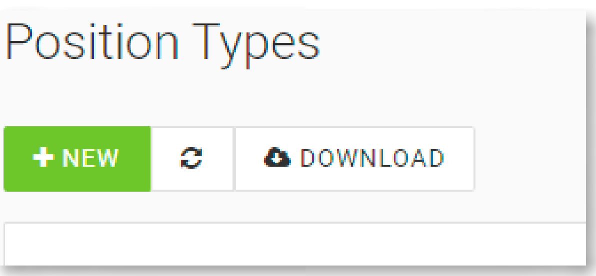
- Click **+New**.



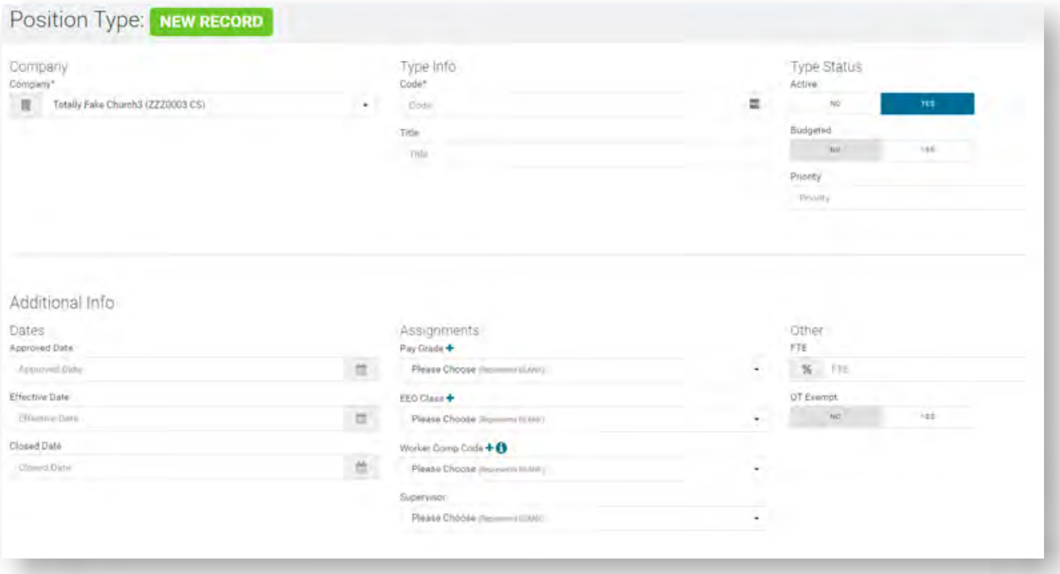
- Enter the **Code** and **Description**.
- Click **Save Changes**.

Position

Go to **HR Admin > Company Setup > Position**.



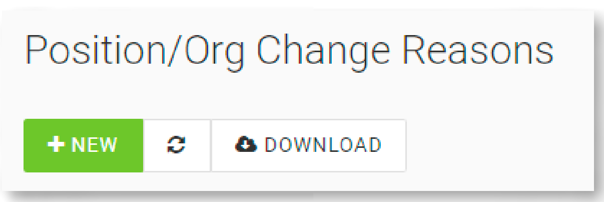
- Click **+New**.



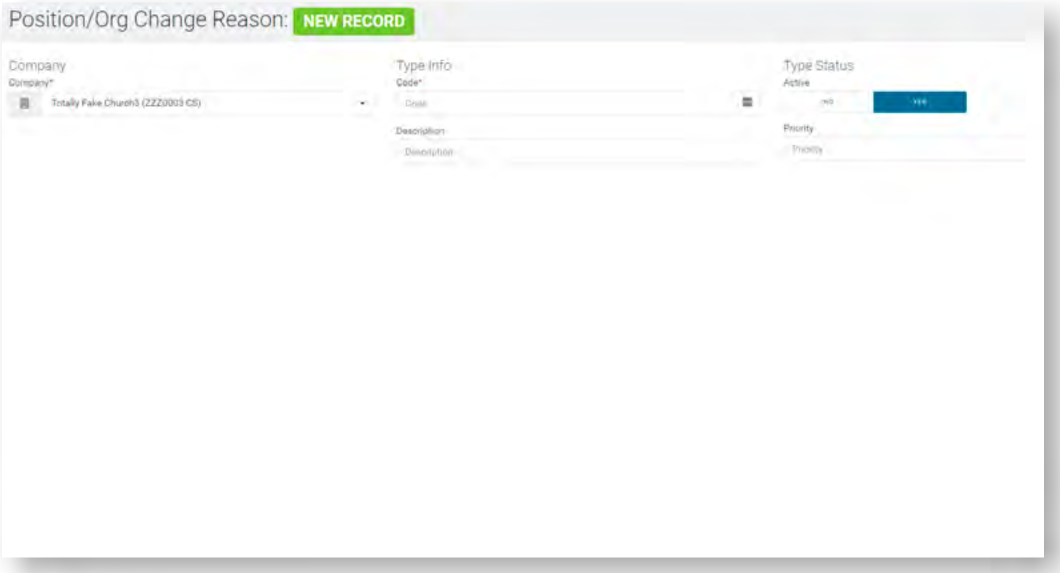
- Enter the **Code** and **Title**.
- Click **Save Changes**.

Position/Org Change Reasons

Go to **HR Admin > Company Setup > Position/Org Change Reasons**.



- Click **+New**.



- Enter the **Code** and **Description**.
- Click **Save Changes**.