

# Payroll Release Notes

Recent Updates 8/26/2022

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## GREENSHADES ONLINE PAYROLL

### New Feature - New Pay Run Type: Adjustment Pay Runs (Initial Rollout)

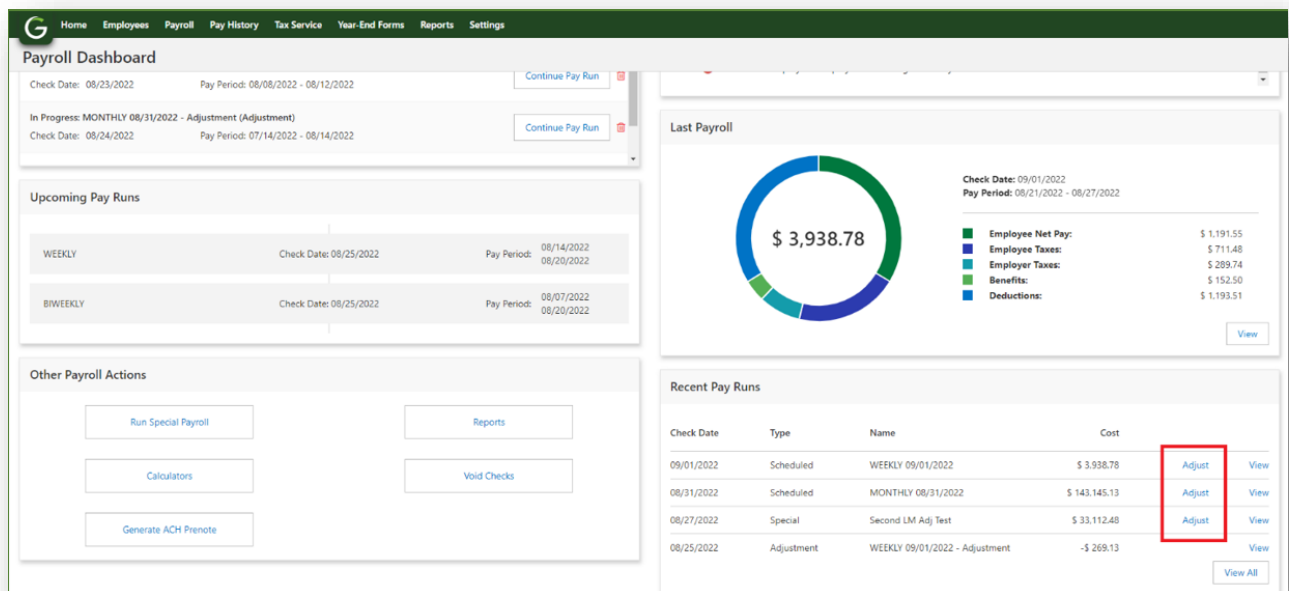
- **Feature Description:** In the Greenshades online Payroll module, Adjustment Pay Runs are used to remediate mistakes or make changes to the results of an already submitted and processed pay run. Adjustments are a very standard operation for payroll practitioners as payrolls are not always perfect. There are many scenarios and types of mistakes that these practitioners may need to address. The goal of this tool is to provide users a clear and comprehensive way to make these very important, and potentially complex, amendments. The process that Greenshades uses to approach these problems is to allow a user to start by finding their historical pay run that they expect requires changes. The tool will help the user determine if an Adjustment Pay Run is indeed the right avenue for correction. Assuming it is, the tool will create a new pay run that is populated with the inputs of the selected source pay run. At this point, you can imagine the problem being “As a payroll practitioner, I wish that I entered X instead of Y before submitting the original pay run, so that my employees were paid as intended”. As such, the user will be tasked with making changes to the values of the original pay run and turning them into what they wish were entered the first time. After entering these new values, Greenshades’ intelligent pay run calculations will determine the earnings, benefits, deductions, arrears, and tax differences between the original run and this new Adjustment Pay Run. Upon pay run submission, resulting net checks (positive or negative), and future arrearages, will be generated for the affected employees. The most important idea to keep in mind when using this tool is to always remember to enter the values that you “wish” you had in the first place and let Greenshades do the rest.
- **Key Feature Information:**
  - Employees who were **NOT** included in the original pay run that you have chosen to adjust, cannot be added to the adjustment run (refer to [What this tool is not](#)).
  - Tax overrides will **NOT** be pulled from the original pay run into an *Adjustment Pay Run*.
  - YTD tax auto adjustments are calculated at the time that this amendment pay run is started. This means that if the tax auto adjust may be triggered from amounts that were 'accrued' on pay runs that took place *after* the pay run that is being adjusted. The resulting Auto Adjustment will appear on the *Adjustment Pay run*.
  - It is not advisable to pull employees into an *Adjustment Pay Run* if they do not actually require an adjustment be made. This can cause unintended consequences from recalculations (i.e. Tax override will not be accounted for, tax auto adjustments may

trigger, accidental edits could be performed, etc.). Even if there were no resulting changes, and no other issues occurred, those employees would still be distributed a \$0 check, which will inevitably confuse Employees and potentially lead to inconsistent reporting.

- Garnishments cannot be “edited” in an *Adjustment Pay Run*, just as they cannot be in the standard pay run wizard. They will still recalculate based on changes to earnings or employee disposable income.
- Pay Runs or checks that were voided cannot be adjusted
- Adjustments can be made up to the start of the current calendar year. You may not adjust pay runs from prior years.
- **What this tool is:** The tool is best positioned to amend the following mistakes (as well as some others not mentioned):
  - Employee(s) was overpaid
  - Employee(s) was paid in the wrong location
  - Employee(s) was paid via incorrect earning codes
  - Employee(s) were paid, and therefore taxed, against the wrong location
  - Employee(s) were assigned incorrect deduction / benefit codes or deduction / benefit amounts
  - Employee(s) were included in a pay run that should not have been
- **What this tool is not:** This tool is incredibly useful to remediate individual pay run based errors. However, it does not meet every use case. Consider the below as situations where this tool may not be the correct solution alongside the options to consider:
  - **Scenario:** Employee(s) were underpaid or not included in a prior pay run
    - **Proposed Solution:** Create a Special Pay Run and include the missed employees or add the additional earnings that were not included in prior runs
  - **Scenario:** Looking to edit, remove, or add a tax that was not pulled in the original run and is NOT a result of other changes in the adjustments (i.e. location changes)
    - **Proposed Solution:** This tool should not be used to adjust specific taxes or tax amounts. Taxes can and will change based on resulting input changes, but the tool is not meant to edit the resulting taxes into the numbers the user desired. This practice is typically advised against, but in rare scenarios the client should contact support for assistance via the *Manual Transactions Tool*
  - **Scenario:** Making subject wage adjustments at quarter end

- **Proposed Solution:** Contact Support for assistance. The representatives can utilize the *Manual Transactions Tool* or request next level support assistance.
- **Will I, as the reader, benefit from this feature?**
  - If you have a business that often receives last minute, or post pay run timesheet submissions (i.e. staffing)
  - If you have complicated benefits or deductions and / or tiered models that require great attention (these setups are more prone to mistakes)
  - If you have a commission-based businesses or sales models that will pay monies in advance and need to remediate later
- **Who can use this feature?** This will be rolled out to pilot clients for a short period. The full rollout will be dependent on received feedback or required changes. **Upon request, this feature can be turned on for your workspace at any time.**

### Starting an Adjustment Pay Run:



### The Adjustment Triage Step:

### Adjust a prior pay run

You selected **MONTHLY 08/31/2022 (Scheduled)** for adjustment.

**What do you need to change?**

☐ Underpaid wages  
☒ Overpaid wages  
☐ Void or cancel a check  
☐ Employee paid in wrong location (affecting minimum wage or taxes)  
☐ Adjust benefit or deduction code  
☐ Specific manual adjustment (potentially affecting taxes)

**Overpaid wages**

Select "Adjust Payrun," find the employee(s), and adjust hours or wages to the values they should have been. When complete, this process will create an adjustment check or wage repayment; all applicable tax adjustment/deduction arrears will be recouped from future paychecks automatically.

Adjust Payrun

## Selecting the Employees to include in the Adjustment:

### Adjust a prior pay run

You selected **WEEKLY 09/01/2022 (Scheduled)** for adjustment.

The employees who were issued checks from this payrun are listed below. Select each employee that should be adjusted. Only the employees selected below will be included in the adjustment pay run.

Filter Table...

<input type="checkbox"/>	Employee ID	Employee Name	Department	Class	Division
<input checked="" type="checkbox"/>	ANHDF001	DEBBIE FOLKS	Department A	CLASSA	
<input type="checkbox"/>	ANHFW001	DAGOBERT WIECZOREK	Department A	CLASSA	
<input checked="" type="checkbox"/>	AF5FM001	FALLON MESSICK	Department A	CLASSA	
<input type="checkbox"/>	AF5PO001	PICERIOUS OGREN	Department A	CLASSA	
<input type="checkbox"/>	AF5TW001	TIRION WESTBROOKS	Department B	CLASSB	

Previous Submit

## Adjustment Pay Run - Hours & Earnings Step:

**Payroll**

Info: The Adjustment Pay Run is pre-filled with information from the pay run you selected. To make adjustments at any step, replace the original amount with the value you want.

Pay Run: WEEKLY 09/01/2022 - Adjustment (Adjustment)    Check Date: 09/01/2022    Edit info    Pay Period: 08/21/2022 - 08/27/2022    Original Pay Run: WEEKLY 09/01/2022 (Scheduled)    Cancel Pay Run

**Employees** 1 **Hours & Earnings** 2 **Deductions** 3 **Benefits** 4 **Arrears** 5 **Review Adjustments** 6

Review your employees' hours and pay rate for all earnings in this pay period. If your employees' hours have not been imported via the Greenshades Timesheets module or other integration, you can bulk upload hours or manually add employees to complete this payroll. You can override any employee's earnings by entering the total earning amount in the Gross Pay field.

Filter Table...    + Add Hours & Earnings    Refresh    Total Hours: 40.00    Last Pay Run: 40.00 hours    Compare

Employee ID	Employee Name	Earning Code	Position	Department	Location	Work Period	Hours	Minutes	Pay Rate	Gross Pay
ANHDF001	DEBBIE FOLKS	BONUS	Position A	Department A	Alaska Work Loc	08/20/2022 - 08/27/2022	0	0	\$ 1,500.00	fixed \$ 1,500.00
APSPM001	FALLON MESSICK	SALARY 2	Position A part 2	Department A	Massachusetts W	08/20/2022 - 08/27/2022	40	0	\$ 50,000.00	per year \$ 961.54

Total Entries: 2

Previous    Save & Exit    Next

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## Adjustment Pay Run – Review:

**Payroll**

Info: The Adjustment Pay Run is pre-filled with information from the pay run you selected. To make adjustments at any step, replace the original amount with the value you want.

Pay Run: Multiple Adjustments - Adjustment (Adjustment)    Check Date: 08/24/2022    Edit info    Pay Period: 08/14/2022 - 08/22/2022    Original Pay Run: Multiple Adjustments (Special)    Cancel Pay Run

**Employees** 1 **Hours & Earnings** 2 **Deductions** 3 **Benefits** 4 **Arrears** 5 **Review Adjustments** 6

Review and submit your payroll for this period. If any changes are required to properly calculate this pay run, you may go back to any prior step and update any necessary fields. To override any calculated values for submission on this pay run, click edit to enter the desired final values. Please note that once you have clicked Submit, you will be unable to undo or cancel this pay run.

Total Employees: 1    Total Wage Repayment Arrears: -204.01

Filter Table...    Adjustments: 1    Paper Paycheck: 0    Direct Deposit: 1    Change

Result Type	Employee ID	Employee Name	Hours	Minutes	Gross Pay	Taxable Wages	Standard Deductions	Wage Repayment Deduction	Employee Taxes	Net Pay	Benefits Total	Employer Taxes	View Paystub
Adjustment	ANHDF001	DEBBIE FOLKS	25	0	\$ 850.00	\$ 850.00	\$ 0.00	\$ 204.01	\$ 225.32	\$ 420.67	\$ 0.00	\$ 65.02	View Paystub
Desired	ANHDF001	DEBBIE FOLKS	50	0	\$ 2,625.00	\$ 2,625.00	\$ 20.00	\$ 0.00	\$ 697.13	\$ 1,907.87	\$ 0.00	\$ 199.28	
Original	ANHDF001	DEBBIE FOLKS	25	0	\$ 2,062.50	\$ 2,062.50	\$ 20.00	\$ 0.00	\$ 555.30	\$ 1,487.20	\$ 0.00	\$ 156.26	
Prior Adjustment	ANHDF001	DEBBIE FOLKS	0	0	-\$ 37.50	-\$ 37.50	\$ 0.00	-\$ 28.06	-\$ 9.44	\$ 0.00	\$ 0.00	-\$ 2.88	
Prior Adjustment	ANHDF001	DEBBIE FOLKS	0	0	-\$ 250.00	-\$ 250.00	\$ 0.00	-\$ 175.95	-\$ 74.05	\$ 0.00	\$ 0.00	-\$ 19.12	

Previous    Last Saved: 8:03:15 PM    Save & Exit    Next

## Navigation:

**Adjustment Pay Run:** Greenshadesonline.com > Payroll Tab >Recent Pay Runs >Adjust

## Enhanced Feature - Pay Run Wizard: Combined Hours & Earnings (Initial Rollout)

- **Feature Description:** With the goal of creating a more fluid and comprehensive Pay Run Experience, Greenshades has combined the Hours and Earnings stages of the Pay Run Wizard. The user interface and imports have all been updated to operate via a single page or import respectively
- **Key Feature Information:** This combined view will be the new standard for the product moving forward. That said, for the coming months, Greenshades will continue to support the ability to import this data in the historical format of Hours and Earnings as separate files. Once the change has gone live, if this separation is required to maintain smooth operation for your business, you may request to keep the separated import option. In addition, this change has added some other improvements found below
  - Active clients that receive this combined functionality will be provided both separated and combined import options at first
  - All newly onboarded clients will be provided the combined Hours & Earnings functionality / import only
  - One row in the interface no longer implies one employee. Each row in the new wizard will indicate a single work week (7 days)
  - The Hours compare tool has been visually reworked
- **Will I, as the reader, benefit from this feature?**
  - All clients should benefit from this change as the new functionality will present a more fluid and straightforward management of employee hours / earnings.
  - This change is specifically impactful for users looking to import a single file for Hours & Earnings or clients that are accustomed to managing this data in one place or table (common in many other HCM systems)
- **Who can use this feature?** This will be rolled out to pilot clients for a short period. The full rollout will be dependent on received feedback or required changes. **Upon request, this feature can be turned on for your workspace at any time.**

### Standard Hours Step (separated from earnings):

Payroll

Pay Run: BIWEEKLY 08/26/2022 (Scheduled) Check Date: 08/26/2022 Pay Period: 08/07/2022 - 08/20/2022 Cancel Pay Run

Employees 2 Hours 3 Earnings 4 Deductions 5 Benefits 6 Arrears 7 Review & Submit

Review your employees' hours for this pay period. If your employees' hours have not been imported via the Greenshades Timesheets module or other integration, you can bulk upload hours or manually add employees to complete this payroll.

7 Total Employees 3 Unique Hours Codes 385.00 Last Pay Run 0.00 (~385.00 hours) Compare to Last Payroll

Filter Table... + Add Hours Refresh Timesheets

	Employee ID	Employee Name	Earning Code	Pay Stub Name	Position	Department	Location	Hours	Minutes	
<input type="checkbox"/>	41742	Worst change	INCN	INCN	0109		test1	6	0	
<input type="checkbox"/>	41742	Worst change	HOURLY	HOURLY	0109		test1	3	0	
<input type="checkbox"/>	41725	Whatever Toast	INCN	INCN	0109		GA	40	0	

### New Hours & Earnings combination:

**Payroll**

Pay Run: BIWEEKLY 09/08/2022 (Scheduled)      Check Date: 09/08/2022      Pay Period: 08/21/2022 - 09/03/2022      [Cancel Pay Run](#)

**Employees** 1 **Hours & Earnings** 2 **Deductions** 3 **Benefits** 4 **Arrears** 5 **Review & Submit** 6

Review your employees' hours and pay rate for all earnings in this pay period. If your employees' hours have not been imported via the Greenshades Timesheets module or other integration, you can bulk upload hours or manually add employees to complete this payroll. You can override any employee's earnings by entering the total earning amount in the Gross Pay field.

Filter Table... [+ Add Hours & Earnings](#) [Refresh](#) **Total Hours: 80.00** [Compare](#) [Print](#)

	Employee ID	Employee Name	Earning Code	Position	Department	Location	Work Period	Hours	Minutes	Pay Rate	Gross Pay
<input type="checkbox"/>	ANH0301	KADIA RUTKOWSKI	SALARY	Position A	Department A	Wisconsin Work Loc	08/16/2022 - 08/23/2022	13	20	\$ 52,000.00 per year	\$ 333.33
<input type="checkbox"/>	ANH0301	KADIA RUTKOWSKI	SALARY	Position A	Department A	Wisconsin Work Loc	08/23/2022 - 08/30/2022	40	0	\$ 52,000.00 per year	\$ 1,000.00
<input type="checkbox"/>	ANH0301	KADIA RUTKOWSKI	SALARY	Position A	Department A	Wisconsin Work Loc	08/30/2022 - 09/06/2022	26	40	\$ 52,000.00 per year	\$ 666.67

### Adding earnings via the new Hours & Earnings combination:

09/08/2022 (Scheduled)      Check Date: 09/08/2022      Pay Period: 08/21/2022 - 09/03/2022

**Hours & Earnings** 2 **Deductions** 3 **Benefits** 4 **Arrears** 5 **Review & Submit** 6

pay rate for all earnings in this pay period. If your employees' hours have not been imported via the Greenshades Timesheets module or other integration, you can bulk upload hours or manually add employees to complete this payroll. You can override any employee's earnings by entering the total earning amount in the Gross Pay field.

**Add Earnings**

- Add Employees
- Select Codes
- Add Details**

**Add Details**

Add details to the selected employees to add earning codes.

Employee ID	Employee Name	Earning Code	Position	Department	Location	Work Period	Hours	Minutes	Pay Rate
AFSNY001	Nancy Yeaker	HIGHER HOUR	Position A	Department D	Alabama Wo	08/23/2022	40	0	\$ 50.00 per hour

☐ Apply this earning code to current and future payruns? (active employees only)

[Previous](#) [Cancel](#) [Save](#)

### Navigation:

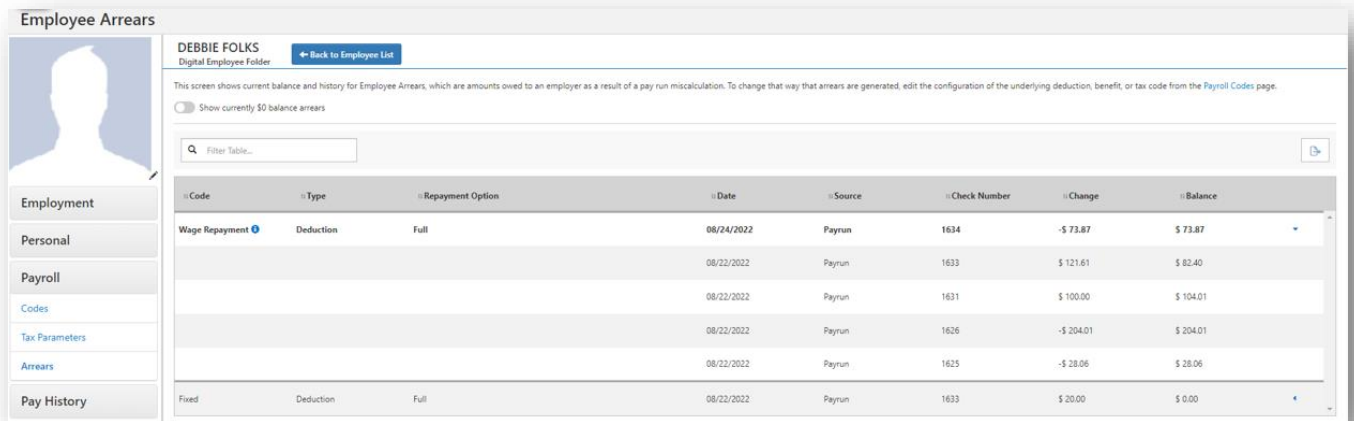
**Combined Hours & Earnings Step:** Payroll Tab > Open Pay Run > Hours & Earnings

### New Page - Employee Information: Payroll Arrears Page (Initial Rollout)

- **Feature Description:** A new page has been added to the employee card to view arrears balances and their history of changes. This page is for informational and viewing purposes only. Its need is primarily a result of the Wage Repayment Arrears that will surface via negative net earnings submitted by an *Adjustment Pay Run*.
- **Key Feature Information:** This page accessible at a per employee view. As a result, this page will not replace arrears reports for the purpose of reviewing arrears across the entire Workspace / Company.

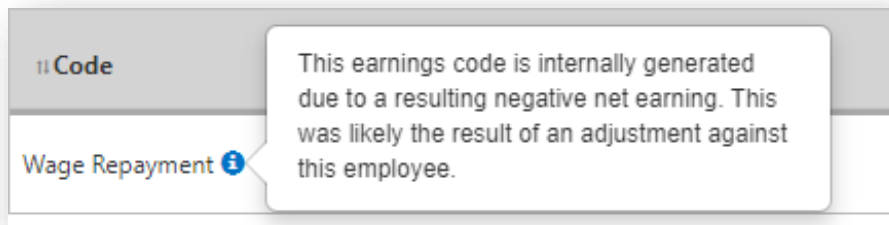
- **Will I, as the reader, benefit from this feature?** All clients can benefit from this page since it is not a change to functionality, but a new page that will assist in making arrear information more visible and well understood
- **Who can use this feature?** This will be rolled out to pilot clients for a short period. The full rollout will be dependent on received feedback or required changes. **Upon request, this feature can be turned on for your workspace at any time.**

### New Arrears Page:



Code	Type	Repayment Option	Date	Source	Check Number	Change	Balance
Wage Repayment	Deduction	Full	08/24/2022	Payrun	1634	-\$ 73.87	\$ 73.87
			08/22/2022	Payrun	1633	\$ 121.61	\$ 82.40
			08/22/2022	Payrun	1631	\$ 100.00	\$ 104.01
			08/22/2022	Payrun	1626	-\$ 204.01	\$ 204.01
			08/22/2022	Payrun	1625	-\$ 28.06	\$ 28.06
Fixed	Deduction	Full	08/22/2022	Payrun	1633	\$ 20.00	\$ 0.00

### Wage Repayment Help Text:



### Navigation:

**Payroll Arrears Page:** Greenshadesonline.com > Employees Tab > Select an Employee > Payroll > Arrears

### New Feature - Pay Run Wizard: Show GL Preview at the Review and Submit step

- **Feature Description:** A new option has been added to the *Review and Submit* step of the Pay Run wizard to allow users to see the GL transactions that will be produced from completing the current Pay Run. Clicking the link Labeled “Preview General Ledger” will present users with all pending GL transactions so that they can review and confirm that the transactions data, as well as their current account mappings, are correct before submitting the Pay Run.



- **Key Feature Information:** Note that there is intentionally no ability to download or export this information since these transactions have NOT actually occurred until after payroll submission. Exporting this data before actual creation would lead to falsified and incorrect accounting.
- **Will I, as the reader, benefit from this feature?** All clients that Utilize the Greenshades General Ledger post pay run can and should benefit from this feature. It is advised for your practitioner to review these transactions before the submission of every pay run
- **Who can use this feature?** This feature is live for all clients

#### Accessing the General Ledger Preview:

Employees

Hours

Earnings

Deductions

Review and submit your payroll for this period. If any changes are required to properly calculate this pay run, you may go back to any prior step and update any necessary fields or cancel this pay run.

<b>Total Employees: 14</b> <b>Earnings</b> BONUS: \$ 125.00 HOURLY 2: \$ 0.00 SALARY: \$ 12,000.00 <b>Deductions</b> 401K: \$ 0.00 HEALTH EF: \$ 0.00 HSA Deduction Catchup: \$ 0.00 Standard Deduction: \$ 0.00 <b>Benefits</b> HEALTH EO: \$ 25.00 HSA FAMILY: \$ 25.00 <b>Other Taxes</b>	<b>Estimated Total Cost: \$ 13,216.11</b>  FFCRA SICK: \$ 0.00 OT: \$ 0.00 SALARY PTO: \$ 0.00  Banks: \$ 48.63 HEALTH EO: \$ 25.00 HSA FAMILY: \$ 50.00  HSA Benefit: \$ 0.00 Standard Benefit: \$ 25.00
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Total Employees: 14

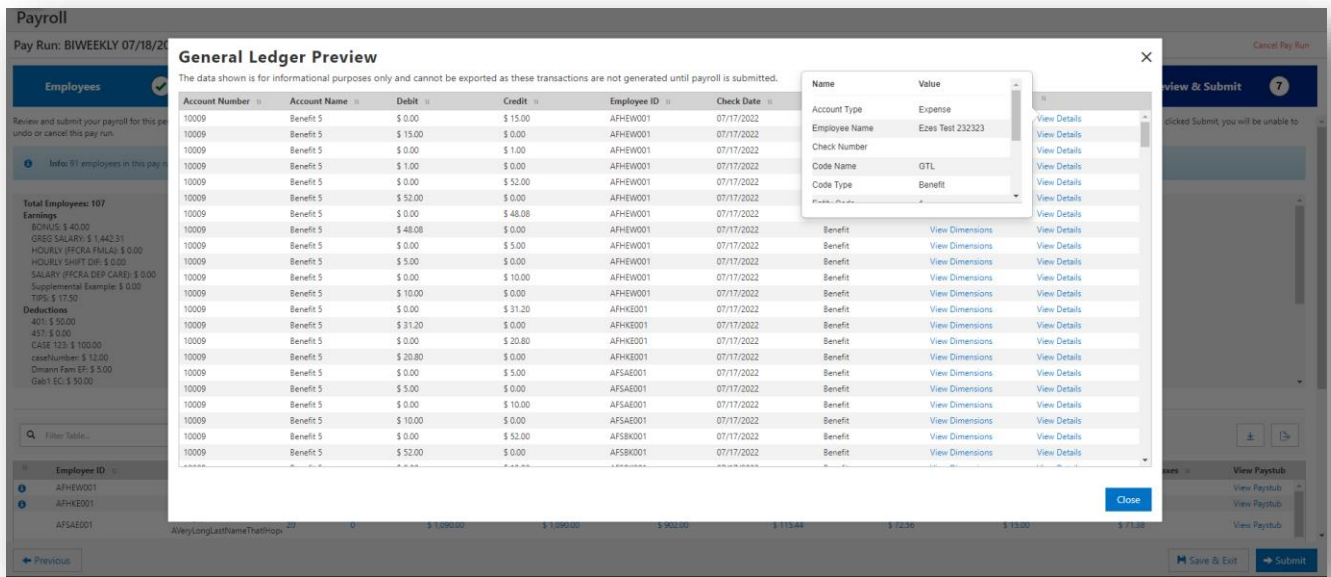
Paper Paycheck: 11

Direct Deposit: 3

Change

Preview General Ledger

#### The General Ledger Preview:



## Navigation:

**General Ledger Preview:** Greenshadesonline.com > Payroll > Open Pay Run > Review & Submit > Preview General Ledger

## Recent Updates 8/3/2022

## GREENSHADES ONLINE PAYROLL

### New Feature - New Employee Fields: Custom Fields

- Feature Description:** The list of standard employment information is important for all Greenshades clients; however, these fields do not provide any flexibility in the form of custom identification to meet client specific business needs. Many clients require information such as: Company specific IDs, noteworthy dates, operational qualifiers, and more that are very specific to their own operations that would not be useful to other Greenshades clients. To provide these clients a more personalized employee set up experience that can solve this explained pain point, we are introducing Custom Fields. These fields will provide clients the ability to define their own list of identifiers that directly relate to all, or even a subset, of their employees. The fields will serve as way for our clients to define a level of employee identification beyond standard HCM qualifiers.
- Additional Information:** Custom Fields, by nature of them being client specific, are used as identifiers for informational purposes only. These fields are not meant to be controllers or

inputs for Greenshades products. Moreover, this feature should **not** be thought of as a “one size fits all” solution for adding to the data types that Greenshades maintains and supports. The below pieces of information will assist in creating a better definition of what these fields are used for:

- **Common use cases for Custom Fields:**
  - Maintaining Unique company IDs
  - Tracking important employee level dates (i.e. tenure)
  - Adding additional contact information (i.e. phone numbers or addresses)
  - Assigning business specific notations for employee achievements, operations, or feats
- **How Custom Fields are managed:**
  - *Custom Fields* are a function of Greenshades Online (GO) and are controlled at the client Administrator level
  - *Custom Fields* are not controlled by or viewable at the employee level or via Green Employee (GE)
  - The *Custom Field's* value assigned against their employees can be managed in bulk or one at a time through the *Custom Fields* settings or in the employee profile
- **Reporting on Custom Fields:**
  - HR or Payroll level Reports will NOT automatically pull in Custom Fields as additional columns
  - Reporting will be expanded on a one-by-one basis, or as requested, to have these new fields as an included set of data points
- **Who will benefit from this feature?** Any client, payroll or not, that is looking to expand their employee information with additional dates, IDs, or other piece of information about the EEs employment
- **Who can use this feature?** This will be rolled out to early access clients for a short period. The full rollout will be dependent on received feedback or required changes. **Upon request, this feature can be turned on for your workspace at any time.**

New Custom Fields Page:

**Custom Fields Management**

Company Info | Access Settings | Payroll | Employee Services | Welcome and Home | New Hire Onboarding | Timesheets | Benefits | Pay History | Evaluation | I-9 | Expense Reports | Certification Management | HR Document Library | Direct Deposit | W-4 | Profile | **Custom Fields** | Organization Chart | Time Clock Kiosk | Time Off Policies

Use custom fields to supplement data in profile.

Filter Table... [+ Add Custom Field](#) [Manage employee data](#)

Field name is	Type [What's this?]	
Age	integer	
Graduation Date	date	
Anniversary	date	
	boolean	
	date	
	dateTime	
	decimal	
	dollar	
	integer	
	percentage	
	text	
	textMultiLine	
	boolean	
	enum	
	boolean	
	enum	

### Setting up a new custom field:

**Add Custom Field** ✕

Field name  
Age

Type  
Whole number [Integer] ▼

A decimal that ends with a percent (%) sign

**Whole number [Integer]**  
Any whole number

List items [Enum]  
Allows only values listed in the EnumValues collection

### Managing Assignments:

Custom Fields

Use custom fields to supplement data in profile.

Filter Table...

+ Add Custom Field

Manage employee data

Field name	Type [What's this?]	
Age	integer	
Graduation Date	date	
Anniversary	date	
boolean		
date		
date and time		
decimal		
dollar		
whole number	int	
percent		
text		
multiline		
Is Smoker		
enum		
Ritz		
List of items		

Bulk manage Custom Fields

Export Custom Fields data

Import updated data

Export Custom Fields data

Use this wizard to export data for all employees, make your updates, and then import back in to Greenshades. We recommend you do this all in the same session, so you avoid accidentally overwriting any data newer than your download.

Download

Before Custom Fields data downloaded. Update custom-fields-template.xlsx with your changes and then select "Next".

Cancel

Next

A	B	C	D	E	F	G	H	I	J	K	L	
Employee Id	Age	Graduation Date	Anniversary	boolean	date	date and time	decimal	dollar	whole number	int	percent	text
AFHEW001	24	6/8/2022 12:00:00 AM	6/17/2022 12:00:00 AM	True	6/2/2022 12:00:00 AM	4/15/2021 08:00:00 AM	1.258757	\$2432.56	515		22.84%	some text
AFHKE001	20	6/15/2022 12:00:00 AM	1/23/2020 12:00:00 AM	True	6/24/2022 12:00:00 AM	3/24/2022 09:09:00 AM	2.545754	\$2845.43	567		22.8%	words are real
AFSBA001	7	3/22/2022 12:00:00 AM	6/15/2022 12:00:00 AM		6/15/2022 12:00:00 AM	3/22/2022 12:00:00 AM						
ANHC8001	24		6/17/2022 12:00:00 AM	True	6/2/2022 12:00:00 AM		1.258757	\$2432.56			22.84%	some text

Custom Fields inside the Employee Information section:

The screenshot displays the 'Employee Management' page for KARTIKEYA ESPIN'OZA. The interface includes a top navigation bar with links to Home, Employees, Payroll, Pay History, Tax Service, Year-End Forms, Reports, and Settings. A left sidebar contains tabs for Employment, Information, Login, Pay Settings, Notes, Personal, Payroll, Pay History, Timesheets, Time Off, Benefits, Documents, Certifications, and Evaluations. The main content area shows the employee's details, including a 'Back to Employee List' button, a list of fields (Employee ID, First Name, Last Name, Hire Date, Termination Date, Email, Work Location, Supervision, Department, Position, Division, Class, Employment Status, HR Status, Employment Type, Work Hours Per Year, User Defined 1, User Defined 2, Affordable Care Act Full Time Status), an 'Organization Chart' showing a hierarchy, and a 'Custom Fields' section with various data points like Age, Graduation Date, Anniversary, Is Teacher, etc.

## Navigation:

**Custom Fields Setup / Settings:** Greenshadesonline.com > Settings Tab > Employee Services > Custom Fields

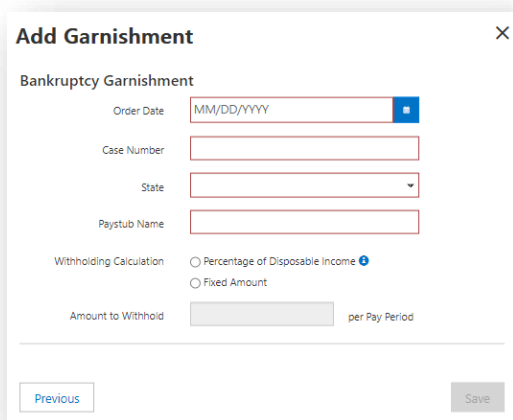
**Custom Fields Individual Employee Management:** Greenshadesonline.com > Employees Tab > Employment > Information

## Enhanced Feature – New Payroll Settings: Expanded Garnishments Options

- Background:** Payroll client's required additional qualifiers and rules to properly handle Garnishment orders. Up until now the Greenshades solution supported basic functionality but could benefit from additional fields to control the way clients can start, stop, and identify Garnishment orders against their EEs.
- What's new?** The below fields have been added to expand our Garnishment functionality:
  - Start Date (Required):** This date will be used to determine when payrolls will start to include the Garnishment against the EE.

- **End date of Garnishment (Optional):** New option to stop the Garnishment after a desired point in time (day).
- **Agency Name (Required):** Identifier to track the federal agency who issued the Garnishment.
- **Total Amount (Optional):** The summed amount to collect before the Garnishment is stopped. This halt will take priority over end date.
- **Note:** The above options have been added to **all** Garnishment types. The one exception is that Total Amount has not added to Child Support as it is not applicable.

**Previously: Bankruptcy Garnishments Setup:**



The screenshot shows a web form titled "Add Garnishment" with a close button (X) in the top right corner. The form is for "Bankruptcy Garnishment" and contains the following fields and options:

- Order Date:** A text input field with a date placeholder "MM/DD/YYYY" and a blue calendar icon.
- Case Number:** A text input field.
- State:** A dropdown menu.
- Paystub Name:** A text input field.
- Withholding Calculation:** Two radio button options: "Percentage of Disposable Income" (selected) and "Fixed Amount".
- Amount to Withhold:** A text input field followed by the text "per Pay Period".

At the bottom of the form, there are two buttons: "Previous" on the left and "Save" on the right.

**Now: Bankruptcy Garnishments Setup:**

### Navigation:

**Garnishment Assignments:** Greenshadesonline.com > Employees > Select an Employee > Payroll Section > Codes > Garnishments Section > Add Garnishment or Edit existing Garnishment

### Enhanced Feature – New Garnishments Details and Updated Summary Reports

- Background:** Garnishments maintained very minimal reporting information against them and the options to view their data was limited. The Garnishment withholding themselves could be tracked on a transactional basis, but not at a summary level across all Employees. Importantly, users did not have a summary level of data to show requesting parties the targeted totals and remaining amounts of the Garnishment.
- What's new?** With the addition of the new Garnishment fields, new and updated reports have been made available for all users. The product now supports a detailed report to show Garnishments at a transactional level (Details Report) and to show them a summary of their current state across all their EEs in the system ("Summary Report"). Lastly, the employee code setup view will show the remaining balance for Garnishments with targeted "Total amounts".

### Garnishments Details Report (UPDATED):



Select the date range or pay run you would like to view  
☒ Last 30 Days  
☐ Year to Date  
☐ Select Quarter  
☐ Custom Date Range  
☐ Select Pay Run

### Garnishment Details Report

The Garnishment Details Report shows your garnishments for the selected time period or pay run.

Date Range: 06/29/2022 - 07/29/2022

Filter Table...

Check Date	Employee ID	Employee Name	Case Number	Agency Name	Order Date	Start Date	End Date	State	Amount	Starting Balance	Remaining Balance
07/29/2022	AFHEW001	Ezes Test 232323	CASE A2824		Fri Jan 01 2021 00:00	Fri Jan 01 2021 00:00	Sun Dec 31 0000 23	AK	\$ 166.34	0	0
07/29/2022	AFSAE001	ARTHUR AveyLongL 1985			Wed Mar 11 2020 00:00	Wed Mar 11 2020 00:00	Sun Dec 31 0000 23	FED	\$ 16.00	0	0
07/29/2022	AFSAE001	ARTHUR AveyLongL FED			Fri May 01 2020 00:00	Fri May 01 2020 00:00	Sun Dec 31 0000 23	FED	\$ 40.00	0	0
07/29/2022	AFSAE001	ARTHUR AveyLongL FED not Tax			Wed Jan 01 2020 00:00	Wed Jan 01 2020 00:00	Sun Dec 31 0000 23	FED	\$ 30.00	0	0
07/28/2022	AFSBK001	BOWMANE ABCDE	BANKS		Fri Oct 02 2020 00:00	Fri Oct 02 2020 00:00	Sun Dec 31 0000 23	DE	\$ 0.00	0	0
07/28/2022	AFSBK001	BOWMANE ABCDE	CHILD GARN		Thu Feb 11 2021 00:00	Thu Feb 11 2021 00:00	Sun Dec 31 0000 23	CA	\$ 0.00	0	0
07/28/2022	AFSPM001	FALLON MESSICK	CHILD SUPP		Sat Aug 01 2020 00:00	Sat Aug 01 2020 00:00	Sun Dec 31 0000 23	FL	\$ 300.00	0	0
07/28/2022	AFSPF001	GIUSEPPINA FONT	A123		Sat May 01 2021 00:00	Sat May 01 2021 00:00	Sun Dec 31 0000 23	AK	\$ 0.00	0	0
07/28/2022	AFSPF001	GIUSEPPINA FONT	A234		Tue Jun 01 2021 00:00	Tue Jun 01 2021 00:00	Sun Dec 31 0000 23	AL	\$ 0.00	0	0
07/28/2022	AFSPF001	GIUSEPPINA FONT	FED TAX		Sat Aug 01 2020 00:00	Sat Aug 01 2020 00:00	Sun Dec 31 0000 23	FED	\$ 0.00	0	0
07/28/2022	AFSH001	HARLEIGH SPOHN	STUD LOAN		Sat Aug 01 2020 00:00	Sat Aug 01 2020 00:00	Sun Dec 31 0000 23	FED	\$ 285.82	0	0
07/28/2022	AFSH001	HOLDA FEKETE	STATE FL		Sat Aug 01 2020 00:00	Sat Aug 01 2020 00:00	Sun Dec 31 0000 23	FL	\$ 0.00	0	0
07/28/2022	AFSKS001	HARTWIN TERRONE	OTHER FED		Sat Aug 01 2020 00:00	Sat Aug 01 2020 00:00	Sun Dec 31 0000 23	FED	\$ 0.00	0	0
07/28/2022	AFSKS001	KEMBLE STEFFEY	SlurhCSPercent		Wed Jan 01 2020 00:00	Wed Jan 01 2020 00:00	Sun Dec 31 0000 23	FED	\$ 0.00	0	0
06/30/2022	AFSW001	WYBER JASPER	ChildGarn		Tue May 31 2022 00:00	Tue May 31 2022 00:00	Sun Dec 31 0000 23	AL	\$ 0.04	0	0
06/30/2022	AFSW001	WYBER JASPER	Bankrupt		Tue May 31 2022 00:00	Tue May 31 2022 00:00	Sun Dec 31 0000 23	AL	\$ 1.00	0	0
06/30/2022	AFSW001	WYBER JASPER	ChildGarn		Tue May 31 2022 00:00	Tue May 31 2022 00:00	Sun Dec 31 0000 23	AL	\$ 1.00	0	0
06/30/2022	AFSW001	WYBER JASPER	TaxLevy		Tue May 31 2022 00:00	Tue May 31 2022 00:00	Sun Dec 31 0000 23	FED	\$ 1.00	0	0
06/30/2022	AFSW001	WYBER JASPER	OtherFed		Tue May 31 2022 00:00	Tue May 31 2022 00:00	Sun Dec 31 0000 23	FED	\$ 1.00	0	0
06/30/2022	AFSW001	WYBER JASPER	StateGarn		Tue May 31 2022 00:00	Tue May 31 2022 00:00	Sun Dec 31 0000 23	AL	\$ 1.00	0	0
06/30/2022	AFSW001	WYBER JASPER	Student		Tue May 31 2022 00:00	Tue May 31 2022 00:00	Sun Dec 31 0000 23	FED	\$ 1.00	0	0
06/30/2022	AFSW001	WYBER JASPER	ChildGarn		Tue May 31 2022 00:00	Tue May 31 2022 00:00	Sun Dec 31 0000 23	AL	\$ 4.08	0	0

## Garnishments Summary Report (NEW):

### Garnishment Summary Report

The Garnishment Summary Report shows the current status of garnishments across a workspace.

Filter Table...

Employee ID	Employee Name	Case Number	Agency Name	Type	State	Starting Balance	Remaining Balance
AFHEW001	Ezes Test 232323	CASE A2824		ChildSupport	AK	0	0
AFSAE001	ARTHUR AveyLongLastNameThatIsHopedC 1985			StudentLoan	FED	0	0
AFSAE001	ARTHUR AveyLongLastNameThatIsHopedC FED			FederalTaxLevy	FED	0	0
AFSAE001	ARTHUR AveyLongLastNameThatIsHopedC FED not Tax			StudentLoan	FED	0	0
AFSBK001	BOWMANE ABCDE	CHILD GARN		ChildSupport	CA	0	0
AFSBK001	BOWMANE ABCDE	BANKS		Bankruptcy	DE	0	0
AFSES001	Potaeto STURDIVANT	CHILDSUPPORTFL		ChildSupport	FL	0	0
AFSES001	Potaeto STURDIVANT	FEDERALTAXLEVY		FederalTaxLevy	FED	0	0
AFSES001	Potaeto STURDIVANT	STUDENTLOAN		StudentLoan	FED	0	0
AFSPM001	FALLON MESSICK	CHILD SUPP		ChildSupport	FL	0	0
AFSPF001	GIUSEPPINA FONT	FED TAX		FederalTaxLevy	FED	0	0
AFSPF001	GIUSEPPINA FONT	A123		ChildSupport	AK	0	0
AFSPF001	GIUSEPPINA FONT	A234		ChildSupport	AL	0	0
AFSH001	HARLEIGH SPOHN	STUD LOAN		StudentLoan	FED	0	0
AFSH001	HOLDA FEKETE	STATE FL		StateWage	FL	0	0
AFSKS001	HARTWIN TERRONE	OTHER FED		OtherFederal	FED	0	0
AFSKS001	KEMBLE STEFFEY	SlurhCSPercent		StudentLoan	FED	0	0
AFSW001	WYBER JASPER	ChildGarn		ChildSupport	AL	0	0
AFSW001	WYBER JASPER	Bankrupt		Bankruptcy	AL	0	0
AFSW001	WYBER JASPER	TaxLevy		FederalTaxLevy	FED	0	0
AFSW001	WYBER JASPER	Student		StudentLoan	FED	0	0
AFSW001	WYBER JASPER	StateGarn		StateWage	AL	0	0

## Navigation:

**View the Garnishment Reports:** Greenshadesonline.com > Reports > Garnishment Details Report or Garnishments Summary Report

### GREENSHADES ONLINE PAYROLL

#### New Feature - New Admin Access Level: Limited Payroll Admins

- **Feature Description:** A new admin level, known as a Limited Payroll Admin, will provide the user the ability to manage and run payroll in a restricted format for only their assigned subset of employees. These Admins are limited, which by Greenshades definition, indicates that they will not have access to change larger workspace level settings or view the information of employees outside of their assignment. The assignment of specific employees will be at a group level, which is defined by a variety of category options (i.e. department, position, location, etc.).
- **Limited Payroll Admin access to each module of Greenshades Online:**
  - Setting controls:
    - Will **not** have access to workspace level control settings (i.e. *Company information* and *Access Settings*)
    - Will **not** be able to change workspace level Payroll settings (i.e. code settings, GL mappings, Schedule settings)
    - Will be able to configure certain employee settings for employees that they manage
    - Will be able to manage notifications
  - Employee controls:
    - Will be able to edit personal and employment information about employees that they have been given access to
    - Will **not** be able to add or remove employees
    - Will be able to manage employee level code controls for employees that they have access to
    - Will be able to manage other HR functions, however these modules access can be refined during the admin setup
  - Payroll controls:
    - Will be able to create *scheduled*, *special* or *adjustment level* pay runs for all employees that they have been given access to
    - Will **not** be able to create pay runs for employees outside of their access
    - Will only possess the ability to operate current and / or completed pay runs where they have access to all the employee groups in the run at minimum
    - Will **not** possess the ability to operate current and / or completed pay runs where they have access to only specific employees from that run
    - Will only possess the ability to void checks for employees that their employee group has given them access to
    - Will only possess the ability to Generate ACH files, print pay registers, and perform other post pay run actions for employees that their employee group has given them access to
    - Will only see payroll errors in the “Warnings Requiring Your Attention” widget for employees that their employee group has given them access to
  - Reporting controls:
    - Will be able to run payroll reporting for all employees that they have access to, even if they did not personally run the pay run that produced those results

- Will **not** be able to report on, or see the data, of employees that they do not have access to, even if their employees shared a run with other employees outside of their control
- **Who will benefit from this feature?**
  - Payroll clients that need split their pay runs across multiple practitioners.
  - Payroll clients that want to run confidential payrolls.
  - Payroll clients that would like to restrict their payroll practitioners from accessing higher level functions (i.e. settings, quarterly reports, and more)
- **Who can use this feature?** This will be rolled out to early access clients for a short period. The full rollout will be dependent on received feedback or required changes. **Upon request, this feature can be turned on for your workspace at any time.**

### Defining Limited Payroll Admins:

Limited Payroll Administrator

Providing this user the Limited Payroll Admin access level will grant them the same basic functionality as a Limited Administrator by allowing access only to specific sets of employees. In addition to a standard Limited Admin, these users will be able to:

- Run payroll for their assigned employee groups
- View limited payroll reports for their assigned employee groups
- Review active and prior payroll data only for the employee in their assigned employee groups

### Limited Payroll Admin Setup:

Administrator Access Details

Greenshades Online Access for Test

Use this section to configure Greenshades Online administrator rights for Test. Greenshades Online administrators may log into GreenshadesOnline.com to perform a variety of HR management tasks and to configure how their employees will be able to use GreenEmployee.com. Companies often choose members of their payroll, HR, and/or IT staff to be administrators. Use this tool to add administrators, remove administrators, or edit administrator access rights.

Greenshades Online Role

- ☐ Super Administrator
- ☐ Limited Administrator
- ☒ **Limited Payroll Administrator**

Access to Modules

Select the modules this administrator may access:

- ☐ All Modules
- ☐ No Modules
- ☒ Specific Modules
  - ☒ Benefits
  - ☒ Certification Management
  - ☒ Direct Deposit
  - ☒ Documents
  - ☒ Evaluations
  - ☒ Everything Benefits Integration
  - ☒ Expense Reports
  - ☒ I-9
  - ☒ New Hires
  - ☒ Pay History
  - ☒ Payroll
  - ☒ Payroll Tax Service
  - ☒ Profile
  - ☒ State W-4
  - ☒ Tax Filing Center
  - ☒ Time Off
  - ☒ Timesheets
  - ☒ W-4

**Limited Payroll Administrator**

☒ Limit access of a Payroll Practitioner to a group of employees.

Access to Employees

Select the employees this administrator may access:

- ☐ All Employees
- ☐ No Employees
- ☒ **Group of Employees**

The administrator employee access rules will apply to all modules except Benefits and Payroll Tax Service.

Access will be restricted by department. **Change**

- ☐ (Blank)
- ☒ DEFA
- ☐ DEPB
- ☐ DEPC

Access to Impersonate Employees

☐ This administrator may impersonate employees.

Back
Save

### Creating a Pay Run as a Limited Payroll Admin:

Run Payroll

×

Select the employee group to include in the payroll.

Employee Group(s) to Include	Status	
Location FLORIDA	Not in Active Payrun	<input checked="" type="checkbox"/>
Location NEWYORK	Not in Active Payrun	<input checked="" type="checkbox"/>
Location WISCONSIN	Not in Active Payrun	<input type="checkbox"/>

Cancel

Create Pay Run

### Comparing limited and non-limited admins:

	Payroll Administrator	Limited Payroll Administrator
<b>Payroll:</b> Active / completed Pay Runs and Reports	Full access to all Employees	Granted full access for associated groups
<b>Payroll:</b> Process, submit, review, report on, file ACH, deposit checks against, and maintain the general ledger pay runs	Full access to all Employees	Limited access to managed Employees
<b>Employee Tab: Payroll Codes and Tax Parameters</b>	Full access to all Employees	Limited access to managed Employees
<b>Workspace Settings: Company Info</b>	Full Access	Not Applicable
<b>Workspace Settings:</b> Employee, Tax, and Notification options	Changes affect all employees	Settings options will be determined by the enabled modules Limited access to managed Employees when module is available
<b>Workspace Settings:</b> Payroll Settings (i.e. code management, general ledger mapping, and schedule management)	All HR and Payroll level settings	Not Applicable

### Navigation:

**Admin Access Settings:** Greenshadesonline.com > Settings > Access Settings > Administrator Access > Access Control > Add / Edit Administrator

### New Feature – General Ledger: Suspense Accounts

- Feature Description:** As a payroll practitioner or accountant, setting up your General Ledger to be correctly mapped and balanced is an incredibly important function. When a payroll is completed, and it's generated General Ledger batch reveals an unbalance set of transactions

between debits and credits, it is very likely that something is wrong with your GL setup / mapping assignments. Previously, in the Greenshades GL functionality, there was no clear way to understand which transactions caused this to happen. To assist clients that run into these scenarios, a new General Ledger Feature and account type known as a “Suspense Account” has been added to the GL offering. This account works essentially as a “**lost transactions**” bin. It will be used to collect all GL transactions that did not fall into another account as defined by the users GL mappings. This new account will also be accompanied by the new “Suspense Transactions Details” report that will show the users each of the transactions that fell into the Suspense account and therefore were not for in other mappings.

- **Key Takeaways:**

1. Moving forward your general ledger will *never* have a batch that results in different Debits and Credits since all unmapped transactions will now fall into the suspense account.
2. You will now have a standard function and reviewable reported of all unmapped transactions through their Suspense Account.
3. You will **not** be required to assign an actual ledger account against the new suspense account. However, completing this process is highly recommended. If utilizing our syncing products, you will not be able to “Sync” transactions that fell into the Suspense account unless you have assigned a ledger Account. Failing to do so will restrict syncing as long as these unmapped transactions exist.

Suspense Account – Account assignment:

EarningsBenefitsDeductionsGarnishmentsTaxesAccounts

General Ledger Mapping: Payment Accounts

This account is often called the "payroll clearing" account and is used to reconcile the net payment amount of the payroll to the transaction from your bank account.

Filter Table...

	Credit Entity Code	Credit Account Number
Do not split	10	None

Edit Mappings

General Ledger Mapping: Suspense Accounts

This account will be used to capture any and all unmapped transactions. If transactions fall into this account, a report will be created after GL Batch creation for you to review the items yet to be mapped. Choosing a specific account is required if you plan to sync these entries to your accounting package.

Suspense Account: 03-6030-01

Edit Account

Edit Suspense Account

Choose Suspense Account

Search...

Federal Tax Levy | 000004

Federal Tax Levy Garn

00-1220-00 | 00-1220-00

Deduction Withholding (CR2)

00-1235-00 | 00-1235-00

Deduction Withholding (CR)

Liability

Income

Income

Submit

Reviewing Suspense Account transactions in Post Pay Batch review:

Batch Details

Batch Name:	9/2/2022, 12:00:00 AM
Batch Status:	Pending
Submit Date:	
Credits:	\$78,307.70
Debits:	\$78,307.70

Recalculate Batch

**Warning!** You have 78 transactions not mapped to an account which are currently held in a Suspense Account. [Click here to review.](#)

**Warning!** You have transactions in Suspense with no Account mapped. As a result your GL is not balanced. You must assign a Suspense account [here](#) in order to sync these transactions.

Filter Table... Submit Batch

Entity Code	Account Number	Account Name	Account Type	Credit
	10029	Earning 5	Expense	\$ 0.00
	10029	Earning 5	Expense	\$ 0.00
	10029	Earning 5	Expense	\$ 0.00
	10029	Earning 5	Expense	\$ 0.00
	10029	Earning 5	Expense	\$ 0.00
	10029	Earning 5	Expense	\$ 0.00
	10029	Earning 5	Expense	\$ 0.00
	10029	Earning 5	Expense	\$ 0.00
None	None	Suspense	None	\$ 78,307.70

## Suspense Account Transactions Details Report:

Home Employees Payroll Pay History Tax Service Year-End Forms Reports Settings

Admin Application

Select the date range or pay run you would like to view

Select General Ledger Batch

Batch Name: 8/1/2022, 12:00:00 AM  
Batch Status: Pending  
[Change](#)

**General Ledger Suspense Transaction Details Report**  
The General Ledger Suspense Transaction Details Report shows transactions that were sent to the Suspense Account for the current batch.  
[Click here to go to the Batch Report.](#)  
[Click here to return to your General Ledger Batch Summary Report.](#)

Filter Table...

Entity Code	Account Number	Account Name	Account Type	Credit	Debit
Unknown	Unknown	Suspense	Suspense	\$ 0.00	\$ 49.60
Unknown	Unknown	Suspense	Suspense	\$ 0.00	\$ 11.60
Unknown	10003	Deduction 4	Income	\$ 0.00	\$ 407.43
Unknown	Unknown	Suspense	Suspense	\$ 0.00	\$ 49.60
Unknown	10003	Deduction 4	Income	\$ 0.00	\$ 11.60
Unknown	10003	Deduction 4	Income	\$ 0.00	\$ 16.00
Unknown	10003	Deduction 4	Income	\$ 0.00	\$ 49.60
Unknown	10003	Deduction 4	Income	\$ 0.00	\$ 4.09
Unknown	Unknown	Suspense	Suspense	\$ 0.00	\$ 11.60
Unknown	10003	Deduction 4	Income	\$ 0.00	\$ 49.60
Unknown	Unknown	Suspense	Suspense	\$ 0.00	\$ 0.48
Unknown	10003	Deduction 4	Income	\$ 0.00	\$ 11.60
Unknown	10003	Deduction 4	Income	\$ 0.00	\$ 15.73

## Navigation:

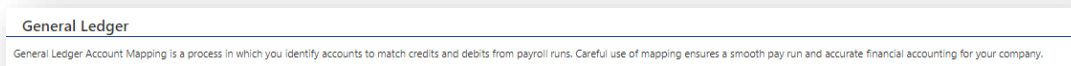
**Suspense Account Assignment:** Greenshadesonline.com > Settings > Payroll > General Ledger > Accounts > General Ledger Mapping: Suspense Accounts

**General Ledger Batch Review:** Greenshadesonline.com > Payroll > View Prior Pay Run > Review Batch (under the General Ledger Section)

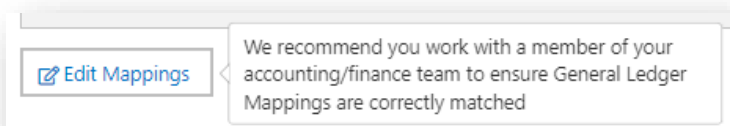
**Suspense Account Report:** Greenshadesonline.com > Reports > Suspense Account Transactions Details Report

## Enhanced Feature - General Ledger: Improved Text

- **Background:** General Ledger setup can be a complicated process for clients. Knowing this, we stated looking for areas to improve the information we provide in the product. We understand that contextual descriptions and warnings are important and can help you through the process.
- **What's new?** Small information changes are being to the General Ledger screens to help better guide clients through the General Ledger mapping process. The released changes are as follows:
  1. The General Ledger informational banner has been revised to better explain the mapping process



2. The “Edit Mappings” button will notify the user of its functionality upon hover over



## Navigation:

**General Ledger Mapping Screens:** Greenshadesonline.com > Settings > Payroll > General Ledger

## New Feature – Employee Direct Deposit: Branch On / Off Setting

- **Background:** All employees of clients that utilize our direct deposit module currently have access to our Branch integration. This enables an employee to instantly setup a Branch account and connect it as a Greenshades DD account through only a few clicks. Once the account is created the employee will have access to a free digital bank and the ability to receive funds up to 2 days faster than standard DD.

We understand that some of our clients would like to control their employee’s access to the Branch integration. This could be due to other third party partnerships, misunderstanding of the Branch offering, or other unknown factors to Greenshades.

- **What's new?** To empower our employers with the desired control over the offerings presented to their employees, a workspace level setting has been added to the Employee Perks settings as a new tab called “Digital Banking”. Here you will have the ability to:
  1. Turn the Branch integration **on** or **off** for all employees at anytime
  2. Clients can [Learn More](#) about Branch and what the integration can offer for your employees



## New Digital Banking Settings:

The screenshot shows the 'Employee Perks' settings page in the Greenshades system. The top navigation bar includes 'System Dashboard', 'Home', 'Employees', 'Pay History', 'Tax Service', 'Year-End Forms', 'Reports', and 'Settings'. The user is logged in as 'QA Legacy User (impersonated by: LPADRON)' with links for 'Account Settings' and 'Sign Out'. The 'Employee Perks' section has two tabs: 'Employee Discounts' and 'Digital Banking'. An information box states: 'Info: Digital Banking is available when client has Pay History and Direct Deposit modules.' Below this, text explains that Greenshades partners with a Digital Banking provider for a free digital wallet and bank account. A note mentions that no employer support is needed and the bank account will be set automatically. There is a checkbox labeled 'Enable Digital Banking for employees' which is currently unchecked. A 'Current Digital Banking offer' section features a green box with a leaf icon and text: 'Get paid two days faster! Sign up for direct deposit and fee-free banking with the Branch Card.' with a 'Get Started Today »' button. A 'Save' button is located at the bottom right.

## Navigation:

**Setting to turn Branch on or off:** Greenshadesonline.com > Settings > Employee Service > Employee Perks > Digital Banking

## Changed Feature – Code Transitions: Locking down the ability to change "Tax Types" and "Wage Types"

- **Background:** At any time, in the code settings for creation or edits of a code, as an admin you may choose the taxation rules for that code via the "Tax Type" and "Wage Type" options. These options will control the taxation methods for Deductions / Benefits or Earnings codes respectively. After initial creation and actual use of those codes, that setting could be edited at any time. Unfortunately, making that change after prior payrolls have been executed could cause a variety of unintended issues, such as:
  - For new payrolls, this changed tax or wage type could affect resulting withholdings or subject wages
  - For historical reporting, the changed types will create strange totals at the code level, especially when filing tax forms such as 941s
- **What Changed?** To protect clients from creating unintended historical taxation confusion, both the "Tax Type" and "Wage Type" options will be restricted from editing after that code has been utilized in a **submitted payroll**.
  - Key things to note:

- Codes, and therefore the use of them as they pertain to employees, will always maintain their history
- You may freely edit wage or tax types on a code until a payroll has been ran that utilized said code
- If you require different taxations or code setups, it is advised to create or remove codes to fit the requirements instead of editing current code taxation related settings. This is the best practice to avoid the aforementioned issues.

#### Earnings Code Wage Type (restricted from edit):

The screenshot shows the 'Edit Earning Code' window with the 'Code Details' tab selected. The 'Wage Type' dropdown menu is highlighted with a red rectangle and is currently set to 'Regular'. Below this, there are checkboxes for 'Reported Earnings (Usually used for Tips)', 'Subject to SUTA', and 'Subject to FUTA'. The 'Subject to SUTA' and 'Subject to FUTA' checkboxes are checked. The 'Code Name' and 'Pay Stub Name' fields both contain the text 'HOURLY'. The 'Description' field is empty with a placeholder text: 'Add a description or additional information you may need to reference later.' At the bottom left, there are buttons for 'Save All Changes' and 'Cancel'.

#### Navigation:

**Code Setup Screens:** Greenshadesonline.com > Settings > Payroll > Codes > Earnings / Deductions / Benefits Tabs > Add / Edit Code

#### Changed Feature – Pay Run Results Report: Changed to a download only report

- **Background:** The Pay Run results contains all data at a detailed level for a single pay run or collection of pay runs over the chosen period. This report generated all this data into a navigable table in the product. You could review the information in the product or choose to download it and analyze separately. Unfortunately, the functionality of allowing this data to be displayed in the product was very slow and would occasionally fail to ever produce the results, especially for very large sets of data.
- **What Changed?** Due to performance concerns, we will be changing this report to be a download only version and it will no longer show the data in the product. This change facilitates the ability for all payroll clients to properly utilize the Pay Run Results report whenever required.

#### Old Pay Run Results Report:

### New Pay Run Results Report:

Navigation:

**Code Setup Screens:** Greenshadesonline.com > Settings > Payroll > Codes > Earnings / Deductions / Benefits Tabs > Add / Edit Code

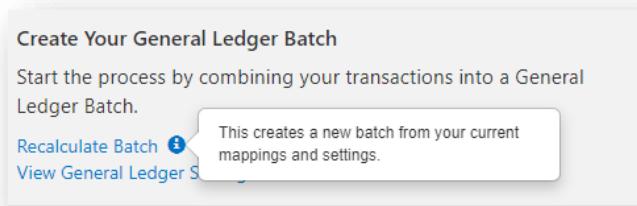
## Recent Updates 6/1/2022

# GREENSHADES ONLINE PAYROLL

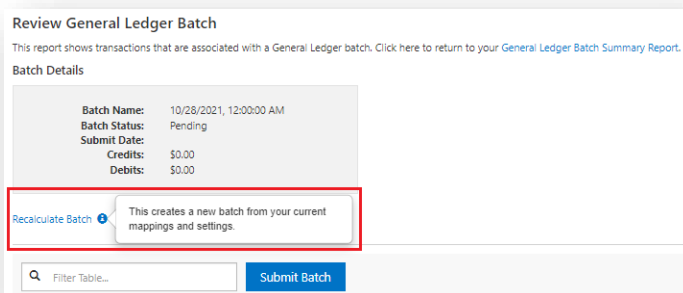
### Enhanced Feature - General Ledger: Recalculate GL batch improvements

- **Summary:** The recalculate General Ledger functionality was not shown in enough areas of the UI. Moreover, it's functionality was not well enough articulated to users.
- **Changed items in the User Interface:**
  - Add the feature to the Batch Review Page
  - Add info text next to the feature's action button
  - A warning pop-up is shown to users after clicking the function to ensure they understand how this could impact transactions that were already imported or synced prior

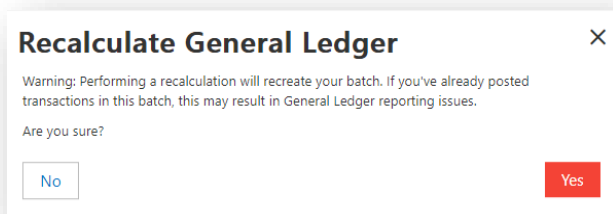
#### Post Pay Run Screen (updated Recalculate batch function):



#### Batch Review Screen (newly added Recalculate batch function):



#### Informational Warning before submitting a recalculate:



### Navigation:

**General Ledger Post Pay Run Screen:** Greenshadesonline.com > View Pay Run > (scroll) "Submit Transactions to the General Ledger" section

**General Ledger Batch Review Screen:** Greenshadesonline.com > View Pay Run > (scroll) "Submit Transactions to the General Ledger" section > Review Batch

### New Feature – Benefit / Deduction Code Setup: Catch-up Support

- **Previously:** Greenshades payroll did not formally support catch-up contributions with proper tax shielding via a standard in product code setup for benefits or deduction codes.
- **Today:** The product now fully supports the process to add and apply catch-up codes for all relevant Tax Types (see list below):
  - Traditional 401k
  - Roth 401k
  - HSA (single and family)
  - 403(b)
  - Roth 403(b)
  - Simple IRA

Catch-up code checkbox in code setup:

New Benefit Code

Code Details

Employer Contribution Details

Maximums & Arrears

Year End Forms

Effective Dates

Employer Contribution Details

Rate Type

Fixed Amount

Tax Type

Traditional 401(k)

Catch Up

☐

Employer Contribution

\$ 20.00

Biweekly

Scheduling Method

☒ Split Evenly on All Pay Checks ?

☐ Even Amount per Month ?

☐ Pay All on First Pay Check of Month ?

☐ Imputed Income ?

Previous

Cancel

Next

Setting up Catch-up Maximum:

Edit Deduction Code

Code Details

Employee Contribution Details

Maximums & Arrears

Year End Forms

Effective Dates

Related Benefit Codes

Maximums & Arrears

Maximums

\$ 6,500.00

per

Year

Remove

+ Add Maximum

Arrears

☐ Allow and track Arrears

Save All Changes

Cancel

Assigning Employees to the Catch-up codes:

### Manage Employees for Benefit Code: 401 K CatchUp Fixed

There are 1 Employees with this code. Assign, modify or remove this code for employees in the table below.

<input type="checkbox"/>	Employee ID	Employee Name	Department	Location	Employer Contribution
<input checked="" type="checkbox"/>	ANHAB001	ASHFORD BEACHAM	Department B	Wisconsin Work Location	<input type="text" value="\$ 2,000.00"/>
<input type="checkbox"/>	ANHDF001	DEBORAH FOLKS	Department A	Georgia Work Location	<input type="text" value="\$ 2,000.00"/>
<input type="checkbox"/>	ANHAC001	AMAL CRANFORD	Department A	New York Work Location	<input type="text" value="\$ 2,000.00"/>
<input type="checkbox"/>	ANHWD001	DAGOBERT WIECZOREK	Department A	Arkansas Work Location	<input type="text" value="\$ 2,000.00"/>
<input type="checkbox"/>	ANHDS001	DYANI SQUIER	Department A	Arizona Work Location	<input type="text" value="\$ 2,000.00"/>

Total Employees Selected: 1

☐ Apply change(s) to in-progress pay run(s)

## Navigation:

**Build Catch-up Codes:** Greenshadesonline.com > Settings > Payroll > Deduction / Benefit Codes > New / Edit Code

## Enhanced Feature - Benefit / Deduction Code Setup: New Shared Code Group functionality

- Previously:** Shared Code Groups were a rarely used and misunderstood feature that supported a small selection of use cases. The most important of these, was to combine maximum amount limits on a selection of different retirement codes to ensure employees did not exceed the IRS limits when contributing to multiple plan types.
- Today:** With the addition of catch-up codes, the use cases for these groups, as well as their necessity to be utilized, grew greatly. The above use case is still valid, but more importantly these groups are REQUIRED for users to facilitate automatic transitioning of employees from their base retirement or HSA codes to their catch-up contribution codes after reaching base limits.
- The below images portray great examples of how you may want to utilize these setups for your employees
- Terminology Reference:
  - Group Name:** This is just an identifier for the user to reference. Nothing downstream will be impacted by this name.
  - Group Type:** Use this to select the types of codes that can be applied to this group. The list includes the option of Benefit, Deductions, custom, or HSA. The HSA option is used to allow limits to be equally shared between benefits and deduction types.

- Plan Type: This selection will choose the focus of the group, essentially as “Retirement”, “HSA”, or a custom type called “Other”
- Group Description: This description is a way for the user to recall the specific purpose of that group. As an example, “This group will create the shared limit for employee deductions of Roth and standard 401k plans”
- Code selections: Apply the relevant Deduction and Benefit codes to the group. Consider that these selectable codes will be filtered based on your above setup selections. Only codes related to the selected Group Type and Plan Type will be shown in the creation process.
- Catch-up Code selections: Catch-ups will appear separately in the Catch-ups menu of the Shared Code Group window only when they are applicable.
- Shared Maximums: This is where your combined maximum between the codes in the group will be defined. For something like retirement contributions, these are often straightforward as defined by the IRS that year. In the case of a Retirement deduction group setup, it would almost always simply be the employee contribution limit for that year (Ex. \$20,500 in 2022).
- Please consult with Greenshades support for additional details or questions on how to properly setup and manage Shared Code Groups

Shared Code Groups (Retirement Example):



### Edit Test Deduction

Group Name

401k Deductions

Group Type

Deduction

Plan Type

Retirement

Group Description

This group will create the shared limit for employee deductions of 403b and standard 401k plans

Deduction

401K

×

Deduction

403B PPP

×

+ Add Code

+ Add Catch-Up

Shared Maximum

\$ 20,500.00

Per Year

Save

### Edit Test Benefit

Group Name

401k Benefit

Group Type

Benefit

Plan Type

Retirement

Group Description

Add a description or additional information you may need to reference later.

Benefit

401K

×

Benefit

403B PPP

×

+ Add Code

+ Add Catch-Up

Shared Maximum

\$ 58,000.00

Per Year

Save

Shared Code Groups (HSA Examples):

### Edit HSA Group

Group Name

HSA Group

Group Type

HSA

Plan Type

HSA

Group Description

Add a description or additional information you may need to reference later.

Deduction

HSA Family

×

Benefit

HSA FAMILY

×

+ Add Code

+ Add Catch-Up

Shared Maximum

\$ 500.00

Per Year

Save

### Edit HSA Catchup

Group Name

HSA Catchup

Group Type

HSA

Plan Type

HSA

Group Description

This group captures HSA single codes limits for both employee and employer contributions

Benefit

Test Single HSA

×

Deduction

HSA SINGLE

×

+ Add Code

+ Add Catch-Up

Benefit (Catch-up)

HSA Single Catchup

×

Shared Maximum  
(Non Catch-up) ?

\$ 3,650.00

Per Year

Save

Navigation:

**Build Shared Code Groups:** Greenshadesonline.com > Settings > Payroll > Shared Code Groups

## Enhanced Feature – Pay Run Wizard: Visual improvements to the Pay Stub review screen

- **Previously:** The “Benefit” and “Deduction” sections of the Pay Stub review were lacking YTD accrued amounts. Moreover, the way information was displayed in the “Taxes” section was hard to properly read the column totals and YTD amounts.
- **Today:** These issues have been addressed in two ways. First, YTD accrued amounts have been added to the “Benefit” and “Deduction” sections. Secondly, the “Taxes” section UI has been reimagined to read more clearly to the user.

### New Pay Stub Review Screen:

KARTIKEYA ESPIN'OZA

Employee ID: 47463201  
Department: Department S  
Work Location: REMOTE  
Position: P01 2 Day A Non exempt Hourly  
Hire Date: 02/27/2014  
HR Status: Active

Paycheck Summary

Net Pay: \$ 1,155.57  
Total Hours: 120 Hours(8)  
Gross Pay: \$ 1,946.73  
Total Deductions: \$ 128.75  
Total Employee Taxes: \$ 454.41  
Payment Method: Direct Deposit

Earnings

Code Name	Pay Stub Name	Position	Department	Location	Hours	Minutes	Amount	Year To Date	
SALARY	Salary	P012A	DETA	PRIMARY	40	0	\$ 666.67	\$ 888.87	Clear
GREG SALARY	GREG SALARY	P012A	Adam Department	CALIFORNIA	40	0	\$ 641.03	\$ 1,288.47	Clear
GREG SALARY	GREG SALARY	P012A	Adam Department	CALIFORNIA	40	0	\$ 641.03	\$ 1,288.47	Clear
Totals					120 Hours(8 Minutes)		\$ 1,946.73		

Benefits

Code Name	Pay Stub Name	Amount Balance	Amount	Year To Date	
esof ED	esof Employee Only	\$ 0.00	\$ 52.00	\$ 156.00	Clear
401	401	\$ 0.00	\$ 0.00	\$ 0.00	Clear
Health ED	HEALTH Employee Only	\$ 0.00	\$ 0.00	\$ 0.00	Clear
401K	401K	\$ 0.00	\$ 0.00	\$ 0.00	Clear
Dismatt Fam Effm	Fam Employee Family	\$ 0.00	\$ 0.00	\$ 0.00	Clear
Totals		\$ 0.00	\$ 52.00		

Deductions

Code Name	Pay Stub Name	Amount Balance	Amount	Year To Date	
esof ED	esof Employee Only	\$ 0.00	\$ 0.00	\$ 0.00	Clear
Dismatt Fam Effm	Fam Employee Family	\$ 0.00	\$ 10.00	\$ 30.00	Clear
OTHER PDS	Other Federal Garnishment OTHER PDS	\$ 0.00	\$ 326.75	\$ 1,026.94	Clear
401K	401K	\$ 0.00	\$ 0.00	\$ 0.00	Clear
401	401	\$ 0.00	\$ 0.00	\$ 0.00	Clear
Totals		\$ 0.00	\$ 336.75		

Taxes

Tax Name	Amount Balance	Taxable Wages	Amount	Year To Date	
Employer Medicare Tax	\$ 0.00	\$ 1,936.73	\$ 28.11	\$ 11.07	Clear
Employer Social Security Tax	\$ 0.00	\$ 1,936.73	\$ 120.20	\$ 367.67	Clear
Federal Unemployment Tax	\$ 0.00	\$ 1,936.73	\$ 11.63	\$ 35.50	Clear
North Dakota State Unemployment Tax	\$ 0.00	\$ 1,946.73	\$ 38.97	\$ 119.10	Clear
Employee Taxes	\$ 0.00		\$ 168.91	\$ 606.34	
Additional Medicare	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	Clear
Arizona State Tax	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	Clear
California Employment Training Tax	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	Clear
California SDI	\$ 0.00	\$ 1,936.73	\$ 21.32	\$ 63.23	Clear
California State Tax	\$ 0.00	\$ 1,936.73	\$ 111.06	\$ 345.63	Clear
California State Unemployment Tax	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	Clear
Colorado State Tax	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	Clear
Federal Income Tax	\$ 0.00	\$ 1,936.73	\$ 168.82	\$ 503.48	Clear
Medicare	\$ 0.00	\$ 1,936.73	\$ 28.11	\$ 83.96	Clear
Minnesota State Tax	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	Clear
Mississippi State Tax	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	Clear
North Dakota State Tax	\$ 0.00	\$ 656.67	\$ 4.00	\$ 4.00	Clear
Social Security	\$ 0.00	\$ 1,936.73	\$ 120.20	\$ 367.67	Clear
Warner County Tax Transpact Tax	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	Clear
Wisconsin State Tax	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	Clear
Employee Taxes	\$ 0.00		\$ 454.41	\$ 1,392.20	
Total Taxes	\$ 0.00		\$ 453.32	\$ 2,000.54	

### Navigation:

**Build Shared Code Groups:** Greenshadesonline.com > Payroll > Start / Continue Pay Run > Review and Submit Step > View pay stub

## Recent Updates 5/11/2022

### GREENSHADES ONLINE PAYROLL

#### Improved Feature - General Ledger: Track voided flag against GL transactions

- **Problem:** Users did not have a clear and simple way to understand which of their General Ledger transactions were inside of a voided pay run or individual paycheck. Accounting teams will likely want to remove or ignore these transactions since monies weren't moved in these scenarios.
- **Solution:** The [General Ledger Transaction Details Report](#) will now clearly identify, via an added column of data, whether or not each individual transaction has been voided

New flag in the report's "View Details" preview:

**General Ledger Transaction Details Report**  
The General Ledger Transaction Details Report shows your general ledger activity on a per-transaction basis for the selected time period or pay run.  
Date Range: 04/10/2022 - 05/10/2022

Filter Table...

Account Number	Account Name	Debit	Credit	Employee ID	Check Date
00-1235-00	00-1235-00	\$ 0.00	\$ 15.00	AFHKE001	04/29/2022
00-1220-00	00-1220-00	\$ 15.00	\$ 0.00	AFHKE001	04/29/2022
00-1235-00	00-1235-00	\$ 0.00	\$ 10.00	AFHKE001	04/29/2022
00-1220-00	00-1220-00	\$ 10.00	\$ 0.00	AFHKE001	04/29/2022
10019	Net 5	\$ 0.00	\$ 25.00	AFHKE001	04/29/2022
00-1235-00	00-1235-00	\$ 25.00	\$ 0.00	AFHKE001	04/29/2022

Transaction Details

Name	Value
Check Date	04/29/2022
Check Number	1681
Code Name	HOURLY
Entity Code	3
Voided	false
Test description	
Dimension	Value Name

View Details

#### Navigation:

**General Ledger Transaction Details Report:** Greenshadesonline.com > Reports > General Ledger Transaction Details

#### Improved Feature - Positive Pay File Customization: Chase Bank, PNC, and Huntington

- **Background:** Positive Pay Files are used to provide various banks with information about distributed checks. They use this data to confirm that the later cashed checks are indeed valid and can be pulled from the respective accounts.
- **Problem:** Each bank has its own format. Greenshades will need to support each individual format of the respective bank for the client.
- **Solution:** Greenshades has expanded the support for a variety of customers via creating custom positive pay file formats for the following banks as of 05/10/2022:
  - Chase Bank

- PNC Bank
- Huntington Bank
- US Bank

*Note:* Utilization of these file types must be requested from support or implementation reps

### Performance Improvement - Optimize calculation persistence in the Payroll Wizard

- **What we heard:** Changes or updates to information within the Pay Run wizard steps have been slow to save (i.e. location, departments, amounts, etc.).
- **How we addressed it:** Critical changes have been made to the way in which the product saves these inputs. As a result, users should expect to experience a “noticeable” decrease to the time it takes to save these changes in the UI and therefore the amount of time they must wait until they can make another edit. Expect at minimum a 20% decrease in wait times per change.

#### Navigation:

**Pay Run Wizard:** Greenshadesonline.com > Payroll > Continue / Run Payroll > Hours / Earnings / Deductions / Benefits / Arrears steps

### Recent Updates 3/30/2022

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## GREENSHADES ONLINE PAYROLL

Improved Feature - Import: Support custom rates for Bulk The Bulk Earnings code rate import has been expanded to handle Custom Rates

- A separate Sheet on the Code Export has been added for the user to specify Position based custom rates
- **Important Note:** Import documents in the old format will no longer be importable. Please ensure a new export is always downloaded before using the Bulk Manage feature.

New Custom Rates import sheet:

	A	B	C	D	E	F	G	H
1	Employee ID	Code Name	Position	Custom Rate				
2	ANHDF001	HOURLY	POSA	20.000000				
3	ANHDF001	HOURLY	POSB	25.000000				
4	ANHDS001	HOURLY	POSA	20.000000				
5	ANHDS001	HOURLY	POSB	30.000000				
6	ANHDW001	HOURLY	POSB	35.000000				
7								
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**Navigation:**

**Bulk Manage Earnings Codes:** Greenshadesonline.com > Settings > Payroll > Earnings Codes > Bulk Manage Codes

New Feature - Reporting: Add new "Pay Run Results" report

A new report has been surfaced that provides clients with a comprehensive data set, at an itemized level, of all the earnings, deductions, taxes, and benefits of each employee per pay run.

**The report will feature the following fields:**

- All Tabs
  - Employee ID
  - Employee Name
  - Pay Run Name
  - Check Date
  - Check Number
  - Name
  - Amount
- Earnings Tab Only
  - Hours Worked
  - Base Pay Rate
  - Effective Pay Rate
  - Location Code
  - Location State
  - Work Period
- Deductions Tab Only
  - Deduction Type
  - Tax Info
- Taxes Tab Only
  - Subject wages
  - Gross Subject Wages
  - Gross Wages
  - Rate
  - Employer Tax (Yes / No)
  - State
- Benefits Tab Only
  - Benefit Type
  - Tax Info

**Pay Run Results Report:**

**Pay Run Results Report**

This report shows the earnings, taxes, deductions and benefits that are in the checks in the given date range or payrun.

Pay Run Results Report  
 Pay Run Name: BIWEEKLY  
 Pay Period: 09/11/2021 - 09/24/2021  
 Check Date: 10/01/2021  
 Posted Time: 09/28/2021 09:37 AM

Select the date range or pay run you would like to view

- ☐ Last 30 Days
- ☐ Year to Date
- ☐ Select Quarter
- ☐ Custom Date Range
- ☒ Select Pay Run

Pay Run Name: BIWEEKLY  
 Pay Period: 09/11/2021 - 09/24/2021  
 Check Date: 10/01/2021

Change

Employee ID	Employee Name	Pay Run Name	Check Date	Check Number	Name	Amount	Hours Worked	Base Pay Rate	Effective Pay Rate	Location Code	Location State	Work Period
APSAE001	ARTHUR ESTATS	BIWEEKLY	10/01/2021	1564	Salary	\$ 181.68	3h 38m	\$ 52,000.00	\$ 50.00	TEXAS	TX	09/06/2021 - 09/13/2021
APSAE001	ARTHUR ESTATS	BIWEEKLY	10/01/2021	1564	Salary	\$ 1,090.84	21h 49m	\$ 52,000.00	\$ 50.00	TEXAS	TX	09/13/2021 - 09/20/2021
APSAE001	ARTHUR ESTATS	BIWEEKLY	10/01/2021	1564	Salary	\$ 727.50	14h 33m	\$ 52,000.00	\$ 50.00	TEXAS	TX	09/20/2021 - 09/27/2021
APFER001	BOWMANE ARCOFISH	BIWEEKLY	10/01/2021	1563	HOURLY	\$ 600.00	40h 0m	\$ 15.00	\$ 15.00	NV	NV	09/06/2021 - 09/13/2021
APSGT001	George Tuber	BIWEEKLY	10/01/2021	1566	HOURLY	\$ 600.00	40h 0m	\$ 15.00	\$ 15.00	NV	NV	09/06/2021 - 09/13/2021
ANHHL001	HID LAFFERTY	BIWEEKLY	10/01/2021	1565	HOURLY	\$ 600.00	40h 0m	\$ 15.00	\$ 15.00	NEWYORK	NY	09/06/2021 - 09/13/2021

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## Navigation:

**New Report:** Greenshadesonline.com > Reports > Pay Run Results

## Improved Feature - Pay Run Wizard: Non-scheduled EEs should not be added to pay runs

- **Previously** – Employees that are not assigned to a pay schedule and / or do not have a primary work location could be selected and visually added to a pay run. However, these EEs would never actually save or be ran in the payroll
- **Now** – The User Interface will not allow you to add employees without one or both of the following qualifiers to be added:
  - No Pay Schedule is assigned to the employee
  - No Primary Work Location is assigned in the employee information section
- **Warning Message** (shown below) – If an employee is missing the above data, the shown messages will be displayed.

## Pay Run Wizard: Add Employees Window with Warnings:

<input checked="" type="checkbox"/>		Employee is missing a schedule.	Nancy Yeaker	Department A
<input type="checkbox"/>			ANHAC001	AMAL CRANFORD
				Department A

<input checked="" type="checkbox"/>		Employee is missing a primary work location.	home	
<input type="checkbox"/>			NOCLASS	Lauren Reid



Navigation:

**Pay Run Wizard (Add Employees):** Greenshadesonline.com > Payroll > Run Payroll > Employees Tab > Add Employee

# GREENSHADES ONLINE PAYROLL

## Improved Feature - Reporting: General Reporting enhancements

The full collection of Payroll reports has been reviewed and refined via the following list of changes:

- Add the Check Date field to all reports where most appropriate
- Rename reports to be clearer in their intent (Summary vs. Details levels)
- The links from the “Payroll Reports section” match the date from the reports in the “Reports tab”

### List of Reporting changes:

Report Name	New Report Name	Data Changes
All Statements Report	Pay Statements Details Report	N/A
Benefit and Deduction Report	Benefit and Deduction Details Report	N/A
Employee Arrears Report	Employee Arrears Summary Report	N/A
Garnishment Post Pay Run Report	Garnishment Details Report	Add Check Date Column
General Ledger Report	General Ledger Account Summary Report	Remove Post Batch button
General Ledger Breakdown Report	General Ledger Transaction Details Report	Add Check Date Column
Hours Breakdown Report	Employee Hours Summary Report	Add Check Date Column to Each Hours Popover
Liability Details Report	New Report	N/A
Liability Report	Liability Summary Report	Add Group column to report. Add to Reports Dashboard in place of Pay History version if Payroll module is enabled. Add to Reports Dashboard.
Pay Run Register Details Report	New	Check Date Column, All Columns from Pay Run Register, Filtering Options for Check Date, Last 30 Days, Year to Date, Select Quarter, Custom Date Range
Positive Pay File Report	Positive Pay File Details Report	Add All Filter Options
Wage Breakdown Report	Employee Wage Summary Report	N/A
FFCRA Liability Adjustment Report	FFCRA Liability Adjustment Summary Report	N/A
Form 941 Quarter End Report	Form 941 Quarter End Summary Report	N/A
Form W-2 Annual Report	Form W-2 Annual Summary Report	N/A
SUTA Report	Employee Quarterly SUTA Summary Report	N/A
Worker's Compensation Report	Worker's Compensation Details Report	N/A
Retirement Report	Retirement Details Report	Add Check Date Column
Employee Earnings Report	Employee Earnings Summary Report	N/A
Benefit & Deduction Report	Benefit and Deduction Details Report	Add Check Date Filter Option.
General Ledger Batch Summary Report	N/A	Add to Reports Dashboard.
Unlinked Transactions Report	N/A	Add to Reports Dashboard.
Pay Run Summary Report	N/A	N/A

### Navigation:

**Reporting:** Greenshadesonline.com > Reports

**Payroll Reporting:** Greenshadesonline.com > Payroll > Other Payroll Actions > Reports

## New Feature - Reporting: New Multiple Worksite (BLS) Report

A new report to capture the required data elements for the Multiple Worksite Reports has been added to the reporting section. The report will feature the following:

- Business Name (Worksite name)
- Address (Worksite location)
  - This is the employees primary work location that is shown on their “Employee Card”
  - **Note:** For WFH workers will show the location that is assigned, not the company default location
- Number of Employees (worked on the 12<sup>th</sup> of each month)
  - The counts are determined per month, as specified in the worksheet.

- If the worker did not work hours on the 12<sup>th</sup> exactly, they are not counted
- Wages of each Worksites (Quarterly)
  - This number is calculated as the subject wage for all checks in the selected date range (based on check dates)

### New Multiple Worksite Report:

**Multiple Worksite Report**

The Multiple Worksite Report provides employee count and the wages for your work locations according to the BLS 3020 form.

**Multiple Worksite Report**

Multiple Worksite Report provides you with information on employee's work location and their wage, useful for filling in the BLS 3020 forms

Select the date range or pay run you would like to view

☐ Last 30 Days  
☐ Year to Date  
☒ Select Quarter  
 Year: 2020  
 Quarter: January - March  
☐ Custom Date Range

Filter Table...

Business Name	Address	Number of Employees			Wages of Worksites
		January	February	March	
PRIMARY	2014 10th Ave E #202 Winston, ND 58001	1	2		\$ 17,723.42
SECONDARY	405 Beeland St Greenville, AL 36037	3	7	1	\$ 16,307.64
	Full, Full Full		1		\$ 785.00
MD and StLouis Tax	2014 10th Ave E #202 Winston, ND 58001		2		\$ 4,711.55
Nevada	2102 Columbine Ln Elko, NV 89601		1	1	\$ 583.54
New York (State and local)	64 Woodbine St Brooklyn, NY 11221		1		\$ 1,403.73

### **Navigation:**

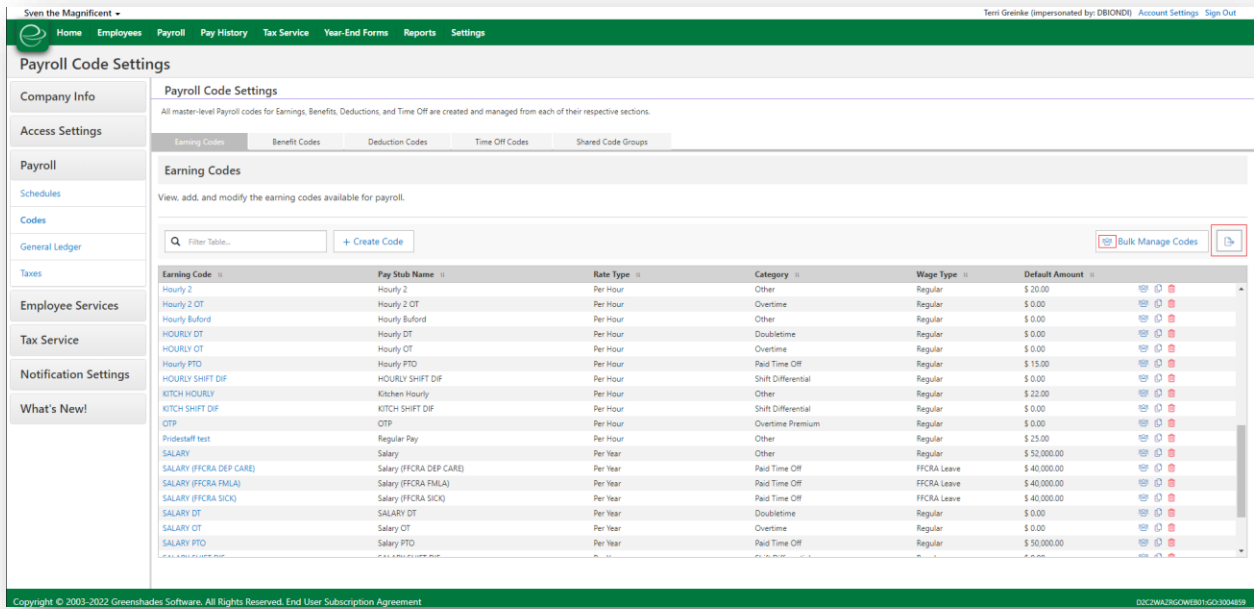
**Reporting:** Greenshadesonline.com > Reports > Multiple Worksite Report

### **Improved Feature - Code Settings: Earnings Code export added alongside bulk management**

As of the first release in 2022, the Earnings code section received a new Bulk Manage Codes feature that allows users to make mass assignments of rates for employees.

A new option to export the code information has been added alongside of the bulk assignment functionality.

### New Earnings Code Export option:



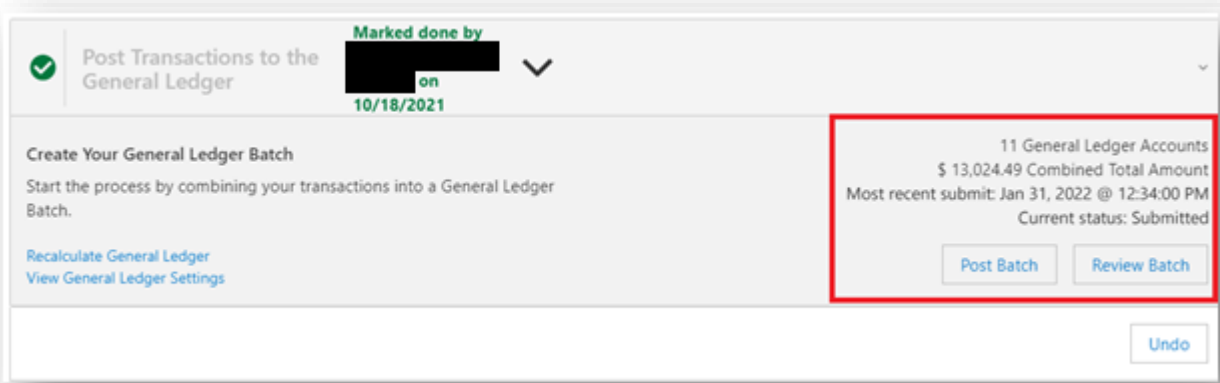
## Navigation:

**Earnings Codes:** Greenshadesonline.com > Settings > Payroll > Codes > Earnings Codes

## Improved Feature - General Ledger: Add GL Status / Timestamp

Multiple General Ledger screens have been updated to provide sync submission status information. See the below examples of the new “Current Status” field.

### Post Pay Run Review Screen:



## General Ledger Batch Summary Report Screen

**Payroll Reports**

★ **General Ledger Batch Summary Report**  
This report shows all General Ledger batches. See more details about each batch by clicking the Review link.

Filter Table... Batch Status

Batch Name	Batch Status	Most recent submit	Associated Pay Run	Pay Period	Check Date	Transaction Count	Credits	Debits	
Payrun - 2019-10-21	Completed	01/31/2022, 12:34:56 PM	Weekly	10/14/2019 - 10/20/2019	10/21/2019	10	\$ 0.00	\$ 203.06	Review
Payrun - 2021-01-22	Completed	01/31/2022, 12:34:56 PM	BiWeekly	01/03/2021 - 01/15/2021	01/22/2021	82	\$ 4,806.33	\$ 9,026.33	Review
Payrun - CORRECTIONS SUTA Liabilities - 2021-01-22	Completed	01/31/2022, 12:34:56 PM	-	-	-	2	\$ 50.00	\$ 50.00	Review
TEST	Pending	01/31/2022, 12:34:56 PM	-	-	-	1	\$ 136.52	\$ 0.00	Review
Payrun - Tip Testing - 2019-11-15	Completed	01/31/2022, 12:34:56 PM	Tip Testing	11/06/2019 - 11/06/2019	11/15/2019	6	\$ 3,477.39	\$ 3,477.39	Review
Testing Split DD	Pending	01/31/2022, 12:34:56 PM	Testing Split DD	11/01/2021 - 11/12/2021	11/12/2021	19	\$ 1,795.12	\$ 3,481.79	Review
Payrun - 2020-09-18	Completed	01/31/2022, 12:34:56 PM	BiWeekly	08/30/2020 - 09/12/2020	09/18/2020	1229	\$ 11,147.43	\$ 18,043.96	Review
Payrun - CORRECTIONS SUTA Liabilities - 2021-02-19	Completed	01/31/2022, 12:34:56 PM	-	-	-	2	\$ 12.98	\$ 12.98	Review
10/29/2021, 12:00:00 AM	Pending	01/31/2022, 12:34:56 PM	BiWeekly	10/09/2021 - 10/22/2021	10/29/2021	61	\$ 4,469.67	\$ 6,514.62	Review
Payrun - CORRECTIONS SUTA Liabilities - 2021-08-15	Completed	01/31/2022, 12:34:56 PM	-	-	-	2	\$ 40.00	\$ 40.00	Review
10/1/2021, 12:00:00 AM	Submitted	01/31/2022, 12:34:56 PM	BiWeekly	09/11/2021 - 09/24/2021	10/01/2021	88	\$ 4,192.00	\$ 7,992.00	Review
Payrun - 2020-06-05	Completed	01/31/2022, 12:34:56 PM	Weekly	05/25/2020 - 05/31/2020	06/05/2020	308	\$ 3,764.82	\$ 3,518.71	Review
All the things	Submitted	01/31/2022, 12:34:56 PM	-	-	-	155	\$ 4,713.73	\$ 9,252.23	Review
Payrun - 2021-07-23	Completed	01/31/2022, 12:34:56 PM	BiWeekly	07/05/2021 - 07/18/2021	07/23/2021	46	\$ 3,239.64	\$ 3,239.64	Review
Payrun - Test Check Number - 2020-02-28	Completed	01/31/2022, 12:34:56 PM	Test Check Number	02/06/2020 - 02/06/2020	02/28/2020	26	\$ 0.00	\$ 0.00	Review
Payrun - 2021-08-13	Completed	01/31/2022, 12:34:56 PM	BiWeekly	07/25/2021 - 08/07/2021	08/13/2021	207	\$ 12,951.62	\$ 24,447.56	Review

### Navigation:

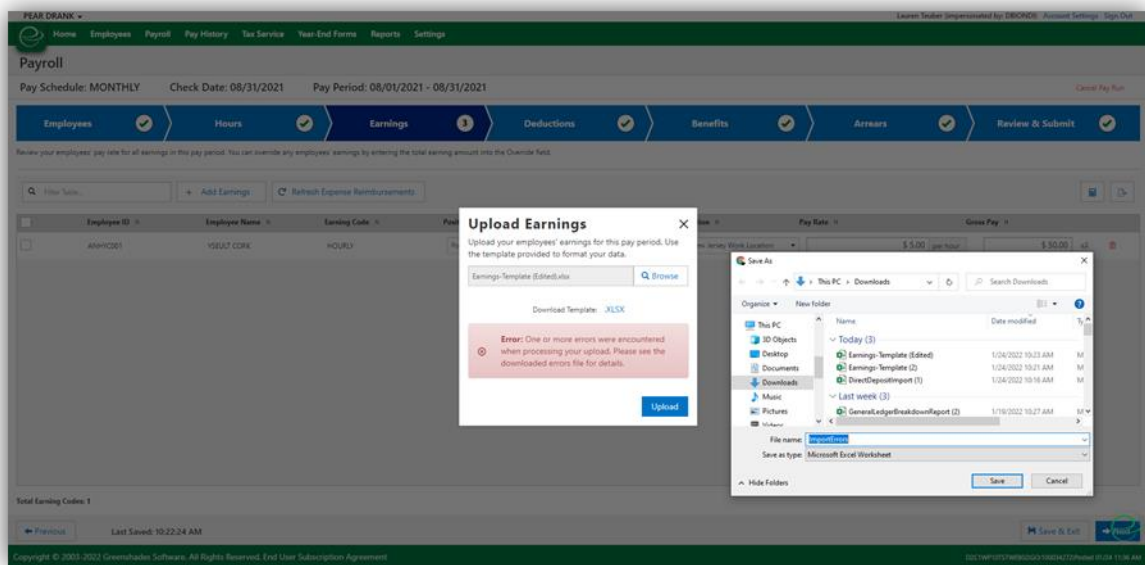
**Post Pay Run Review:** Greenshadesonline.com > Payroll > Last Payroll > View > Review Batch

**General Ledger Batch Summary Report:** Greenshadesonline.com > Payroll > Last Payroll > View > Review Batch > General Ledger Batch Summary Report

### New Feature – Pay Run Wizard: Benefits Import Enhancement

- Importing Benefits has been improved to produce an exported report of errors whenever an import fails
  - Initially you will be returned text will explain that errors were found on the import. Then the error report will automatically download for review.
  - This error report will be the same as the base import, but with an added column to describe the data issues found on the file
- Important Note:** This functionality was added for the hours, earnings, and Deductions steps previously. To recap, it is now live for Hours, Earnings, Deductions, and Benefits steps of the Pay Run Wizard.

Error on Earnings import with new download:



### Error Report Example:

	A	B	C	D	E	F	G	H	I
1	Errors	EmployeeID	Earning Code	Department Code	Position Code	Location	Start Date	Earning Amount	Adjustment Amount
	Employee 'ANHVV001' not found in workspace Location 'Empty' not found Department 'Department B' not found Position 'Deprn' not found								
2		ANHVV001	HOURLY	Department B	Deprn	Empty	07/22/2021	500	

### Navigation:

**Benefits Import:** Greenshadesonline.com > Payroll > Run Payroll > Benefits Step > Add Benefits > Upload > Import

### Performance Improvements – Reduce UI load times and remove unused components

File sizes and dependencies for the user interface have been reduced, thus improving the load times and perceived responsiveness of the UI in a variety of payroll screens.

### Navigation:

**Payroll:** Greenshadesonline.com > Payroll

## Recent Updates 2/16/2022

### Navigation:

Greenshadesonline.com > Setting > Payroll > General Ledger

Greenshadesonline.com > Payroll > Continue Pay Run > Calculator Icon

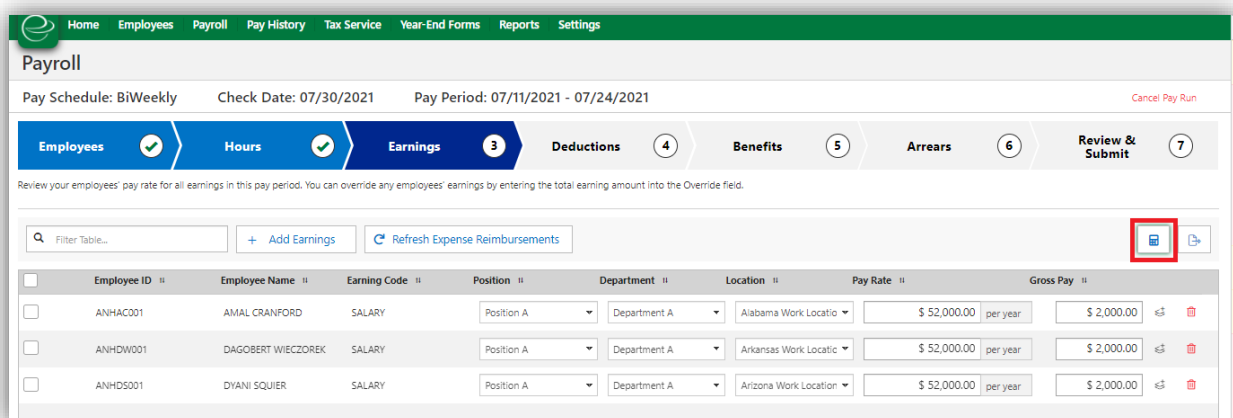
### Improved Feature - Pay Run Wizard: Gross-up calculator fixed

The Gross-up calculator in the Pay Run wizard has been enabled. The newly live version of this feature will:

- Re-enable the base feature functionality
- Provide minor changes to how the calculator is taxing
- The calculator will now allow any location to be applied to its setup

We encourage users to experiment with this feature in your payroll via the following navigation (Icon shown below).

Gross-up navigation: Greenshadesonline.com > Payroll > Continue Pay Run > Calculator Icon



The screenshot shows the Payroll Wizard interface with the following details:

- Payroll** header with navigation tabs: Home, Employees, Payroll, Pay History, Tax Service, Year-End Forms, Reports, Settings.
- Pay Schedule:** BiWeekly, **Check Date:** 07/30/2021, **Pay Period:** 07/11/2021 - 07/24/2021, **Cancel Pay Run** link.
- Wizard Steps:** Employees (1), Hours (2), Earnings (3), Deductions (4), Benefits (5), Arrears (6), Review & Submit (7).
- Instructions:** Review your employees' pay rate for all earnings in this pay period. You can override any employees' earnings by entering the total earning amount into the Override field.
- Table:** A table with columns: Employee ID, Employee Name, Earning Code, Position, Department, Location, Pay Rate, and Gross Pay. It lists three employees: AMAL CRANFORD, DAGOBERT WIECZOREK, and DYANI SQUIER, all with a salary of \$52,000.00 per year and a gross pay of \$2,000.00.
- Buttons:** Filter Table..., Add Earnings, Refresh Expense Reimbursements, and a Calculator icon (highlighted with a red box) in the top right corner.

Gross-up calculator in action:

**Gross Up Calculator**

Calculate the values needed to pay an employee in this pay run a fixed or pre-determined net wage.

Select an Employee   [Cancel & Select New Employee](#)

**General Information**

Check Date

Pay Frequency

Work Location

**Earnings**

Earning Code	Department	Position	Location	Net Pay

**Voluntary Deductions**

Deduction Code	Amount	Include in Gross Up?

[Clear All Changes](#)

**Results**

**Gross Earnings** -

FICA -

Medicare -

Additional Medicare -

Federal Income Tax -

**Net Pay** \$ 0.00

[Close Without Updating](#) [Update Pay Run](#)

## Improved Feature - General Ledger: Move Mapping default to top

General Ledger mapping previously would add new mappings to the bottom of the list instead of the top. With the new change, new mappings are added to the top.

- This is to better accommodate our users that start their mapping process with the most general cases covered first
- The more detailed mappings will be the latest considerations; therefore, they should be moved to the top of the mapping order when added



## General Ledger Mapping wizard:

### General Ledger Mapping: Deductions

×

#### Map Accounts

Map your General Ledger accounts below.

**Order matters.** Use the action icons next to each mapping to shift that mapping's priority. General Ledger activity will be mapped using the first mapping that applies in priority order, from top to bottom.

Location	Debit Entity Code	Debit Account	Credit Entity Code	Credit Account	
Alabama Work Location	None	Deduction 1	None	Deduction 1	+ ⋮
Alaska Work Location	None	Deduction 2	None	Deduction 2	+ ⋮
Arizona Work Location	None	Deduction 3	None	Deduction 3	+ ⋮
Arkansas Work Location	None	Deduction 4	None	Deduction 4	+ ⋮
Florida Work Location	None	Deduction 5	None	Deduction 5	+ ⋮

+ Add Mapping

Previous

Submit

## Recent Updates 1/26/2022

### Navigation:

Greenshadesonline.com > Employees > Selected Employee > Pay Settings

Greenshadesonline.com > Setting > Payroll > Codes

Greenshadesonline.com > Payroll > Continue Pay Run

### New Feature - Pay Settings: New HSA Direct Deposit setup

- Newly added functionality to deposit HSA allocated funds directly into specified accounts
  - o Any benefits or deductions marked as HSA will be deposited into the specified account for the chosen employee
- This account setup is separated from the standard Direct Deposit setup as the allocation has no dependency on the standard Direct Deposit allocation splits
  - o Only 1 HSA account can be set up and assigned per employee
  - o The account type can be selected as a checking or savings

### HSA Deposits Setup Page:

The screenshot shows the 'Employee Management' page for 'DEBORAH FOLKS'. The 'Pay Settings' tab is selected. Under 'Payment Method', 'Pay by direct deposit' is chosen. Below this, there are two sections for 'Account 1' and 'Account 2'. Each section has fields for 'Routing Number', 'Account Number', 'Type' (dropdown), 'Allocation Type' (dropdown), and 'Allocation Amount' (text input). There are also checkboxes for 'Add direct deposit account as a preroad'. A red box highlights the 'HSA Account' section, which includes a note: 'When you can setup this employee's HSA Account information in order to deposit HSA funds directly into their account past payroll.' and an 'Add Account' button. At the bottom, there is a 'Pay Schedule' section with a dropdown for 'Pay schedule' and an 'Advanced Settings' link. The footer contains copyright information: 'Copyright © 2000-2022 Greenshades Software, All Rights Reserved. End User Subscription Agreement'.

### HSA Deposits Account Setup:

**HSA Account**

Here you can setup this employee's HSA Account information in order to deposit HSA funds directly into their account post payroll.

**Account** ✕

Routing Number: 051808031

Account Number: 404555547885622

Type: Checking Savings

**Pay Schedule**

Assign this employee to a pay schedule. Choose 'None' for employees who are not paid by this company. If you are changing the pay schedule of an employee in the middle of pay period, you may need to reconcile this within the pay run wizard.

Pay Schedule: MONTHLY

[Advanced Settings...](#)

By clicking save, this employer is authorizing the initiation of credit entries and adjustment debit entries to the account(s) listed above. This employer has verified that the information above is accurate and the affected employee has agreed to release the employer from any liability resulting from any incorrect information above.

[Save](#)

## New Feature - Code Settings: Earnings codes import (Bulk Manage Fields)

- The Earnings codes import / export process has been enabled to allow for bulk operation of Employee earnings rates

### New "Bulk Manage Fields" feature:

**Payroll Code Settings**

All master-level Payroll codes for Earnings, Benefits, Deductions, and Time Off are created and managed from each of their respective sections.

**Earning Codes**

View, add, and modify the earning codes available for payroll.

[+ Create Code](#) [Bulk Manage Codes](#)

Earning Code	Pay Stub Name	Rate Type	Category	Wage Type	Default Amount	
BONUS	BONUS	Fixed Amount	Other	Supplemental	\$0.00	<a href="#">✕</a> <a href="#">⌵</a> <a href="#">⌶</a>
COMMISSION	COMMISSION	Fixed Amount	Business Expense	Regular	\$0.00	<a href="#">✕</a> <a href="#">⌵</a> <a href="#">⌶</a>
HOL HOURLY	Holiday Hourly	Per Hour	Holiday	Regular	\$0.00	<a href="#">✕</a> <a href="#">⌵</a> <a href="#">⌶</a>
HOURLY	HOURLY	Per Hour	Other	Regular	\$15.00	<a href="#">✕</a> <a href="#">⌵</a> <a href="#">⌶</a>
HOURLY OT	HOURLY OT	Per Hour	Doubletime	Regular	\$0.00	<a href="#">✕</a> <a href="#">⌵</a> <a href="#">⌶</a>
HOURLY FCRA SICK	HOURLY FCRA SICK	Per Hour	Paid Time Off	FCRA Leave	\$0.00	<a href="#">✕</a> <a href="#">⌵</a> <a href="#">⌶</a>
HOURLY OT	HOURLY OT	Per Hour	Overtime Premium	Regular	\$0.00	<a href="#">✕</a> <a href="#">⌵</a> <a href="#">⌶</a>
HOURLY OT PREM	HOURLY OT PREM	Per Hour	Overtime Premium	Regular	\$0.00	<a href="#">✕</a> <a href="#">⌵</a> <a href="#">⌶</a>
HOURLY PTO	HOURLY PTO	Per Hour	Paid Time Off	Regular	\$20.00	<a href="#">✕</a> <a href="#">⌵</a> <a href="#">⌶</a>
SALARY	SALARY	Per Year	Other	Regular	\$52,000.00	<a href="#">✕</a> <a href="#">⌵</a> <a href="#">⌶</a>
SALARY 2	SALARY 2	Per Year	Other	Regular	\$52,000.00	<a href="#">✕</a> <a href="#">⌵</a> <a href="#">⌶</a>
SALARY 2 OT	SALARY 2 OT	Per Year	Overtime	Regular	\$0.00	<a href="#">✕</a> <a href="#">⌵</a> <a href="#">⌶</a>
SALARY HOLIDAY	SALARY HOLIDAY	Per Year	Holiday	Regular	\$52,000.00	<a href="#">✕</a> <a href="#">⌵</a> <a href="#">⌶</a>
SALARY OT	SALARY OT	Per Year	Overtime	Regular	\$0.00	<a href="#">✕</a> <a href="#">⌵</a> <a href="#">⌶</a>
SALARY PTO	SALARY PTO	Per Year	Paid Time Off	Regular	\$52,000.00	<a href="#">✕</a> <a href="#">⌵</a> <a href="#">⌶</a>
SD MULTIPLIER	SD MULTIPLIER	Per Hour	Shift Differential	Regular	\$0.00	<a href="#">✕</a> <a href="#">⌵</a> <a href="#">⌶</a>
TIPS	TIPS	Fixed Amount	Business Expense	Tips	\$0.00	<a href="#">✕</a> <a href="#">⌵</a> <a href="#">⌶</a>

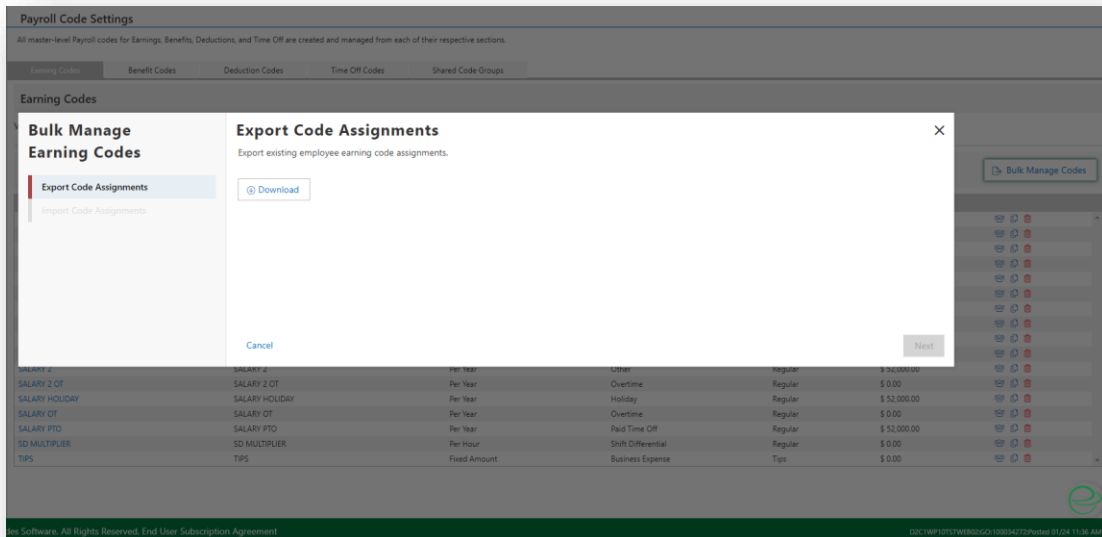
des Software. All Rights Reserved. End User Subscription Agreement

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- Using the new "Bulk Manage Fields" wizard you may...
  - o Export the full list of earnings data for all employees
  - o Assign new rates and amounts at the individual employee level
  - o Review an exported list of errors to determine the pieces of data that caused errors and why

- **Note:** The Export of current assignments is always required before the Import step to safeguard users from unintentionally overwriting with old data

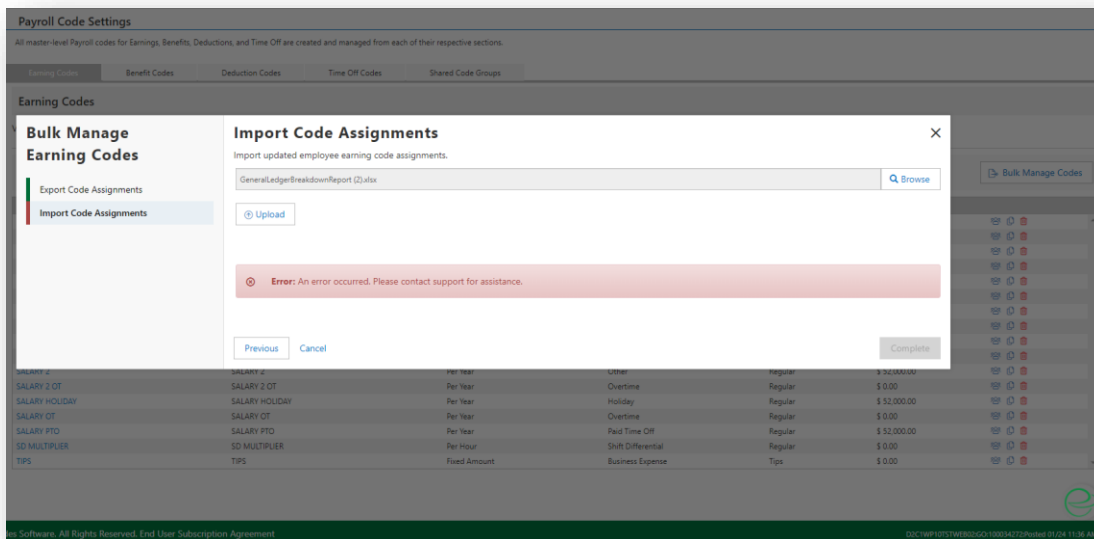
Export current assignments:



Review exported data and adjust:

	A	B	C	D	E	F	G	H	I	J
1	First Name	Last Name	Name	Employee ID	Department	Position	Location Name	Amount	Start Date	End Date
2	AMAL	CRANFORD	SALARY	ANHAC001	DEPA		ALABAMA	52000.000000	1/1/2020 12:00:00 AM	
3	DEBORAH	FOLKS	SALARY	ANHDF001	DEPA		ALASKA	52000.000000	1/1/2020 12:00:00 AM	
4	DEBORAH	FOLKS	HOURLY	ANHDF001	DEPA		ALASKA	20.000000	4/1/2021 12:00:00 AM	
5	DEBORAH	FOLKS	HOURLY OT	ANHDF001	DEPA	Position A	ALASKA	0.000000	4/16/2021 12:00:00 AM	
6	DYANI	SQUIER	SALARY	ANHDS001	DEPA		ARIZONA	52000.000000	1/1/2020 12:00:00 AM	
7	DYANI	SQUIER	SALARY OT	ANHDS001	DEPA		FLORIDA	0.000000	1/1/2020 12:00:00 AM	
8	DYANI	SQUIER	HOURLY	ANHDS001	DEPA		ALABAMA	20.000000	1/1/2020 12:00:00 AM	
9	DYANI	SQUIER	HOURLY OT	ANHDS001	DEPA		ALABAMA	0.000000	1/1/2020 12:00:00 AM	
10	DAGOBERT	WIECZOREK	SALARY	ANHDS001	DEPA		ARKANSAS	52000.000000	1/1/2020 12:00:00 AM	
11	DAGOBERT	WIECZOREK	SALARY PTO	ANHDS001	DEPA		FLORIDA	52000.000000	1/1/2020 12:00:00 AM	
12	DAGOBERT	WIECZOREK	SALARY OT	ANHDS001	DEPA		FLORIDA	0.000000	1/1/2020 12:00:00 AM	
13	ERNESTINE	KIKER	HOURLY	ANHEK001	DEPA		CALIFORNIA	20.000000	1/1/2020 12:00:00 AM	
14	FINLAY	KIKER	HOURLY	ANHEK001	DEPA		COLORADO	20.000000	1/1/2020 12:00:00 AM	
15	GALI	MARRA	HOURLY	ANHEK001	DEPA		CONNECTICUT	20.000000	1/1/2020 12:00:00 AM	
16	HIDI	LAFFERTY	HOURLY	ANHEK001	DEPA		DC	20.000000	1/1/2020 12:00:00 AM	
17	TAHNIA	SPOHN	HOURLY	ANHTS001	DEPA		IOWA	20.000000	1/1/2020 12:00:00 AM	
18	TAHNIA	SPOHN	HOURLY FFCRA SICK	ANHTS001	DEPA		IOWA	25.000000	4/1/2021 12:00:00 AM	
19	YSEULT	CORK	HOURLY	ANHYC001	DEPB		NEWJERSEY	30.000000	1/1/2020 12:00:00 AM	
20	YSEULT	CORK	SD MULTIPLIER	ANHYC001	DEPB		NEWJERSEY	0.000000	4/1/2021 12:00:00 AM	
21										

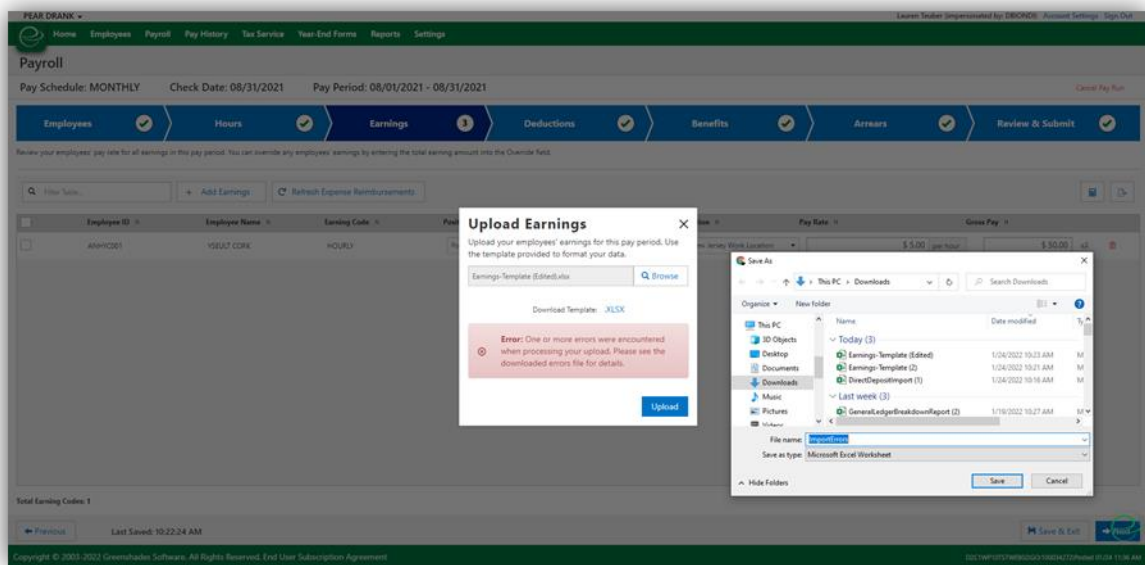
Import new assignments (with error):



## New Feature – Pay Run Wizard: Deductions and Earnings Import Enhancement

- Importing Earnings or Deductions has been improved to produce an exported report of errors whenever an import fails
  - o Initially you will be returned text will explain that errors were found on the import. Then the error report will automatically download for review.
  - o This error report will be the same as the base import, but with an added column to describe the data issues found on the file
- **Important Note:** This functionality was added for the hours import step last release. To recap, it is now live for Hours, Earnings, and Deductions steps of the Pay Run Wizard.

Error on Earnings import with new download:



### Error Report Example:

	A	B	C	D	E	F	G	H	I
1	Errors	EmployeeID	Earning Code	Department Code	Position Code	Location	Start Date	Earning Amount	Adjustment Amount
	Employee 'ANHVV001' not found in workspace Location 'Empty' not found Department 'Department B' not found Position 'Deprn' not found								
2		ANHVV001	HOURLY	Department B	Deprn	Empty	07/22/2021	500	

### Improved Feature - Pay Run Wizard: Hours and Earnings import accepts Null Locations

- The Pay Run Hours / Earnings imports will no longer error when no location is specified. Now the process of populating the Work location from the import will populate based on the below criteria (in priority order):
  1. If a value is specifically entered in the import field, the location will populate with that chosen value.
  2. If the field is left blank, then the location will populate with the Employee's specific location for the chosen earnings code
  3. If there is no employee specific earnings code location, then the location will populate with the "Work Location" for that Employee found in their Employee Information section
  4. If no Employee work location, then error and explain that the employee does not have a location setup

Example: Scenario 3 shown

Employee "Work Location" in the employee information section:

**YSEULT CORK**  
 Digital Employee Folder

[← Back to Employee List](#)

Employee ID  
 ANHYC001

First Name  
 YSEULT

Last Name  
 CORK

Hire Date  
 12/01/2019

Rehire Date

Termination Date

Email

Work Location ⓘ New Jersey Work Location

Supervisor

Department  
 Department B

Position  
 Position B

Division

Organization Chart  
[View Organization Chart](#)

Earnings Import Example for the above employee with no location entered:

	A	B	C	D	E	F	G	H	I
1	EmployeeID	Earning Code	Department Code	Position Code	Location	Start Date	Earning Amount	Adjustment Amount	
2	ANHYC001	HOURLY				07/22/2021	500		
3									
4									
5									

Employee earnings code is properly populated with the Employee “Work Location”

Rule: MONTHLY    Check Date: 08/31/2021    Pay Period: 08/01/2021 - 08/31/2021

Employees    Hours    Earnings    Deductions    Benefits    Arrears

Employees' pay rate for all earnings in this pay period. You can override any employees' earnings by entering the total earning amount into the Override field.

+ Add Earnings    Refresh Expense Reimbursements

Employee ID ⓘ	Employee Name ⓘ	Earning Code ⓘ	Position ⓘ	Department ⓘ	Location ⓘ	Pay Rate ⓘ
ANHYC001	YSEULT CORK	HOURLY			New Jersey Work Location	\$ 500.00 per hour

## Recent Updates 12/22/2021

### Improved Feature - Multi-State taxation:

- Payroll calculations for employees working across multiple jurisdictions were improved to ensure withholding accuracy for SIT, SUTA, SDI, and other taxes.
- SUTA withholdings will always be calculated against the Employee's set Work Location in their employee information
- Payrun Wizard Review step now contains "Earnings locations" and "Position" columns

Code Name	Pay Stub Name	Position	Department	Location	Hours	Minutes	Amount	
Hourly	Hourly	ATC	ACCT	KENTUCKY	15	0	\$ 225.00	Clear
Hourly	Hourly	ATC	ADMIN	OHIO	21	0	\$ 315.00	Clear
Total Taxes					36 Hours	0 Minutes	\$ 148.00	

- The Tax Parameters screen will also show warnings on said locations where no specific W-4 parameters are set for that employee

Employer Medicare Tax Exempt: No

Social Security Exempt: No

Medicare Exempt: No

Additional Medicare Exempt: No

Texas State Unemployment Tax Exempt: No

There are no specified tax parameters chosen for this tax. Default values will be used until edited.

- **Important Note:** When no tax parameters are specified, defaults parameters will be utilized



### Improved Feature – Blended OT:

- Calculation changed for OVERTIME codes to adhere to proper FLSA OT standards
- Overtime Premium and standard Overtime codes will now produce the same resulting total earnings.
- For Payroll Frequencies of Bi-weekly, Twice a Month, Monthly, etc. Overtime is calculated on a weekly basis and the result of each week is summed together in the payrun

### How to Calculate Blended OT:

**Step 1** – Calculate RROP as follows:

1. Multiply each earning code by its total hours
2. Add the resulting earnings totals together
3. Then divide by total hours worked

**Step 2** - Determine the total base earnings amount (without Overtime):

1. Multiply each earning code by its total hours
2. Add the resulting earnings totals together

**Step 3** - Determine the Overtime earnings

1. The determined RROP is multiplied by 0.5
2. The result is multiplied by the total OT hours, which is determined as the total hours over 40 in that work week

**Step 4** – Sum your Base Earnings with your Overtime earnings

#### Example:

- Hours and Rates:
  - o 20 hours Code A at \$15/hr
  - o 20 hours Code B at \$25/hr
  - o 10 hours total OT (on Code B - base rate \$25 in this case)
- **[Step 1]**  $RROP = (20 * \$15 + 20 * \$25) / 50 = \$21/\text{hour}$
- **[Step 2]**  $\text{Base Earnings} = (20 * \$15) + (20 * \$25) + (10 * 25) = (\$300) + (\$500) + (\$250) = \$1050$
- **[Step 3]**  $\text{Overtime} = (0.5 * \$21) * 10 = \$10.5 * 10 = \$105$
- **[Step 4]**  $\$1050 \text{ (Base Earnings)} + \$105 \text{ (Overtime)} = \$1155$

**Note:** The above resulting pay will be the same no matter what codes are used as OT as long as it is the same total **OT** hours and total **Base Code** hours.

### New Feature – HAS Family Support

- HSA family plans for deductions and benefits have been added
- Validation in the code setup interface to ensure an Employee can only be applied either a family or single HSA plan (not both)

### Employee Contribution Details

Rate Type: Fixed Amount

Tax Type:

Employee Contribution:

Scheduling Method:

- Section 125 Plan
- Flexible Spending Account - Medical
- Flexible Spending Account - Dependent Care
- Health Savings Account - Single
- Health Savings Account - Family**
- Traditional 401(k)
- 403(b)
- 457
- Roth 401(k)
- Roth 403(b)
- Roth 457
- Simple IRA
- Custom

Previous Cancel

## New Feature - Payrun Wizard Hours Import Enhancement:

- The Hour import tool in the Payrun Wizard will produce an error report if issues are found on the imported file
- The report will explain the discrepancies or issues in each line of the import (example below)

	A	B	C	D	E	F	G	H	I
	Errors	EmployeeID	Earning Code	Department Code	Position Code	Location	Start Time	Hours Worked	Minutes Worked
1	EarningCode 'Pots' not found	ANHEF001	Pots			HAWAII	12/5/2021	40	
2	Employee 'Sandwich' not found in workspace								
3	Employee Sandwich does not have a work period that satisfies the start date 11/29/2021	Sandwich	HOURLY			CALIFORNIA	11/29/2021	40	
4	Employee ANHNN001 does not have a work period that satisfies the start date 12/15/2021	ANHNN001	HOURLY			OHIO	12/15/2021	40	
5	ANHSH001	SALARY			INDIANA	12/01/2021	40		
6									
7									

## Recent Updates 2/8/2021

### Benefit and Deduction Modals

Benefit and Deduction codes can now be configured as separate, unrelated codes for most benefit and deduction code types. These codes are also now managed in separate workflows and is most useful in scenarios where an employee paid deduction does not have a corresponding employer paid benefit (ex: an employee paid uniform deduction). No changes were made to health insurance code workflows.

### General Ledger Settings

Fixed a minor bug where different tabs on the General Ledger settings weren't always loading correctly when no filters were set. These tabs now load correctly.

### Payroll Calculations

Fixed an issue where an entire pay run would fail to load if it included an employee whose start date is after the pay period end date. Now, these employees won't be automatically included if they were not employed during the pay period.

### ACH File – Hash Totals

In some instances, ACH files were erroring after submission to the clients bank due to incorrect hash values. We fixed the underlying calculation for this and this should not recur.

## Recent Updates 1/25/2021

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### Pay Run Loading Improvements

Fixed a sporadic issue where clicking too fast between different pay run steps, the wizard would redirect infinitely. Users could only refresh the page to fix the issue. Now, users should not hit this issue anymore.

## Recent Updates 1/9/2021

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### Holiday Settings for Pay Schedules

Added a new option to pay schedules where a check date may fall on a weekend or holiday. The new option is to change the check date to the nearest business day in the same week (ex: A Saturday check will be paid on Friday, and a Sunday holiday is paid on Monday).

### Tax Display Updates

Break out employer paid taxes and employee paid taxes more clearly in the 'View Paystubs' modal on the final step of the pay run wizard.

### Bank Account Settings

Added help text to bank account settings for the Origin ID and Taxpayer ID fields.

### Taxability for Negative Deductions

Fixed issue where negative deductions were being treated as a positive pre-tax amount. Now, these negative deductions do not reduce taxable wages.

### UI Improvements

Fixed a minor bug where clicking on a schedule in the schedule list would first load the last schedule the user had looked at, and then would load the correct schedule next.

## Recent Updates 12/23/2020

---

### Homepage Warnings for Benefit Codes

Updated the homepage warnings for benefit codes to be more clear, reduce duplicate errors, and stop warning for configurations that are correct.

### Payroll Pay Schedules and Timesheets Pay Groups

These two concepts share similar overlapping settings (specifically work week and pay schedule settings). Now, these two values must be mapped to each other to prevent conflicting configurations that lead to incorrect payroll calculations.

### Hours Step Improvements

Fixed an issue with timeouts occurring on the hours step where the amount of hours an employee worked was taking 30+ seconds to load from Greenshades timesheets.

### Premium Shift Pay

Premium shift pay is now fully supported in earnings codes. Earning code rates can now be set to be based on another earning code and include either a rate addition or rate multiplier to handle special circumstances. These codes can also be used on employee timesheets for shift differential tracking.

### Pay Run UX Improvements

Filters that are set in one step of a pay run now persist throughout the rest of the steps within a pay run.

## Recent Updates /12/9/2020

---

### State W4

Updated behavior for employee tax parameters where these were uploaded from a previous system that did not account for state-specific requirements. Specifically, the state of Oklahoma does not recognize certain Filing Status options that the Federal W-4 allows. These state's filing status options now match the allowed values.

### Code Frequency Options

Added robust settings for all fixed amount earning, benefit, and deduction codes and removed the corresponding global settings. Now, each fixed amount code can specify if the total rate should be applied over multiple checks or be included in a single check.

### Group Term Life Taxability

Users now have the option of making their Group Term Life imputed income subject to Federal Income Tax and/or State Income Tax.

### Holiday Earning Codes Updates

Added option to holiday earnings codes to not reduce a salary employee's hours worked.

### Catchup 401k Deductions

Users now have the ability to set up a specific 401k catchup deduction that will only be applied once the standard 401k deduction limit has been met.

## Review and Submit

Added subject wages to the review and submit step of the pay run wizard.

## UI Improvements

Fixed an issue where bolding text causes the text to run past the standard column width.

## Performance Improvements

The payroll product in general was loading inactive employees who are ineligible for pay runs and code or schedule assignments. Now, these employees will no longer be loaded in scenarios where they should not be to improve performance.

## Recent Updates 11/25/2020

---

### Overtime Calculations

Added warnings to a pay run when overtime hours are included in a pay run, but those overtime hours are in a work week that extends past the end of the pay period.

### W-2 Compatibility

Added Box 12 and Box 14 code values to the screens for master code settings on earnings codes. These values were previously set during initial implementation of the payroll product only and were not visible to end users until now.

### Special Pay Runs – Time Off

Special pay runs now include an option to include Time Off accruals

### Pay Run Performance Improvements

The earnings step in a pay run was sending too much data back to the screen that wasn't actually used. We reduced the amount of data that is sent to this screen to reduce the load time.

### Arizona State Taxes

Fixed an issue where the tax engine for Arizona state taxes needed a tax rate of 0.0 and not simply 0.

## Recent Updates 11/11/2020

---

### Schedule Settings

Performance improvements to the schedules list in payroll settings to improve loading times for large (5,000+ employee) companies. As part of this change, inactive employees can only be assigned to a pay schedule from the employee card.

### Visual Improvements

Added highlighting to delete functionality on grids so its easier for the admin to understand which item is being deleted.

### Data Testing Updates

Added additional data update options for clients who are implementing and updating employee information.

### Warning Improvements

Improve warnings for inactive employees who are not in a pay schedule.

Improve error messages on homepage when a Pennsylvania work location is missing a Political Sub Division.

## Recent Updates 10/28/2020

---

### Bankruptcy Garnishments

Bankruptcy garnishments are now natively support within the payroll module and can be assigned to any employee as needed. These garnishments act like all other garnishments and automatically pull in to appropriate pay runs as configured.

### Foreign Military Base Taxes

On the employee profile, an employee's location can be set to a military base. When that employee is paid via payroll, they are taxed correctly. This is most useful for employees who are working part-time for a US-based company while stationed abroad.

Marital Status

Married

Address Line 1

123 Main St

Address Line 2

Address Line 3

Military Address

☒

City

APO - Air/Army Post Office

State

AA - Armed Forces of the Americas

Zip Code

12345

Country

United States

Cancel

Save

## Earnings Import Improvements

When Uploading the earnings import, some errors result in a non-specific error of "Error: Failed to import for the following reasons: null". We've updated these to be more specific and useful, for example: "Error: Failed to import for the following reasons: Invalid Base Code Name value ('Salary')"

## General UI Improvements

- Added better tooltips to earnings imports
- Update the minutes and hours on the final pay stub preview modal so that 40 hours, 61 minutes appears correctly as 41 hours, 1 minute
- Improved loading times for the pay schedule modal

## Recent Updates 10/7/2020

---

### Bank Account Number Validation

When entering a bank account number, leading 0s will work as expected and we've added better warnings when a bank account number appears incorrectly formatted.

### Ambiguous Error Prevention

In some instances, conflicting changes or requests to the payroll databases were causing transient errors. We've made some changes handle these situations better to prevent internal and user impacting errors.

## General UI Improvements

Hover over text no longer blocks input fields

## Recent Updates 9/23/2020

---

### Add Inactive Employee Filter to Assignment Grids

Schedule assignment grids now have an 'Include Inactive Employees' filter. This allows the admin to show/hide inactive employees from the selection list, making it easier to find specific employees or to select all active employees only.

**Edit BIWEEKLY**

Pay Frequency: Biweekly  
Pay Day: Friday  
Work Period Start Day: Sunday 12:00 AM  
Bank Holidays & Weekends: Day Before  
Bank Account: Bank Account

Employees Assigned to this Schedule

There is 1 employee assigned to this schedule. Click [here](#) to hide them.

☐ Include inactive employees

Employee ID	First Name	Last Name	Department	Class	Position	Location
AFHKE001	KARTIKEYA	ESPINOZA	Department B	CLASS	Pos 2 Dep A Non exempt Hourly	PRIMARY

Save

### Added Validation to Bank Account Inputs

Added better guidance and warning text to the bank account screen in case a user inputs an invalid check number.

### Workers Comp Codes

Workers Compensation Codes are now supported on the employee's position, and this code is used throughout payroll as needed.

## Recent Updates 8/31/2020

---

### Work From Home Employees

An employee's work location can now be set to 'Work From Home'. Use this option if you wish to withhold taxes based on the employee's home location instead of this work location. This option is frequently used by employers that need to treat an employee's home location as their work location. This may be because organizations meet the economic nexus requirements and fulfill other regulations.

### Negative Earnings During Pay Run



Admins can now enter or upload negative earnings for an employee during a pay run. The amount input boxes in the pay run accept negative values, and an employee can have both negative and positive amounts for the same earnings codes during a pay run. These values will show as separate lines on the employee's pay stub. If negative earnings result in a negative net pay, an error will display on the final step and the employee's wages must be greater than or equal to \$0.

The left screenshot shows the 'Special Payroll: Negative Earnings' screen. It has a navigation bar with tabs: Employees, Hours, Earnings, Deductions, Benefits, and Arrears. The 'Earnings' tab is selected. Below the navigation bar, there is a table with columns: Employee ID, Employee Name, Earnings Code, Position, Department, Location, Pay Rate, and Gross Pay. The table contains two rows of data for employee JPH001.

Employee ID	Employee Name	Earnings Code	Position	Department	Location	Pay Rate	Gross Pay
JPH001	BLANCO, JUAN	Salary	For 2 Day A Non	HR/BA001		\$ 10,000.00	\$ 4,000.00
JPH001	BLANCO, JUAN	Salary	For 2 Day A Non	HR/BA001			\$ 2,000.00

The right screenshot shows the 'Special Payroll: Negative Earnings' screen. It has a navigation bar with tabs: Employees, Hours, Earnings, Deductions, Benefits, and Arrears. The 'Benefits' tab is selected. Below the navigation bar, there is a table with columns: Employee ID, Employee Name, Hours, Wages, Gross Pay, Taxable Wages, Deductions Total, Employee Taxes, Net Pay, Benefits Total, and Employer Taxes. The table contains one row of data for employee JPH001.

Employee ID	Employee Name	Hours	Wages	Gross Pay	Taxable Wages	Deductions Total	Employee Taxes	Net Pay	Benefits Total	Employer Taxes
JPH001	BLANCO, JUAN	08	0	\$ 4,000.00	\$ 4,000.00	\$ 0.00	\$ 0.00	\$ 4,000.00	\$ 0.00	\$ 0.00

## Gross Up Calculator Updates

The gross up calculator now automatically includes an employee's regular deductions in its calculations. These deductions can easily be removed from the calculation as well.

## General Ledger Improvements

A subset of clients were experiencing significant performance issues with the General Ledger settings. We completely rewrote all these pages to improve loading speeds.

## Handle New Timesheets "Activity" Features

The timesheets products now allow for custom "Activities" to be added to timesheets, so the payroll product also handles the results from those entries correctly.

## Minor UI Improvements

Cleaned up some loading icons throughout payroll, fixed some minor display bugs for some totals, and fixed some help tips that were loading off screen.

## Recent Updates 8/13/2020

### Employee Earnings Report

New report shows the total earnings for each employee between a given time period. This report includes columns for: Regular Pay, Non Taxable Earnings, Supplemental Pay, Overtime, Doubletime, Reported Earnings/Tips, Non-reported Tips, Pay Adjustments (Minimum Wage Adjustments), and Gross Earnings.

### Employee Tax Calculations

Change the workflows for overriding employee values on the final step of a pay run to prevent unintentional mistakes.

The preview pay check modal no longer allows the user to override taxes directly. Instead, the admin can change the earnings, benefits, and deductions amounts for the pay run and the save button will automatically recalculate taxes.

**ELDRED WORKS**  
 Employee ID: AFHEW001  
 Department: Department B  
 Work Location: Ohio Work Location  
 Position: Pos 2 Dep A Non exempt Hourly  
 Hire Date: 02/05/2010  
 HR Status: Family Leave

**Paycheck Summary**  
 Net Pay: \$ 1,343.87  
 Total Hours: 80 Hour(s) 0 Minute(s)  
 Gross Pay: \$ 1,961.54  
 Total Deductions: \$ 259.00  
 Total Employee Taxes: \$ 358.67  
 Payment Method: Direct Deposit

**Earnings**

Code Name	Pay Stub Name	Department	Hours	Minutes	Amount
SALARY	Salary	DEPA	40	0	\$ 1,000.00
SALARY	Salary	DEPA	40	0	\$ 961.54
<b>Totals</b>			<b>80 Hour(s)</b>	<b>0 Minute(s)</b>	<b>\$ 1,961.54</b>

**Benefits**

Code Name	Pay Stub Name	Arrears Balance	Amount
401K	401K	\$ 0.00	\$ 100.00
ACA New EO	ACA New Employee Only	\$ 0.00	\$ 25.00

Buttons: Cancel, Save and Recalculate Taxes, Review & Submit

In order to change tax amounts on a pay run, the admin will need to navigate to the tax amounts directly in order to override these.

**Review & Submit**

Check Date: 08/21/2020 Pay Period: 08/02/2020 - 08/15/2020

**Employees** | **Hours** | **Earnings** | **Deductions** | **Benefits** | **Arrears** | **Review & Submit**

**Employee Taxes**

Code	Total	Employer Taxes
Federal Income Tax	\$ 214.92	\$ 143.75
Social Security	\$ 116.50	\$ 6,344.22

Buttons: Previous, Last Saved: 10:09:10 AM, Save & Exit, Submit

## Minor UI Improvements

- Add explanation text to the employees step of a pay run.

## Recent Updates 7/29/2020

## Calculator Print Options

By default, both payroll calculators now have printer-friendly view to print the calculation results or save as a PDF.

**Calculators**

### Gross-Up Calculator

Calculate the values needed to pay an employee a fixed or pre-determined net wage.

Select an Employee:

#### General Information

Check Date	<input type="text" value="10/07/2020"/>
Pay Frequency	<input type="text" value="Biweekly"/>
Work Location	<input type="text" value="MO and St.Louis Tax"/>

#### Earnings

Earning Code	Net Pay
<input type="text" value="Phone Stipend"/>	<input type="text" value="\$ 50.00"/>

#### Results

**ARTHUR ESTATUS**  
Employee ID: AFSAE001  
Department: DEPB  
Position: Pos 2 Dep B Non Exempt Hourly

Check Date	10/07/2020
Pay Frequency	Biweekly
Work Location	MOSTL
Phone Stipend	\$ 54.15
<b>Gross Pay</b>	<b>\$ 54.15</b>
FICA	(\$ 3.36)
Medicare	(\$ 0.79)
Additional Medicare	(\$ 0.00)
Federal Income Tax	(\$ 0.00)
<b>Net Pay</b>	<b>\$ 50.00</b>

## Various Technical Updates

- Work locations now import faster from the core Greenshades Online database to payroll
- Payroll data is sent to other modules faster once a pay run is completed

## Recent Updates – 7/20/2020

### New Report Showing Changes to Employee Compensation

A new report has been added to the Payroll Reports section that shows all changes to employee code assignments and values. This can be used to see changes in employee compensation within payroll.

### Improvements to taxability for codes with \$0 on the pay run

Some minor backend improvements to handle codes that have been included on a pay run this year, but not on this pay run. This has previously been causing a rare error.

## Recent Updates – 7/13/2020

### Showing garnishment on a pay run within the deductions step when an employee is manually added to the pay run.

This addresses an issue where if an employee is added manually to a pay run, we were not seeing garnishment information in the deductions step. This item also makes the garnishment read-only during a pay run.

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HomeEmployeesPayrollPay HistoryTax Filing CenterYear-End FormsReportsSettings

Lauren TeuberAccount SettingsSign Out

Payroll

Pay Schedule: BimonthlyCheck Date: 07/17/2020Pay Period: 07/01/2020 - 07/16/2020Cancel Pay Run

EmployeesHoursEarningsDeductionsBenefitsArrearsReview & Submit

Review your employees' deductions for this pay period. You can override the amount of an employee's deduction by entering the total deduction amount for that code.

afsdAdd Deductions

	Employee ID	Employee Name	Deduction Code	Pay Stub Name	Percent Gross	Fixed Amount	Total Deduction Amount	
	AFSDM001	DOREEN MCSWEENEY	Test Benefit Code EF	Test Benefit Code Employee Family		\$ 1,000.00	\$ 1,000.00	
	AFSDM001	DOREEN MCSWEENEY	Test Dental EF	Test Dental Employee Family		\$ 125.00	\$ 125.00	
	AFSDM001	DOREEN MCSWEENEY	Test for Pretax	Test for Pretax		\$ 541.67	\$ 541.67	
	AFSDM001	DOREEN MCSWEENEY	123456-ABC	123456-ABC			\$ 100.00	

Total Deduction Codes: 13

PreviousSave & ExitNext

Prevent users from deleting bank accounts that are tied to active pay schedules.

If a bank account is associated with an active pay schedule, that bank account cannot be deleted.

Bank Account Settings

Company Info

Access Settings

Payroll

Schedules

Codes

General Ledger

Employee Services

Tax Filing Center

Notification Settings

Bank Accounts

View, edit, modify existing bank accounts or add new bank accounts from this page.

Filter Table...

Add New


Name	Routing Number	Account Number	Financial Institution	Origin ID	Payer ID	
BankyBank	123456789	123456789	Banky Bank	1234567897	1234567899	
Default Account	000123000	123456789	My Bank	23-1010101	23-0101010	

Bank Account cannot be deleted because it is used in at least one pay schedule.

Baxter the Brave Lauren Teuber Account Settings Sign Out

Home Employees Payroll Pay History Tax Filing Center Year-End Forms Reports Settings

### Payroll Codes



- Employment
- Personal
- Payroll
- Codes**
- Tax Parameters
- Timesheets
- Time Off
- Benefits
- Documents
- Evaluations

KAREN SA HALDERMAN  
Digital Employee Folder

Payroll Codes General Ledger Allocation

Code

Pay Stub Name

Calculation Method

Department

Work Location

Position

Tax Type

Amount

HOURLY	HOURLY	Hourly	999	PRIMARY		Regular	\$ 10.00
--------	--------	--------	-----	---------	--	---------	----------

+ Add Earning

Code

Pay Stub Name

Calculation Method

Work Location

Amount

Arrears Balance

Test Benefit Code EF	Test Benefit Code Employee Family	Fixed Amount	SECONDARY	\$ 1,000.00	\$ 1,000.00
Test Dental EF	Test Dental Employee Family	Fixed Amount	SECONDARY	\$ 250.00	\$ 0.00
Test for Pretax	Test for Pretax	Fixed Amount	SECONDARY	\$ 1,000.00	\$ 0.00

+ Add Benefit

Code

Pay Stub Name

Calculation Method

Amount

Arrears Balance

Test Benefit Code EF	Test Benefit Code Employee Family	Fixed Amount	\$ 1,000.00	\$ 1,000.00
Test Dental EF	Test Dental Employee Family	Fixed Amount	\$ 250.00	\$ 0.00
Test for Pretax	Test for Pretax	Fixed Amount	\$ 500.00	\$ 0.00

+ Add Deduction + Add Garnishment

Code

Pay Stub Name

Accrual Method

Balance

Salary PTO	Salary PTO	Fixed Annually	0.00
------------	------------	----------------	------

+ Add Time Off

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## New Administrative Wage Garnishment types

We've added two new garnishment types: "Other Federal" and "Other State". These are for garnishments that do not fit our pre-existing garnishment types. These garnishments can be set to deduct a minimum amount from disposable earnings as well as a percentage of disposable earnings to withhold.

Employee Name

Calculation Method

Work Location

LOW Earnings

LOW Earnings

SECONDARY

SECONDARY

Add Garnishment

Select a Garnishment to add to this employee

Garnishment Code

Select a code

Garnishments

Child or Spousal Support

Federal Tax Levy

Student Loan

Other State

Other Federal

Next

Other minor UI enhancements

# Create Earning Code



## Calculation Details

Rate Type

Fixed Amount

▼

☐ Contributes to Regular Rate of Pay

?

Earning Category

Other

▼



Default Amount

\$ 50.00

Monthly

▼



Default Location

PRIMARY

▼

Default Department

Department A

▼

Default Position

Pos 1 Dep A Non exempt Salary

▼

Previous

Next

## Recent Updates – 6/23/2020

### Ability to assign an employee to a schedule of “none”.

This functionality allows you to set an employee to a default schedule of “none”. This can be used when you have an employee in our application that is not paid through payroll.

Payroll Codes for KAREN H. HALDERMAN

Allocation Type: Fixed Amount

Account 1: Routing Number: 000001111, Account Number: 988311111112, Type: Checking, Allocation Type: Fixed, Allocation Amount: \$ 75.00

Account 2: Routing Number: 000001111, Account Number: 235235323223, Type: Checking, Allocation Type: Remaining Amount, Allocation Amount: 100.00 %

Do Not Pay This Employee

This employee will not be included in any future scheduled pay runs and can not be added to any special pay runs. Are you sure?

Pay Schedule: None - Do Not Pay Employee

### Setting up garnishments for employees

We have enhanced the process to setup a garnishment for an employee. If garnishments are present, they will be listed separately from deductions and include garnishment-specific fields.

Payroll Codes for KAREN H. HALDERMAN

General Ledger Allocation

Earnings

Code	Pay Stub Name	Calculation Method	Department	Work Location	Position	Tax Type	Amount
HOURLY	HOURLY	Hourly	999	PRIMARY		Regular	\$ 10.00

Benefits

Code	Pay Stub Name	Calculation Method	Work Location	Amount	Arrears Balance
Test Benefit Code EF	Test Benefit Code Employee Family	Fixed Amount	SECONDARY	\$ 1,000.00	\$ 1,000.00
Test Dental EF	Test Dental Employee Family	Fixed Amount	SECONDARY	\$ 250.00	\$ 0.00
Test for Pretax	Test for Pretax	Fixed Amount	SECONDARY	\$ 1,000.00	\$ 0.00

Deductions

Code	Pay Stub Name	Calculation Method	Amount	Arrears Balance
Test Benefit Code EF	Test Benefit Code Employee Family	Fixed Amount	\$ 1,000.00	\$ 1,000.00
Test Dental EF	Test Dental Employee Family	Fixed Amount	\$ 250.00	\$ 0.00
Test for Pretax	Test for Pretax	Fixed Amount	\$ 500.00	\$ 0.00

Time Off

Code	Pay Stub Name	Accrual Method	Balance
Salary PTO	Salary PTO	Fixed Annually	0.00

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Lauren Teuber

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Line

Pay Stub Name

Calculation Method

Department

Work Location

Position

Tax Type

Amount

HOURLY

HOURLY

Hourly

999

PRIMARY

\$ 10.00

+ Add Earning

Benefits

Code

Pay Stub Name

Calculation Method

Work Location

Amount

Arrears Balance

Test Benefit Code EF

Test Benefit Code Employee Family

Fixed Amount

SECONDARY

\$ 1,000.00

\$ 1,000.00

Test Dental EF

Test Dental Employee Family

Fixed Amount

SECONDARY

\$ 250.00

\$ 0.00

Test for Pretax

Test for Pretax

Fixed Amount

SECONDARY

\$ 1,000.00

\$ 0.00

+ Add Benefit

Deductions

Code

Pay Stub Name

Calculation Method

Amount

Arrears Balance

Test Benefit Code EF

Test Benefit Code Employee Family

Fixed Amount

\$ 1,000.00

\$ 1,000.00

Test Dental EF

Test Dental Employee Family

Fixed Amount

\$ 250.00

\$ 0.00

Test for Pretax

Test for Pretax

Fixed Amount

\$ 500.00

\$ 0.00

+ Add Deduction

Garnishments

Code

Garnishment Type

Calculation Method

Amount

A12345

Child or Spousal Support Garnishment

Fixed Amount

\$ 50.00

+ Add Garnishment

Time Off

Code

Pay Stub Name

Accrual Method

Balance

Salary PTO

Salary PTO

Fixed Annually

0.00

+ Add Time Off

## Update to the ordering of taxes when viewing an employee's paystub

When viewing a paystub we will display the taxes being paid during the pay period alphabetically followed by taxes that have not been paid alphabetically.

Taxes						
Code Name	Pay Stub Name	Year To Date	Arrears Balance	Amount		
Employer Social Security Tax	Employer Social Security Tax	\$ 4,636.53	\$ 0.00	\$ 1,636.92		Clear
Employer Medicare Tax	Employer Medicare Tax	\$ 1,084.35	\$ 0.00	\$ 382.83		Clear
Federal Income Tax	Federal Income Tax	\$ 16,869.06	\$ 0.00	\$ 8,346.44		Clear
Social Security Tax	Social Security Tax	\$ 4,636.53	\$ 0.00	\$ 1,636.92		Clear
Medicare	Medicare	\$ 1,084.35	\$ 0.00	\$ 382.83		Clear
Additional Medicare	Additional Medicare	\$ 0.00	\$ 0.00	\$ 0.00		Clear
Federal Unemployment Tax	Federal Unemployment Tax	\$ 42.00	\$ 0.00	\$ 0.00		Clear
Florida State Unemployment Tax	Florida State Unemployment Tax	\$ 0.00	\$ 0.00	\$ 0.00		Clear
New York Employer Compensation Expense Tax	New York Employer Compensation Expense Tax	\$ 0.00	\$ 0.00	\$ 0.00		Clear
New York SDI	New York SDI	\$ 0.00	\$ 0.00	\$ 0.00		Clear
Totals		\$ 28,352.82	\$ 0.00	\$ 12,385.94		

Cancel

Save



## Fixed amount earning enhancements

We've made the process of adding a fixed amount earning more flexible. When creating the earning code, we now provide the ability to specify the default amount and frequency in which it should be paid.

### Create Earning Code



#### Calculation Details

Rate Type

Fixed Amount ▼

☐ Contributes to Regular Rate of Pay ?

Earning Category

Other ▼



Default Amount

\$ 50.00

Monthly ▼



Default Location

PRIMARY ▼

Default Department

Department A ▼

Default Position

Pos 1 Dep A Non exempt Salary ▼

[Previous](#)

[Next](#)

## Recent Updates – 6/17/2020

Our payroll dashboard now has a section called “Calculators”. This page is accessible from the payroll dashboard.

The calculators are available through a new button on the payroll dashboard that hosts our Gross Up Calculator and a “What-if” scenario-based calculator.

The screenshot shows the Payroll Dashboard with the following sections:

- In Progress:** WEEKLY FOR PRETAX (Check Date: 06/12/2020, Pay Period: 05/31/2020 - 06/06/2020) and Weekly (Check Date: 06/19/2020, Pay Period: 06/07/2020 - 06/13/2020).
- Upcoming Pay Runs:** Weekly (Check Date: 06/19/2020, Pay Period: 06/07/2020 - 06/13/2020) and WEEKLY FOR PRETAX (Check Date: 06/19/2020, Pay Period: 06/07/2020 - 06/13/2020).
- Recent Pay Runs:** A table showing recent pay runs with columns for Check Date, Total Amount, and a View button.
- Other Payroll Actions:** A section with buttons for Run Special Payroll, Reports, **Calculators** (highlighted with a green arrow), and Void Checks.

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The screenshot shows the Calculators page with the following sections:

- What If Calculator:** Calculate an employee's gross to net wages after taxes for changes to earnings, deductions or work location. View Calculator
- Gross-Up Calculator:** Calculate the values needed to pay an employee a fixed or pre-determined net wage. View Calculator

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Ability to specify a net amount to pay an employee and calculating the gross wages needed to pay that amount.

This functionality allows you to enter a net amount and be able to calculate up what needs to be paid in gross wages.

The screenshot shows the 'Gross-Up Calculator' interface. It includes a navigation bar at the top with various application links. The main section is titled 'Calculators' and contains the 'Gross-Up Calculator' tool. The tool has a 'Select an Employee' dropdown set to 'DYANI SQUIER'. Below this is the 'General Information' section with fields for 'Check Date' (06/16/2020), 'Pay Frequency' (Weekly), and 'Work Location' (Arizona Work Location). The 'Earnings' section has an 'Earning Code' dropdown set to 'SALARY' and a 'Net Pay' field set to '\$ 2,000.00'. The 'Voluntary Deductions' section is empty. On the right, the 'Results' section displays a breakdown for 'DYANI SQUIER', showing 'Gross Pay' of \$ 2,669.52 and 'Net Pay' of \$ 2,000.00. At the bottom, there are 'Reset Values' and 'Calculate' buttons.

Results	
DYANI SQUIER	
Employee ID: AHNDS001	
Department: ARIZONA	
Position:	
Check Date	06/16/2020
Pay Frequency	Weekly
Work Location	ARIZONA
SALARY	\$ 2,669.52
Gross Pay	\$ 2,669.52
FICA	(\$ 185.51)
Medicare	(\$ 38.71)
Additional Medicare	(\$ 0.00)
Federal Income Tax	(\$ 393.22)
Arizona State Tax	(\$ 71.08)
Arizona State Tax	(\$ 0.00)
Net Pay	\$ 2,000.00

The screenshot shows the 'Edit Benefit & Deduction Code' modal window. It is divided into three main sections: 'Benefit Details', 'Calculation', and 'Deduction Details'. The 'Benefit Details' section includes fields for 'Code' (Test Benefit Code EC), 'Pay Stub Name' (Test Benefit Code Employee Child), and 'Description' (Created with the health insurance wizard). The 'Calculation' section includes fields for 'Benefit Category' (Other), 'Calculation Method' (Fixed Amount), 'Employer Contribution' (\$ 800.00), and 'Tax Type' (Section 125 Plan). The 'Deduction Details' section includes fields for 'Rate Type' (Fixed Amount), 'Deduction Category' (Other), and 'Employee Deduction' (\$ 3,200.00). At the bottom, there are 'Cancel' and 'Save' buttons.

Benefit Details	
Code	Test Benefit Code EC
Pay Stub Name	Test Benefit Code Employee Child
Description	Created with the health insurance wizard
Benefit Category	Other

Calculation	
Calculation Method	Fixed Amount
Employer Contribution	\$ 800.00
Tax Type	Section 125 Plan

Deduction Details	
Rate Type	Fixed Amount
Deduction Category	Other
Employee Deduction	\$ 3,200.00

Ability to run a “what if” scenario and see what an employee’s paycheck would look like if certain changes are made.

This functionality allows you to enter an amount and be able to calculate what exactly needs to be paid. The output of this can be printed and provided to employees.

The screenshot shows the 'What If Calculator' interface. At the top, there's a navigation bar with 'Home', 'Employees', 'Payroll', 'Pay History', 'Tax Filing Center', 'Year-End Forms', 'Reports', and 'Settings'. The main heading is 'Calculators'. Below it, the 'What If Calculator' section has a sub-header 'Calculate an employee's gross to net wages after taxes for changes to earnings, deductions or work location.' There's a 'Select an Employee' dropdown and a 'Clear All' button. The 'General Information' section includes 'Check Date' (06/16/2020), 'Pay Frequency' (Weekly), and 'Work Location' (Primary). The 'Earnings' section has a table with 'Earning Code' and 'Gross Pay', with an '+ Add' button. The 'Voluntary Deductions' section has a table with 'Deduction Code' and 'Amount', also with an '+ Add' button. On the right, the 'Results' section shows a summary: Gross Pay, FICA, Medicare, Additional Medicare, Federal Income Tax, and Net Pay (\$ 0.00). At the bottom, there's a copyright notice: 'Copyright © 2003-2020 Greenshades Software. All Rights Reserved. End User Subscription Agreement' and a unique identifier 'D/C2W4XDEV5ANB0K3G03004819'.

This screenshot shows the same 'What If Calculator' interface, but with a print overlay on the right side. The print settings include 'Destination' (HP ENVY 5000 series), 'Pages' (All), 'Copies' (1), 'Layout' (Portrait), and 'Color' (Black and white). The print preview shows a detailed breakdown of the calculation for 'DEBORAH FOLK' on '06/16/2020' with 'Weekly PRIMARY' pay. The breakdown includes Gross Pay (\$ 2,500.00), FICA (\$ 155.00), Medicare (\$ 36.25), Federal Income Tax (\$ 0.00), and a final Net Pay of \$ 2,158.25. The print overlay also has a 'Print' button and a 'Cancel' button. The background interface remains the same as the previous screenshot, showing the 'What If Calculator' form and the 'Results' section.

New Report – Codes assigned by Employee

The Code Assignments report shows all payroll codes currently assigned to employees. This report can be filtered based on code type (benefit, deductions, etc.) and list the details associated with it (employee ID, code name, amount, rate, start/end date). This report can be accessed through the “Reports” section of the payroll dashboard.

## Recent Updates – 5/22/2020

### Liability Report Date Range Changes:

You can now view your liability report by custom date ranges or preset date ranges (including quarterly, yearly and the past 30 days).

Baxter the Brave

Lauren Teuber Account Settings Sign Out

Home Employees Payroll Pay History Tax Filing Center Year-End Forms Reports Settings

Payroll Reports

The Liability Report provides you with details on payroll liabilities for the selected time period or pay run.

Select the date range or pay run you would like to view

☐ Last 30 Days

☐ Year to Date

☐ Select Quarter

☐ Custom Date Range

☒ Select Pay Run

Pay Run Name: SemiMonthly

Pay Period: 03/16/2020 - 03/31/2020

Check Date: 04/15/2020

Change

**Liability Report**

Pay Run Name: SemiMonthly  
Pay Period: 03/16/2020 - 03/31/2020  
Check Date: 04/15/2020  
Posted Time: 04/10/2020 10:25 AM

Q Filter Table...

Code	Type	Group	Amount
401K Test 2020	Deduction		\$ 0.00
Additional Medicare	Tax	Employee	\$ 0.00
arrears test guy	Benefit		\$ 275.00
arrears test guy	Deduction		\$ 400.00
Employer FICA Tax	Tax	Employer	\$ 506.49
Employer Medicare Tax	Tax	Employer	\$ 118.46
Federal Income Tax	Tax	Employee	\$ 871.77
Federal Unemployment Tax	Tax	Employer	\$ 41.54
FICA	Tax	Employee	\$ 506.49
Florida State Unemployment Tax	Tax	Employer	\$ 0.00
HEALTH EO	Benefit		\$ 162.51
HEALTH EO	Deduction		\$ 162.51
Laz Sample Health Ins EO	Benefit		\$ 3.25
Laz Sample Health Ins EO	Deduction		\$ 2.17
LIFE	Deduction		\$ 0.00
Life test 2020	Benefit		\$ 0.00
Life test 2020	Deduction		\$ 0.00
Medicare	Tax	Employee	\$ 118.46

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Ability for admins to set accrual maximums for time off codes that are accrued on an hourly, per pay run basis. This is particularly useful for clients in California where they may need to be able to set an accrual maximum on time off codes in payroll:

**Edit PTO**

**Code Details**

Code Name: PTO

Pay Stub Name: PTO

Description: Add a description or additional information you may need to reference later.

Start Date: 10/01/2019

**Accrual Details**

Accrual Method: Hourly Pay Period

Hours Worked:

**Years of Service Tiers**

Time off codes can have multiple tiers to denote accrual methods, maximum balances and maximum rollovers based on the employee's years of service. An employee who has worked longer than the highest tier will receive the highest tier.

Rollover Date: MM/DD

	Year	Amount	Max Rollover	Max Balance	Max Accrual
Tier 1	0	0.5			
Tier 2	1	1		55	
Tier 3	2	10			

Save

Remove \$0 checks from pay run:

Admins will be alerted at the end of the pay run of employees that have no net wages. We now provide the option to remove those employees from the pay run by being able to select a list of employees presented at the end of the pay run.

**Payroll**

Pay Schedule: BiWeekly Check Date: 11/15/2019 Pay Period: 10/27/2019 - 11/09/2019

**Employees** **Hours** **Earnings** **Deductions** **Benefits** **Arrears** **Review & Submit** (7)

Review and submit your payroll for this period. If any changes are required to properly calculate this pay run, you may go back to any prior step and update any necessary fields. To override any calculated values for submission on this pay run, click edit to enter the desired final values. Please note that once you have clicked Submit, you will be unable to undo or cancel this pay run.

**Info:** 89 employees in this pay run have \$0 net wages and will not show in the results below. Click here to view these employees.

**Warning:** 91 time entries have hours that are not associated to a matching earning code. Resolve Now.

Total Employees: 9	Estimated Total Cost: \$ 29,254.08	Estimated Total Tax: \$ 7,263.57
<b>Earnings</b>		
Fixed Test Code: \$ 4,615.38	HOURLY: \$ 0.00	SALARY: \$ 21,682.70
<b>Deductions</b>		
1234579: \$ 100.00	126545: \$ 50.00	401K Test 2020: \$ 0.00
98416312: \$ 15.00	arrears test guy: \$ 800.00	asdasd: \$ 20.00
HEALTH EO: \$ 400.00	Laz Sample Health Ins EO: \$ 4.00	LIFE: \$ 0.00
Life test 2020: \$ 0.00	test arrears dude: \$ 1,800.00	
<b>Benefits</b>		
arrears test guy: \$ 550.00	HEALTH EO: \$ 400.00	Laz Sample Health Ins EO: \$ 6.00
Life test 2020: \$ 0.00	test arrears dude: \$ 2,000.00	Trad401K: \$ 0.00

Previous Save & Exit Submit

•

In the payroll module, we now have a payroll report to assist clients with FFCRA. The FFCRA Liability Adjustment Report details the liabilities and FFCRA credits for a selected time period. We've also calculated the adjusted liability and these values can be used when completing Form 941 and/or Form 7200.

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## Addition of Garnishment reports top the existing payroll reports list:

Garnishments is now available in the reports section of payroll in addition to the payroll reports package.

Baxter the Brave

Lauren Teuber Account Settings Sign Out

Home Employees Payroll Pay History Tax Filing Center Year-End Forms Reports Settings

Payroll Reports

Liability Report

View Report

General Ledger Report

View Report

Employee Changes Report

View Report

Employee Arrears Report

View Report

Garnishment Post Pay Run Report

View Report

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Baxter the Brave

Lauren Teuber Account Settings Sign Out

Home Employees Payroll Pay History Tax Filing Center Year-End Forms Reports Settings

Garnishment Post Pay Run Report

This report shows your garnishments for a given pay run. You can select a pay run to view below.

Pay Run: SemiMonthly

Pay Period: 03/16/2020 - 03/31/2020

Check Date: 04/15/2020

Posted Time: 04/10/2020 10:25 AM

Select Pay Run

Filter Table...

Download

Employee ID	Employee Name	Case Number	State	Amount
AFHEW001	ELDRED WORKS	98416312	FED	\$ 15.00
AFHEW001	ELDRED WORKS	asdadad	AS	\$ 20.00
AFHEW001	ELDRED WORKS	126545	FED	\$ 50.00
AFHEW001	ELDRED WORKS	1234579	AS	\$ 100.00

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D2C2WAZRSTQWE802:GO:11186455

## Clarifying the ACH file warnings on the post pay run screen:

We've added some additional information to the existing warning when the number of employees in an ACH file doesn't match the number of employees whose settings indicate they should be receiving a direct deposit as the result of a pay run. In the case where an employee was included in a pay run but has a \$0 net check, we're explaining that because they don't have anything to deposit and thus aren't included in the file.

**View Your Positive Pay File Report**

View the positive pay file created by this pay run.

4 of 8 employees are included in this ACH file. 4 of these employees have zero net pay and are excluded.

View the positive pay file created by this pay run.

4 of 8 employees are included in this ACH files. 4 of these employees have zero net pay and are excluded.

4 of 8 employees are included in this ACH files. 4 of these employees have zero net pay and are excluded.

**Download Your Direct Deposit ACH File** 4 Direct Deposits

Download your ACH file in order to pay your employees via direct deposit. **\$ 117,433.21 Total Net Wages**

File Last Created: 03/27/2020 at 10:00 AM

[Print Direct Deposit Stubs](#) [Download](#)

[Refresh Direct Deposit Data](#)

**Download Your Direct Deposit ACH File** 4 Direct Deposits

Download your ACH file in order to pay your employees via direct deposit. **\$ 117,433.21 Total Net Wages**

File Last Created: 03/27/2020 at 10:00 AM

[Print Direct Deposit Stubs](#) [Download](#)

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File Last Created: 03/27/2020 at 10:00 AM  
[Print Direct Deposit Stubs](#)  
[Refresh Direct Deposit Data](#) [Download](#)

Print Direct Deposit Stubs      Download  
Refresh Direct Deposit Data

[Refresh Direct Deposit Data](#)

#### 4 Direct Deposits

\$ 117,433.21 Total Net Wages

Download

**Distribute Pay Checks** **65 Total Paychecks**  
 Distribute paper checks yourself or request for Greenshades to Print and Mail these  
 paychecks via Pay History. **\$ 244,796.56 Total Net Wages**

[Print Pay Stubs](#) [Distribute](#)

**Distribute Pay Checks** **65 Total Paychecks**  
 Distribute paper checks yourself or request for Greenshades to Print and Mail these  
 paychecks via Pay History. **\$ 244,796.56 Total Net Wages**

[Print Pay Stubs](#) [Distribute](#)

Print Pay Stubs Distribute

65 Total Paychecks

\$ 244,796.56 Total Net Wages

Distribute

Paycheck Summary

Net Pay: \$ 0.00

Total Hours: 0 Hour(s) 0 Minute(s)

Gross Pay: \$ 0.00

Total Deductions: \$ 0.00

Total Employee Taxes: \$ 0.00

Payment Method: 

Direct Deposit

Paper Check

Direct Deposit

Net Pay: \$ 0.00

Total Hours: 0 Hour(s) 0 Minute(s)

Gross Pay: \$ 0.00

Total Deductions: \$ 0.00

Total Employee Taxes: \$ 0.00

Payment Method: Direct Deposit

Direct Deposit ▼

Paper Check

Direct Deposit

Add additional information on the “Review and Submit” step of the pay run:

On the final step of the pay run, we display how many paper checks will be generated and how many direct deposits will be included in the ACH file so the admin can catch and correct any errors prior to submitting the pay run. (Also note: the code summaries at the top are now in alphabetical order!)

Baxter the Brave Lauren Teuber Account Settings Sign Out

Home Employees Payroll Pay History Tax Filing Center Year-End Forms Reports Settings

## Payroll

Pay Schedule: BiWeekly Check Date: 11/15/2019 Pay Period: 10/27/2019 - 11/09/2019 Cancel Pay Run

Employees ☒
Hours ☒
Earnings ☒
Deductions ☒
Benefits ☒
Arrears ☒
Review & Submit ☒ 7

**Total Employees:** 9

**Earnings**  
Fixed Test Code: \$ 4,615.38

**Deductions**  
1234579: \$ 100.00  
98416312: \$ 15.00  
HEALTH EO: \$ 400.00  
Life test 2020: \$ 0.00

**Benefits**  
arrears test guy: \$ 550.00  
Life test 2020: \$ 0.00

**Estimated Total Cost:** \$ 29,254.08

HOURLY: \$ 0.00

126545: \$ 50.00  
arrears test guy: \$ 800.00  
Laz Sample Health Ins EO: \$ 4.00  
test arrears dude: \$ 1,800.00

HEALTH EO: \$ 400.00  
test arrears dude: \$ 2,000.00

**Estimated Total Tax:** \$ 7,263.57

SALARY: \$ 21,682.70

401K Test 2020: \$ 0.00  
asdad: \$ 20.00  
LIFE: \$ 0.00

Laz Sample Health Ins EO: \$ 6.00  
Trad401K: \$ 0.00

Filter Table...

**Total Employees:** 9 **Paper Paycheck:** 24 **Direct Deposit:** 74

Employee ID	Employee Name	Hours	Minutes	Gross Pay	Taxable Wages	Deduction Total	Employee Taxes	Net Pay	Benefits Total	Employer Taxes	View Paystub
AFSLP001	LATONYA PEPPER	0	0	\$ 4,615.38	\$ 4,615.38	\$ 0.00	\$ 1,201.63	\$ 3,413.75	\$ 0.00	\$ 380.76	<a href="#">View Paystub</a>
AFSEG001	DELWOOD GARRETT	80	0	\$ 1,923.08	\$ 1,873.08	\$ 50.00	\$ 254.44	\$ 1,618.64	\$ 50.00	\$ 154.53	<a href="#">View Paystub</a>
AFSDM001	DOREEN MCSWEENEY	80	0	\$ 1,923.08	\$ 1,873.08	\$ 50.00	\$ 363.93	\$ 1,509.15	\$ 50.00	\$ 154.53	<a href="#">View Paystub</a>

Previous Save & Exit Submit

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### Add real-time success/error messages through payroll:

The payroll module will now include toast messages when user actions are successful or fail, but we don't want to interrupt the user. You can read more about the philosophical differences between the two here, but here's what it looks like in payroll:

Baxter the Brave QA Testing (Impersonated by: LPMOROW Account Settings Sign Out)

Home Employees Payroll Pay History Tax Filing Center Year-End Forms Reports Settings

## Payroll

Pay Schedule: BiWeekly Check Date: 11/15/2019 Pay Period: 10/27/2019 - 11/09/2019 Cancel Pay Run

Employees ☒
Hours ☒
Earnings ☒
Deductions ☒
Benefits ☒
Arrears ☒
Review & Submit ☒

Total Employees
Unique Hours Codes
Total Hours
Complete or Save Payroll

Filter Table...

[Add Hours](#) [Refresh Timesheets](#)

Employee ID	Employee Name	Earning Code	Pay Stub Name	Position	Department	Location	Hours	Minutes
AFHEW001	ELDRED WORKS	Cash Money	Cash Money	Pos 1 Dep A Non exempt	2500	PRIMARY	1	0
AFSDK001	ABCD EFGHIJKLMNOPQRSTUVWXYZ	SALARY	Salary	Pos 1 Dep B Non exempt Salary	Department A	PRIMARY	80	0
AFSBA001	BURDONELL ACEVES	SALARY	Salary	Pos 1 Dep B Non exempt Salary	Department A	PRIMARY	81	0
AFSAE001	ARTHUR STATS	SALARY	Salary	Pos 2 Dep A Non exempt Hourly	Department A	PRIMARY	80	0
AFHEK001	KARTIKEYA ESPIN OZA	SALARY	Salary	Pos 2 Dep A Non exempt Hourly	Department A	PRIMARY	80	0
AFHEW001	ELDRED WORKS	SALARY	Salary	Pos 2 Dep A Non exempt Hourly	Department A	PRIMARY	80	0
AFHEW001	ELDRED WORKS	SALARY	Salary	Pos 1 Dep A Non exempt Salary	Department A	PRIMARY	2	0

Total Hour Codes: 0

Previous Last Saved: 1:09:05 PM Save & Exit Next

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## Recent Updates – 5/12/2020

### Navigation:

Greenshadesonline.com > Employees > Select Employee > ACA Details > Offers and Enrollment

### Enhanced Feature

Platform users with a basic Payroll package (does not contain Benefits) will now be able to manage self insured dependent coverage information that is needed for end of year reporting on the 1095-C form. Administrators are now able to enter dependent enrollment information for any self insured medical coverage the employee was enrolled into.

System Dashboard ▾

QA Onboarding User (impersonated by: KMGINNIS) [Account Settings](#) [Sign Out](#)

[Home](#) [Employees](#) [Payroll](#) [Pay History](#) [Year-End Forms](#) [Reports](#) [Settings](#)

Employee Management

TIRION LANISTER

Digital Employee Folder

← Back to Employee List

Plan Offer and Enrollment

This grid displays your employee's current plan healthcare offers and enrollment. Add an Offer and Enrollment below and then select a plan code from the drop down list to indicate the coverage level plan for which the employee was offered coverage. There may be multiple plan offers and/or enrollment during a given plan year if the employee changed coverage levels due to a Qualifying Life Event or if you follow a non-calendar plan year. You may not, however, have overlapping dates of offers within the same plan group or enrollment across all plan groups. To indicate that an employee enrolled in the offered coverage for a given date range, please check the "Enrolled" checkbox.

Filter by Year 2020 ▾

Plan Code	Plan Group Name	Start Date	End Date	Employee-Only Monthly Cost	Enrolled?
ACA MEC	1C Populate	01/01/2019	Ongoing	\$5.00	<input checked="" type="checkbox"/> <input type="checkbox"/>
ACA MEC + MVP	1A Populate	01/01/2019	Ongoing	\$1.00	<input checked="" type="checkbox"/> <input type="checkbox"/>
BEN4 EF	1C Populate	01/01/2019	Ongoing	\$5.00	<input checked="" type="checkbox"/> <input type="checkbox"/>
Kyle Test EO	1A Populate	01/01/2019	Ongoing	\$1.00	<input checked="" type="checkbox"/> <input type="checkbox"/>

+ Add New Offer Dates and Costs

Dependent Enrollment

If your organization is providing self insured coverage, then the individuals covered will need to be reported on Part III of the 1095-C form at the end of the year. Use the space below to enter any dependent coverage information to be used for this purpose.

Spouse-typed dependents are not shown because the employee was not offered any Employee + Spouse or Employee + Family coverage level types.

AndAnother Child - Child - DOB 8/1/2000

Plan Code	Plan Group Name	Start Date	End Date
<div>+ Add New Enrollment</div>			

Another Child - Child - DOB 8/3/2009

Plan Code	Plan Group Name	Start Date	End Date
<div>+ Add New Enrollment</div>			

bees bees - Child - DOB 10/18/2019

Plan Code	Plan Group Name	Start Date	End Date
<div>+ Add New Enrollment</div>			

Kid Westbrook jack - Child - DOB 1/26/1990

Plan Code	Plan Group Name	Start Date	End Date
<div>+ Add New Enrollment</div>			

Save

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D101C1WP10TSTW003.G0:10000118

This data will also display on the ACA details page for the employee to track what will display on the 1095-C Part III.

Covered Individuals Details

1095-C Part III

The Covered Individuals details below are displayed for the selected plan year. This information will be populated within Part III of the employee's 1095-C from.

First Name	Last Name	Relationship Type	January	February	March	April	May	June	July	August	September	October	November	December
AndAnother	Child	Child												
Another	Child	Child												
bees	bees	Child												
Kid	Westbrooks jack	Child												
Riley	Test	Sibling												
Spouse	Westbrooks	Spouse												
TIRION	LANISTER	Self	✓	✓	✓	✓								
TIRION	WESTBROOKS	Self	✓	✓	✓	✓								

## Recent Updates – 4/20/2020

### Ability To Specify A Deduction So That The Deduction Is Made Before Taxes Are Withheld.

- This functionality allows you to have a deduction come out before taxes are withheld.

**Note:** This will not impact an employee's tax calculation if enabled.

### Create Benefit Code

Deduction Details

Rate Type

Fixed Amount

Deduction Category

Employee Deduction

\$ 0.00

☐ Apply before taxes

Previous

Next

### Edit Benefit & Deduction Code

Benefit Details

Code

Test Benefit Code - EC

Pay Stub Name

Test Benefit Code Employee Child

Description

Created with the health insurance wizard

Benefit Category

Other

Calculation

Calculation Method

Fixed Amount

Employer Contribution

\$ 800.00

Tax Type

Section 125 Plan

☐ Apply before taxes

☐ Imputed Income

Deduction Details

Rate Type

Fixed Amount

Deduction Category

Other

Employee Deduction

\$ 3,200.00

Benefit Arrears Details

Cancel

Save

### Add/Change Employee Schedule from Employee Card

- You can now access the employee schedule directly from the employee card.

## Check ordering

- We've introduced the ability to specify in what order checks are numbered. You can now specify whether to order them alphabetically by an employee's last name, first name or numerically by their employee ID.

**Note:** In the case where first name and last name match, we will then sort by the employee ID.

## Change in the order of columns where General Ledger information is presented.

- We've changed how columns are displayed when viewing and/or changing General Ledger data. We now display Debits in one column followed by Credits. This change is more in line with existing GL setups today.

Entity Code	Account Number	Account Name	Account Type	Debit	Credit
	00-1220-00	00-1220-00	Income	\$ 0.00	\$ 84.06
	00-1220-00	00-1220-00	Income	\$ 8,851.31	\$ 0.00
	00-1235-00	00-1235-00	Income	\$ 0.00	\$ 422.54
	00-1235-00	00-1235-00	Income	\$ 3,717.94	\$ 0.00
	00-2020-00	00-2020-00	Income	\$ 0.00	\$ 1,500.00
	00-2029-00	00-2029-00	Income	\$ 34.06	\$ 0.00
	00-2033-00	00-2033-00	Income	\$ 0.00	\$ 1,840.31
	00-2045-00	00-2045-00	Income	\$ 0.00	\$ 1,744.86
	00-2045-00	00-2045-00	Income	\$ 211.54	\$ 0.00
	00-6010-02	00-6010-02	Income	\$ 1,500.00	\$ 0.00

## Ability to send Garnishments information separately to General Ledger.

- We've now made it easier to map Garnishments to GL transactions. Instead of displaying it lumped as one transaction, we now provide the ability to map garnishments down to the agency level.

## General Ledger Settings

General ledger entries are created after every pay run. Use the settings below to create mappings for entries for specific general ledger accounts.

Earnings

Benefits

Deductions

Taxes

Payment Account

Garnishments

General Ledger Mapping: Garnishments

Add or edit the mapping between garnishments and general ledger accounts. Any value not mapped will be included in the default account's total after every pay run.

Filter Table...

Debit Account Name	Credit Account Name	Garnishment Type
00-1220-00	00-1235-00	Child Support
00-1235-00	00-1220-00	Student Loan

Edit Mappings

## Change employee's payment method before payroll is submitted.

- Before submitting a payroll, you can now switch an employee's payment method between direct deposit or a paper check. You can only switch between paper check to direct deposit if direct deposit is already setup for that employee.

Paycheck Summary

Net Pay: \$ 0.00

Total Hours: 0 Hour(s) 0 Minute(s)

Gross Pay: \$ 0.00

Total Deductions: \$ 0.00

Total Employee Taxes: \$ 0.00

Payment Method: 

Direct Deposit

Paper Check

Direct Deposit