www.payrollguardian.com

USER GUIDE

Employee Maintenance

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Landing Page

Employee Profiles

[Edit filters] [New Employee]

Find an Employee...   *Showing 705 Employees*

Employee	Status	Group	Branch	Department	Occupation	Class	WCB Class	Work Group	Shift Code	Union/ Association	Vacation Plan
000004 Smith, Allister	ACT	H	MS	PCPQ	REC	F	AB	DAY	0600	A	-
000010 Downy, Jane	ACT	S	ON	x	x	F	AB	X	-	x	LLD1
000011 Banner, Bruce H.	ACT	5	AB	TRNS	TECH	x	BC	-	-	-	-
000012 Jones, Brock	ACT	5	x	x	x	x	AB	-	-	-	-
000013 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.

PGi

Step 1: Create New Employee

Create a new Employee
Step 1: Select a template

New Employee

Create a new employee with the next available employee ID in sequence.

Manually assign an ID

Create a new employee with a manually assigned employee ID of your choosing.

Copy an existing employee

Create a new employee using an existing employee as a template. The following fields will be copied:

Group, Branch, Department, Occupation, Position, Employee Type, Class, Misc. Qualifier, Vacation Plan

Copy an existing employee, with a manual ID

Create a new employee using an existing employee as a template. The following fields will be copied:

Group, Branch, Department, Occupation, Position, Employee Type, Class, Misc. Qualifier, Vacation Plan

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

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

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Employee Portal

Employee Record

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Alvin Reid

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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.

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Allocations

✖ Cancel

Begin Date	End Date	Department	Occupation	Branch	Misc. Qualifier	Task	Employee Type	Employee GL Qualifier	Factor	Remarks
		?	?	?	?	?	?	?	0.00	

You can add unlimited allocations to an employee, as long as the Factor always equals 100%

Enter a begin date for every record, as well as any applicable fields based on your allocation requirements. If you do not require a specific field, leave it as ?.

Save your line by selecting the green checkmark.

To edit the record once saved, select the line and the fields will open for you.

When you wish to stop an allocation, end date the record, do not delete it.

PGi

AUDIT LOG

View History of all changes made to the employee record

Audit Log Inquiry

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🔍 Find an item on this page...   *Showing 52 items*

Field Name	Date	User	Reference	Program	Function	Original Value	New Value
Adj-Flag	15Jul2019	demos	UNTP	PWM1	Insert	yes	no
Bgn-Date	15Jul2019	demos	UNTP	PWM1	Insert	–	07/15/19
Itm-Code	15Jul2019	demos	UNTP	PWM1	Insert	–	UNTP

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

PGi

COMPANY PROPERTY REGISTRY

Track company property given to employees

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Company Property Registry

⊕ Add Item

Company Property	Effective Date	Expiry Date	Reference 1	Reference 2	Notes

Company Property Registry

← Back   ☑ Edit

Enter your Compa

Company Property Registry

← Back   ✓ Save   ✗ Cancel

Enter your Company Property details

Company Property:

Company Property:	▼
Effective Date:	📅
Expiry Date:	📅
Reference 1:	
Reference 2:	

Notes

Details:

ADD ITEM

EDIT

Enter details as applicable.

Red fields are mandatory

SAVE your record

PGi

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DATES

Track an unlimited number of employee dates

You will land on the screen 'Non Empty Dates'

Select 'All Dates' to view all available date codes for updating, or begin to type in the search bar for the specific date you are looking for.

EDIT to make changes

Select the line you wish to add a date for

SAVE the line once complete

** Payroll Administrators, select supervisors or employees can be set up to be automatically notified by report of relevant dates as they approach. Contact Support@payrollguardian.com for more details **

DIRECT DEPOSIT DIRECTIVES

To store banking and account details for direct deposit

You can create up to 99 direct deposit directives for a single employee

ADD ITEM to insert a new record

Add the banking information as applicable. We recommend to request an actual deposit directive document from your employees via their banking institution, to ensure proper account numbers and prevent rejections.

Select the green checkmark to save your entry

If you would like to temporarily stop the deposit to a specific account, change the 'Suspend Record' flag to YES.

This will keep the record on file for reference but will not be paid to.

**When there are partial deposit amounts, these records should be entered first, before the line that the remaining NET pay is to be deposited into **

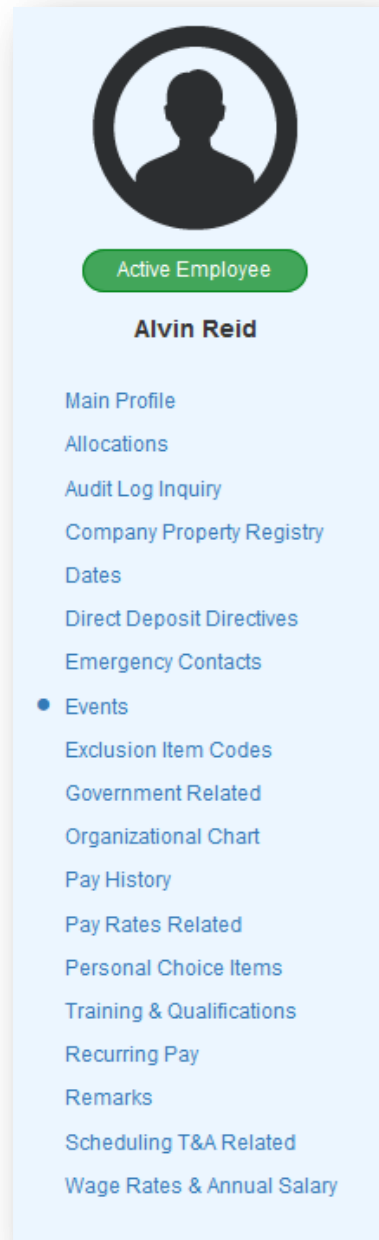# EMERGENCY CONTACTS

Track employee emergency contacts

You can add up to 3 emergency contacts for an employee

SAVE your record

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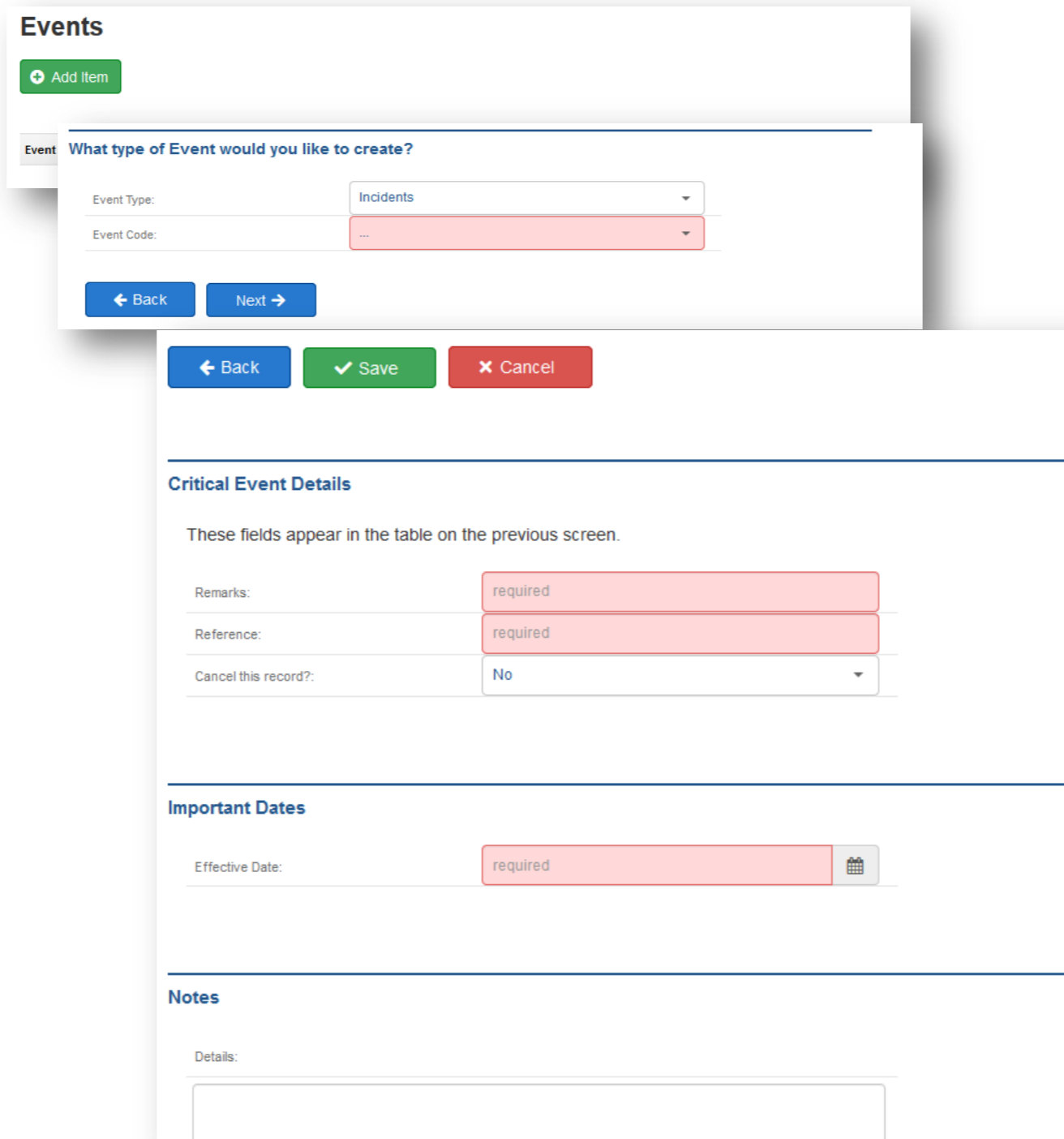
EVENTS

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

Events

⊕ Add Item

What type of Event would you like to create?

Event Type:	Incidents ▼
Event Code:	... ▼

← Back **Next →**

← Back **✔ Save** **✗ Cancel**

Critical Event Details

These fields appear in the table on the previous screen.

Remarks:	required
Reference:	required
Cancel this record?:	No ▼

Important Dates

Effective Date:	required 📅

Notes

Details:

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To make a new entry, ADD ITEM Once you have selected the Event Type, you will have access to enter the Event Code

NEXT

Enter Event Details.
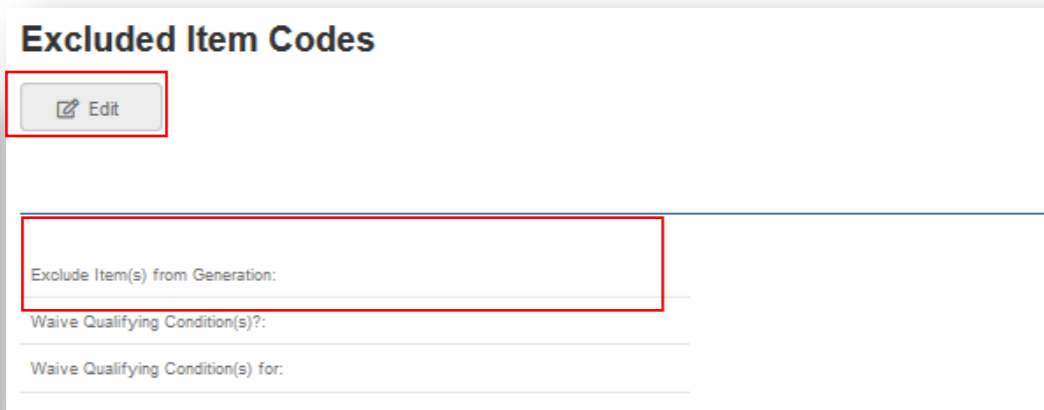
RED fields are mandatory and the record will not save without them

SAVE

*If the event type and code you are looking for do not currently exist, contact Support for set up **

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

Excluded Item Codes

Edit

Exclude Item(s) from Generation:

Waive Qualifying Condition(s)?:

Waive Qualifying Condition(s) for:

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:

Excluded Item Codes

✔ Save   ✕ Cancel

Exclude Item(s) from Generation: Social Club Dedn

Waive Qualifying Condition(s)?:

Waive Qualifying Condition(s) for:

Sidebar

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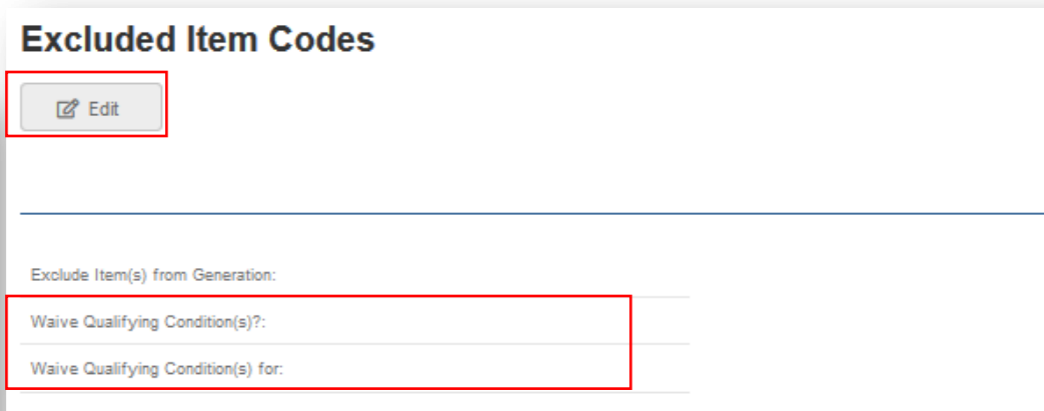
SAVE your record

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
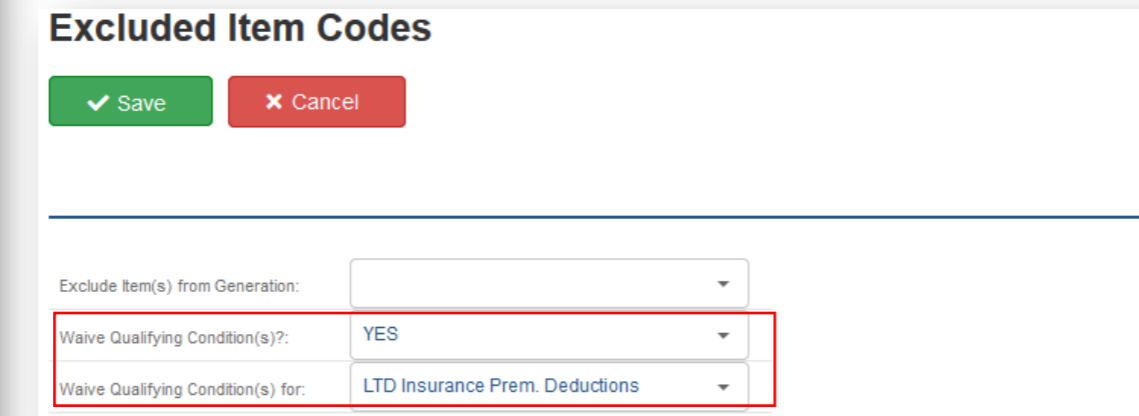
Excluded Item Codes

✏ Edit

Exclude Item(s) from Generation:
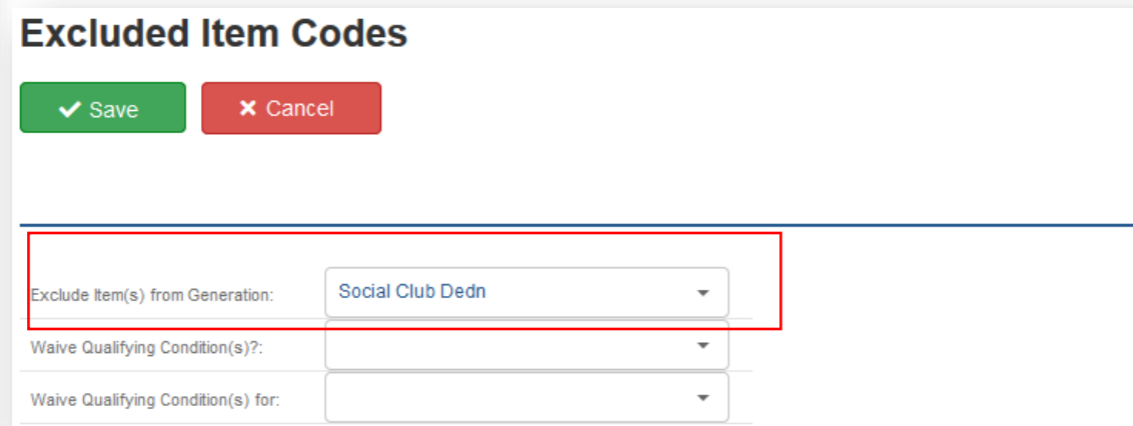
Waive Qualifying Condition(s)?:

Waive Qualifying Condition(s) for:

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

✔ Save   ✖ Cancel
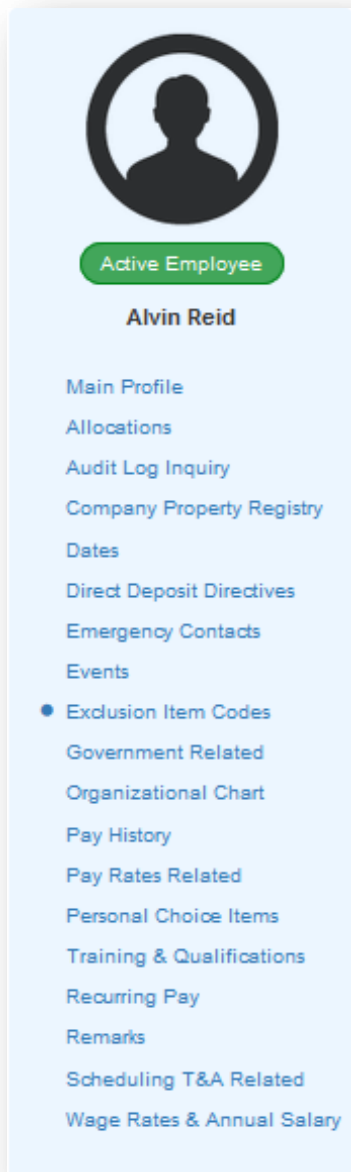
Exclude Item(s) from Generation:

Waive Qualifying Condition(s)?:   YES

Waive Qualifying Condition(s) for: LTD Insurance Prem. Deductions

SAVE your record

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

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GOVERNMENT RELATED

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

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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

☑ Edit

Province (Home):	Alberta	Status Indian:	No
Province (Work):	British Columbia	Registerd Pension No.:	
Province (Tax):	Alberta	Employer Business No.:	
Jurisdiction:	Alberta	Earnings Forecast Factor:	
Tax Calculation Type:	Individual Payment (Disrega	Benefits Forecast Factor:	
Pay Period Type:		State/Prov Employer ID N	
T4 Employment Code:			

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This information will automatically populate from the information you initially entered for the employee, as well as based on existing company set up. EDIT to make changes

Tax Settings

⊕ Add Item

Prov/CAN	Begin Date	End Date	Tax Exempt	Additional Tax $	Additional Tax %	Cycle List for Additional Tax
AB	08Jul2019					
CAN	08Jul2019		No	0	0	

If your employee has claimed tax credits or exemptions, enter 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.

✖PGi

GOVERNMENT RELATED – CANADA RECORD

Effective Dates

Date Range:	07/08/2019
End Date:	

TD1 Exemption Claim

Calculated:	12069
TD1 Override:	0

Additional Tax

Additional Tax ($):	0
Additional Tax (%):	0
Pay Period Cycles for Additional Tax:	
Witholding Tax Adjustment:	0
Fixed Tax ($):	0
Fixed Tax (%):	0

Other Exemptions

Is this Employee Tax Exempt?:	No
Is this Employee EI Exempt?:	No
Remarks:	

CPP/QPP Exemptions

Exempt?:	No
Disability Exempt?:	No
CPT30 Filed?:	No
CPT30 Exempt?:	No
Document Date:	

TD1 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

TD1 Tuition

Full Time Tuition Applicable?:	No
Full Time Amount:	0
Full Time Months:	0
Part Time Tuition Applicable?:	No
Part Time Amount:	0
Part Time Months:	0

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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.

SAVE your record

ORGANIZATIONAL CHART

Set employee supervisors for approval

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Organizational Chart

✔ Save   ✖ Cancel

Primary Supervisor:

Primary Supervisor (Override):

Secondary Supervisor:

Secondary Supervisor (Override):

Supervisor?:   No

Region:

Territory:

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

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PAY HISTORY

View History of Employee Rate changes

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Pay History Inquiry

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	-	-

This screen is for information only, and will list pay changes made to the entered salary and hourly rate fields. This does not track occupation-based rate increases

PGi

PAY RATES RELATED

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

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

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+ Add Item

Find an item on this page...   Showing 15 items

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
UNTP	Union Training Program	W	07/15/2019	-	I	-	-	3	-	-	Rte	-	43.470
ADDB	AD&D TB	B	-	-	-	-	-	3	.000	-	Rte	No	-
ADDP	AD&D Premium	W	-	-	-	-	-	3	.000	-	Rte	No	.002

General Item Details

Reference:

Item Units: 0.000

Benefit Income Base: 0.00

Maximum Item Value:

Override Related Amount: 0.00

Reduce Related Amount:

Maximum Total Value

Maximum Total Value:

Date Code:

Start Date:

Items that show pre-populated here are items that are tied to Class or Group. Items entered on this screen are recurring and will be generated each pay unless specified.

ADD ITEM to create a new entry, and select the item code you wish to add from the drop down menu. The yellow fields are mandatory, and the record will not save without them. If they are not applicable to you, leave as ?.

Be sure to always have a start date for your entries.

NEXT to proceed to the Details.
EDIT to make changes. Add the details of the entry as applicable to you.

SAVE your record

**For assistance in entering items like Garnishee, please contact Support for a detailed user guide **

TRAINING AND QUALIFICATIONS

Track employee qualifications and training

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What type of Qualification/Training would you like to add?

Qualification Type: [▾]

What type of Qualification/Training would you like to add?

Qualification Type: [Education   ▾]
Qualification Sub Type: [External Education   ▾]
Qualification Code: [Bachelor of Science   ▾]

[← Back] [Next →]

Training & Qualifications

[← Back] [✔ Save] [✕ Cancel]

Important Dates

Year: [   ]
Completion Date: [🗓]

Qualification Details

Notes: [   ]

ADD ITEM

Select your qualification type. As you select them, the additional qualification fields will open for you. Red fields are mandatory

Once you have entered all items, NEXT to proceed

Enter details and other important information.

SAVE your record

PGi

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.

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Recurring Pay

⊕ Add a Recurring Payment

Item Code	Begin Date	End Date	Occupation	Department	Branch	Item Rate	Item Units	Pay Period Units	Hours per Week	Hours per Day	FTE Count	Generate Earnings?	Primary	Suspend	Default Shift	Annual Salary Hourly Rate
SAL	-	-	-	-	-	0.000	0.000	-	.000	0.000	0.00	yes	no	no	-	95000.000

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

ADD ITEM

Select your Remark Type
Enter an Effective date, and add remarks as applicable to you.

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

EDIT to make changes.

To set someone to be scheduled, select a Default Shift Code

Select ADD ITEM to enter the shift code settings. For more details on how to enter this screen, see the T&A User Guide, or contact Support

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

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Wage Rates

✕ Cancel

Begin Date	End Date	Item Code	Occupation	Position	Qualifying Condition Code	Branch	Department	Misc. Qualifier	Shift Code	Hourly Rate Code	Item Rate	Absolute Occupation Rate?	
07/21/2019		OT ▾	? ▾	? ▾	? ▾	? ▾	? ▾	? ▾	? ▾	? ▾	26.00	YES ▾	✓

Enter a Begin Date

Select the item you wish to create a wage rate for (Item code, Occupation, Position, etc)

Select any other applicable information. If it does not apply to you, leave as?

Enter the Item Rate

Change the Absolute Occupation Rate to YES – this will override any system generated amounts and ensure your entry on this record is what is generated

SAVE your record