

## EMPLOYEE SET UP

Go to the "Employee" tab and select "Add an Employee."

**Employee Directory** ?

To view the details for a specific employee, highlight the employee, and then in the Menu list, select the page you need to view. To reach the Employee Home Page, click the employee's name. To see an employee's pay statements, click the link under Employee Access. To enable Employee Access, highlight the employee and select Employee Access from the left menu.

Filter by status:  Search by:

Status	Name	Address	City	State	Zip Code	Phone Number	Employee Access
Active							

Seven step wizard. All lines marked with \* need to be completed. Can select "Finish later" at any time.

**Firm View** | **Payroll Home** | **Employees** | **Company** | **Reports**

**Step 1 of 7**

- 1. Employee Info
- 2. Employment Info
- 3. Tax Info
- 4. Payroll Info
- 5. Earnings Deductions
- 6. Garnishments
- 7. Direct Deposit

### Employee Info - New Employee

Enter the employee's personal information. The name and address must address as they are displayed on the W-2. The employee's legal name c

First name: \*

Middle initial:

Last name: \*

Address line 1: \*

Address line 2:

City: \*

State/Province: \*

Zip code: \*

Home phone:

E-mail:

Check stub message:

Cannot copy/paste SSN – the “-” appears when the number is typed. ADP suggests using 1/1/1900 for any unknown dates (like Birth date). Can simply type in numbers for dates “xx/xx/xxxx” format will appear. “Job tax credit” refers to the HIRE Act credit. System grays out if employees are not eligible (hired before effective date of the act).

**Step 2 of 7**

- ✓ 1. Employee Info
- 2. Employment Info
- 3. Tax Info
- 4. Payroll Info
- 5. Earnings Deductions
- 6. Garnishments
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### Employment Info -

Enter employment information for the employee.

Hire date: \*

Job tax credit:

Social security no: \*

Company paid pension: \*

Employee status: \*

Statutory employee: \*

Birth date: \*

Gender: \*

Termination date:

The wizard sets up each set of taxes, starting with Federal. Unemployment is included in each jurisdiction.

- Step 3 of 7**
1. Employee Info
  2. Employment Info
  - 3. Tax Info**
  4. Payroll Info
  5. Earnings Deductions
  6. Garnishments
  7. Direct Deposit

## Tax Info -



To add a federal, state, or local tax jurisdiction, click the appropriate Add button. To change the employee's tax information, click Edit next to the appropriate tax jurisdiction. You must set up federal and state tax jurisdictions for this employee before you can continue the setup process.

Description	Withholding Status	Total Allowances	Tax Type	Status
Federal Tax				
State Tax				
Local Tax				

System will default to zero allowances if left blank. "Exempt from Tax" is the same as "Subject Do Not Take Tax."

- Step 3 of 7**
1. Employee Info
  2. Employment Info
  - 3. Tax Info**
  4. Payroll Info
  5. Earnings Deductions
  6. Garnishments
  7. Direct Deposit

## Federal Tax -

Enter the employee's federal tax information, and click Save. This information can be used on Form 4. For information about setting up exempt employees, click Help.

Withholding status: \*

Total allowances:

Tax override:

Tax override amount:

Earned Income Credit (EIC): \*

Tax Type	Exempt Status
Federal income tax (FIT): *	<input type="text" value="Not Exempt from Tax"/> ?
Federal unemployment tax (FUTA): *	<input type="text" value="Not Exempt from Tax"/> ?
Medicare: *	<input type="text" value="Not Exempt from Tax"/> ?
Social security: *	<input type="text" value="Not Exempt from Tax"/> ?

MD local taxes are set up under State tax under "Withholding Status."

## Step 3 of 7

- 1. Employee Info
- 2. Employment Info
- 3. Tax Info
- 4. Payroll Info
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## State Tax -

Enter the employee's state tax information, and click Save. The income tax state for the employee is usually the state where the employee lives. The unemployment tax state for the employee is usually the state where the employee works. For more information about state taxes, click Help.

Income tax state: *	<input type="text" value="Maryland"/>	Unemployment tax state: *	<input type="text" value="Maryland"/>
Withholding status: *	<input type="text" value="No County Selected"/>		
Allowances:	<input type="text"/>		
Tax override:	<input type="text"/>		
Tax override amount:	<input type="text"/>		

Tax Type	Exempt Status
State income tax: *	<input type="text" value="Not Exempt from Tax"/> ?
State unemployment tax: *	<input type="text" value="Not Exempt from Tax"/> ?

Select "Hourly" under "Pay Type" and a list of 5 rates will appear to the right. Select "Salary" and only one rate will appear. If you input "Standard hours" the number will appear on the pay grid.

## Step 4 of 7

- ✓ 1. Employee Info
- ✓ 2. Employment Info
- ✓ 3. Tax Info
- 4. Payroll Info
- 5. Earnings Deductions
- 6. Garnishments
- 7. Direct Deposit

## Payroll Info -

This employee can have either a salary amount or an hourly rate. Select the appropriate pay type and then enter the pay rate. If the employee works the same hours each pay period, enter the hours in the Standard Hours Per Pay Period field. (Standard Hours are required in MN, OR, RI, VT and WA to calculate productive time). If the employee has multiple hourly pay rates, a department must be entered for each rate.

Pay type: *	<input type="text" value="Hourly"/>
Pay frequency: *	<input type="text" value="Biweekly"/>
Employment type:	<input type="text" value="Full time"/>
Standard hours per pay period:	<input type="text"/> ?

Select "Edit" on the right to make any changes to the codes. If hours are entered on any of the earnings codes they will appear on the pay grid. Earnings list does not include regular hours. Every employee should have regular hours code so ADP doesn't give the user the chance to edit or delete it from each employee. Garnishments are not included in the deduction list – they appear in the next step.

If you need to delete a deduction amount, "Edit" the deduction and input 0.

- Step 5 of 7**
- ✓ 1. Employee Info
  - ✓ 2. Employment Info
  - ✓ 3. Tax Info
  - ✓ 4. Payroll Info
  - 5. Earnings Deductions**
  - 6. Garnishments
  - 7. Direct Deposit

## Earnings and Deductions -



To enter or edit the earning or deduction details for the employee, click Edit next to the appropriate earning or deduction.

Description				
Gross receipts	Amount			<a href="#">Edit</a>
Indirect tips owed	Amount			<a href="#">Edit</a>
Indirect tips paid	Amount			<a href="#">Edit</a>
Banquet tips owed	Amount			<a href="#">Edit</a>
Banquet tips paid	Amount			<a href="#">Edit</a>
Meals (employer provided)	Amount			<a href="#">Edit</a>
Meals (taxable)	Amount			<a href="#">Edit</a>
Vacation	Hours			<a href="#">Edit</a>
Sick	Hours			<a href="#">Edit</a>
Personal	Hours			<a href="#">Edit</a>
Bonus	Amount			<a href="#">Edit</a>
Misc pay	Amount			<a href="#">Edit</a>
<b>Deductions</b>	<b>Type</b>	<b>Amount</b>	<b>Goal Amount</b>	
Advance	Dollar	\$0.00	\$0.00	<a href="#">Edit</a>
Loan	Dollar	\$0.00	\$0.00	<a href="#">Edit</a>

Garnishment name & type are defined in the company level. **Please call your payroll specialist to ensure proper garnishment set up.**

**Step 6 of 7**

- 1. Employee Info
- 2. Employment Info
- 3. Tax Info
- 4. Payroll Info
- 5. Earnings Deductions
- 6. Garnishments**
- 7. Direct Deposit

## Garnishment Info - ?

Enter or edit the garnishment details for this employee and click Save. For more information about garnishments, click Help.

### Garnishment Info

Garnishment name: *	<input type="text" value="Creditor 1"/>	Case ID: *	<input type="text" value=""/>
Garnishment type: *	<input type="text" value="Creditor"/>	FIPS code:	<input type="text" value=""/>
		Dependent medical coverage: *	<input type="text" value="No"/>

### Payment Info

Deduction amount: *	<input type="text" value=""/>	Goal amount (\$):	<input type="text" value=""/>
Agency fee:	<input type="text" value=""/>		
Calculate order on: *	<input type="text" value=""/>	<input type="button" value="Custom"/>	
Fixed amount (\$):	<input type="text" value=""/>	Processing sequence: *	<input type="text" value="1"/>
Compare percentage with:	<input type="text" value=""/>	Compare amount (\$):	<input type="text" value=""/>
Protected wage base (\$):	<input type="text" value=""/>	Limit on wage base:	<input type="text" value=""/>

### Payee Info

(Garnishment continued) Earliest "Nth" day = 1. Cannot input 0.

**Step 6 of 7**

- 1. Employee Info
- 2. Employment Info
- 3. Tax Info
- 4. Payroll Info
- 5. Earnings Deductions
- 6. Garnishments**
- 7. Direct Deposit

## Garnishment Info - ?

Enter or edit the garnishment details for this employee and click Save. For more information about garnishments, click Help.

### Payee Info

Payee name: *	<input type="text" value=""/>	Nth day: *	<input type="text" value=""/>
Payee address: *	<input type="text" value=""/>		
Payee city: *	<input type="text" value=""/>		
Payee state/province: *	<input type="text" value=""/>		
Payee zip code: *	<input type="text" value=""/>		
Payment schedule: *	<input type="text" value="Send Payment N days after check date"/>		
Payee contact name:	<input type="text" value=""/>		
Payee contact phone:	<input type="text" value=""/>		
Distribution memo:	<input type="text" value=""/>		

### Obligee Info

Obligee receives payment: *	<input type="text" value="No"/>
Obligee name:	<input type="text" value=""/>
Obligee SSN:	<input type="text" value=""/>

Child supports are set up on the company level as a deduction code, but defined on the employee level.

**Firm View** | **Payroll Home** | **Employees** | **Company** | **Reports** | **Taxes**

**▼ Employees**  
Employee Directory  
Employee Home  
Employee Info  
Employment Info  
Tax Info  
Payroll Info  
Earnings Deductions  
Garnishments  
Direct Deposit  
Check View  
Add Employee  
Terminate Employee  
Employee Access

**▼ Contractors**  
1099 Directory  
1099 Home  
1099 Info  
1099 Payroll Info  
1099 Deductions  
1099 Direct Deposit  
1099 Check View  
Add Contractor  
Terminate Contractor

## Garnishment Info - ?

Review the garnishment details for this employee. To update the garnishment, enter the new information and click Save. For more information about garnishments, click Help.

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**Garnishment Info**

Garnishment name: \*  Case ID: \*  ?  
Garnishment type: \*  FIPS code:  ?  
Dependent medical coverage: \*  ?

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**Payment Info**

Deduction amount: \*   Goal amount (\$):   
Agency fee:   
Calculate order on: \*  ?   
Fixed amount (\$):  Processing sequence: \*  ?  
Compare percentage with:  Compare amount (\$):   
Protected wage base (\$):  Limit on wage base:  ?

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**Payee Info**

Payee name: \*  ?  
Payee address: \*

Only 4 direct deposit options are available. System will ask a security question after completion upon occasion. **Only flat dollar amounts can be entered into "Amount."** In the queue to be changed, but for now, we will need to alert any employees that have direct deposit %'s.

### Step 7 of 7

1. Employee Info
2. Employment Info
3. Tax Info
4. Payroll Info
5. Earnings Deductions
6. Garnishments
7. Direct Deposit

## Direct Deposit -



Each employee can have up to four accounts set up for direct deposit. Enter the direct deposit information to activate direct deposit on the employee's next pay check. The remaining net pay after a direct deposit will be issued to the employee in a check. If the employee does not want direct deposit, click Next.

	Account Type	Bank Name	Transit Number	Account Number	Deposit Distribution	Amount
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Once set up is complete the system masks the SSN. Click on the lock to unlock the mask.

	Account Type	Bank Name	Transit Number	Account Number	Deposit Distribution	Amount
<input type="checkbox"/>	Checking	PNC BANK	0540-0003-0	*****	Full Net	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Input balances & taken amount. Uncheck any PTO that does not apply. Under "Accrual Type" you can override the accrual rate or stop it so an employee only has a balance bank (for those that deviate from the company set up).

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### Step 7 of 8

- ✓ 1. Employee Info
- ✓ 2. Employment Info
- ✓ 3. Tax Info
- ✓ 4. Payroll Info
- ✓ 5. Earnings Deductions
- ✓ 6. Direct Deposit
7. Paid Time Off
8. Employee Access

## Paid Time Off -

To track paid time off (PTO) for the employee, enter the information for each plan you want to track. To ensure accuracy, you must make manual updates to the employee's PTO information at the beginning of the calendar year.

PTO Plan	Carried Forward	Available	Taken Hours	Balance Hours	Accrual Type	Accrual Rate
<input checked="" type="checkbox"/> Vacation:	<input type="text" value="0.00"/>	<input type="text" value="40"/>	<input type="text" value="24.00"/>	<input type="text" value="16.00"/>	<input type="text" value="Default"/>	<input type="text" value="0.0000"/>
<input checked="" type="checkbox"/> Sick:	<input type="text" value="0.00"/>	<input type="text" value="24"/>	<input type="text" value="16.00"/>	<input type="text" value="8.00"/>	<input type="text" value="Default"/>	<input type="text" value="0.0000"/>
<input type="checkbox"/> Personal:	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="Default"/>	<input type="text" value="0.0000"/>

Check or uncheck to allow Employee Access.

**Firm View** **Payroll Home** **Employees** **Company** **Reports** **Taxes**

**Step 7 of 7**

- ✓ 1. Employee Info
- ✓ 2. Employment Info
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- ✓ 5. Earnings Deductions
- ✓ 6. Direct Deposit
- 7. Employee Access**


## Employee Access -

To add this employee as a user of Employee Access, enter the contact information and then click Next. A welcome e-mail with instructions on how to access the system will be sent to the e-mail you enter. You need to provide the temporary password to the employee so the Employee Access registration process can be completed.

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Allow access to Employee Access:

Temporary password: \*

Employee Access contact E-mail: \*  

Employee Access contact phone: \*  Ext:

The payroll processor will receive an email every time a new employee is set up as part of security.

**Step 7 of 7**

- ✓ 1. Employee Info
- ✓ 2. Employment Info
- ✓ 3. Tax Info
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- ✓ 5. Earnings Deductions
- ✓ 6. Garnishments
- ✓ 7. Direct Deposit

## Employee Setup Completion Summary

You have successfully completed the setup for this employee. Click Close to return to the Payroll Home page to continue adding your employees. If all of your employees are set up, click Close to return to the Payroll Home page to add any necessary prior payroll amounts or to run your payroll.

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**Employee Information:**

(I blanked out the employee's information as a precaution. Name, address, and contact information are displayed.)

## Contractor Set Up

Select "Set up Contractors" on Payroll Home. This will take you through the 4 step process.

<b>Firm View</b>	<b>Payroll Home</b>	<b>Employees</b>	<b>Company</b>	<b>Reports</b>	<b>Taxes</b>
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**Step 1 of 4**

- 1. 1099 Info
- 2. 1099 Payroll Info
- 3. 1099 Deductions
- 4. 1099 Direct Deposit

### 1099 Info - RADCLIFFE CORPORATE SERVICES INC ?

Enter the independent contractor's personal or company information. The name and address information entered is displayed on the 1099.

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**Contractor Info**

First name:	<input type="text"/>	Address line 1:	<input type="text" value="870 HIGH STREET SUITE 1"/>
Middle initial:	<input type="text"/>	Address line 2:	<input type="text"/>
Last name:	<input type="text"/>	City:	<input type="text" value="CHESTERTOWN"/>
Social security no:	<input type="text"/>	State/Province: *	<input type="text" value="Maryland"/>
Or		Zip code:	<input type="text" value="21620"/>
Company name: *	<input type="text" value="RADCLIFFE CORPORATE SERVICES"/>	Phone:	<input type="text"/>
TIN: *	<input type="text" value="52-2210213"/>	E-mail:	<input type="text"/> <input type="checkbox"/>

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**Employment Info**

Hire date: *	<input type="text" value="01/01/2010"/> <input type="button" value="Calendar"/>	State: *	<input type="text" value="Maryland"/>
Status: *	<input type="text" value="Active"/>	Local:	<input type="text"/>
Termination date:	<input type="text" value="mm/dd/yyyy"/> <input type="button" value="Calendar"/>		
Check stub message:	<input type="text" value="INVOICE FEE"/> <input type="button" value="Help"/>		

**Work Location**

State: *	<input type="text" value="Maryland"/>
Local:	<input type="text"/>

## Pay type = Amount

[Firm View](#) | [Payroll Home](#) | [Employees](#) | [Company](#) | [Reports](#) | [Taxes](#)

**Step 2 of 4**

- ✓ 1. 1099 Info
- ✓ 2. 1099 Payroll Info
- ✓ 3. 1099 Deductions
- 4. 1099 Direct Deposit

### 1099 Payroll Info - RADCLIFFE CORPORATE SERVICES INC

To set up this independent contractor, select the appropriate pay type and then enter the rate. If this independent contractor earns a different amount each time, select Amount as the pay type and leave the pay rate blank. Enter the frequency and department for this independent contractor and click Next.

Pay type: \*       Pay rate:

Pay frequency: \*       Department: \*

## No deductions

[Firm View](#) | [Payroll Home](#) | [Employees](#) | [Company](#) | [Reports](#) | [Taxes](#)

**Step 3 of 4**

- 1. 1099 Info
- 2. 1099 Payroll Info
- 3. 1099 Deductions
- 4. 1099 Direct Deposit

### 1099 Deductions - RADCLIFFE CORPORATE SERVICES INC ?

To enter or edit the deduction information for this independent contractor, click Edit next to the appropriate deduction.

Deductions				
Description	Type	Amount	Goal Amount	
Advance	Dollar	\$0.00	\$0.00	<a href="#">Edit</a>
Miscellaneous	Dollar	\$0.00	\$0.00	<a href="#">Edit</a>
Uniform	Dollar	\$0.00	\$0.00	<a href="#">Edit</a>

## Input Billing Account

[Firm View](#) | [Payroll Home](#) | [Employees](#) | [Company](#) | [Reports](#) | [Taxes](#)

**Step 4 of 4**

- ✓ 1. 1099 Info
- ✓ 2. 1099 Payroll Info
- ✓ 3. 1099 Deductions
- 4. 1099 Direct Deposit

### 1099 Direct Deposit - RADCLIFFE PAYROLL SERVICES ?

Each independent contractor can have up to four accounts set up for direct deposit. The remaining net pay after the direct deposits will be issued to the contractor in a check. If the independent contractor does not want direct deposit, click Next.

	Account Type	Bank Name	Transit Number	Account Number	Deposit Distribution	Amount
<input type="checkbox"/>	Checking	PNC BANK			Full Net	
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						