DASHBOARD

Reminders
- Appear on follow-up date (if follow-up date is blank, reminders appear on dashboard)
- Can be removed from list by marking "complete"

Employee Access can be used to set up and send ESS to your employees (enter as work email)

EMPLOYEE

Uncheck "Hide Terminated Employees" to see entire list

Use "Switch Layout" to see employees in list view vs. card view

Click "Edit" to open employee information and "Save" after making changes

Enter salaries at the pay frequency amount at per pay amount

"Scheduled Earnings"—only used for additional permanent payments other than regular wages

Local Taxes
- Local tax defaults to the code for your main location. If you have more than 1 location, be sure to change the local code accordingly when adding a new employee.
- To enter employee PSD Code & Local tax rate
    1. Select "edit" on the local tax labeled with the county
    2. Enter EE PSD Code for their Residence
    3. Enter ER PSD Code for Work PSD
    4. Enter EE tax rate in Fixed Local W/H as a decimal (e.g., 1.7% = .017)
    5. Save changes
- If an EE is exempt from LST
    1. Select "Edit" in the local tax labeled LST
    2. Click the box for "Exempt" (allows EE to appear on report, as required)
    3. Save changes
- If the EE is a nonresident of PA, they may still be subject to local and LST based on circumstances—contact PaySmart for further instruction

Direct Deposit
- Any changes will result in a pre-note for all accounts and a live check
- Split Method is flat or percentage
- For more than 1 account, put flat amount or smaller percentage in first account and use 100% as percentage for second account (100% is entered as 1 not 100)
- For more than 2 accounts, contact PaySmart

Entering Payroll

- Do not use 1-step payroll unless you have automated hours or only salaried EE
- Make ALL permanent changes to EE prior to starting payrolls
- All changes on grid are one time only
- Terminated EE will not show up initially but can be added via "Add Employee"
- You can hide columns that aren't used frequently
- To add columns or permanently remove columns, contact PaySmart
- Grid can be sorted by clicking on the column
- Please IGNORE "Refresh Totals"—it isn't programmed properly and will be removed in a coming update
- Div. & Departs can be changed in drop-down but rate will not change
- To add an additional pay for an employee or pay for another department
    1. Right-click on EE row
    2. Select "Add Row" for this Employee
    3. Add/Change pay as required, this will appear on same check as a separate line
- Uncheck the Pay box if an EE is not being paid this pay period
- To add a separate check for same EE
    o Send check information in payroll notes
    o If separate checks are a frequent occurrence, a column for extra checks can be added—contact PaySmart
- Automatic/Scheduled Earnings do not appear on the actual grid. They will be visible in Preprocess Register.

Submitting Payroll

- Your payroll is not processed until you click "Submit Payroll"
- Enter notes regarding payroll processing on this screen prior to submitting or email Payroll@paysmartpa.com
- Preview your Preprocess register
- To add an employee after the fact
    1. Save & Exit
    2. Add EE info
    3. Go back to "Edit Payroll"
    4. Select "Add EE"
    5. Pick EE from drop-down list
- Changes can be made until you hit "Submit"

BROWSER COMPATIBILITY

There are some compatibility issues with Internet Explorer 10 and 11. If your screen is jumbled up or you encounter repeated errors, make sure to review the compatibility instructions on www.PaySmartPa.com under the "Tools and Forms" tab. Chrome and Firefox are compatible with PPX.

If the payroll gets hung up at any point, contact PaySmart.
We can typically pull the payroll in and/or put it back to editing for you.