



MinistryWorks®
by Brotherhood Mutual

Evolution + HCM Training Manual

Contents

Section 1: HCM – Payroll

Log In	4
Create payroll	4
Add Additional E/D (Earnings And Deductions) Columns	5
Add Or Edit Payroll Information	6
Preview Reports	7
Submit Payroll	7
Processing Multiple Pay Groups	8
Log In and Create Payroll	8
Create Batch For 1st Pay Group	9
Create Batch For 1st Pay Group	10
Additional Functions	13
Add An Employee To Pay Grid or Add a Second Check to an Employee	13
Add/Delete an E/D	14
Allocate Wages To Division/Branch/Department/Team	14
Additional Functions in Detail View of Check	15
To Add An Additional Hourly Rate And Hours To Pay Grid	16
Check Calculator: Gross to Net/Net to Gross	17
Viewing Reports	21
Published Reports	22
Defined Reports	23

Section 2: HCM – Employee Maintenance

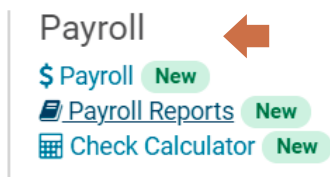
Employee Maintenance	24
Employee Summary	24
Alternate Rate	24
Auto Labor Distribution	25
Compensation	25
Direct Deposit	26
Adding a Direct Deposit	27
To Deactivate a Direct Deposit in Use	28
Approving a Direct Deposit Change Initiated by the Employee	29
Documents (Employee)	30

Earnings and Deductions	31
Employment Detail	32
I-9	33
Pay Stub	33
Time Off Accrual	33
Tax (Federal)	33
Tax (Local)	34
Tax (State)	36
Tax Form – Year End Documents (W2)	37
W4's	37
Company	38
Announcements	38
Uploading Company Documents	39
Adding E-Signature	40
Onboarding	40
Question Bank	40
Task List	41
Onboard Prep	44
Approving Employee Onboarding	45
Employee Actions	54
Setting up Employee Self Service – (ESS)	54
Resetting Passwords	54
Resending Welcome Email	55
Terminate Employee	56
Rehire Employee	57
Company Setup	58
Compensation Change Reason	58
Position	59
Position/Org Change Reasons	60

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



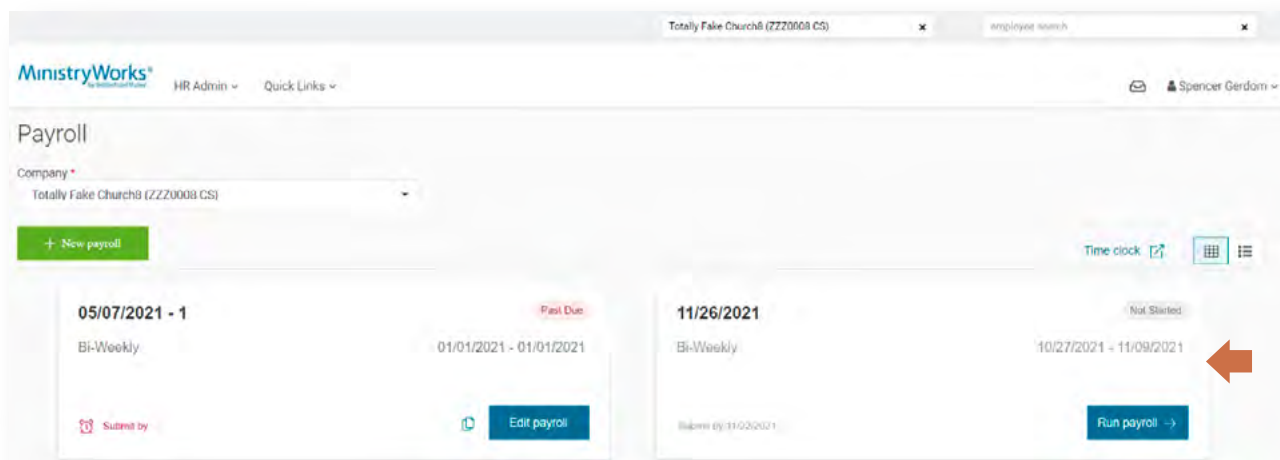
- Go to **HR Admin > Payroll > \$ Payroll**.

Create Payroll

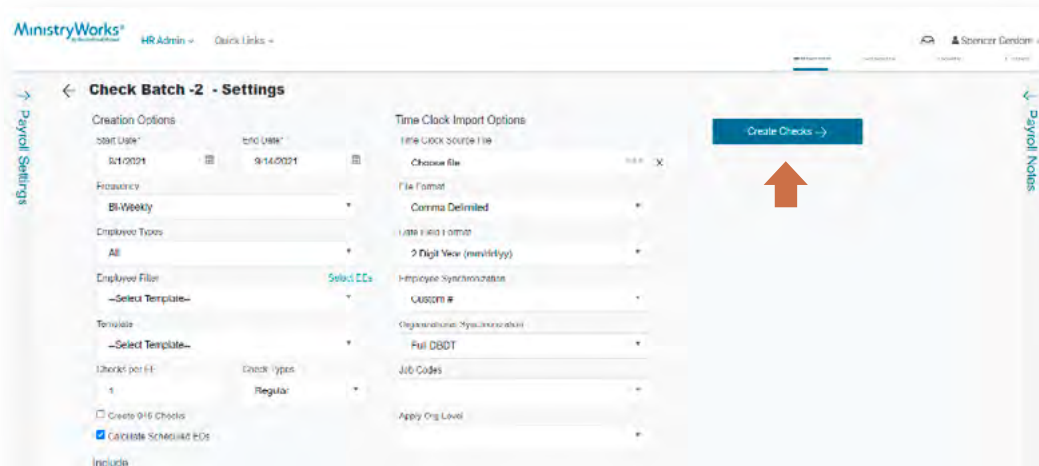
- Pay cards will populate with check date in upper left-hand corner.

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.



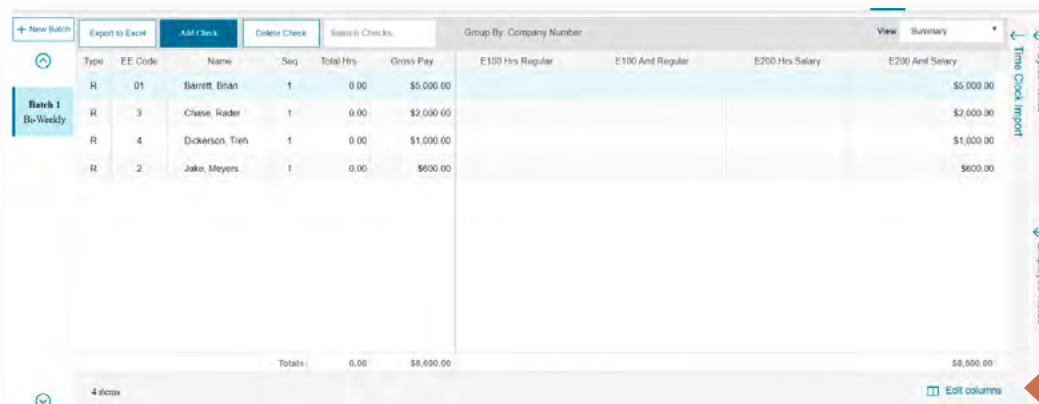
If applicable, review Payroll Notes by clicking on **Payroll Notes** section and then hide the note.



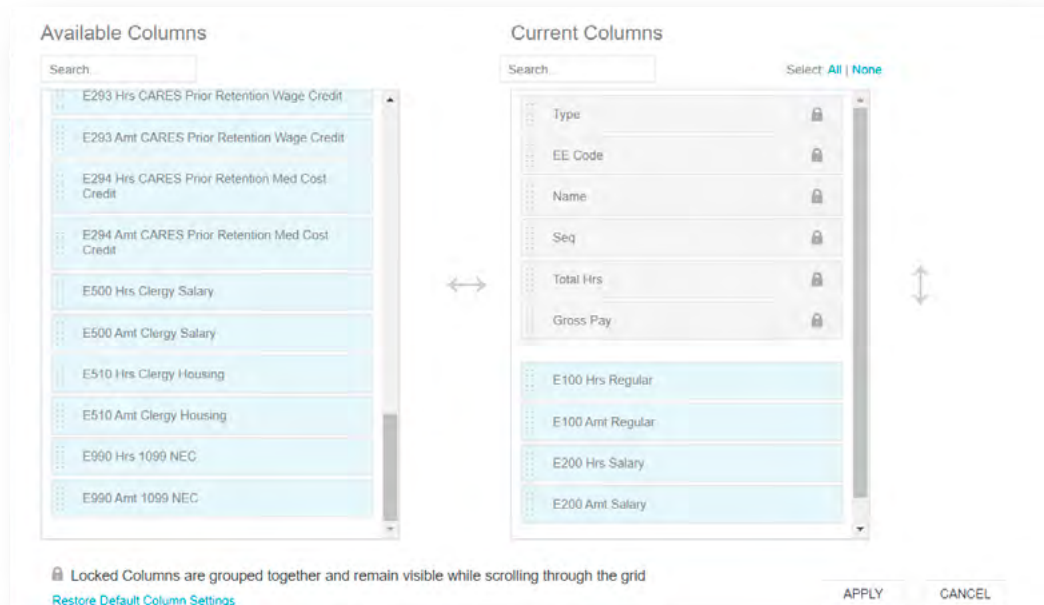
- Review the prepopulated information in the following fields: *(This information is populated based on your Pay Run Annual Calendar; if it needs changed please contact your payroll processor)*
 - Start Date** – beginning of pay period.
 - End Date** – end of pay period.
 - Frequency** – payroll frequency.
 - 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.



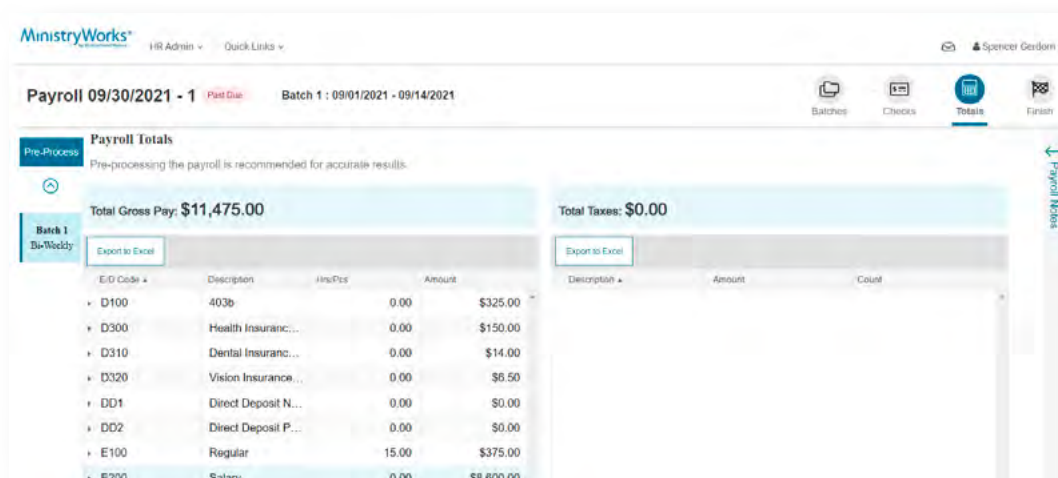
- Click the **Edit columns** in the bottom right-hand corner of the screen, and select the E/D codes from the **Available Columns** list.



- 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.

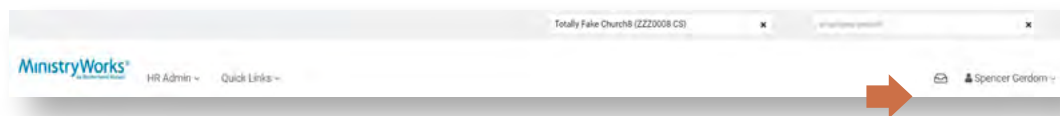
Payroll

\$ Payroll New

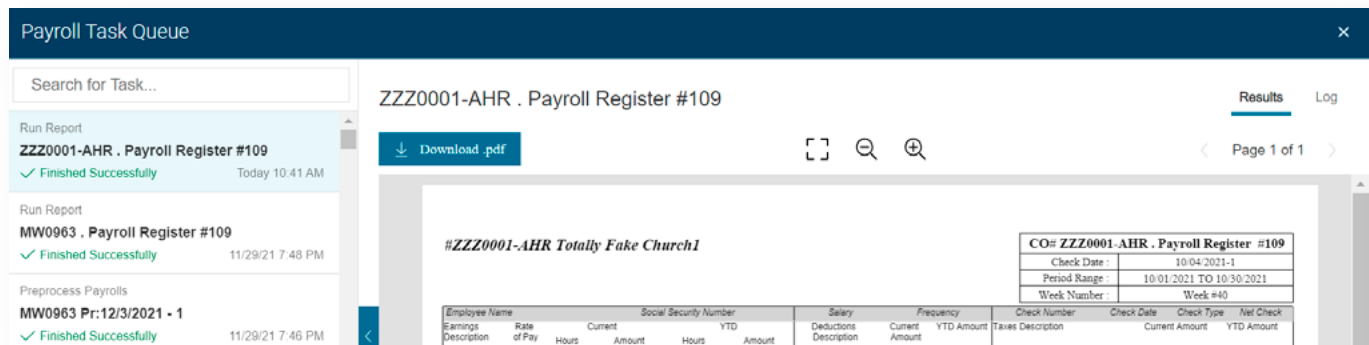
Payroll Reports New 

Check Calculator New

- 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.



Employee Name	Earnings Description	Rate of Pay	Social Security Number	Salary Deductions Description	Frequency	Check Number	Check Date	Check Type	Net Check
		Current	YTD	Current	YTD Amount				
		Hours	Amount	Amount	Amount	Taxes Description	Current Amount	YTD Amount	

- 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.

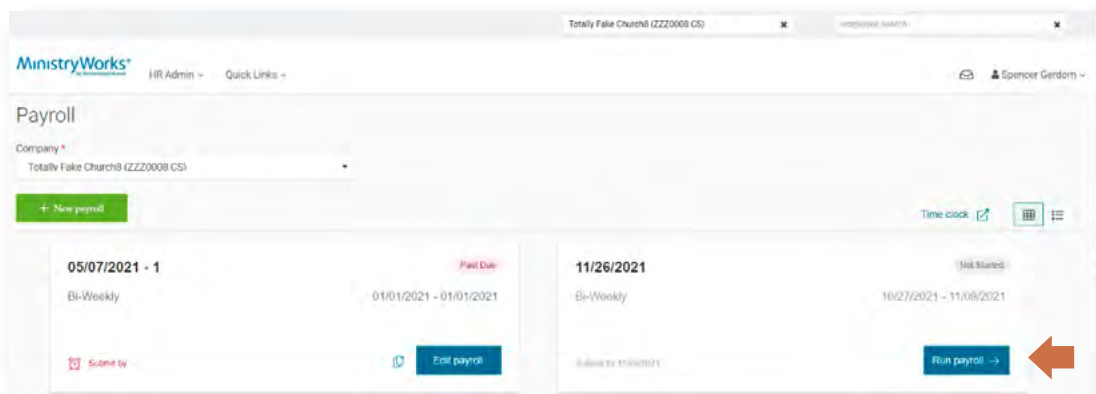
Payroll

- \$ Payroll **New** ←
- Payroll Reports **New**
- Check Calculator **New**

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

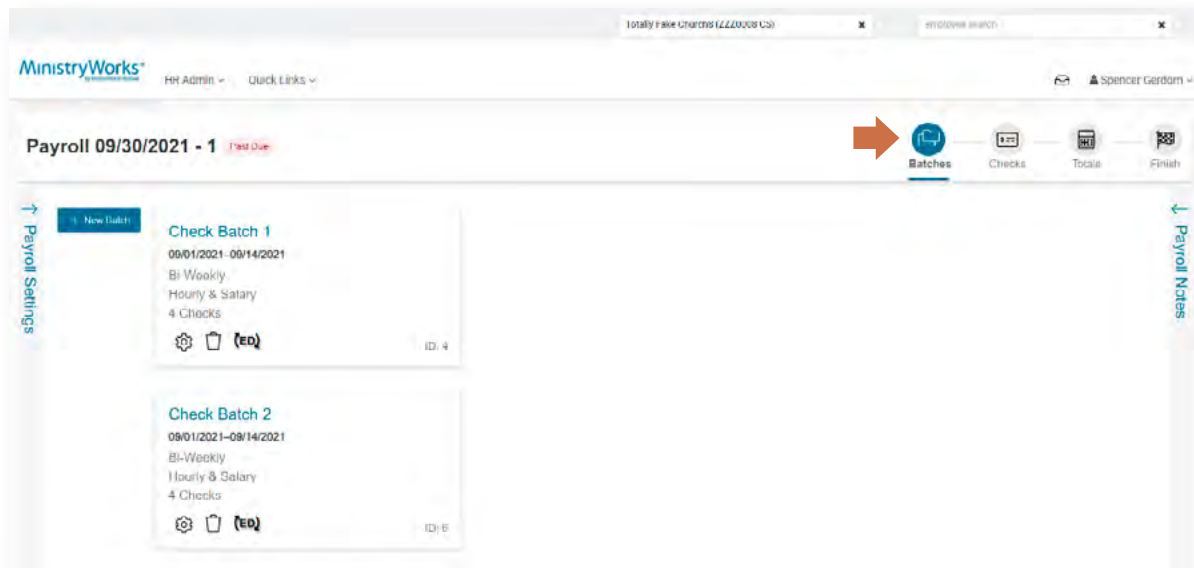
Create Payroll


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

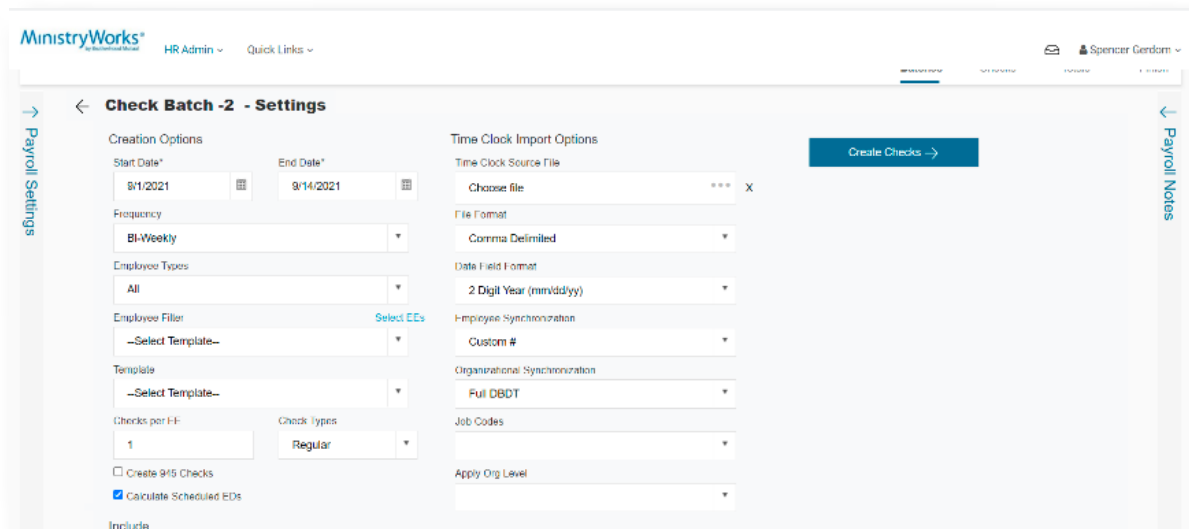


- Find the **pay card with the check date for the pay run you want to process** and click the **Run payroll** button.
- In the Check Batch Settings screen, if applicable, review Payroll Notes by clicking on **Payroll Notes** section and then hide the note.

Create Batch for 1st Pay Group

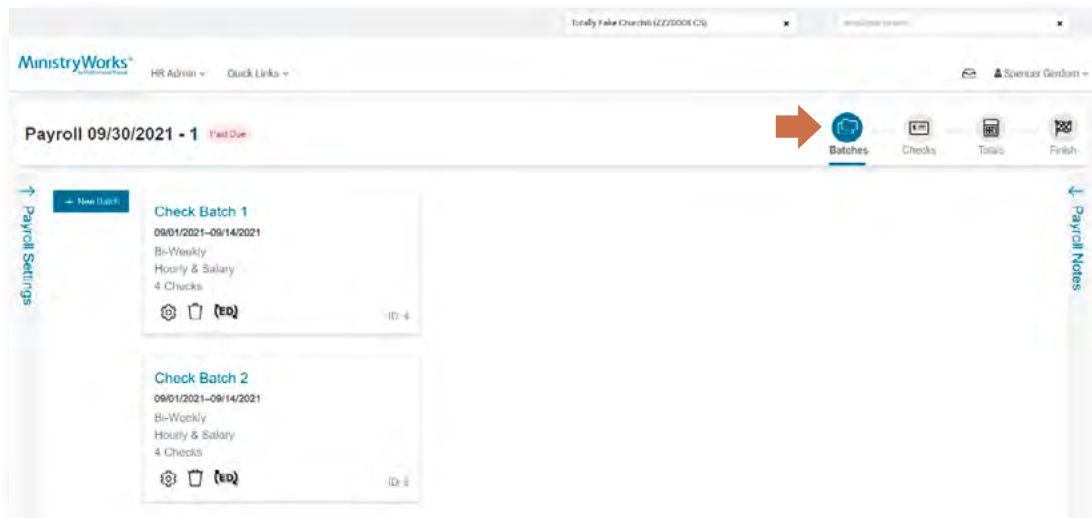


- Click on **Batches** Icon.
- Click on  for **Check Batch** – for first pay group.
- Review the prepopulated information in the following fields:
 - Start Date** – beginning of pay period.
 - End Date** – end of pay period.
 - Frequency** – payroll frequency.
 - Employee Types** – employee types to include in the payroll.

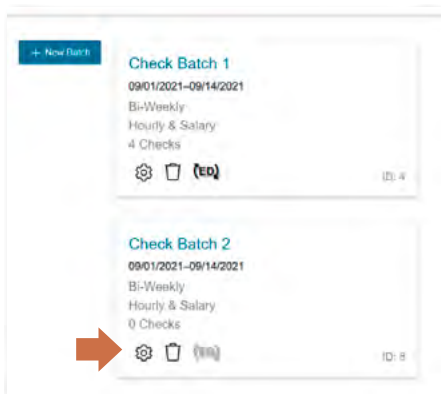



- Click on **Create Checks** to include all employees assigned to that pay group.
- When “Checks successfully created” message appears, click on **OK**.

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.


Payroll 09/30/2021 - 1 Past Due Regular | -99999987

+ New Batch Export to Excel Add Check Delete Check Search Checks... Group By: Com

	Type	EE Code	Name	Seq	Total Hrs	Gross Pay	E100 Hrs Regu
All Batches	R	01	Barrett, Brian	1	0.00	\$5,000.00	
	R	3	Chase, Rader	1	0.00	\$2,000.00	
Batch 1 Bi-Weekly	R	4	Dickerson, Treh	1	0.00	\$1,000.00	
	R	2	Jake, Meyers	1	0.00	\$1,600.00	
Batch 2 Bi-Weekly							

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!

MinistryWorks® HR Admin - Quick Links - Springer Gerdam -

Payroll 09/30/2021 - 1 Past Due Batch 1: 09/01/2021 - 09/14/2021

Batches Checks **Totals** Filters

Payroll Totals
Pre-processing the payroll is recommended for accurate results.

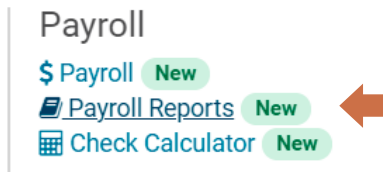
Total Gross Pay: \$11,475.00 **Total Taxes: \$0.00**

E/D Code	Description	Hrs/Pcs	Amount	Description	Amount	Count
D100	403b	0.00	\$325.00			
D300	Health Insuranc...	0.00	\$150.00			
D310	Dental Insuranc...	0.00	\$14.00			
D320	Vision Insuranc...	0.00	\$8.50			
DD1	Direct Deposit N...	0.00	\$0.00			
DD2	Direct Deposit P...	0.00	\$0.00			
E100	Regular	15.00	\$375.00			
E200	Salary	0.00	\$8,600.00			

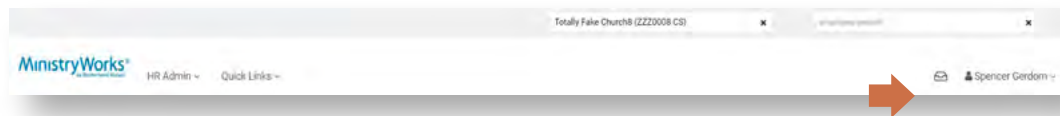
- The **Calculation Results** screen appears. Review totals of earnings, deductions and taxes.

Preview Reports

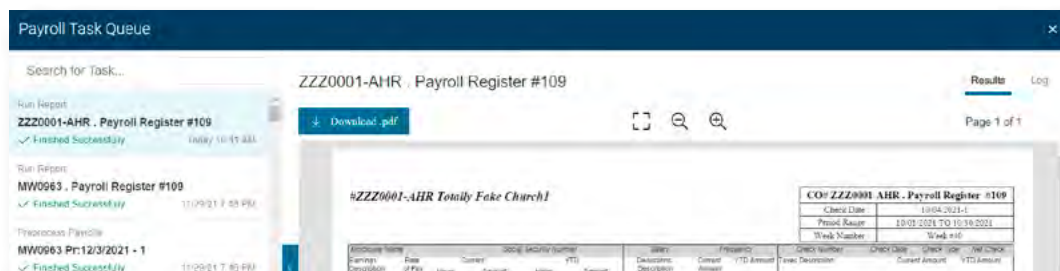
- Go to HR Admin.



- 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

Type	EE Code	Name	Seq	Total Hrs	Gross Pay	E100 Hrs Regular	E100 Amt Regular	E200 H
R	7	Atkins, Ginger	1	80.00	\$2,000.00	80.00	\$0.00	
R	01	Barrett, Brian	1	0.00	\$2,000.00			
R	8	Bob, Rob	1	0.00	\$0.00			
R	3	Chase, Rader	1	0.00	\$1,000.00			
R	4	Dickerson, Treh	1	0.00	\$1,000.00			

- 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").

Add Checks

Select a Check Type: Regular

Find and Select the Employees to use when creating checks. One check will be created for each Employee you select.

Check Creation Options

Standard Hours: No Use this Template: -Select-

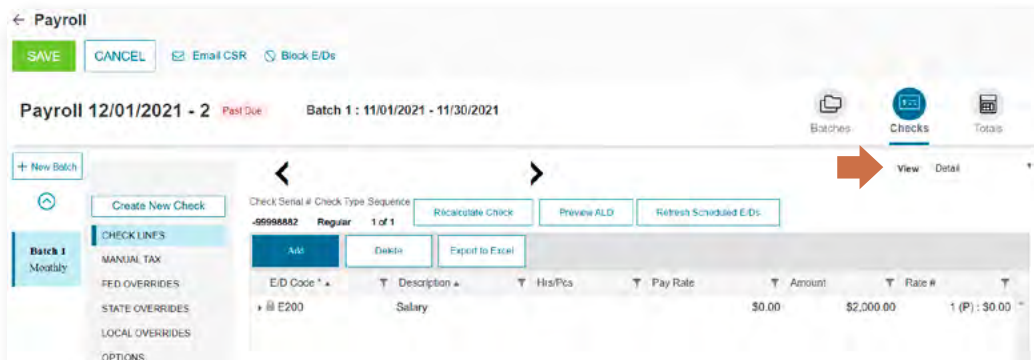
Salary Pay: No

EE #	Last Name	First Name	Middle Initial	Status	Organization ...
<input type="checkbox"/>	01	Barrett	Brian	Active	01 > Lafayette >> L...
<input type="checkbox"/>	2	Jake	Meyers	Active	01 > Lafayette >> L...
<input type="checkbox"/>	3	Chase	Rader	Active	01 > Ft. Wayne >> ...
<input type="checkbox"/>	4	Dickerson	Treh	Active	01 > Ft. Wayne >> ...
<input type="checkbox"/>	7	Alkins	Ginger	Active	01 > Ft. Wayne >> ...

Page 1 of 2 10 items

- **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**.

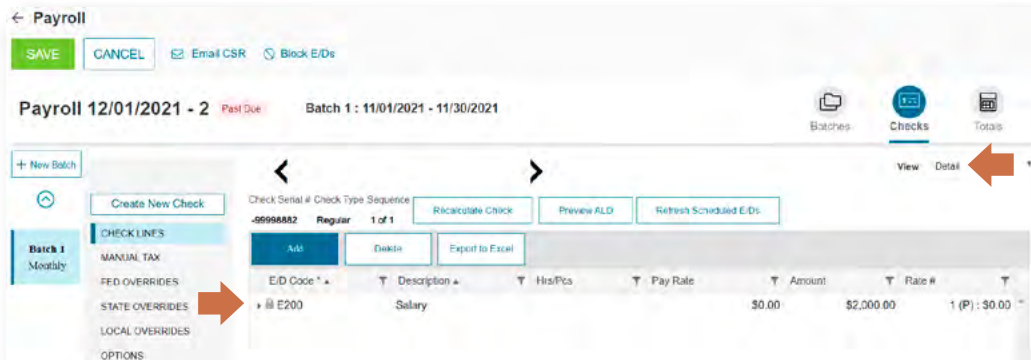
Allocate Wages to Division/Branch/Department/Team

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

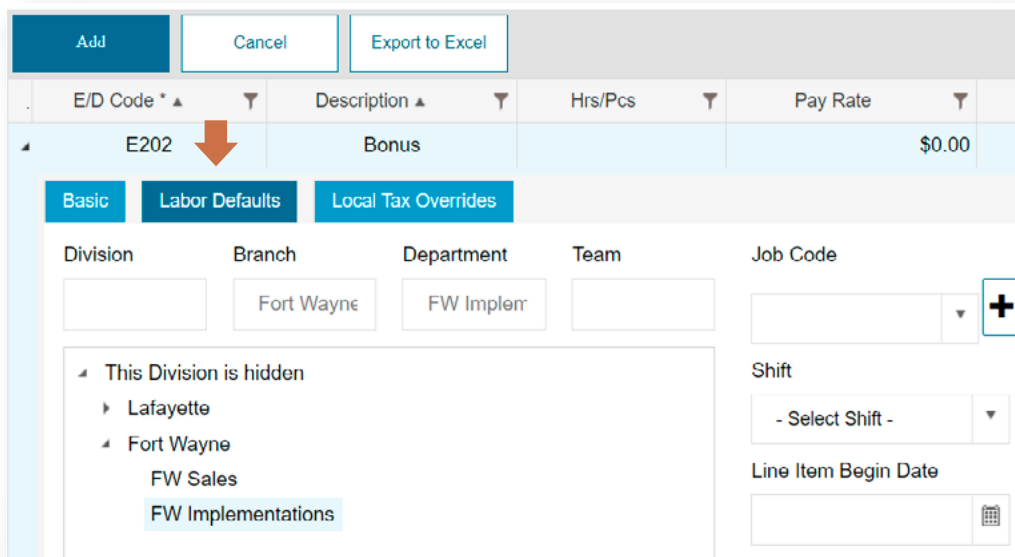
In the pay grid:

Type	FF Code	Name	Req	Total Hrs	Gross Pay	F100 Hrs Regular	F100 Amt Regular	F500 Amt Clergy Salary	F510 Amt Clergy Hrs	E200 Amt Salary
R	01	Danett, Brian	1	30.00	\$5,480.00	30.00	\$480.00			\$5,000.00
R	3	Chepe, Rader	1	0.00	\$2,000.00					\$2,000.00
R	4	Dickerson, Treh	1	0.00	\$1,000.00					\$1,000.00

- 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.

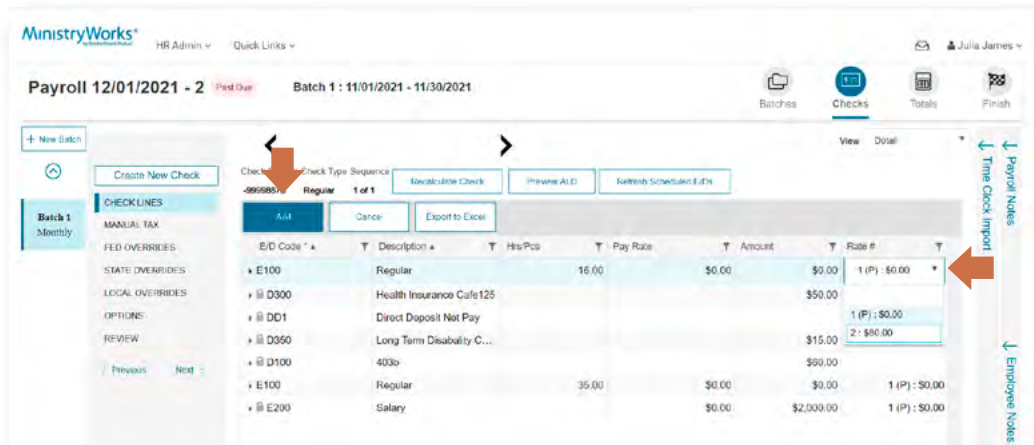
To Add an Additional Hourly Rate and Hours to Pay Grid

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

In the pay grid:

Type	FF Code	Name	Seq	Total Hrs	Gross Pay	F100 Hrs Regular	F100 Amt Regular	F150 Amt Clergy Salary	F110 Amt Clergy Hrs	E200 Amt Salary
R	01	Barrett, Brian	1	30.00	\$5,480.00	30.00	\$480.00			\$5,000.00
R	3	Chase, Rader	1	0.00	\$2,000.00					\$2,000.00
R	4	Dickerson, Tresh	1	0.00	\$1,000.00					\$1,000.00

- 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 **i** 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.

Check Calculator

Sandbox Client

EE Code - Name
Search Employee

Net Amount
 Net In Gross

Check Settings

Earnings/Deductions Federal State SUI Local Options

E/D Code *	Description	Hrs/Pcs	Pay Rate	Amount	Rate #
------------	-------------	---------	----------	--------	--------

Actions

CALCULATE
DELETE PAYROLL
PAYROLL

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™

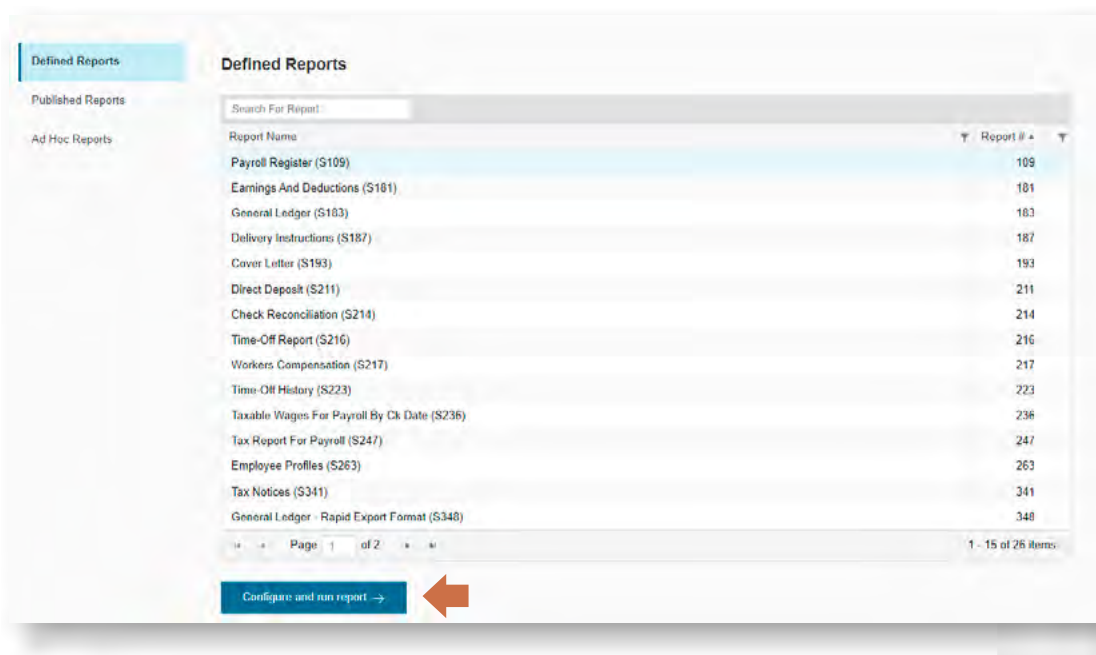
Payroll

\$ Payroll **New**

 Payroll Reports **New** ←

 Check Calculator **New**

- Click on **Payroll Reports**.



Defined Reports

Published Reports

Ad Hoc Reports

Search For Report:

Report Name	Report #
Payroll Register (S109)	109
Earnings And Deductions (S181)	181
General Ledger (S183)	183
Delivery Instructions (S187)	187
Cover Letter (S193)	193
Direct Deposit (S211)	211
Check Reconciliation (S214)	214
Time-Off Report (S216)	216
Workers Compensation (S217)	217
Time-Off History (S223)	223
Taxable Wages For Payroll By Ck Date (S236)	236
Tax Report For Payroll (S247)	247
Employee Profiles (S263)	263
Tax Notices (S341)	341
General Ledger - Rapid Export Format (S348)	348

Page 1 of 2

1 - 15 of 26 items

Configure and run report ->

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

Payroll Reports

Company *
Totally Fake Church8 (ZZZ0008 CS)

Defined Reports

Search for Report...

EXPORT LIST TO EXCEL

	Check Date	Run #	Check Period	Report #	Report Name	Type
<input type="checkbox"/>	12/31/2020	0		S4012	IN WH-1 Return-ZZZ0009 CS	TaxReturn
<input type="checkbox"/>	09/30/2020	0		S1375	NM TRD-31106 Return-ZZZ0008 CS	TaxReturn
<input type="checkbox"/>	09/30/2020	0		S1375	NM TRD-31106 Return-ZZZ0008 CS	TaxReturn
<input type="checkbox"/>	09/30/2020	0		S1375	NM TRD-31106 Return-ZZZ0008 CS	TaxReturn
<input type="checkbox"/>	09/30/2020	0		S1375	NM TRD-31106 Return-ZZZ0008 CS	TaxReturn
<input type="checkbox"/>	09/30/2020	0		S1375	NM TRD-31106 Return-ZZZ0008 CS	TaxReturn
<input type="checkbox"/>	09/30/2020	0		S1375	NM TRD-31106 Return-ZZZ0008 CS	TaxReturn
<input type="checkbox"/>	09/30/2020	0		S1375	NM TRD-31106 Return-ZZZ0008 CS	TaxReturn
<input type="checkbox"/>	09/30/2020	0		S2	Reconciliation Report-ZZZ0008 CS	TaxReturn

- 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

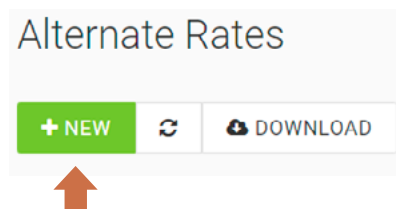


Employee Summary

- 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.



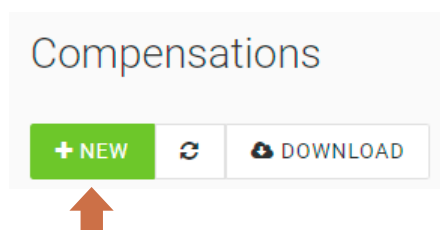
- The system displays the **Alternate Rate: New Record** screen.
- Under the **Employee** section, select the employee from the **Employee** drop-down menu if you don't have one selected yet.
- Under the **Alternate Rate Info** section; enter the rate number, start date, end date (if applicable), the 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**.

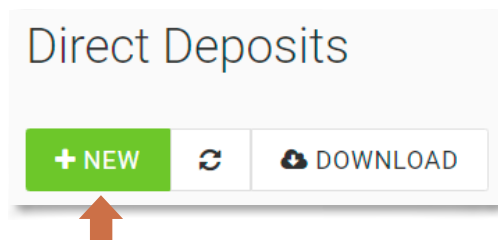
- If the employee is changing their DD1 Direct Deposit you must first end date the current direct deposit that is active.
- Open the **Direct Deposit** details screen of the current direct deposit. Add an **End Date** and click the **Save Changes** button.

The screenshot shows the 'Direct Deposit' details screen for deposit ID 123456687. The form is divided into several sections:

- Employee:** Company (Totally Fake Church5 (ZZZ0005 EV)), Employee (Smith, John (6)).
- Bank Info:** Routing Number (074000010), Account # (123456687).
- Transaction Info:** Start Date (04/13/2021), End Date (08/06/2021). A red arrow points to the End Date field.
- Details:** Prenote? (NO).
- Account Type:** Checking (YES), Savings (NO), Money Market (NO).
- Deduction Info:** Deduction Code (DD1 - Direct Deposit Net Pay).
- Approval Status:** Approved.

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.

Deposit: **123456687**

Employee Company* Totally Fake Church5 (ZZZ0005 EV)	Bank Info Routing Number* 074000010	Account Type Checking <input type="checkbox"/> NO <input checked="" type="checkbox"/> YES
Employee* Smith, John (6)	Account #* 123456687	Savings <input type="checkbox"/> NO <input type="checkbox"/> YES
Transaction Info Start Date * 04/13/2021	Details Prenote? <input type="checkbox"/> NO <input type="checkbox"/> YES	Money Market <input type="checkbox"/> NO <input type="checkbox"/> YES
End Date 08/06/2021		Deduction Info Deduction Code* DD1 - Direct Deposit Net Pay
Amount Code* Balance / Remainder		Approval Status Approved
Amount \$ Amount		

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.

Deposit: **123456687**

Employee Company* Totally Fake Church5 (ZZZ0005 EV)	Bank Info Routing Number* 074000010	Account Type Checking <input type="checkbox"/> NO <input checked="" type="checkbox"/> YES
Employee* Smith, John (6)	Account #* 123456687	Savings <input type="checkbox"/> NO <input type="checkbox"/> YES
Transaction Info Start Date * 04/13/2021	Details Prenote? <input type="checkbox"/> NO <input type="checkbox"/> YES	Money Market <input type="checkbox"/> NO <input type="checkbox"/> YES
End Date 08/06/2021		Deduction Info Deduction Code* DD1 - Direct Deposit Net Pay
Amount Code* Balance / Remainder		Approval Status Approved
Amount \$ Amount		

- 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.

ADD DOCUMENT

- 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**.

Scheduled Earnings and Deductions

Company: Church3 (ZZZ0003 CS) Employee: Lake, Meyers (2)

+ ADD NEW DELETE SAVE CHANGES CANCEL

Code	Description	Calculation Method	Amount \$	Amount %
D100	403b	% of Gross		5
D300	Health Insurance Cafe125	Fixed	25	
D310	Dental Insurance Cafe125	Fixed	5	
D320	Vision Insurance Cafe125	Fixed	3.5	
DD1	Direct Deposit Net Pay	None		
DD2	Direct Deposit Partial	Fixed		
E200	Salary	Fixed	600	
E291	CARES Retention Med Cost Credit	% of E/D Group Amt		50
E292	CARES Retention Wage Credit	% of E/D Group Amt		50
E500	Clergy Salary	Fixed	1000	

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

Scheduled Earnings and Deductions

Company: Totally Fake Church3 (ZZZ0003 CS) Employee: Lake, Meyers (2)

+ ADD NEW DELETE SAVE CHANGES CANCEL

Code	Description	Calculation Method	Amount \$	Amount %
E510	Clergy Housing	Fixed		

Basic Schedule Limits **Thresholds**

Code: E510

Description: Clergy Housing

Calculation Link: - Select E/D Group -

Amount \$:

Amount %:

Always Pay/Deduct:

Current Payroll:

Deduct Whole Check:

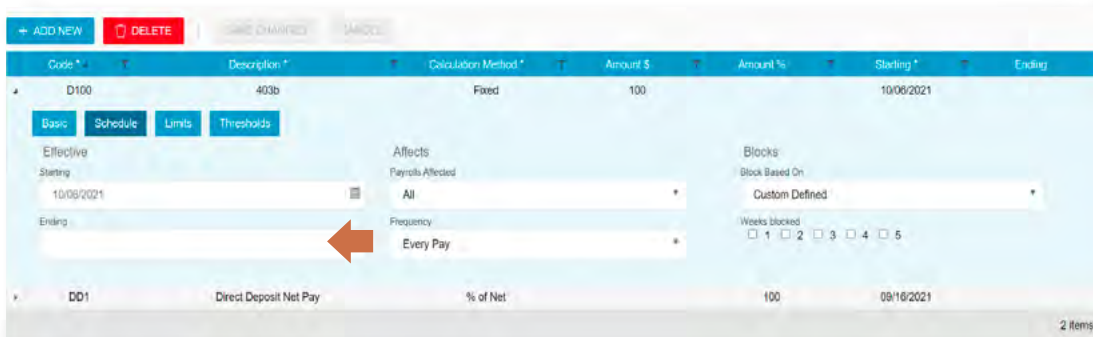
Send To: Client/Company

Reference to Display:

- 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.



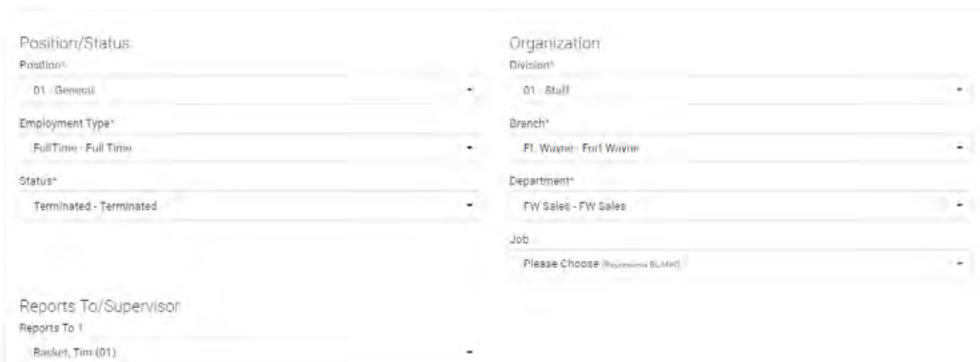
To Inactivate an Earning or Deduction:

- 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.

Tax Info: Tim Basket - 01

Details	Allowances
Federal Marital Status* Married	0
Federal Tax Type None	Total Dependents Tax Withholding \$ Total Dependent Tax Withholding
	Other Income \$ Other Income
	Deductions \$ Deductions

- 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.

The screenshot shows two side-by-side panels for tax status overrides. The left panel, titled 'Employee Tax Statuses', shows 'Federal Tax Status' as 'Include - Withhold Tax'. Below it, 'OASDI Exempt' and 'Medicare Exempt' are both set to 'YES'. The right panel, titled 'Employer Tax Statuses', shows 'FUI Rate Credit Override' as '\$ FUI Rate'. Below it, 'FUI Exempt' is set to 'NO', 'OASDI Exempt' is set to 'YES', and 'Medicare Exempt' is set to 'YES'.

- **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)

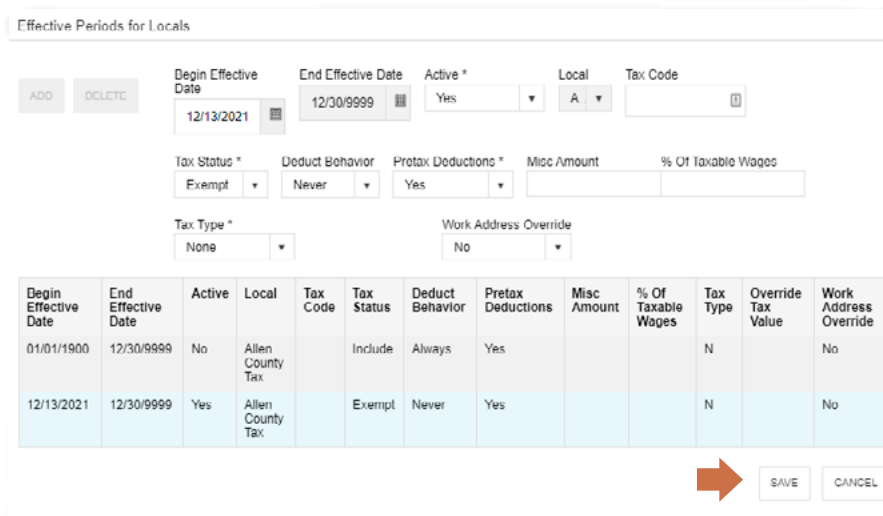
Go to **HR Admin > Employee Maintenance > Tax (Local)**.

- 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**.

MinistryWorks® HR Admin - Quick Links - [User: John James]

Employee Local Taxes

Company: Totally Fake Church3 (ZZZ003 CS) Employee: Mike Fader (3)

+ ADD NEW DELETE

Active	Local	State	County	Local Type	Tax Rate	Misc Amount	Tax Code
Yes	Allen County Non-Res. Tax	Indiana	Allen County	EE	0.0148		
Yes	Allen County Tax	Indiana	Allen County	EE	0.0148		
Yes	Tippecanoe County Tax	Indiana	Tippecanoe County	EE	0.0128		

Overrides: Pre-tax Deductions: Yes, Tax Type: None, % Of Taxable Wages, Work Address Override: No

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

To Attach a New Resident Local Tax:

Active: Yes

Local: Tippecanoe County Tax

State: Indiana

County: Tippecanoe County

Local Type: EE

Tax Rate: 0.0128

Misc Amount:

Tax Code:

Tax Status: Include

Deduct Behavior: Always

Overrides: Pre-tax Deductions: Yes, Tax Type: None, % Of Taxable Wages, Work Address Override: No

- 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:

The screenshot shows a web-based interface for configuring tax settings. The main area is divided into several sections: 'State' (IN), 'SUI' (IN), 'SDE' (IN), 'Home' (Yes), 'Marital Status' (Claiming 0), and 'Tax Exemptions'. The 'Overrides' section on the right is highlighted with a red box and contains a dropdown menu for 'Tax Type' with 'Additional Amount' selected, and two input fields for 'Amount' and 'Minimum Wage'.

- 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

Company

- Home
- Home Dashboard Setup

- Announcements
- Company Documents
- Company List
- User List

Announcements

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

The screenshot shows a table with the following columns: Actions, Post Date, Title, On, High Priority, and Expire Date. A single row is visible with the following data: Actions (a red square icon), Post Date (10/18/2021), Title (Company Picnic), On (a green YES button), High Priority (a red NO button), and Expire Date (12/21/2021). Below the table is a pagination control showing 'Page: 1 of 1', 'GO', 'Page size: 1', and 'CHANGE'.

Actions	Post Date	Title	On	High Priority	Expire Date
	10/18/2021	Company Picnic	<input type="button" value="YES"/>	<input type="button" value="NO"/>	12/21/2021

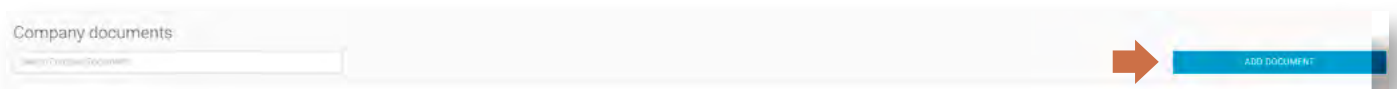
- Click on **+New**

The screenshot shows the 'Announcement: NEW RECORD' form. The form is divided into two main sections: 'Company' and 'Announcement Posting'. The 'Company' section includes a dropdown menu for 'Company' (currently showing 'Totally Fair Church (ZZZ0003 CS)'), a 'Status' dropdown (set to 'Active'), a 'High Priority' dropdown (set to 'No'), and date fields for 'Post Date' (12/14/2021) and 'Expiration Date'. The 'Announcement Posting' section includes a 'Title' field and a 'Detail' field with a rich text editor. Below these fields is an image upload area with the text 'Images (only JPG, PNG, and GIF extension files allowed here)', 'Browse or Drag/Drop images', and 'Temporarily Uploaded Images'. A 'Browse' button is located at the bottom right of the image upload area. At the bottom of the form, there are three buttons: 'SAVE CHANGES', 'SAVE & POST RECORD', and 'CLOSE'.

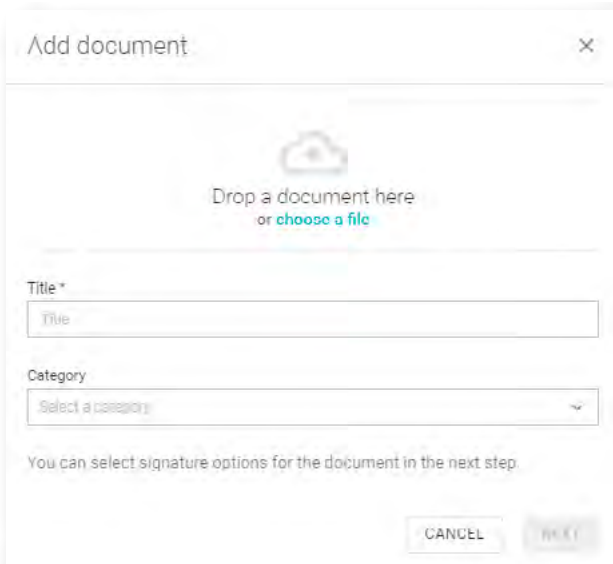
- Enter **Title**.
- Enter **Detail of Announcement** that will be posted.
- Under Dates – enter **Post Date** of when announcement should be posted to the dashboard.
- Enter **Expiration Date** of when announcement should be removed from the dashboard.
- Add Images (if applicable).
- Click **Save Changes**.

Uploading Company Documents

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



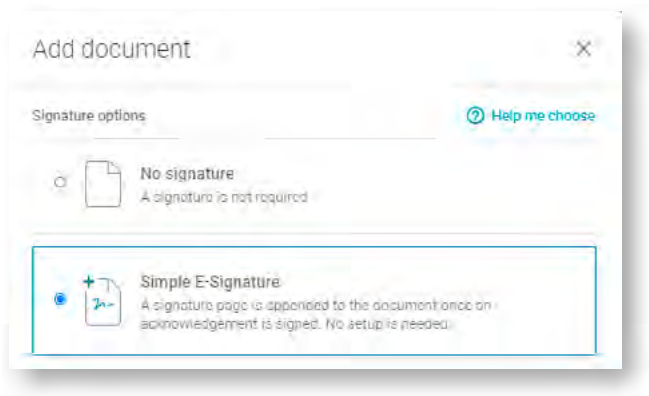
- Click **Add Document**.
- Upload a document.



- 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

Onboarding

- ? Question Bank
- Task List
- Dashboard
- OnBoard Prep
- Onboarding Dashboard

Steps to Complete before onboarding a new hire

Question Bank

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

- Click **+New**.

Company
Company*
Totally Fake Church3 (ZZZ0003 CS)

Type/Status
Question Type*
Please Choose (Requires S.A.A.R.)

Question
Question Title*
Question Title
Question Title is required
Question Text
Question Text

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

Multiple Choice Answers

New Multiple Choice Answer

Answer Text Here +

- 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.

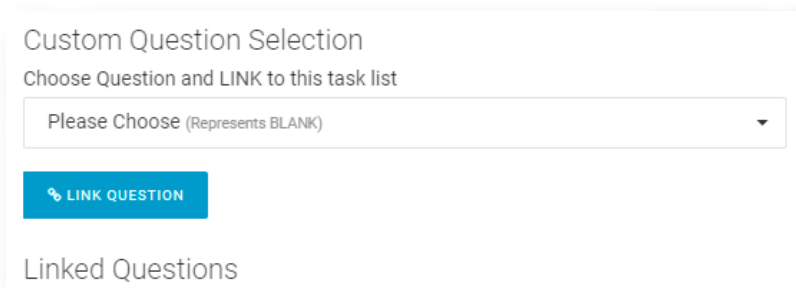


- **Welcome and End Notes:**

- 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.

Onboarding

- ? Question Bank
- Task List
- Dashboard
- OnBoard Prep
- Onboarding Dashboard

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

The screenshot shows the 'Onboarding Prep Process' interface in the MinistryWorks HR Admin system. The page title is 'Onboarding Prep Process'. Below the title, it indicates 'STEP 1 - Type of Hire' and provides a brief instruction: 'The information below helps to guide you through the rest of the Onboarding process.' The form contains several fields:


- Company***: A dropdown menu with 'Totally Fake Church3 (ZZZ0003 CS)' selected.
- Tax Form (Type of Hire)***: A dropdown menu with 'Please Choose (Requires BLANK)' selected.
- Hire Date***: A date field with '08/03/2021' entered.
- Position+***: A dropdown menu with 'Please Choose (Requires ELAW)' selected.
- Employee ID***: A text field with '14' entered.
- Onboarding Task List***: A dropdown menu with 'Please Choose (Requires ELAW)' selected.

- **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**

STEP 2 - Fill out Employee information
Complete each section. Don't worry, we'll tell you if you forget anything important.

Profile

Contact

First Name*
First Name 
First Name is required

Last Name*
Last Name

Email*

Clock Number

Compensation

Pay Type*
Please Choose (Represents BLANK)


Rate (Hourly or Salary per pay period)*
\$

Payroll

Pay Frequency*
Please Choose (Represents BLANK)

Standard Payroll Hours
Standard Hours

Benefits

Eligible For Benefits
Eligible For Benefits 

Medical Coverage Offered
None - No Medical Coverage Offered

Benefit Class / Eligibility Group
Please Choose (Represents BLANK)

- **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.

Taxes

State Tax
State*
Please Choose (Represents BLANK)

SUI State*
Please Choose (Represents BLANK)

SDI State*
Please Choose (Represents BLANK)

Employment

Position/Status
Employment Type*
Please Choose (Represents BLANK)

Status*
Please Choose (Represents BLANK)

FLSA Classification*
NonExempt - Entitled To Overtime Pay (FLSA)

Eligible for Rehire
NO YES

Organization

Division*
Please Choose (Represents BLANK)

Branch*
Please Choose (Represents BLANK)

Department*
Please Choose (Represents BLANK)

Compliance

EEO Category+
Please Choose (Represents BLANK)

Worker Comp Code+
Please Choose (Represents BLANK)

Reports To/Supervisor

Reports To 1*
Please Choose (Represents BLANK)

Reports To 2
Please Choose (Represents BLANK)

Reports To 3
Please Choose (Represents BLANK)

Supervisor (SC) ⓘ
Supervisor (SC)

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

Integration

SUBMIT ONBOARDING REQUEST

SUBMIT AND START ANOTHER

LET ME START OVER


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

OnBoarding Dashboard

ONBOARDING PREP

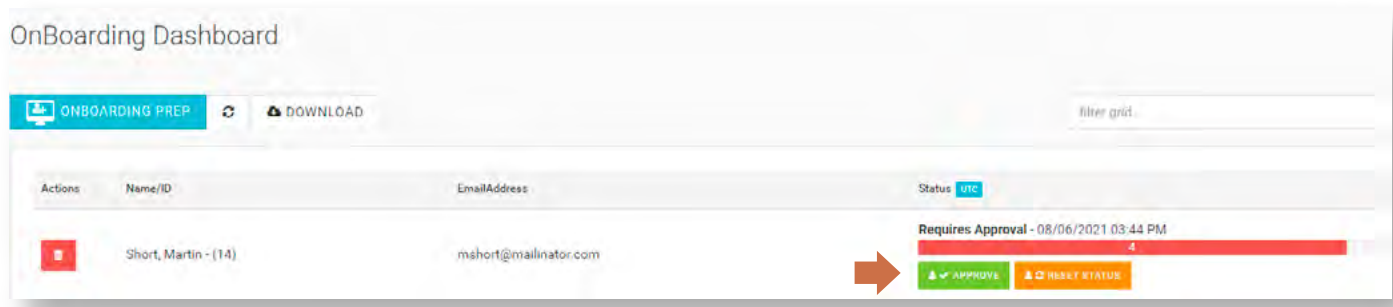
DOWNLOAD

filter grid..

Actions	Name/ID	Email/Address	Status UTC
	Shurt, Martin - (14)	mshurt@mailinator.com	Prepped - 08/06/2021 03:35 PM

- 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**.

The screenshot shows the 'Direct Deposits' form. It includes fields for 'Direct Deposit #1', 'Routing Number' (07400010), 'Account #' (22223111), 'Checking' (selected), 'Savings' (not selected), 'Money Market' (not selected), 'Amount Code' (Balance / Remainder), 'Amount*' (with a '\$' icon), 'Deduction Code' (Please Choose), 'Approval Status*' (Please Choose), and 'Prenote?' (selected). At the bottom, there are two buttons: 'CONTINUE APPROVAL' (highlighted with a red arrow) and 'CANCEL APPROVAL'.

- 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

Employee Maintenance

Employee Summary

- Alternate Rate
- Compensation
- Direct Deposit
- Document (employee)
- Document (company)
- Emergency Contact
- Employment Detail
- I-9
- Pay Stub
- Tax (Federal)
- Tax (State)
- Tax Form
- Time Off
- W4s

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

Name	Employee ID	Hire Date (orig)	I-9 Status	I-9 Assigned	St
Short, Martin	14	08/06/2021	8/6/2021 Incomplete	NO YES	Ar

- 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 of 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	List B Identity	List C Employment Authorization
Document Title Please Choose (Represents BLANK)	Document Title Please Choose (Represents BLANK)	Document Title Please Choose (Represents BLANK)
Issuing Authority Please Choose (Represents BLANK)	Issuing Authority Please Choose (Represents BLANK)	Issuing Authority Please Choose (Represents BLANK)
Document Number Document #	Document Number Document #	Document Number Document #
Expiration Date (if any)(mm/dd/yyyy) Expiration Date	Expiration Date (if any)(mm/dd/yyyy) Expiration Date	Expiration Date (if any)(mm/dd/yyyy) Expiration Date
Document Title Please Choose (Represents BLANK)	Additional Information Additional Information	
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.**

E-Signature
Type your name here*
E-Sign Name
Today's Date (mm/dd/yyyy)*
08/06/2021

Employer or Authorized Representative
Title of Employer or Authorized Representative*
Title
Last Name of Employer or Authorized Representative*
James
First Name of Employer or Authorized Representative*
Julia

Business/Organization
Employer's Business or Organization Name*
Totally Fake Church3
Employer's Business or Organization Address (Street Number and Name)*
Totally Fake Church
City or Town*
Ft. Wayne
State*
IN - INDIANA, US
ZIP Code*
46804

SAVE AND GENERATE I-9 (SEC 2)

- 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.

Employee Maintenance

Employee Summary

- Alternate Rate
- Compensation
- Direct Deposit
- Document (employee)
- Document (company)
- Emergency Contact
- Employment Detail
- I-9
- Pay Stub
- Tax (Federal)
- Tax (State)
- Tax Form
- Time Off
- W4s

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

Overrides and Exemptions

Employee Tax Statuses

Federal Tax Status

Include - Withhold Tax

OASDI Exempt

NO

YES

Medicare Exempt

NO

YES

Employer Tax Statuses

FUI Rate Credit Override

\$ FUI Rate

FUI Exempt

NO

YES

OASDI Exempt

NO

YES

Medicare Exempt

NO

YES

- 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.

Employee Maintenance

Employee Summary

- Alternate Rate
- Auto Labor Distribution **New**
- Child Support **New**
- Compensation
- Direct Deposit
- Document (employee)
- Document (company)
- Earnings and Deductions **New** ←
- Emergency Contact
- Employment Detail
- I-9
- Pay Stub
- Time Off Accrual **New**
- Tax (Federal)
- Tax (Local) **New**
- Tax (State)
- Tax Form
- Time Off Requests
- W4s

- Click on **Earnings and Deductions**.

Scheduled Earnings and Deductions

Company *
Totally Fake Church3 (ZZZ0003 CS)

Employee *
Lake, Meyers (2)

+ ADD NEW DELETE SAVE CHANGES CANCEL

Code *	Description *	Calculation Method *	Amount \$	Amount %
D100	403b	% of Gross		5
D300	Health Insurance Cafe125	Fixed	25	
D310	Dental Insurance Cafe125	Fixed	5	
D320	Vision Insurance Cafe125	Fixed	3.5	
DD1	Direct Deposit Net Pay	None		
DD2	Direct Deposit Partial	Fixed		
E200	Salary	Fixed	600	
E291	CARES Retention Med Cost Credit	% of E/D Group Amt		50
E292	CARES Retention Wage Credit	% of E/D Group Amt		50
E500	Clergy Salary	Fixed	1000	

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

MinistryWorks®
HR Admin - Quick Links -

Scheduled Earnings and Deductions

Company *
Totally Fake Church3 (ZZZ0003 CS)

Employee *
Lake, Meyers (2)

+ ADD NEW DELETE SAVE CHANGES CANCEL

Code *	Description *	Calculation Method *	Amount \$	Amount %
E510	Clergy Housing	Fixed		
D100	403b	% of Gross		5
D300	Health Insurance Cafe125	Fixed	25	
D310	Dental Insurance Cafe125	Fixed	5	
D320	Vision Insurance Cafe125	Fixed	3.5	
DD1	Direct Deposit Net Pay	None		
DD2	Direct Deposit Partial	Fixed		

Basic Schedule Limits Thresholds

Code:

Description: Clergy Housing

Calculation Method: Fixed

Always Pay/Deduct: Current Payroll

Deduct Whole Check: No

Send To: Client/Company

Reference to Display on Check:

Code Description

E320	GTL Imputed Value
E450	Memo
E500	Clergy Salary
E510	Clergy Housing
E990	1099 Earnings

E/D Group: - Select E/D Group -




Amount \$

Amount %

- 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

Employee Actions

-  Add New Hire
-  Self-Service Setup
-  Terminate Employee

Setting up Employee Self-Service:

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

Self-Service Setup

Company/Employees
Choose a company, assign default settings, and confirm list of employees to be setup for Self-Service. The default list of employees includes all currently **ACTIVE** employees who do NOT currently have Self-Service setup for them. If the employee does NOT currently have an email address on record, they also will not appear in this list. If there are employees initially listed on the EXCLUDED list, these employees have something invalid about them such as duplicate email addresses. Once the process is started, it will also verify any duplicate emails as this is used for the USERNAME in the system.

Company*
Totally Fake Church3 (ZZZ0003 CS)

Default settings for new Self-Service users
Send Welcome Email
NO YES

Timezone*
Please Choose (Required SLAMP)

Assign a Role*
Please Choose (Required SLAMP)

Employees to be setup with Self-Service

Employee	Email
Harding, Joshua (17)	jharding231@mailinator.com

Employees EXCLUDED from Self-Service setup

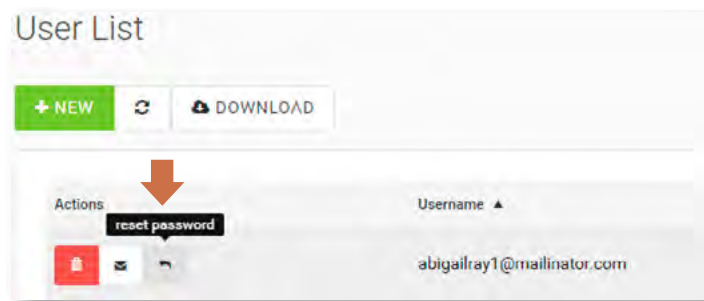
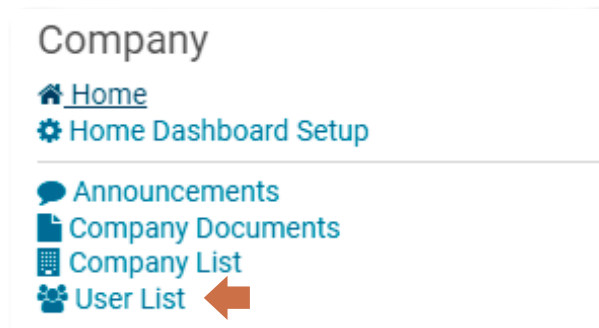
Employee	Email
----------	-------

SETUP SELF-SERVICE

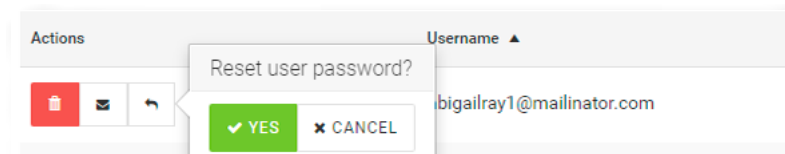
- Ensure your ministry's name is in the **Company** search & **Company** fields.
- **Timezone** – Select Eastern timezone.
- **Assign a Role** – Select **"MWxxxx – Base User (Level =10)**.
- **Employees to be setup with Self-Service:**
 - If you do NOT want the employee set up, click on the trash can 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.

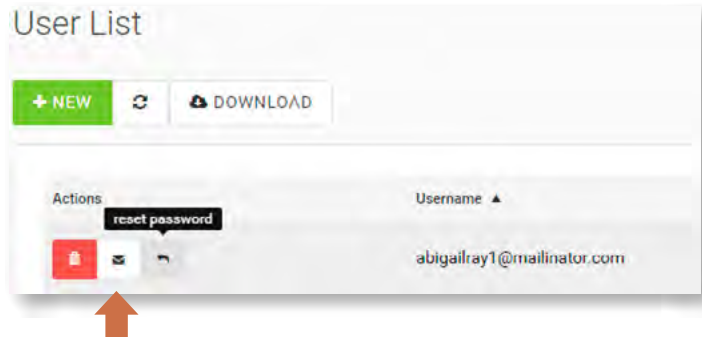
Resending Welcome Email

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

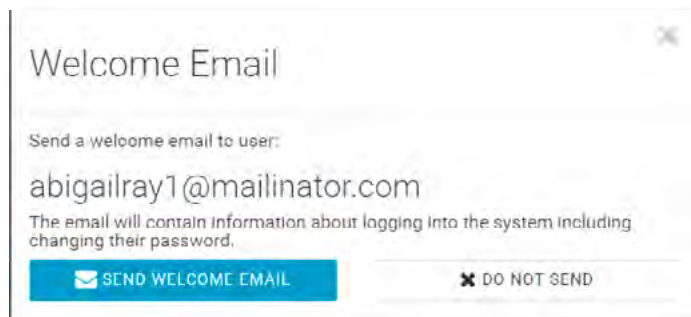
Company

- [Home](#)
- [Home Dashboard Setup](#)

- [Announcements](#)
- [Company Documents](#)
- [Company List](#)
- [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.**

Employee Actions

-  Add New Hire
-  Self-Service Setup
-  Terminate Employee

Termination Process

STEP 1 - Employee Info
The information below helps to guide you through the rest of the Termination process. Remember, you can only terminate a current ACTIVE employee.

Company*
Totally Fake Church3 (ZZZ0003 CS)

Employee*
Darling, Rosland (07)

Termination Date*
12/16/2021

LET'S BEGIN TERMINATION →

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

Termination Process

STEP 1 - Employee Info
The information below helps to guide you through the rest of the Termination process. Remember, you can only terminate a current ACTIVE employee.

Company*
Totally Fake Church3 (ZZZ0003 CS)

Employee*
Darling, Rosland (07)

Termination Date*
12/16/2021

STEP 2 - Fill out Termination information
Choose an appropriate status and optionally provide a reason and comment. Don't worry, we'll tell you if you forget anything important.

Employment
Status*
Please Choose (Reasons: BLANK)

Termination Reason
Please Choose (Reasons: BLANK)

Eligible for Rehire
NO YES

Submit Termination

I DID SOMETHING WRONG... LET ME START OVER

- 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**.

Totally Fake Church5 (ZZZ0005 EV) x → Barrett, Brian (01) x

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

Employment Detail

ADD Position/Organization

If you would like to add a Position/Organization record, please choose a company and employee to give a better context for the effective date that you will be choosing. We will be copying information from the previous effective dated record, so please keep that in mind when choosing an effective date. You cannot pick a date that would become the first historical dated record for this employee. Also remember that it is NOT a good idea to have multiple records for the same employee on the same day. The system can get confused on which one should be current/active.

If you wish to re-hire (or add any record) for an inactive employee, please use the top employee search to find the inactive employee rather than the dropdown selection.

Company* Totally Fake Church5 (ZZZ0005 EV) Employee* Barrett, Brian (01)

Effective Date* 08/04/2021

Is this a RE-HIRE? NO YES

LET'S BEGIN ADDING A POSITION/ORGANIZATION →

- 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**.

Position/Status

Position* 1 - Pastor

Employment Type* FullTime - Full Time

Status* Active - Active

- 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 employee 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

- Company Setup
- ⚙ Compensation Change Reason
 - ⚙ EEO
 - ⚙ Employment
 - ⚙ Ethnicity
 - ⚙ Frequency
 - ⚙ Position
 - ⚙ Position/Org Change Reason
 - ⚙ Status
 - ⚙ Termination Reason
 - ⚙ Worker Comp

Compensation Change Reason

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

- Click **+New**.

Compensation Change Reason: **NEW RECORD**

Company
Company*
Trinity Park Church (ZZZ0033 C3)

Type Info
Code*
Code is required
Description
Description

Type Status
Active
Priority
Priority



SAVE CHANGES | GO TO NEXT RECORD

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

Position

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

Position Types

+ NEW   DOWNLOAD

- Click **+New**.

Position Type: **NEW RECORD**



Company Company* Totally Fake Church3 (ZZZ0003 CS)	Type Info Code* Code: Title: Title:	Type Status Active NO YES Budgeted NO YES Priority Priority
Additional Info		
Dates Approved Date Approved Date Effective Date Effective Date Closed Date Closed Date	Assignments Pay Grade + Please Choose (Business Unit) EEO Class + Please Choose (Business Unit) Worker Comp Code + Please Choose (Business Unit) Supervisor: Please Choose (Business Unit)	Other FTE % FTE OT Exempt NO YES

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

Position/Org Change Reasons

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

Position/Org Change Reasons

+ NEW   **DOWNLOAD**

- Click **+New**.

Position/Org Change Reason: **NEW RECORD**

Company	Type Info	Type Status
Company*	Code*	Active
Totally Fake Church3 (ZZZ0003 CS)	Date	NO YES
	Description	Priority
	Description	Priority

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