Keeping Accurate Employee Records

Keeping accurate employee records is extremely important.

In ACS Payroll, you can track an employee's time off, direct deposit information, adjustments, comments, pay, and contact information on the record. Some of this information is useful in case of emergencies, while other data helps you avoid errors when preparing W-2 forms. You can also deactivate employees who no longer work at your organization.

In addition, if you own ACS People Suite, Organizations, or HeadMaster, you can import records from those programs and refresh them frequently to ensure that you have the latest employee data.

Here's an overview of some of the information you can track on employee records:

- **Profile Information** — Tracks an employee's date of birth, employee status, Social Security Number (required for Form W-2), Cost Center, Worker's Compensation Information, 3rd Party ID, and Employment Dates. You can also attach documents to the Profile tab, such as the employee's Form W-4 and performance evaluation documents.
- **Addresses** — Tracks employee home and mailing addresses, which are extremely important at year-end when you need to mail Forms W-2. The mailing address in the employee's record prints on the Form W-2.
- **Phones/E-mail** — Tracks phone and e-mail information for employees. This is especially important in emergency situations. You can also click on the e-mail icon to send an e-mail to the selected address from this window. 
- **Pay** — Tracks an employee's rate of pay, gross pay, whether an employee is hourly or salaried, and other information. Any time an employee's pay rate changes, you want to update the pay information in the employee's record. The changes to the rate of pay or gross pay affect the next payroll that you process. Any payroll information already posted is not affected by changes that you make in the employee's record. If you leave the pay type blank, you may receive program errors.
- **Taxes** — Tracks tax information such as withholdings, tax tables, exemptions, and W-2 elections. You can update an employee's tax information at any time. If you change the number of exemptions or extra withholding, make sure that you have a current Form W-4 or I-9 on file. If you change the tax tables, tax exemptions, or W-2 elections, you must also obtain the proper completed forms from the employee.
- **Adjustments** — Tracks adjustments such as health insurance premiums, 401K contributions, pension plans, and auto or housing allowances. Any time a change occurs in an individual's adjustment amount, you must update the adjustment information in the employee's record. The change takes place immediately and is reflected in the payroll that you process for the employee.
- **Personnel** — Tracks employee job descriptions, evaluations, spouse information, and filed forms. A quick glance at your notes concerning an employee's last evaluation can let you know if an employee is ready for that promotion or needs more time in the current position. Also, you need current information in the records if you want to use your reports in planning for additional personnel needs.
- **Events** — Tracks events (also known as comments) entered into ACS. Keeping your comments in an employee's record up-to-date is an important task, especially if the comments relate to the employee's evaluation details. Some predefined events are included, and you can define custom event types in Payroll - Define Lists. You can also select Key Comment for specific comments.

- **Time Off** — Tracks an employee's current time off totals, time taken, accrual rates, and hire date. This tab gives a complete view of vacation, sick, and other time off totals. To learn about updating employee time off, see Adding Vacation and Sick Time to Employee Records and Carrying Over Employee Vacation and Sick Time.
- **Contacts** — Tracks an employee's emergency contacts. You can display the primary contact information on the employee Profile tab. When you need to update address, phone, or e-mail information for an employee's emergency contact, click on the Contacts tab.
- **Direct Deposit** — Tracks bank and account information for employees using direct deposit. You can allocate percentages of pay to different accounts as well. To learn more about direct deposit, see Adding Employee Direct Deposit Information

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If an employee claims Single - 1 or more withholding allowances, you must add 2 to your existing allowances.