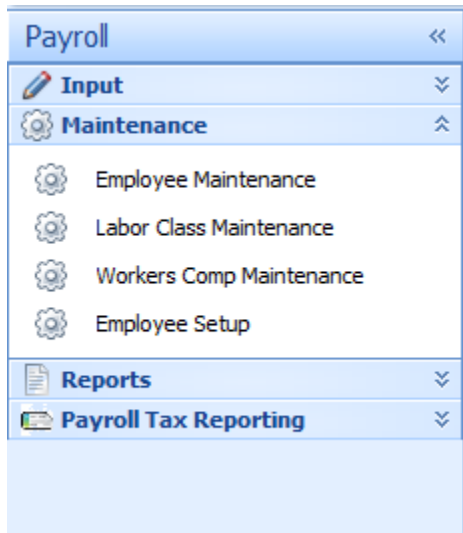




# Employee Maintenance

Used to set up New Employee's or modify current employee's.

From the Main Menu (Payroll > Maintenance > Employee Maintenance)



**Employee Information:** This is the display information of the employee that you are setting up or modifying

**Image:** Upload an image of the employee (Right Click on blank image)

**SSN:** Enter the employee's Social Security number

**ID:** Hardhat automatically generates this number when the employee is saved

**Title:** Job title of the employee, such as Manager, Accounting Clerk, or Technician

**Choose:** Select one or more of the following options, this field can be left blank

1. ESOP - An employee stock ownership plan (ESOP) is a qualified defined-contribution employee benefit 2.

2. Security - Password protected employee, check this box if you want anyone that accesses an employee's information to have to enter a password to allow access.

3. HubZone - A United States Small Business Administration (SBA) program for small companies that operate and employ people in Historically Underutilized Business Zones (HUBZones). Check this box if the employee qualifies.

4. Section 3 Certified - HUD-funded employment opportunities, click on the link below to view the website Section 3 Brochure.

The screenshot shows the 'Employee Maintenance' form. At the top, there are fields for SSN (100-10-1000), ID, and Title (Account Manager). A dropdown menu is open for 'Choose: Security', showing options: (Select All), ESOP, Security, HubZone, and Section 3 Certified. Below the dropdown, there are fields for Date of Birth (1/1/1952), Date Terminated, Date Hired (2/9/2017), Date Deceased, Anniversary (2/9/2018), and Date Last Paid. At the bottom, there are tabs for General, Deductions/Withholdings, and Hire/Rehire/Term Info.

**Date of Birth:** Enter the employee's date of birth

**Date Hired:** Enter the date the employee became employed with the company

**Anniversary:** The anniversary for working at the company

**Date Terminated:** Reflects the date the employee was terminated, this field can only be changed in the Hire/Rehire/Term Info Tab below

**Date Deceased:** Enter employee's deceased date (If applicable)

**Date Last Paid:** Last pay cycle the employee received a check, this will automatically be generated once payroll data has been updated, and this field cannot be change by user

**Gender:** Enter if the employee is male or female

**Race:** Enter employee's description of race such as Asian, White, Black, or Native American

The screenshot shows the 'Employee Maintenance' form with the 'Gender' and 'Race' fields filled in. The 'Gender' field is set to 'Male' and the 'Race' field is set to 'White'. The other fields (SSN, ID, Title, Date of Birth, Date Terminated, Date Hired, Date Deceased, Anniversary, Date Last Paid) are the same as in the previous screenshot.

**Personal Information:** All this information will be shown as a label in the top box and can only be changed in this area.

**First Name:** Enter the employee's first name

**Middle Name:** Enter the employee's middle name or middle initial

**Last Name:** Enter the employee's last name

**Address 1:** Enter the employee's address

**Address 2:** Enter additional address information for the employee

**City:** Enter the city where the employee resides

**State:** Enter the state where the employee resides

**Zip Code + 4:** Enter in the 7 digit zip code where the employee resides (additional 4 are optional)

**County:** This is automatically generated by the state and city

**Home Phone:** Enter employee's home phone number

**Cell Phone:** Enter employee's cell phone number, if this is the only phone number they have make sure to enter it here

**Cell Phone Carrier:** Enter the carrier of the employee's cell phone, this field will allow service calls to be sent directly to the employee's cell phone

**Email:** Enter employee's email address, this field will allow the employee to sign into the payroll website (if applicable)

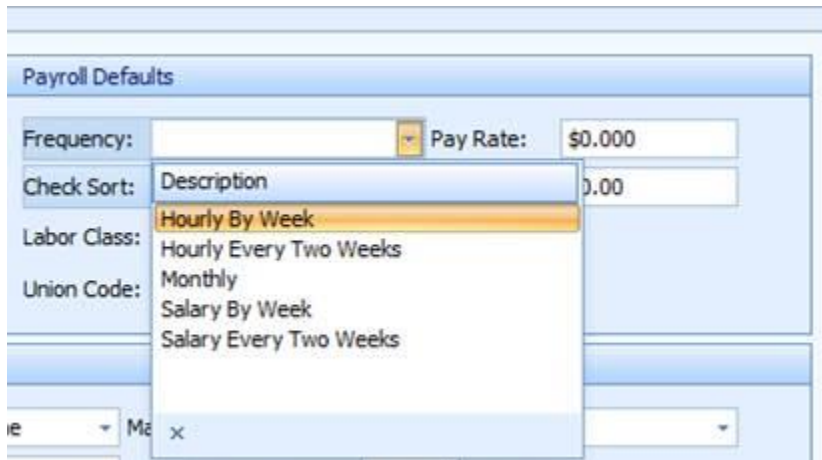
The screenshot shows a software interface with three tabs: 'General', 'Deductions/Withholdings', and 'Hire/Rehire/Term Info'. The 'General' tab is active, and the 'Personal Information' section is expanded. The form contains the following fields:

- First Name:
- Middle Name:
- Last Name:
- Suffix:
- Address 1:
- Address 2:
- City:
- State:
- Zip Code:
- County:
- Home Phone:
- Cell Phone:
- Cell Phone Carrier:
- Email:

## Payroll Defaults:

### Frequency:

1. Hourly by Week – Paid weekly by the hour
2. Hourly Every Two Weeks – Paid every two weeks by the hour
3. Monthly – Paid on a monthly basis
4. Salary By Week – Paid a salary on a weekly basis
5. Salary Every Two Weeks – Paid a salary either every two weeks or bimonthly (Twice a month)



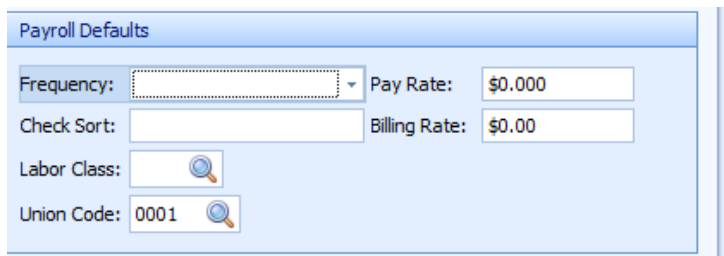
The screenshot shows the 'Payroll Defaults' dialog box. The 'Frequency' dropdown menu is open, displaying the following options: 'Description', 'Hourly By Week' (highlighted), 'Hourly Every Two Weeks', 'Monthly', 'Salary By Week', and 'Salary Every Two Weeks'. The 'Pay Rate' field is set to '\$0.000'. The 'Check Sort' field is set to '0.00'. The 'Labor Class' field is empty. The 'Union Code' field is empty.

**Pay Rate:** Enter employee's rate of pay

**Check Sort:** Used as a quick sort on employee's checks by separating them into categories when entering a number in this box

**Billing Rate:** Enter the billing rate of the employee that can be charged as a billing item

**Labor Class:** Enter in the labor class designated to the type of work in which this employee does most often



The screenshot shows the 'Payroll Defaults' dialog box with the following fields filled: 'Frequency' is set to 'Hourly By Week', 'Pay Rate' is '\$0.000', 'Check Sort' is '\$0.00', 'Billing Rate' is '\$0.00', 'Labor Class' is empty, and 'Union Code' is '0001'. There are magnifying glass icons next to the 'Labor Class' and 'Union Code' fields.

**Verification Information:**

**Driver's License:** Enter the employee's driver's license number

**DL State:** Enter the issuing state of the employee's driver's license

**DL Expiration:** Enter the expiration date of the employee's driver's license

*\*The following information is taken directly from the I-9 each employee fills out as part of the application process\**

**United States Citizen:** Check this box if the employee is a US Citizen

**Non-Citizen National of the United States:** Check this box if the employee is Not a US Citizen

*\*If either of these two boxes are checked additional information is needs to be answered (this field is NOT required)\**

**Lawful Permanent Resident:** Check this box if employee is NOT a citizen of the United States who is residing the in the U.S. under legally recognized and lawfully recorded permanent residence as an immigrant. The term "lawful permanent resident" includes conditional residents.

If you check this box Write either your Alien Registration Number (A-Number) or USCIS Number in the field next to your selection. At this time, the USCIS Number is the same as the A-Number without the "A" prefix.

**Alien Authorized to Work Until:** If you are not a citizen or national of the United States or a permanent resident, but are authorized to work in the United States, check this box.

If you check this box:

**A.** Record the date that your employment authorization expires, if any \_ Aliens whose employment authorization does not expire, such as refugees, asylees, and certain citizens of the Federated States of Micronesia, the Republic of the Marshall Islands, or Palau, may mite 'N/A" on this line.

**B.** Next, enter your Alien Registration Number (A-Number) USCIS Number. At this time, the USCIS Number is the same as you A-Number without the "A" prefix. If you have not received an A-Number/US

CIS Number, record your Admission Number. You can find your Admission Number on Form 1-94, "Arrival-Departure Record" or as directed by USCIS or U.S. Customs and Border Protection (CBP).

(1) If you obtained your admission number from CBP in connection with your arrival in the United States, then also record information about the foreign passport you used to enter the United States (number and country of issuance).

(2) If you obtained your admission number from USCIS within the United States, or you entered the United States without a passport, you must write "N/A" in the Foreign Passport Number and Country of Issuance Fields.

The image shows a screenshot of a web form titled "Additional Information". The form is divided into several sections, each with a blue header and a downward-pointing arrow icon. The first section is "Verification Information", which contains the following fields and options:

- Drivers License: [text input field]
- DL State: [dropdown menu]
- DL Expiration: [dropdown menu]
- United States Citizen
- Lawful Permanent Resident
- Noncitizen National of the United States
- Alien Authorized to Work Until: [dropdown menu]

Below the "Verification Information" section are five more sections, each with a blue header and a downward-pointing arrow icon:

- Emergency Contacts
- Attendance Records
- Banking Information
- Dependents
- Retirement Information

**Taxation:** The following taxes can be set by Company, Home, or Job, each one can be based on how your company chooses the employee to be taxed.

1. State Tax By - This is the state tax the employee pays, if any. There may not be a state tax, depending on what state the employee lives in
2. County Tax By
3. City Tax By
4. Local Tax By
5. S.U.I Tax By

**Marital Status:** Choose one of the following based on the employee's marital status

1. H: Head of Household

2. M: Married

3. S: Single

**Federal Exemptions:** Enter the number of dependents the employee is claiming on their federal tax return

**State Exemptions:** Enter the number dependents the employee is claiming on their state tax return

**MS Exemption Amount:** (Will only be visible if the employee resides in the State of Mississippi, employee must have a completed form on file with the company)

Enter the personal exemption allow by the State of Mississippi click the form link [Form 89-350](#) or you can search the Mississippi Department of Revenue

The screenshot shows a 'Taxation' form with the following fields and values:

State Tax By:	Home	Marital Status:	S - Single
County Tax By:	Home	Federal Exemptions:	0
City Tax By:	Home	State Exemptions:	0
Local Tax By:	Home		
S.U.I. Tax By:	Home		

Exclude Employee From FICA

**Emergency Contacts:** Right click to add a new contact or to delete a contact, can have multiple emergency contacts listed (This is an optional field)

**First Name:** Enter the first name of the emergency contact

**Last Name:** Enter Last name of the emergency contact

**Phone Number:** Enter a phone number can be a landline or cell phone

**Alternate Phone:** Enter an additional phone number can be a landline

The screenshot shows a software interface titled "Additional Information". It contains several expandable sections: "Verification Information", "Emergency Contacts", "Attendance Records", "Banking Information", "Dependents", and "Retirement Information". The "Emergency Contacts" section is expanded, revealing a table with four columns: "First Name", "Last Name", "Phone Number", and "Alternate Phone". The table is currently empty, and a yellow button with a plus sign and the text "+ New" is centered within the table area. A vertical scrollbar is visible on the right side of the table.

**Attendance:** Track the employee's attendance by selecting one of the preset events, right click to add a new event or to delete an event to the employee's information (This is optional)

**Event:**

Medical

Sick

Dental

Leave of Absence

Comp Time

Family

Doctor's Appointment

Military

Transportation

Transportation Issues



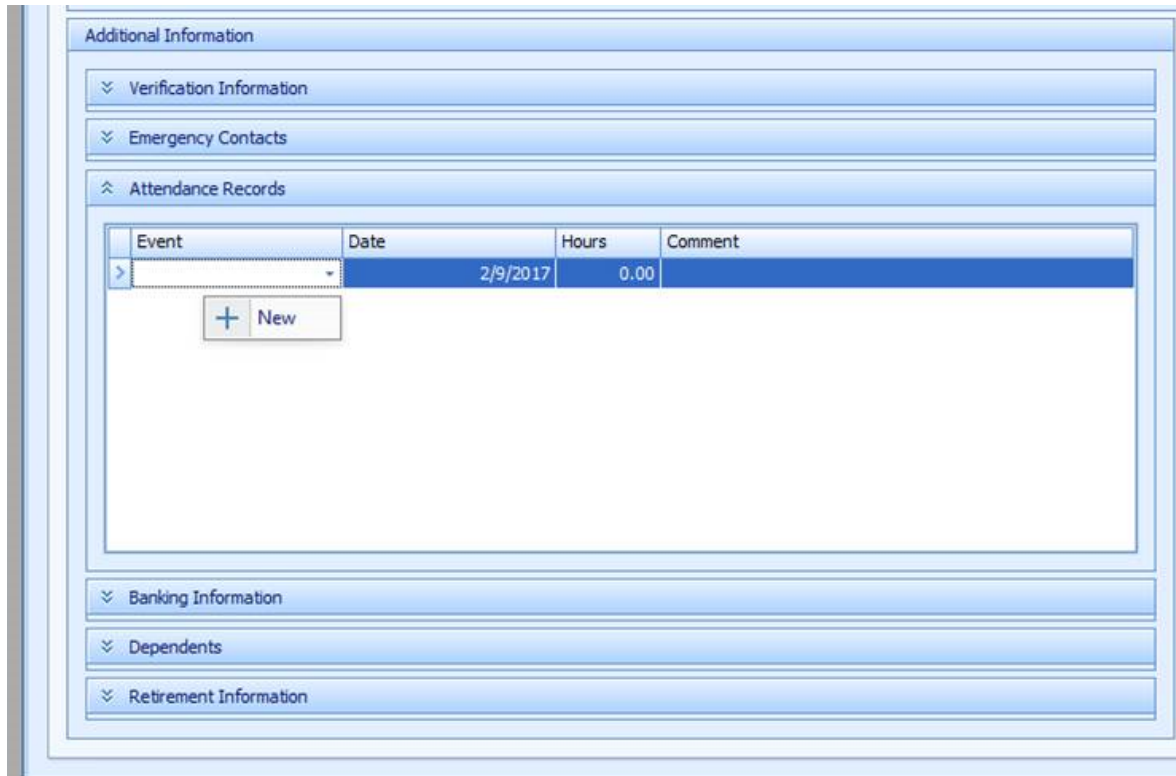
Other

Tardiness/Leave Early

**Date:** Enter the date of the event

**Hours:** Enter the number of hours of the event

**Comment:** Enter comments about the current event



The screenshot displays a software interface titled "Additional Information". It contains several expandable sections: "Verification Information", "Emergency Contacts", "Attendance Records", "Banking Information", "Dependents", and "Retirement Information". The "Attendance Records" section is expanded, showing a table with the following data:

Event	Date	Hours	Comment
>	2/9/2017	0.00	

Below the table is a "+ New" button.

**Banking Information:** Direct deposit information, if the employee participates you can

**Type:** Select the type of account Checking or Savings

**Routing Number:** Enter the routing number of the bank account

**Bank Account:** Enter the bank account number

**Amount:** The first account is the Default Account, if no other accounts are set up the full amount of the employee's payroll check will be direct deposited into this account. If other accounts are set up then you can enter in the second and third account information along with the amount for that bank account.

Additional Information

∨ Verification Information

∨ Emergency Contacts

∨ Attendance Records

∧ Banking Information

Type	Routing Number	Bank Account	Amount
> Checking			DEFAULT ACCOUNT

+ New

∨ Dependents

∨ Retirement Information

**Dependents:** Right click to add or delete the employee's dependent information, this information should be same as the number of exemptions the employee is claiming as their federal exemptions

**First Name:** Enter the first name of each dependent

**Last Name:** Enter last name of each dependent

**Date of Birth:** Enter the date of birth of each dependent

**Social Security Number:** Enter the social security number of each listed dependent

**Relationship:** Enter the relationship of each dependent

Additional Information

- ⌵ Verification Information
- ⌵ Emergency Contacts
- ⌵ Attendance Records
- ⌵ Banking Information
- ⌵ Dependents
- ⌵ Retirement Information

First Name	Last Name	Date of Birth	Social Security Number	Relationship
>		1/1/2000		

+ New

**Retirement Information:** This is where you can put in the date the employee becomes eligible for 401K benefits

Additional Information

- ⌵ Verification Information
- ⌵ Emergency Contacts
- ⌵ Attendance Records
- ⌵ Banking Information
- ⌵ Dependents
- ⌵ Retirement Information

401K Eligible:   Company Contribution

Thursday, February 9, 2017

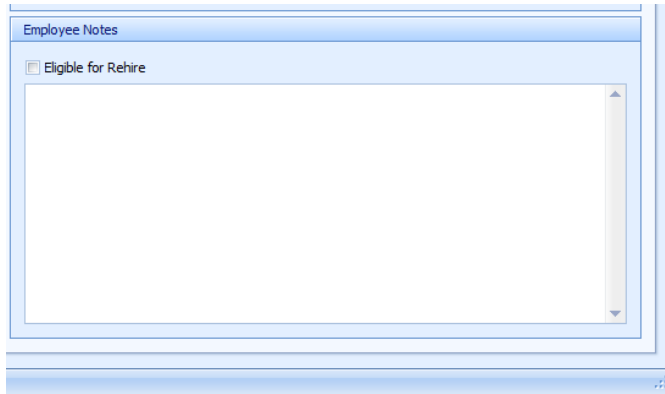
February 2017

SU	MO	TU	WE	TH	FR	SA
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	1	2	3	4
5	6	7	8	9	10	11

Clear

**Employee Notes:** Enter notes pertaining to the employee

**Eligible for Rehire:** Check this box if the employee is eligible for rehire; if an employee has left the company and it's agreed the employee has left under reasonable terms that allows the company to rehire them



The screenshot shows a window titled "Employee Notes". Inside the window, there is a checkbox labeled "Eligible for Rehire". Below the checkbox is a large, empty text area with a vertical scrollbar on the right side. The window has a standard blue border and a title bar.

## Deductions/Withholdings Tab

**Employee Taxes:** Add additional Federal or State taxes or County, City, or Local Tax

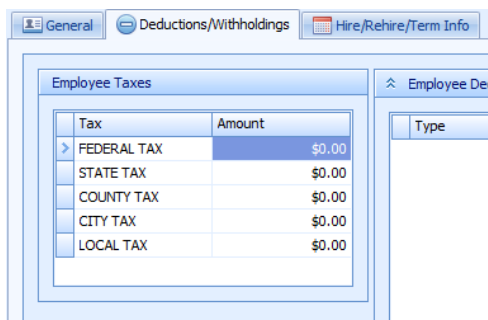
**Federal Tax:** Enter an amount the employee wants to add as additional to their regular federal tax

**State Tax:** Enter an amount the employee wants to add as additional to their regular state tax

**County Tax:** Enter an amount that will be held out of the employee's payroll check for a county tax (if applicable)

**City Tax:** Enter an amount that will be held out of the employee's payroll check for a city tax (if applicable)

**Local Tax:** Enter an amount that will be held out of the employee's payroll check for a local tax (if applicable)



The screenshot shows the "Deductions/Withholdings" tab in a software application. The "Employee Taxes" section is expanded, showing a table with the following data:

Tax	Amount
FEDERAL TAX	\$0.00
STATE TAX	\$0.00
COUNTY TAX	\$0.00
CITY TAX	\$0.00
LOCAL TAX	\$0.00

To the right of the table, there is a "Type" field with a dropdown arrow.

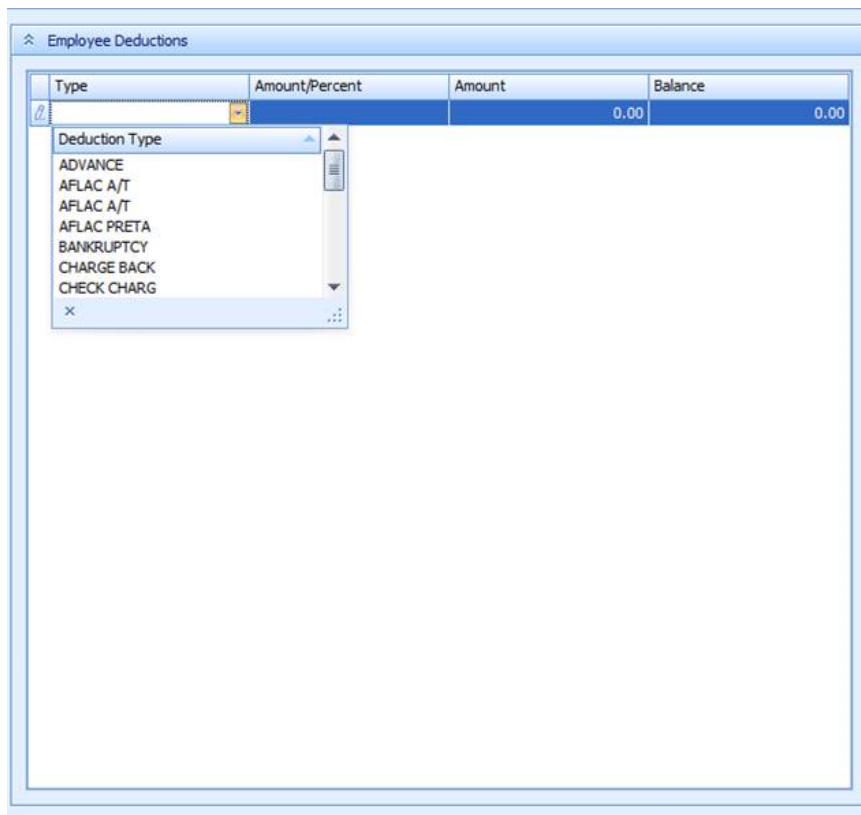
**Employee Deductions:** Right click to add a new deduction or to delete a deduction

**Type:** Choose a Deduction Type such as loan, garnishment, personal

**Amount/Percent:** Choose Amount if this is an actual amount or choose Percent if this will be a percentage of the deduction amount

**Amount:** Enter the amount of the deduction or the percent of the deduction

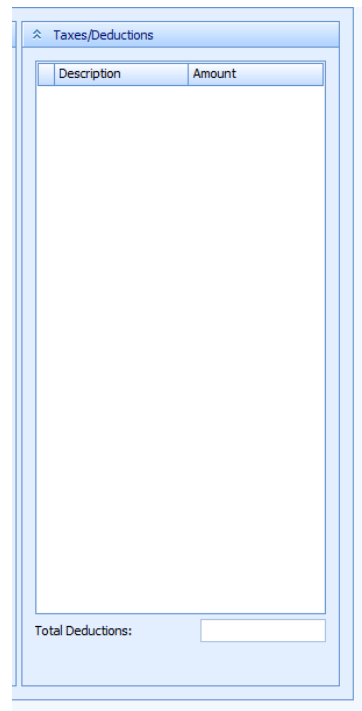
**Balance:** Enter the balance of the deduction



The screenshot shows a software window titled "Employee Deductions". It contains a table with the following columns: "Type", "Amount/Percent", "Amount", and "Balance". The "Amount" and "Balance" columns currently show "0.00". A dropdown menu is open for the "Type" column, listing the following options: "ADVANCE", "AFLAC A/T", "AFLAC A/T", "AFLAC PRETA", "BANKRUPTCY", "CHARGE BACK", "CHECK CHARG", and "x".

Type	Amount/Percent	Amount	Balance
		0.00	0.00

**Taxes/Deductions:** This will reflect what taxes or deductions and the amounts the employee has taken from their payroll check each payroll cycle, this field cannot be changed.



The screenshot shows a software window titled "Taxes/Deductions". Inside the window, there is a table with two columns: "Description" and "Amount". The table is currently empty. Below the table, there is a label "Total Deductions:" followed by a small rectangular input field.

### **Hire/Rehire/Term Info**

**History:** Hire/Rehire/Term information of the employee, the first line will represent the original hire information along with the date.

**Hire/Rehire:** Hire will show if this is the first time this employee has been employed if the employee has been terminated for any reason and the employee has returned to employment right click to add a new line as a Rehire.

**Date Hired:** Enter the hire or rehire date of the employee

**Date Terminated:** Enter a date if the employee has been terminated, each line will represent a date hired and a termination date

**Separation Reason:** Choose from the following if an employee has been terminated

1. Discharge - No further information will be needed
2. Lack of Work - Fill out the information in the pop up box if this termination is permanent or temporary
3. Quit - No further information will be needed

General Deductions/Withholdings Hire/Rehire/Term Info

History

Hire/Rehire	Date Hired	Date Terminated	Separation Reason
Hire	1/10/2017	2/4/2017	Lack of Work

General Notes

Date Hired: 1/10/2017 Date Terminated: 2/4/2017 Separation Reason: Lack of Work

If lack of work, indicate if layoff is:  Permanent  Temporary - Recall Date:

Reason  
Deceased  
Discharge  
Lack of Work  
Quit