# Process a Regular Payroll

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The Payroll Prep Process page guides you through the payroll process and provides tools and reports to help you complete payroll processing.

This guide describes the steps to access and complete the Payroll Prep Process.

Access the Payroll Prep Process Checklist

Begin processing a payroll by accessing the Payroll Prep Process checklist.
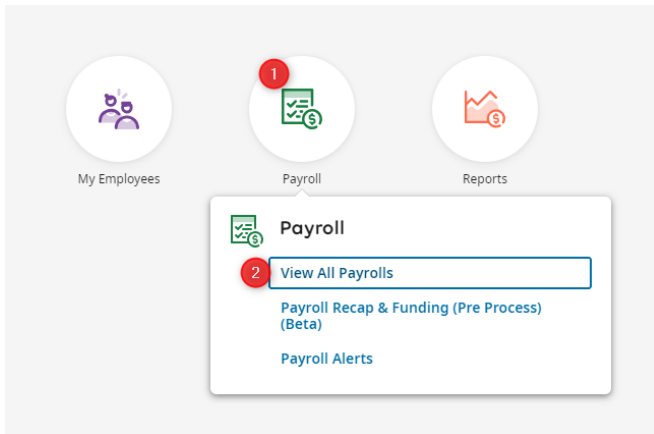
- Select the **Payroll Prep Process** icon for the payroll you want to process. The Payroll Prep Process checklist opens for the selected payroll.

Mark Task as Complete (Optional)

As you go through the Payroll Prep Process steps, you may select Mark as Complete as you finish each step.

⊘ Mark as Complete

- When you select **Mark as Complete**, the steps shows as complete and displays the time, date, and user who completed the step.
- Once you mark a step as complete, you can select **Reset** to undo the action.
- The status bar at the top of the page reflects the percentage complete.

← Payroll Prep - PPC5042 Weekly Payroll 10/13/2023

⚠ Incomplete

0%

- You cannot mark a step as complete until all previous steps are marked as complete.

Employee Related Functions

If you do not have new hires or need to make changes to employees, you can skip this step.

Processing

Employee Related Functions

Hire New Employee(s)

Edit Employees

Hire New Employee(s)

1. Select the **Hire New Employee(s)** link.
2. Complete the fields as needed.
3. Select **Add Employee** to save.
4. Select **Back** to return to the **Payroll Prep Process** page.

Edit Employees

1. Select the **Edit Employees** link.
2. Use the selection options and tools to select the employees to edit.
3. Select **View Selected Employees**.
4. Edit as needed.
5. Select **Save** for each employee you edit.
6. Select **Back** to return to the **Employee Information** page.
7. Select **Back** to return to the **Payroll Prep Process** page.

Initiate Payroll

Initiate payroll to mass create pay statements for selected employees (1). Choose an option to select the group of employees to create pay statements for (2), and the type of pay statements to create (3).

Navigation:Menu > Team > Payroll > Process Payroll > Select a payroll

1. From the **Payroll Prep Process** page, select **Initiate Payroll**.
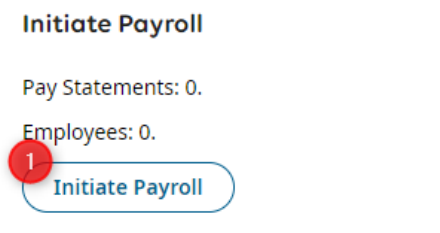
The **Initiate Payroll** window appears.

2. Select the box(es) for the group type you want to create pay statements for.
3. At the **PST Type** field, select a pay statement type.
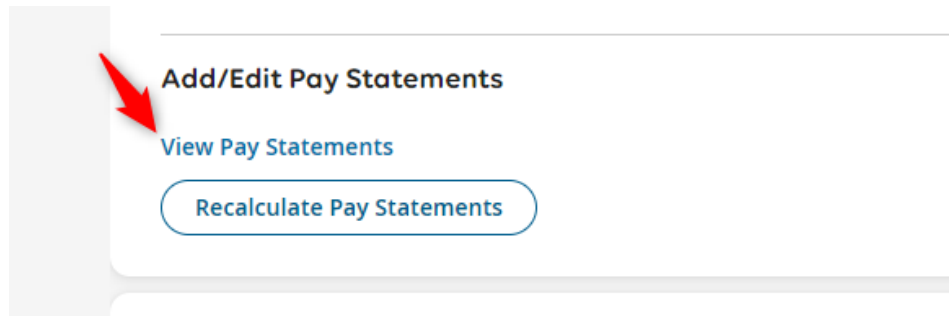4. Select **Initiate**.

Add/Edit Batches: Create the Batch

You can use this step to mass edit payroll data in a spreadsheet style, and import payroll information to batches. Each payroll has a Master batch called *Regular Earnings*.

Add/Edit Pay Statement

Use this step if you need to add and edit individual pay statements.

1. From the **Payroll Prep Process** page, select the **View Pay Statements** link.

The **Pay Statements page** appears.

2. Select the **View/Edit Pay Statement** icon for a pay statement.

The **Edit Pay Statement** page appears.

3. In an empty row, place your cursor in the empty cell in the **E/D Code** or **E/D Name** column to enable the drop-down list.

4. Select the drop-down arrow (1) and select from the list (2).

5. In the same row, enter the hours (1) and/or amounts (2) in the corresponding column(s).

6. You can repeat the steps to add additional hours and amounts.
7. If you need more rows, select **Add Rows (1)** in the upper right hand corner. In the **Add Rows** dialog box, enter the number of rows needed (2), then select **Add Rows (3)**.
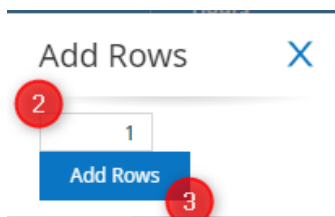
8. You can delete rows by selecting the **Delete Record** icon (X). For additional options, select **Utilities**, then select an option.

9. Select **Save**.
10. Select **Back** to return to the **Pay Statements** page.
11.

Sign-Off Open Alerts

Payroll alerts notify you of information about the payroll and should be resolved (Marked as Complete). If there are no alerts, you can skip this step. Note that if you recalculate pay statements while processing the payroll, you may have new alerts.
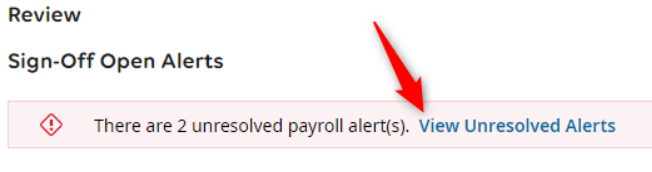
1. From the Payroll Prep Process page, select **Sign-Off Open Alerts.** The **Payroll Alerts** page appears.

   Review
   Sign-Off Open Alerts

   There are 2 unresolved payroll alert(s). View Unresolved Alerts

2. Review the alerts and make changes as needed (1).

   Example: Review default tax settings that were applied by the system.

3. Select the box beside each alert you want to mark as complete (2).

   ← Open Payroll Alerts

   | Page | 1 | of 1 | 1 - 2 of 2 Rows | Saved: [System] ▼ |

☐			Employee Id	Employee Name	Label
			= ▼	= ▼	= ▼
☐	⚑	📄	111	Monica Geller	System added local tax: New York MCTMT Employer Payroll Tax
☐	⚑	📄	111	Monica Geller	NY MCTMT Zone added

4. Select **Mark as Complete**.

   Mark as Complete

A **Warning** message appears.
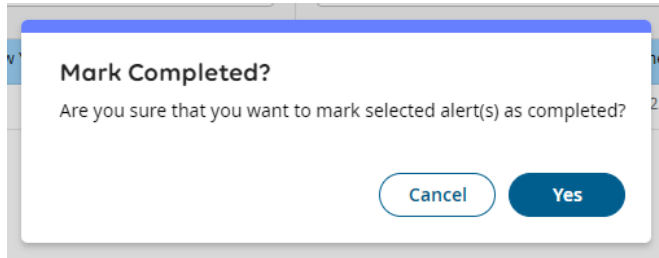
5. Select **Yes**.
6. Select **Back** to return to the **Payroll Prep Process** page.

Resolve Errors

Any errors appear under **Close/Open Payroll** and must be resolved before you can complete the payroll.

1. From the Payroll Prep Process page, select the linked error message under **Close/Open Payroll** .

   The **Payroll Pay Statement Errors** page appears.

2. At the **Record Message Text** column, select the linked text.
3. Make and save changes as needed to resolve the error and return to the **Payroll Pay Statement Errors** page.
4. Select **Back** to return to the **Payroll Pay Statement Errors** page; then select **Back** to return to the **Payroll Prep Process** page.
5. Under **Close/Open Payroll**, select **Recalculate**.

Note Recalculating may generate new alerts and errors that must be resolved.

Check Your Totals and View Payroll Reports

You can access reports from the Payroll Prep Process page that allow you to review and verify accuracy before finalizing a payroll.
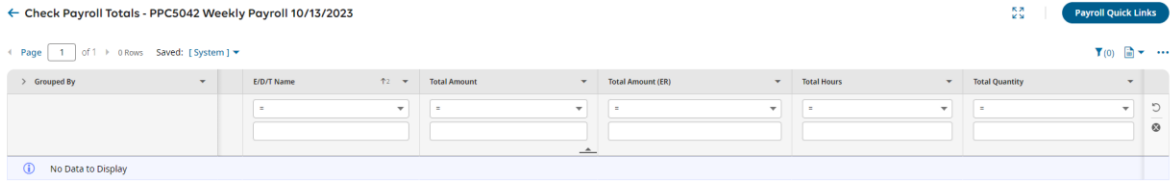
Navigation:Menu > Team > Payroll > Process Payroll > Select a payroll

1. From the **Payroll Prep Process** page, select the **Check Your Totals** link.
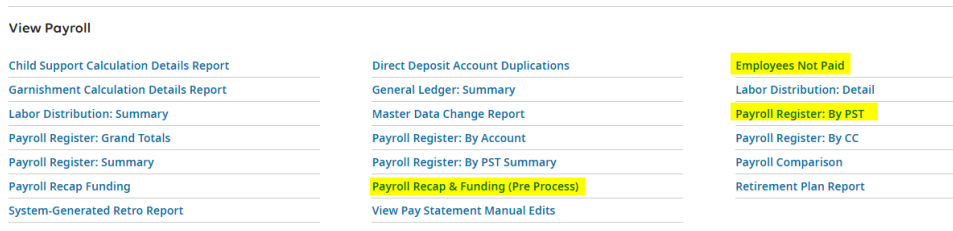
The **Check Payroll Totals** page appears.

2. Select **Back** to return to the previous page.
3. In the **View Payrolls** section, select the link for any report listed to view the report.

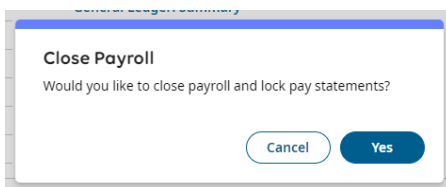4. Select **Back** to return to the previous page.

Close a Payroll

Closing the payroll locks the pay statements from further editing. The payroll must be closed before you can submit or finalize it. If needed, you can reopen the payroll for editing.

1. From the Payroll Prep Process page, select **Close Payroll**.
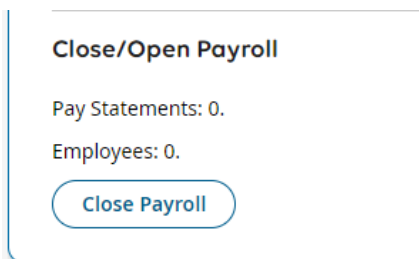
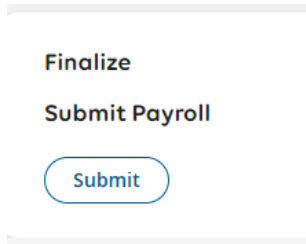2. On the Close Payroll message, select **Yes**.

The payroll is closed and the button changes to **Re-Open**.

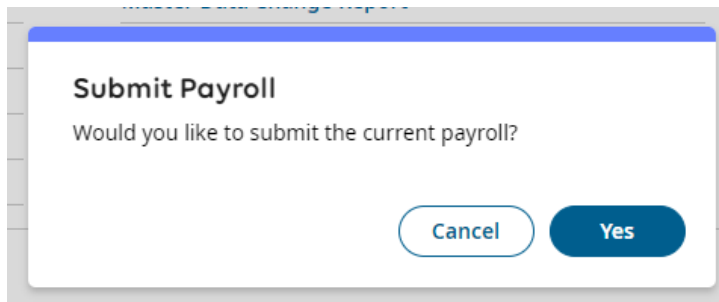**Note** If needed, select **Re-Open** to open the payroll.

Submit the Payroll

Submit the payroll to complete the payroll process.

1. From the **Payroll Prep Process** page, select **Submit Payroll**.

Finalize

Submit Payroll

Submit

2. Select **Yes** on the message.

Submit Payroll

Would you like to submit the current payroll?

Cancel   Yes

The **Payroll Prep Process** page displays a timestamp.