

Options when Adding and Editing Employee Records

Some fields on the Employee record tabs are self-explanatory, while others are more complex.

To make **entering** and **editing** employee records easier, the list below describes some of these fields.

Additional Field Information

The Profile Tab

3rd Party ID

If you are using a third-party time clock software, enter the employee's identification number.

Attachments

Click to add, open, or remove documents from the employee's record. You can add documents such as the employee's Form W-4 and performance evaluation documents.

Ethnic Description

EEOC law requires certain employers to track this information. It displays on the Employee Master List report.

The Pay Tab

Payroll Type

Displays the revenue type for the selected employee. The valid revenue types are **H** (Hourly), **S** (Salaried), **O** (Overtime), **T** (Vacation), and **L** (Sick).

The Taxes Tab

Federal Withholding

of Federal Exemptions

Displays the number of federal exemptions for the employee. Enter the number of federal exemptions from the employee's Form W-4.

Extra Withholding

Displays the extra federal withholding amount for the employee, if any. Enter any extra federal withholding amount from the employee's Form W-4. If the employee indicated that the extra federal withholding amount is a percentage of taxable gross pay, select **Percent**.

State and Local Taxes

of State Exemptions

Displays the number of state exemptions for the employee. Enter the number of state exemptions from the employee's Form W-4.

State Extra Withholding

Displays the extra state withholding amount for the employee, if any. Enter any extra state withholding amount from the employee's Form W-4. If the employee indicated that the extra state withholding amount is a percentage of taxable gross pay, select **Percent**.

Tax Tables

Enter the appropriate tax code, or click **Lookup**  to select one in the table.

- **Federal** — Displays the federal tax code. Select 001 for married or 002 for single.
- **EIC** — Displays the earned income credit tax code. Select the correct code for which the employee qualifies.
- **State** — Displays the state tax code. Select the correct tax code for the state in which the employee resides.
- **Local 1, 2, and 3** — Displays the local tax code. Select the tax code for the locality in which the employee resides.

Tax Exemptions

If the employee is FICA, FUTA, or SUTA Exempt, select the appropriate option.

- **FICA** — FICA is the acronym for the Federal Insurance Contributions Act. This act mandates that an employer withhold a set percentage of an employee's salary each pay period. FICA also requires that the employer match the amount and contribute the money to a government account known as the Social Security Trust Fund. This fund provides retirement income, as well as disability insurance, Medicare, and benefits for survivors. If an employee is FICA exempt, be sure to mark this on his record as well as the pay type on his wages, otherwise negative FICA wages display.
- **FUTA** — The Federal Unemployment Tax Act (FUTA), authorizes the Internal Revenue Service to collect a federal employer tax used to fund state workforce agencies. An employer may have to pay FUTA for their employees unless the employer is FUTA exempt. Contact your tax advisor for further information on how this affects you as an employer.
- **SUTA** — The State Unemployment Tax is a tax that states require to fund unemployment benefits. An employer may have to pay SUTA for their employees unless the employer is SUTA exempt. Contact your tax advisor for further information on how this affects you as an employer.

W-2 Elections

If the employee is a statutory employee, participates in a designated retirement plan, or receives third-party sick pay, select the appropriate check box. A statutory employee is a worker who is treated as an employee for FICA (Social Security) and Medicare tax purposes, but as self-employed for income tax purposes.

The Adjustments Tab

Category

Displays the type of adjustment. The valid categories are ADD (Addition), DED (Deduction), CON (Contribution), GTL (Group Term Life Insurance).

Global and Individual Amounts

If the same amount or percentage of the adjustment applies to all employees, select **Global**. If the employee can select an individual amount or percentage, select **Individual**, then enter the amount or percentage selected by the employee.

Global and Individual Limits

If a maximum limit is set for all employees, select **Global**. If the employee set an individual maximum limit, select **Limit**, and enter the limit. Adjustments are designed to start over at the beginning of the new year, so a new YTD total is obtained each year. You can manually set a new adjustment amount for mid-year adjustments that carry over into a new year.

The Personnel Tab

New Hire Reported

Under federal and state law, employers must report newly hired or re-hired employees to ensure wage garnishment for child support on applicable employees. Select the check box once the information has been reported.

Form W-11 on file (HIRE Act)

Select if the employee's Form W-11 is complete.

Job Category

EEOC law requires certain employers to track this information. It displays on the Employee Master List report.

The Affordable Care Act Tab

Typically, you'll provide [mass health care coverage](#) for your employees where everyone has the same terms of coverage. However, there are exceptions, and that's what this tab is for. For example, if you provide mass coverage for your employees all 12 months of the year, and you hire a new employee in the middle of the year, their coverage terms aren't for 12 months that year. So, you'll need to add their coverage terms on this tab within their record. Another common example for using this tab to make health care coverage changes is if you lose an employee in the middle of the year and need to delete their coverage.

This tab is also where you'll add employee family members who are covered.

Health Care Coverage Terms for Employee

This grid displays the terms of health care coverage for the employee. See the [Administering Affordable Care Act Tax Provisions](#) for a description of each column heading in the grid.

Covered Individuals

This grid displays the terms of health care coverage for the employee's family members. Click **Add** to add a family member to the grid.