Polaris Payroll Meeting Tomorrow's Needs Today

Processing Payroll
Quick Reference Guide

Version 1.0

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Introduction

This ***Payroll Processing Quick Reference Guide*** highlights the workflows and guides you through the payroll processing function. In the event that you require more information on specific functions or features that are not covered in this Guide, please contact us at your convenience.

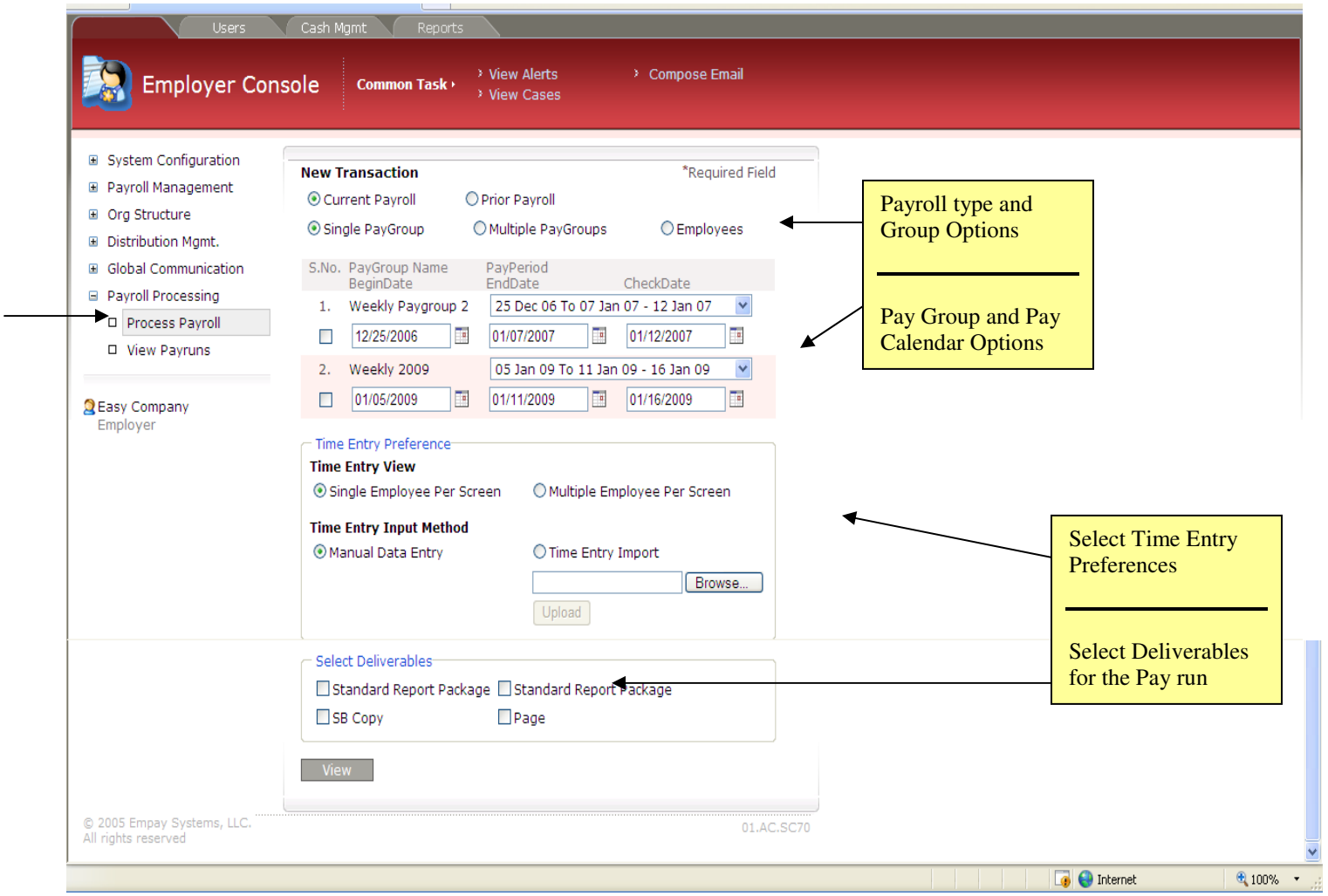
Payroll Processing

After logging in you will then click on any of the "Employer Console" items to advance to the next screen where you will click on the "+" sign and expand the Payroll Process function in the left hand navigation section toward the bottom.

Process Payroll

Select the Processing Criteria

Next you will click on Process Payroll select the processing criteria as follows:



You can choose from several different options when beginning to process a payroll. For example, you must choose whether you are entering a "Current Payroll" or a "Prior Payroll" such as when you are entering YTD pay runs for a new client conversion. Next, you must select whether you are going to process for a Single Pay Group or Multiple Pay Groups or just a single employee.

Next, you will select your Time Entry Preferences:

- Time Entry View (how you want to view the data entry screens)
    - Single Employee per Screen (Helpful when entering YTD/client conversion information)
    - Multiple Employee per Screen
- Time Entry Input Method
    - Manual Data Entry
    - Time Entry Import

Lastly, you will need to select the deliverables for the payroll to be processed, and then click on "View" and a list of all the employees that have been associated with the selected Pay Group will appear and "pre-selected" to be included in the pay run.

View

Sort | Filter

Employee List

S.No.	Employee Name	Pay Group	Location	
1.	Mary Cox	Weekly 2009	South Carolina	☐
2.	Roxie Cornish	Weekly 2009	Nil	☐
3.	Paul Crouch	Weekly 2009	Nil	☑
4.	Uray Ewing	Weekly 2009	Nil	☑
5.	Joe Harrison	Weekly 2009	Nil	☑
6.	Nancy Murphy	Weekly 2009	Nil	☑
7.	Vicky Nolan	Weekly 2009	Nil	☑
8.	Tracy Pinkett	Weekly 2009	Nil	☑
9.	Bob Smith	Weekly 2009	Nil	☐
10.	Suzie Mainstay	Weekly 2009	Nil	☐

Continue to process payroll

You can now de-select one or more employees if you wish. Once you have finalized your employee selection, if different from automatically provided, click on "Continue to Process Payroll".

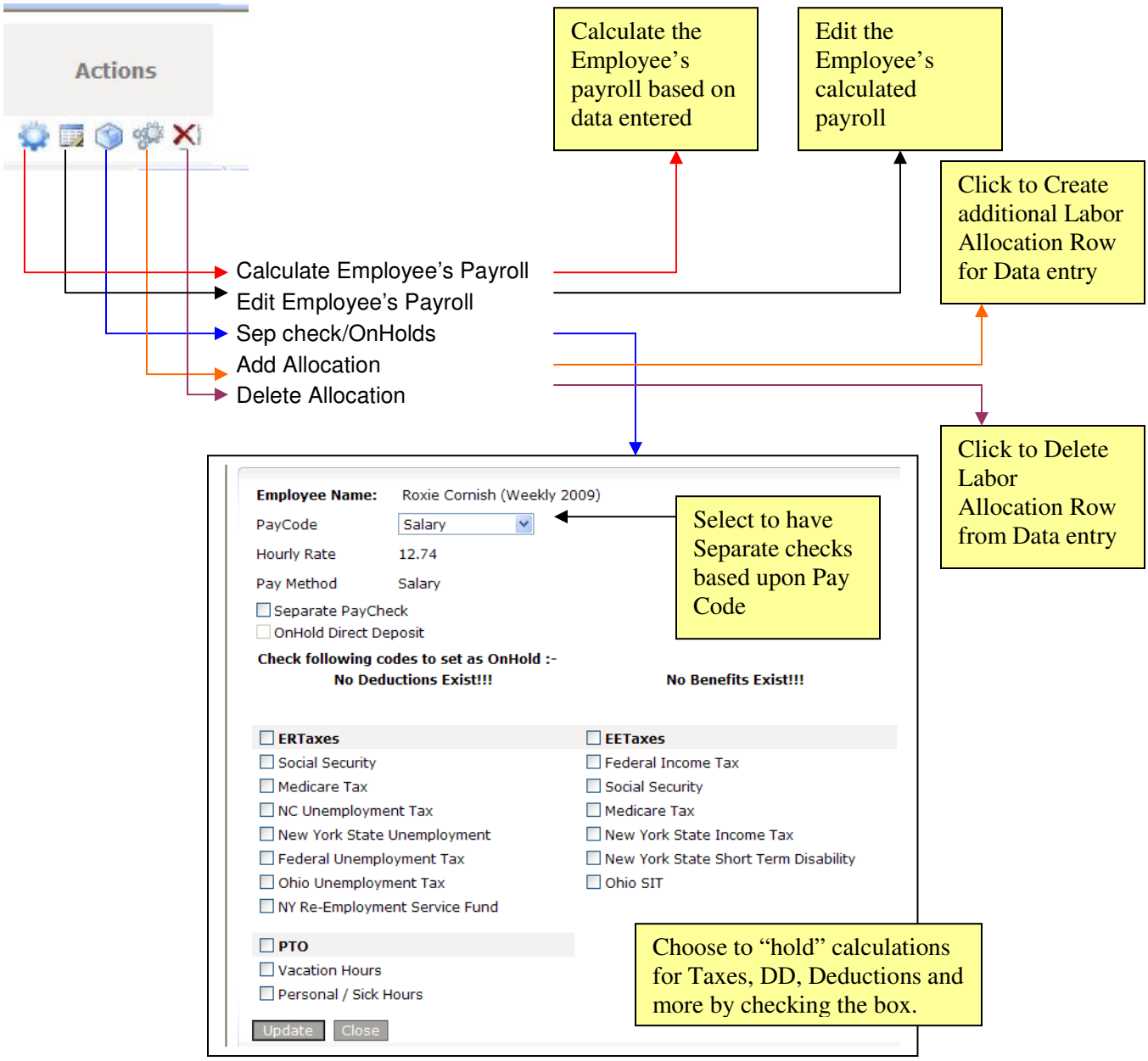
For illustration purposes we have selected to enter data with multiple employees per screen and as a result the system displays a "pay grid" type of input layout for fast data entry. You can quickly enter time, edit rates and more simply by "tabbing" from field to field.

Modifying Pay Grid

In the event you want to show different column headers for Pay Codes and/or Deduction codes click on the Filter button near the top right of the screen and you will have the ability to select or de-select Codes of your choosing. When done, click on the View button and the revised pay grid will load on your screen.

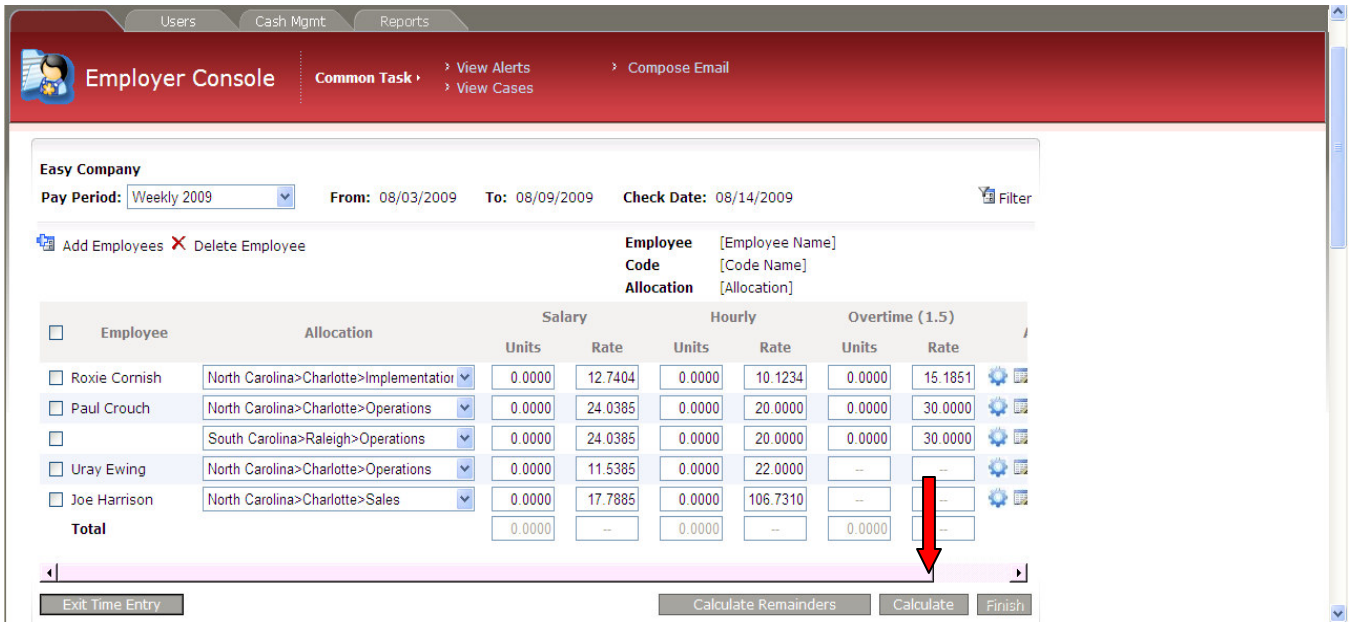
Action Buttons

The Action Buttons to the right of the Pay Grid are Employee specific actions that you can choose as follows:

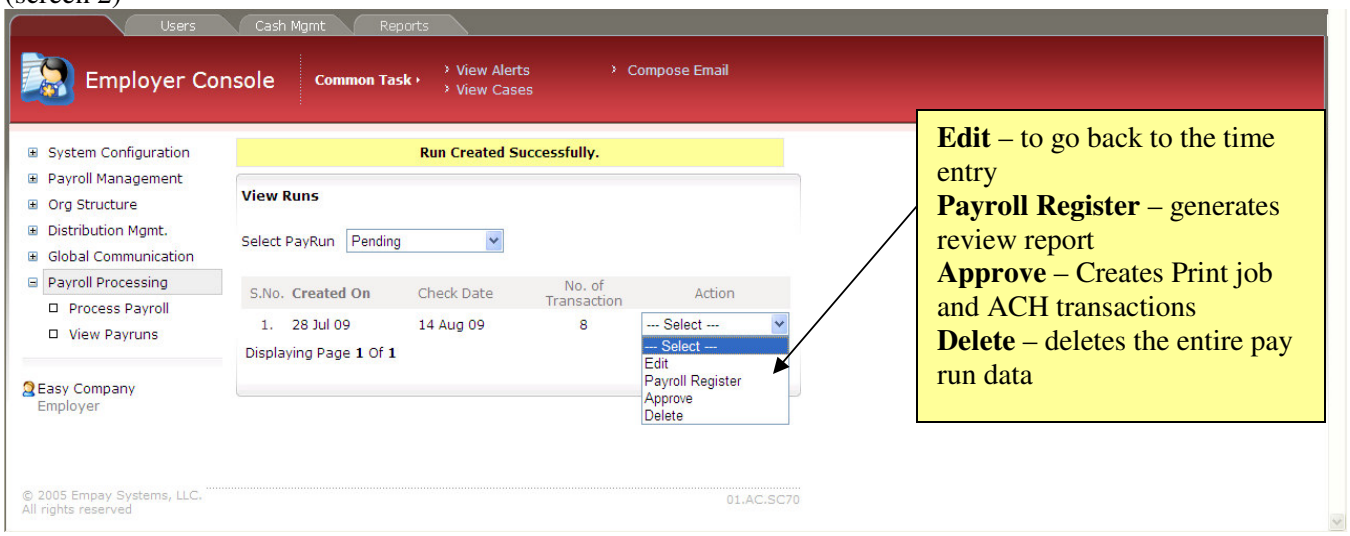


Enter Data and Calculate

Enter the pay data and click on the Calculate button at the bottom right of the screen and you will notice a red box labeled "Loading…." in the upper right hand corner of the screen while the payroll is being calculated. Once the calculation is complete, simply click on the Finish button and the payroll will move to a "Pending" Status, as can be seen on the second screen below:



(screen 2)

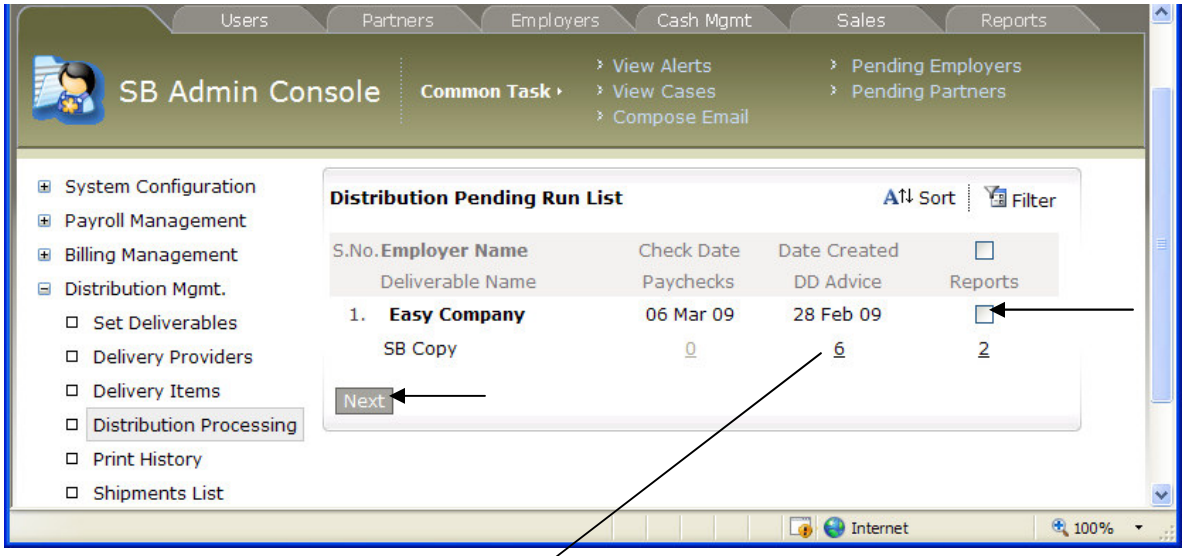


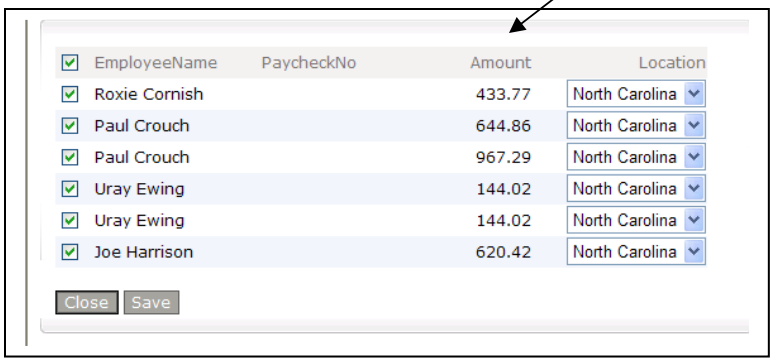
Approve Payroll

Click on Approve and the system will create the Print job for all Paychecks, Direct Deposit Advices and selected Reports as defined in the Deliverable Items. The next step in the process is to move to Distribution Management in order to print the pay run and process the shipping.

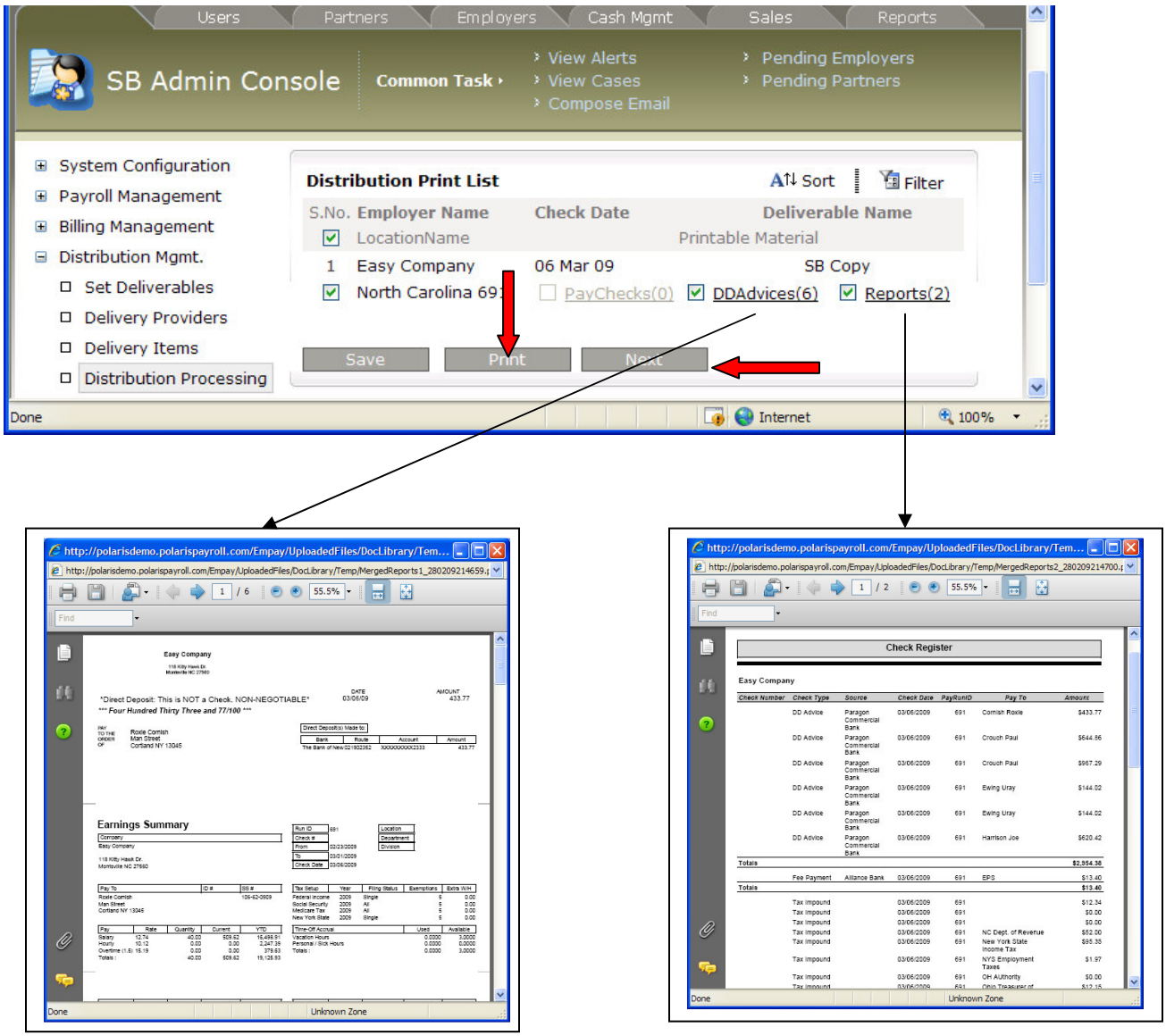
Distribution Processing

Distribution Processing is where you are able to batch print all payrolls or select individual payrolls for printing and shipping. When you click on the "6" a separate window will pop-up and display the 6 DD Advices that are set to print. Be sure a location is selected in the location column. If not, then select a location and click the Save button before proceeding. Next, check the box to the right of "28 Feb 09" to select this run for printing and shipping and then click the "Next button.





Now, click on the Print button and two report jobs will generate in Adobe PDF format. All checks and Direct Deposit Advices will be merged into one PDF for being sent to your check printer, while the other PDF print file will contain all your reports for the payroll process and this can then be sent to your reports printer.



After you have printed the above print jobs you can close each window and click on Next to proceed to the Shipping and final step in the process.

This screen will be pre-populated based upon the Deliverable you selected when you began the payroll processing step. Accordingly, unless there are changes you wish to make, simply select a "From Location" and check the box next to the pay run you wish to ship and enter in a value in the Weight (lbs) box, even if 0 (zero) and click on Make Shipment.

If you decide to work with Federal Express (now) or UPS (in the future) you will then be able to automatically print your shipping labels directly from within this function. This will then complete the payroll process. A complete Print and Ship history will be maintained.