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USER GUIDE

Employee Maintenance

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- Page 24 Scheduling/ T&A Related
- Page 25 Wage Rates and Annual Salary



Landing Page

C Edit filters	e										
Find an Employee			Show	ving 705 Emplo	yees						
mployee	Status	Group	Branch	Department	Occupation	Class	WCB Class	Work Group	Shift Code	Union/ Association	Vacation Plan
000004 Smith, Allister	ACT	н	MS	PCPQ	REC	F	AB	DAY	0600	A	-
<u>000010</u> Downy, Jane	ACT	s	ON	x	x	F	AB	х	-	x	LLD1
<u>000011</u> Banner, Bruce H.	ACT	5	AB	TRNS	TECH	x	BC	-	-	-	-
000012 Jones, Brock	ACT	5	x	x	x	x	AB	-	-	-	-
<u>000013</u> Mester, Maria	ACT	5	x	x	x	x	AB	-	-	-	-

When you log in, you will land on the Employee Profiles Screen. All employees will be listed. If your selection is limited, review and update your filters by selecting EDIT FILTERS. Type in the search bar to narrow down your results to search for a specific name or employee, or select from the list.

Select NEW EMPLOYEE to create a new employee profile.



Step 1: Create New Employee



There are 4 options for entering a new employee

- 1. Using the next available employee ID number in sequence
- 2. Manually assign employee ID number
- 3. Create a new employee profile using an existing employee as a template. Uses the next ID number in sequence
- 4. Create a new employee profile using an existing employee as a template. Manually assign the user ID.

For the purposes of this guide, we will be using option 1, Create new Employee with the next available ID in sequence. Select as applicable to you.



Step 1a: Create New Employee

	Create a ne Employee ID: 000022	w employee	✓ Save X Ca	ancel	
	General				
w employee	First Name:		SIN:	required	
	Middle Initial:		Gender:		•
	Last Name:		Termination Reas	on:	Ŧ
	AKA Name:		ROE Reason:		*
	Former Name:		Suspend Record:	No	*
	Status:	-			
	Status: Contact Suite/Apt: Address:		Phone (Work) :	Ext.	
	Status: Contact Suite/Apt: Address: City:		Phone (Work) : Phone (Home) :	Ext.	
	Status: Contact Suite/Apt: Address: City: Province (Home):	Alberta	Phone (Work) : Phone (Home) : Phone (Alternate)	Ext.	
	Status: Contact Suite/Apt: Address: City: Province (Home): Province (Tax):	Alberta -	Phone (Work) : Phone (Home) : Phone (Alternate) Email:	Ext. Ext.	
	Status: Contact Suite/Apt: Address: City: Province (Home): Province (Tax): Province (Work):	Alberta - Alberta - British Columbia -	Phone (Work) : Phone (Home) : Phone (Alternate) Email: Email (Alternate):	Ext. Ext.): Ext.	

Enter new employee information as applicable

Red fields are required information, and the record will not save without them. This includes employee SIN, and birth date.

Although not mandatory, it is essential that you add the group, branch and department upon initial set up. If you or your users are limited in user permissions and the record is saved without an identifier, you may not be able to access the record.

Initial set up screens include: General Contact Employment Remuneration Benefits Scheduling Dates Employee Portal



Employee Record



Main Profile Allocations Audit Log Inquiry Company Property Registry Dates Direct Deposit Directives Emergency Contacts Events Exclusion Item Codes Government Related Organizational Chart Pay History Pay Rates Related Personal Choice Items Training & Qualifications Recurring Pay Remarks Scheduling T&A Related Wage Rates & Annual Salary Once the employee record has been saved, the Detailed Maintenance Screens will now be available to you. The following pages of this guide will go step by step through each item. Not all screens may be applicable to you. If there is a screen you do not have but wish to, please contact support@payrollguardian.com



ALLOCATIONS

To automatically allocate earnings to certain Cost Centers for the purpose of the General Ledger.

Active Employee Alvin Reid Begin Date Begin Date Begin Date	End Date You can a Enter a be do not req	Department ? add unlimit egin date f juire a spe	occupat ? ted all for eve	tion fillocation	Branch ? • tions	Misc. Qu ? to an d, as	emp well	Task ? • loyee as an	Employee T	ype E	Employee GL Qualifier ?	Factor 0.00 /ays equal	Remarks
Alvin Reid Main Profile Allocations Audit Log Inquiry Company Property Registry Dates Direct Deposit Directives Emergency Contacts Events Exclusion Item Codes	You can a Enter a be do not req	? • add unlimit egin date f juire a spe	? ted all for eve	llocat very r	? •	? to an d, as	emp well	? • loyee as an	? , as long	, as able	?	0.00	Is 100%
Main Profile Allocations Audit Log Inquiry Company Property Registry Dates Direct Deposit Directives Emergency Contacts Events Exclusion Item Codes	You can a Enter a be do not req	add unlimit egin date f juire a spe	ted all for eve	llocat rery r field	tions	to an d, as	emp well	loyee as an	, as long	g as able	the Factor alv	vays equal	Is 100%
llocations udit Log Inquiry ompany Property Registry ates irect Deposit Directives mergency Contacts vents cclusion Item Codes	You can a Enter a be do not req	add unlimit egin date f juire a spe	ted all for eve	llocat rery r field	itions recore	to an d, as	emp well	loyee as an	, as long	g as able	the Factor alv	ays equal	Is 100%
udit Log Inquiry company Property Registry lates lirect Deposit Directives mergency Contacts vents xclusion Item Codes	You can a Enter a be do not req	add unlimit egin date f juire a spe	ted all for eve ecific f	llocat rery r field	itions recore	to an d, as	emp well	loyee as an	, as long v applic	g as able	the Factor alv	ays equal	Is 100%
ompany Property Registry ates irect Deposit Directives mergency Contacts vents xclusion Item Codes	Enter a be do not req	egin date f juire a spe	for eve ecific f	ery r field	recor	d, as	well	as an	v applic	, able	fields boood		agation requirementa If you
ates irect Deposit Directives mergency Contacts vents xclusion Item Codes	do not req	luire a spe	ecific f	field		u, as	weii	as al	iv applic	aue			
irect Deposit Directives mergency Contacts vents cclusion Item Codes					1021	A IT 20	z ?		<i>J</i> - 1 1			on your and	ocation requirements. If you
mergency Contacts vents cclusion Item Codes				noid,	, icav								
vents xclusion Item Codes	Save your	· line by se	electir	ng th	ne gre	een ch	neckn	nark.					
xclusion Item Codes													
	To edit the	e record o	nce s	save	d. sel	ect th	e line	and	the field	s wi	ill open for vou	L	
overnment Related					u, ee.		0			0			
rganizational Chart													
ay History	When you	wish to s	stop a	n alle	ocatio	on, en	id dat	te the	e record,	do r	not delete it.		
ay Rates Related													
ersonal Choice Items													
aining & Qualifications													
ecurring Pay													
emarks													
cheduling T&A Related													
/age Rates & Annual Salary													



AUDIT LOG

View History of all changes made to the employee record



- Audit Log Inquiry
 Company Property Registry
 Dates
 Direct Deposit Directives
 - Emergency Contacts
 - Events
 - Exclusion Item Codes
 - Government Related
 - Organizational Chart
 - Pay History
 - Pay Rates Related
 - Personal Choice Items
 - Training & Qualifications
 - Recurring Pay
 - Remarks
 - Scheduling T&A Related
 - Wage Rates & Annual Salary

Audit Log Inquiry

Q Find an item on this page	
------------------------------------	--

Field Name	Date	User	Reference	Program	Function	Original Value	New Value
Adj-Flag	15Jul2019	demos	UNTP	PWM1	Insert	yes	по
Bgn-Date	15Jul2019	demos	UNTP	PWM1	Insert	-	07/15/19
ltm-Code	15Jul2019	demos	UNTP	PWM1	Insert	-	UNTP

Showing 52 items

See the entire list of employee maintenance changes, or enter into the search bar to find a specific item



COMPANY PROPERTY REGISTRY

Track company property given to employees

Com • Add	pany Property Registry		
Сотралу	Property Effective Date Expiry Date Reference	ce 1 Reference 2 Notes	ADD ITEM
Active Employee	Company Property Registry		EDIT
Alvin Reid	← Back 🕼 Edit		
Profile			Enter details as applicab
ations	Enter your Company Property Regist	ry	Red fields are mandatory
.og Inquiry	← Back ✓ Save × Cance	el	
any Property Registry	Company Broostly		
			SAVE your record
Deposit Directives	Enter your Company Property details		
ency Contacts	Company Property:		
	Company Property:	·	
on Item Codes	Effective Date:		
nent Related	Expiry Date:		
tional Chart	Reference 2:		
ory			
es Related			
I Choice Items	Notes		_
& Qualifications	Details:		
ng Pay			
s			
ling T&A Related		i.	
Rates & Annual Salary		••••	



DATES

Track an unlimited number of employee dates

	Fr? Edi	it						
	Q Find a	a Date		Showin	g 128 Dates			
	All Dates	Favorite Dates	(0) Non-Empty Dates (1)				
	Code	Description				Date	Time Years	8
ave Employee	BD	Dates						
lvin Reid		✓ Save	e X Cancel					
file		Q Find a	Date		Showing 128 Dates			
ns								
g Inquiry		All Dates	Favorite Dates (0) Non-Empt	<u>y Dates (1)</u>				
y Property Registry		Code	Description			Date	Time Yes	ars
		***	Active Employees					
eposit Directives								
ncy Contacts		AHC	AHC Begins Date					
		ANN	Anniversary					
n Item Codes								
nent Related	You v	will land o	n the screen 'Non	Empty Dates	3			
tional Chart	Selec	t 'All Date	es' to view all avai	lable date co	des for undating	or begin to type in th	e search har fo	or the
огу	date	vou are lo	okina for.		doo lor apaating,			
s Related								
Choice Items	EDIT	ю таке	changes					
& Qualifications	Selec	t the line	you wish to add a	date for				
) Pay	SAVE	E the line	once complete					
ng T&A Related	** Do		inistratore coloct		r omplovens con	ha cat up to ha quita	matically patifia	d by
ites & Annual Salary	Fa	yrun Aum	an istraturs, select	Contact Sur		ne set up to be auto	matically notifie	u n



of

DIRECT DEPOSIT DIRECTIVES

To store banking and account details for direct deposit





EMERGENCY CONTACTS

Track employee emergency contacts

Recurring Pay

Scheduling T&A Related

Wage Rates & Annual Salary

Remarks

	Emergency Conta	ICTS Save	× Cancel		
	Contact 1				
	Name:		Relationship:		
Active Employee	Address Line 1:		Phone:		
Alvin Reid	Address Line 2:		Phone (Mobile):		
	City:		Phone (Business) :		Ext
Profile	Province:	•	Phone (International):		
ations	Country:		Notes:	<u></u>)
Log Inquiry	Postal Code:				
pany Property Registry	Email:				
3					
t Deposit Directives					.::
rgency Contacts					
its					
usion Item Codes	Contact 2				
ernment Related					
anizational Chart	Name:		Relationship:		
History	Address Line 1:		Phone:		
Rates Related	can add un to 3 em	ergency contac	ts for an emp	ovee	
onal Choice Items		orgonoy contac		i y u u	
ing & Qualifications	/E your record				

** Employees are able to update and maintain this themselves via the Employee Portal. Contact Support for more details **



EVENTS

Track various Employee events, such as Injuries, WCB claims, recognition or disciplinary tracking. Event codes can be customizable. Contact Support for more details.

Active Encloyed Image: state of the second of the seco	Even	t What type of Event would you lik	e to create?	To make a new entry, ADD ITEM Once you have selected the Event Type, you will have access to enter
Alvin Reid Main Profile Allocations Audit Log Inquiry Company Property Registry Dates Direct Deposit Directives Emergency Contacts • Events Exclusion then Codes Government Related Organizational Chatt Pay History Pay Rates Related Pay Rates Related Programs Training & Qualifications Recurring Pay Remarks Scheduling TAK Related	Active Employee	Event Type:	Incidents	the Event Code
Main Profile Alocations Audt Log Inpuiry Company Property Registry Dates Dired Deposit Directives Emergency Contads • Events Exclusion tem Codes Government Related Organizational Chait Pay Hstory Parsonal Chait Parsonal Chaits Important Dates Effective Date: required Effective Date: required	Alvin Reid	Event Code:		
Main Profile Allocations Audit Log Inquity Company Property Registry Dates Direct Deposit Directives Emergency Contacts • Events Exclusion tem Codes Government Related Organizational Chart Pay Rates Related Personal Choice tems Training & Qualifications Remarks Scheduling T&A Related		← Back Next →		NEXT
Audit Log Inqui? Company Property Registry Dates Direct Deposit Directives Emergency Contacts • Events Exclusion Item Codes Government Related Organizational Chart Pay History Pay Rates Related Personal Choice Items Training & Qualifications Remarks Scheduling T&A Related Wave Defauer	Main Profile			
Adductog intquiry Company Properly Registry Dates Direct Deposit Directives Emergency Contacts • Events Exclusion item Codes Government Related Organizational Chart Pay Ristory Pay Rates Related Personal Choice items Training & Qualifications Recurring Pay Remarks Scheduling T&A Related	Allocations	🗲 Back	✓ Save × Cancel	Enter Event Details.
Dired Deposit Diredwes Emergency Contacts Events Exclusion item Codes Government Related Organizational Chait Pay History Pay Rates Related Personal Choice items Training & Qualifications Recurring Pay Remarks Scheduling T&A Related	Company Property Registry Dates			RED fields are mandatory and the record will not save without them
Emergency Contacts Emergency Contacts Events Exclusion Item Codes Government Related Organizational Chart Pay History Pay Rates Related Personal Choice Items Training & Qualifications Recurring Pay Remarks Scheduling T&A Related	Direct Deposit Directives	Critical Event Det	ails	SAVE
 Events Exclusion Item Codes Government Related Organizational Chart Pay History Pay Rates Related Personal Choice Items Training & Qualifications Recurring Pay Reduring T&A Related Effective Date: 	Emergency Contacts	These fields appe	ear in the table on the previous screen.	O/WE
Exclusion Item Codes Government Related Government Related Organizational Chart Pay History Pay Rates Related Personal Choice Items Training & Qualifications Recurring Pay Remarks Scheduling T&A Related Were Rates & Annual Schart	Events			
Government Related Organizational Chart Pay History Pay Rates Related Personal Choice Items Training & Qualifications Recurring Pay Recurring Pay Remarks Scheduling T&A Related	Exclusion Item Codes	Remarks:	required	*If the event type and code you are
Organizational Chart Pay History Pay Rates Related Personal Choice Items Training & Qualifications Important Dates Recurring Pay Remarks Scheduling T&A Related Wage Rates & Annual Salage	Government Related	Reference:	required	looking for do not currently exist.
Pay History Pay Rates Related Personal Choice Items Training & Qualifications Important Dates Recurring Pay Remarks Scheduling T&A Related	Organizational Chart	Cancel this record?:	No	contact Support for set up **
Pay Rates Related Personal Choice Items Training & Qualifications Important Dates Recurring Pay Remarks Scheduling T&A Related	Pay History			
Personal Choice Items Training & Qualifications Recurring Pay Remarks Scheduling T&A Related	Pay Rates Related			
Training & Qualifications Important Dates Recurring Pay Effective Date: Remarks Effective Date: Scheduling T&A Related Effective Date:	Personal Choice Items			
Recurring Pay Effective Date: Remarks Effective Date: Scheduling T&A Related	Training & Qualifications	Important Dates		
Remarks Scheduling T&A Related Wage Rates & Appual Salary	Recurring Pay	Effective Date:	required	
Scheduling T&A Related	Remarks			
	Scheduling I&A Related			
	wage Rates & Annual Salary			
Notes		Notes		
Details:		Details:		

EXCLUSION ITEM CODES

Allocations

Dates

Events

Pay History

Audit Log Inquiry

Company Property Registry

Direct Deposit Directives Emergency Contacts

 Exclusion Item Codes Government Related Organizational Chart

Pay Rates Related Personal Choice Items Training & Qualifications

Recurring Pay Remarks

Scheduling T&A Related Wage Rates & Annual Salary

Some item codes are hard coded to a group or class. If you do not wish for them to automatically generate, enter

them here	Excluded Item Codes
	Z Edit
	Exclude Item(s) from Generation:
Active Employee	Waive Qualifying Condition(s)?:
Alvin Reid	
ain Profile	

Pick item codes from the dropdown menu that you wish to exclude from generating. For example, if the set up for Class C is that all employees have a Social Fund deduction, but a specific employee in that class is not to receive it, enter it here:

✓ Save × Car	icel		
Exclude Item(s) from Generation:	Social Club Dedn	-	
Waive Qualifying Condition(s)?:		•	

SAVE your record

You cannot add CPP or tax exemptions here. See Government Related



EXCLUSION ITEM CODES

Some item codes are hard coded to a group or class. If you do not wish for them to automatically generate, enter

them here	
them here	Excluded Item Codes
	C Edit
	Exclude Item(s) from Generation:
Active Employee	Waive Qualitying Condition(s) /:
Alvin Reid	Warve dealinging Condition(s) for.
Main Profile Allocations Audit Log Inquiry Company Property Registry Dates Direct Deposit Directives Emergency Contacts Events	You can also waive qualifying conditions on items such as benefits . For example, you can waive the 3 month waiting period and start premium deductions, if applicable. You can select multiple item codes at the same time Excluded Item Codes
Exclusion Item Codes Government Related Organizational Chart Pay History	✓ Save × Cancel
Pay Rates Related Personal Choice Items	Exclude Item(s) from Generation:
Training & Qualifications	Waive Qualifying Condition(s)?: YES
Recurring Pay	Waive Qualifying Condition(s) for: LTD Insurance Prem. Deductions
Remarks	
Scheduling T&A Related	SAV/E your record
Wage Rates & Annual Salary	SAVE your record

You cannot add CPP or tax exemptions here. See Government Related



GOVERNMENT RELATED

To track Government related items (CPP, EI, Tax)



All	o	ca	ti	o	ns

```
Audit Log Inquiry
```

```
Company Property Registry
```

Dates

- Direct Deposit Directives
- Emergency Contacts Events
- Exclusion Item Codes
- Government Related
- Organizational Chart Pay History
- Pay Rates Related
- Personal Choice Items
- Training & Qualifications
- Recurring Pay
- Remarks
- Scheduling T&A Related
- Wage Rates & Annual Salary

IMPORTANT INFORMATION

 * Use this section to track government related items such as tax computations, exceptions, CPP/CPT30 forms

*Effective dates are very important for these records. Be sure to always use begin and end dates, and to refrain from deleting records.

*If you tax exempt an employee on the Federal (CAN) record, this will automatically update the Provincial tax record to be exempt as well.



GOVERNMENT RELATED

	Employee's Tax Profile			-	
	C Edit				
	Province (Home): Alberta	Stat	us Indian: No		This information will automatically po
ive Employee	Province (Work): British Colum	ibia Reg	isterd Pension No.:		from the information you initially enter
Alvin Reid	Province (Tax): Alberta	Emp	oloyer Business No.:		the employee, as well as based on e
	Jurisdiction: Alberta	Earr	nings Forecast Factor:		company set up. EDIT to make chan
ions	Tax Calculation Type: Individual Pay	yment (Disrega Ben	efits Forecast Factor:		
og Inquiry	Pay Period Type:	Stat	e/Prov Employer ID N		
y Property Registry	T4 Employment Code:				
	14 Employment Code.				
eposit Directives					
ncy Contacts					
on Item Codes	Tax Settings				
ment Related					
ational Chart					
tory					
es Related	Prov/CAN Begin Date End Date	Tax Exempt Additional Tax	\$ Additional Tax %	Cycle List for Additional Tax	
I Choice Items	AB 08Jul2019				
& Qualifications	CAN 08Jul2019	No 0	0		
ng Pay			-		
à					
ling T&A Related	K	time of the second life		nton it hows	
Rates & Annual Salary	If your employee has cla	aimed tax credits or	exemptions, e	nter it here.	

These records are automatically populated based on Start Date and Province of Work.

Select the record line you wish to make changes to open the record. All new records will populate with the Basic Personal Exemption Amount unless changed.



GOVERNMENT RELATED – CANADA RECORD

	Effective Dates		
	Date Range:	07/08/2019	#
	End Date:		#
	TD1 Exemption Claim		
	Calculated:	12069	
	TD1 Override:	0	
Active Employee			
Alvin Reid			
	Additional Tax		
Main Profile	Additional Tax (\$):	0	
Allocations	Additional Tax (%):	0	
Audit Log Inquiry	Pay Period Cycles for Additional Tax:		•
Company Property Registry	Witholding Tax Adjustment:	0	
Dates	Fixed Tax (\$):	0	
Direct Deposit Directives	Fixed Tax (%):	0	
Emergency Contacts			
Events			
Exclusion Item Codes	Other Exemptions		
Government Related	Is this Employee Tax Exempt?:	No	-
Organizational Chart	Is this Employee EI Exempt?:	No	-
Pay History	Remarks:		
Pay Rates Related			
Personal Choice Items			
Training & Qualifications			
-			

Recurring Pay Remarks

Scheduling T&A Related

Wage Rates & Annual Salary

Enter the information as filled out on the tax forms you have received.

Use the TD1 Tax Credit fields as provided to recalculate the claim amount. Only enter a TD1 Override if the amount is something other than what can be calculated by changing the claim fields.

Exempt?:	No
Disability Exempt?:	No
CPT30 Filed?:	No
CPT30 Exempt?:	No
Document Date:	
1 Personal Tax Credits	
Basic Personal?:	Yes
Spouse or Common-Law Partner?:	No
Infirm Spouse of Common Law Partner?:	No
No. of Eligible Dependents:	0
No. of Eligible Infirm Dependents:	0
No. of Caregiver Infirm Dependents:	0
No. of Infirm Dependants age 18 or older:	0
No. of Caregiver children under age 18:	0
Age Amount Applicable?:	No
Pension Income Amount Applicable?:	No
Disability Amount Applicable?:	No
1 Tuition	
Full Time Tuition Applicable?:	No
Full Time Amount:	0
Full Time Months:	0
Part Time Tuition Applicable?:	No
Part Time Amount:	0
De la Trans Marcília	0

ORGANIZATIONAL CHART

Set employee supervisors for approval

Exclusion Item Codes Government Related

Organizational Chart

Pay Rates Related

Personal Choice Items

Training & Qualifications

Scheduling T&A Related

Wage Rates & Annual Salary

Pay History

Recurring Pay

Remarks

Active Employee	Organizational C	hart a	
Alvin Reid	Primary Supervisor:		
Main Profile	Primary Supervisor (Override):	•	
Allocations	Secondary Supervisor:		
Audit Log Inquiry	Secondary Supervisor (Override):	•	
Company Property Registry	Supervisor?:	No -	
Dates	Region		
Direct Deposit Directives			-
Emergency Contacts	Territory:	-	
Events			

Set up employee Supervisors, and set who will receive notifications and be responsible for approving employee requests.

Indicate if this user is a Supervisor by changing the supervisor flag to YES.

You can set up a secondary supervisor- When the primary supervisor has been marked as out of office, the request will go to the secondary supervisor

SAVE your record



PAY HISTORY

View History of Employee Rate changes

Original Date	Time	User	Previous Rate	Previous Effective Date	New Rate	New Effective Date	Reason Code	Pay Rate Update Notes
15Jul19	0801	demos	.000	-	15.950	15Jul19	-	-
							_	
stry								
This s		~				-		
	screen is	for info	ormation onl	ly, and will list pay ch	anges mad	e to the entered	salary	
and h	ourly rat	for info e fields	ormation onl s. This does	ly, and will list pay ch not track occupation	anges mad -based rate	e to the entered increases	salary	
and h	ourly rat	for info e fields	ormation onl 5. This does	ly, and will list pay ch not track occupation	anges mad -based rate	e to the entered increases	salary	
and h	ourly rat	for info e fields	ormation onl 5. This does	ly, and will list pay ch not track occupation	anges mad -based rate	e to the entered increases	salary	
and h	ourly rat	tor info e fields	ormation onl s. This does	ly, and will list pay ch not track occupation	anges mad -based rate	e to the entered increases	salary	
and h	ourly rat	tor info e fields	ormation onl 5. This does	ly, and will list pay ch not track occupation	anges mad -based rate	e to the entered increases	salary	
and h	ourly rat	tor info e fields	ormation onl s. This does	ly, and will list pay ch not track occupation	anges mad -based rate	e to the entered increases	salary	
and h	ourly rat	tor interest	ormation onl s. This does	ly, and will list pay ch not track occupation	anges mad -based rate	e to the entered increases	salary	
and h	ourly rat	tor interest	ormation onl s. This does	ly, and will list pay ch not track occupation	anges mad -based rate	e to the entered increases	salary	
and h	ourly rat	tor interest	ormation onl s. This does	ly, and will list pay ch not track occupation	anges mad -based rate	e to the entered increases	salary	
and h	ourly rat	tor info e fields	ormation onl 5. This does	ly, and will list pay ch not track occupation	anges mad -based rate	e to the entered increases	salary	
and h	ourly rat	tor interest	ormation onl s. This does	ly, and will list pay ch not track occupation	anges mad -based rate	e to the entered increases	salary	
and h	ourly rat	tor interest	ormation onl s. This does	ly, and will list pay ch not track occupation	anges mad -based rate	e to the entered increases	salary	



PAY RATES RELATED

Track multiple rates for an item code (e.g. Regular Time – RT1, RT2, RT3 etc...)

✓ Save × Canc	el	
Annual Salary:	0.00	
Annual Salary Effective Date:		
Annual Salary Reason:		•
Previous Annual Salary:	0.00	
Hourly Rate:	15.950	
Hourly Rate Effective Date:	07/15/2019	m
Hourly Rate Update Reason:		*
Previous Hourly Rate:	0.000	
-1-:	0.000	
-2-:	0.000	
2 .	0.000	
	0.000	
- 4 - :	0.000	
- 5 - :	0.000	
Hours Per Week:	0.000	
Hours Per Day:	0.000	
Use Absolute Occupation Rates?:		-
Min Hourly Rate:	0.000	
Max Hourly Rate:	0.000	
Min Annual Salary:	0.00	
Max Annual Salary:	0.00	
Benefit Income Base:	0.00	
Benefit Base Effective Date:		
	✓ Save X Canc Annual Salary: Annual Salary Effective Date: Annual Salary Reason: Previous Annual Salary: Hourly Rate: Hourly Rate Effective Date: Hourly Rate Update Reason: Previous Hourly Rate: -1-: -2-: -3-: -4-: -5-: Hours Per Week: Hours Per Day: Use Absolute Occupation Rates?: Min Hourly Rate: Max Hourly Rate: Max Annual Salary: Benefit Income Base: Benefit Base Effective Date: Benefit Base Effective Date:	✓ Save X Cancel Annual Salary 0.00 Annual Salary Effective Date:

Use this screen to enter and track multiple rates and effective dates



PERSONAL CHOICE ITEMS (PCI)

To setup recurring earnings, benefits, or deductions, outside of Group or Class set up

Add	ltem													
Q Find	an item on this page				Sho	wing 15 item	15							
Employee Item Code	Description	Item Type	Begin Date	End Date	Date Code	Cycle List	Benefit	Rate Code	Employee Rate RC	Value	Coverage Units	Rate or Amount	One Time Only	Global Rat
Leid UNTP	Union Training Program	W	07/15/2019	-	I.	-	-		3	-	-	Rte	-	43.470
ADDB	AD&D TB	в	-	-	-	-	-		3	.000	-	Rte	No	-
ADDP	AD&D Premium	w	-	-	-	-	-		3	.000	-	Rte	No	.002
			_				-		_		_	_	_	
jistry Genera	al Item Details							Iten	ns that show	pre-	populated	here are it	ems that a	are
							- 8	tied	l to Class or	Grou	ip. Items e	ntered on t	his screer	n are
Refe	rence:						-81	recu	urring and w	ill be	generated	each pay	unless	
Item	Units:	0.0	00				- 81	spe	cified.					
s Bene	efit Income Base:	0.0	0				- 84							
Maxi	imum Item Value:						- 84	ADI	D ITEM to cr	eate	a new ent	ry, and sele	ect the iter	m
0.00	ride Related Amount:	0.0	0				- 81	cod	le you wish t	o ad	d from the	drop down	menu. Th	ne
	nde Related Amount.	0.0	0				-81	yell	ow fields are	e mai	ndatory, an	nd the recon	rd will not	save
Redu	uce Related Amount:						-81	WILI	iout them. II	tney	are not ap		you, leave	e as ?.
							- 84	Be	sure to alway	ys ha	ave a start	date for yo	ur entries	
ns							- 84	NE	XT to proce	ed to	the Detail	S.		
Maxim	um Total Value						-11	EDI	IT to make c	hang	es. Add th	e details of	f the entry	as
ated								app	licable to yo	u.				
al Salary Maxi	imum Total Value:							0.41						
Date	Code:							SAV	VE your reco	ord				
Start	Date:						-1	**Fo	or assistance	e in e	entering ite	ms like Ga	rnishee, p **	lease



TRAINING AND QUALIFICATIONS

Track employee qualifications and training

	What type of Qualification/Train	ing would you like to add?		
	Qualification Type:		•	
				ADD ITEM
Active Employee	What type of Qualification/Tr	raining would you like to add?		Select your qualification type. As you select them, the additional qualification fields will
Alvin Reid	Qualification Type:	Education	-	open for you. Red fields are mandatory
Main Profile	Qualification Sub Type:	External Education	-	Once you have entered all items, NEXT to
Allocations	Qualification Code:	Bachelor of Science	-	proceed
Audit Log Inquiry				Enter details and other important information.
Company Property Registry	← Back Next →			
Dates		_		SAVE your record
Direct Deposit Directives	Training & Quali	fications		
Emergency Contacts	← Back ✓ Save	× Cancel		
Events				
Exclusion Item Codes				
Government Related	Important Dates			
Organizational Chart	Year:			
Pay History	Completion Date:		m	
Pay Rates Related				
Personal Choice Items				
 Training & Qualifications 	Qualification Details			
Recurring Pay	Notes:			
Remarks				
Scheduling T&A Related				
wage Rates & Annual Salary				



RECURRING PAY

To track and generate item code (e.g. RT – 80 Hours, SALH - 80 Hours) for Mass Time Card Entry as well as setting hours per pay, week and day.

Active Employee

Alvin Reid

Main Profile Allocations

Audit Log Inquiry

Company Property Registry

Dates

Direct Deposit Directives

Emergency Contacts

Events

Exclusion Item Codes

Government Related

Organizational Chart

Pay History

Pay Rates Related

Personal Choice Items

Training & Qualifications

 Recurring Pay Remarks
 Scheduling T&A Related
 Wage Rates & Annual Salary

Rec	urring	Pay														
🕀 Ad	d a Recurrin	ng Paymen	t													
ltem Code	Begin Date	End Date	Occupation	Department	Branch	ltem Rate	ltem Units	Pay Period Units	Hours per Week	Hours per Day	FTE Count	Generate Earnings?	Primary	Suspend	Default Shift	Annual Salary Hourly Rate

If you have set the Salaried flag to 'YES' on the Main Profile, the SAL/SALH recurring entry will automatically populate for you based on the Company set up. You can make changes to the record if needed.



REMARKS

Track general remarks and notes for an employee

	Rem	narks										
Active Employee	Ad Date	d a Rema Time Date	use Time	er T User	ype Eff Type	fective	Date F	emarks Remarks				
Alvin Kelu												
Profile					GEN	•						
ins					123	- 60) Character -	^				
quiry					ССМ	Cu	stomer Complaint					
operty Registry					CPR	Cu	stomer Praise					
					DSC	Dis	ciplinary					
osit Directives					GEN	Ge	neral					
Contacts					ROE	RO	E Comments					
					TRD	Tar	dy/Late					
em Codes												
nt Related												
ional Chart					_	-		-	_	_	_	
y												
s Related		דו ר	ПЛ									
Choice Items	ADL		. IVI									
& Qualifications	Sele	ect yo	our R	ema	rk Type	е						
ring Pay	Ente	er an	Effe	ctive	date, a	anc	add rem	arks as	s applic	cable to	o you.	

Remarks
 Scheduling T&A Related
 Wage Rates & Annual Salary

SAVE your record



SCHEDULING/ T&A RELATED*

*Use this screen only if you use the T&A and Scheduling Modules. Set rotations, shift codes and supervisors

	Scheduling, Time & Attendance	EDIT to make changes.				
	Employee Settings	select a Default Shift Code				
Active Employee	✓ Save × Cancel					
Alvin Reid	Default Shift Code: Monday to Friday - 40 hours - Applicable Branches:	Select ADD ITEM to enter the shift				
Main Profile Allocations	Production Line: 0900 09:00-17:30 Labour Level: 15:00-23:00 Cupations:	code settings. For more details on how to enter this screen, see the T&A User Guide, or contact Support				
Audit Log Inquiry	Eligible for Scheduling: 1600 15:00-23:00	· · · · ·				
Company Property Registry Dates	Eligible for T&A: M-F Monday to Friday - 40 hours ks:					
Direct Deposit Directives Emergency Contacts Events Exclusion Item Codes	OT Banking Directive: SCKH Sick Time Hours T&A Password: TRNH Training Hours VPH Vacation Pay Hours					
Organizational Chart Pay History	Shift Code Settings					
Pay Rates Related Personal Choice Items Training & Qualifications Recurring Pay Remarks	Shift Code Settings Add Item					
 Scheduling T&A Related Wage Rates & Annual Salary 	Begin Date End Date Rotation Block Branch Department Occupation Position Shift Code Shift Code	ift Cycle Start ⊧gin Date Week				
	PG i					

WAGE RATES & ANNUAL SALARY

Allocate specific rates to an employee that has multiple wage rates for the same department or occupation, or if the rate is different from the rate table

	Wage F	ge Rates													
	× Cancel														
Active Employee	Begin Date	End Date	Item Code	Occupation	Position	Qualifying Condition Code	Branch	Department	Misc. Qualifier	Shift Code	Hourly Rate C	ode Item Rate	Absolute Occupation Rate	?	
Alvin Reid	07/21/2019		ot 👻	? •	? •	? •	? •	? •	? •	? 👻	?	• 26.00	YES -		
Profile	_														
tions	= .														
Log Inquiry	Enter a Begin Date														
any Property Registry	Select the item you wish to create a wage rate for (Item code, Occupation, Position, etc)														
	Solast any other applicable information. If it does not apply to your loove as?														
Deposit Directives	Select any other applicable information. If it does not apply to you, leave as?														
ency Contacts	Enter the Item Rate														
	Chang	e the Ah	solute (Occupat	ion R	ate to YES - thi	s will	override	anv svet		nerated a	mounts a	and ensure vour e	ntr	
on Item Codes	on this	record i	s what i	s dener	ated		5 99111	overnae	, any syst	em gei				intry	
ment Related		1000101	5 What I	o gener	atou										
zational Chart															
tory	SAVE	vour rec	ord												
es Related															
I Choice Items															
& Qualifications															
ng Pay															
(S															
ling T&A Related															
ates & Annual Salary															

