

HOW TO ADD A NEW EMPLOYEE IN PAYROLL MATE

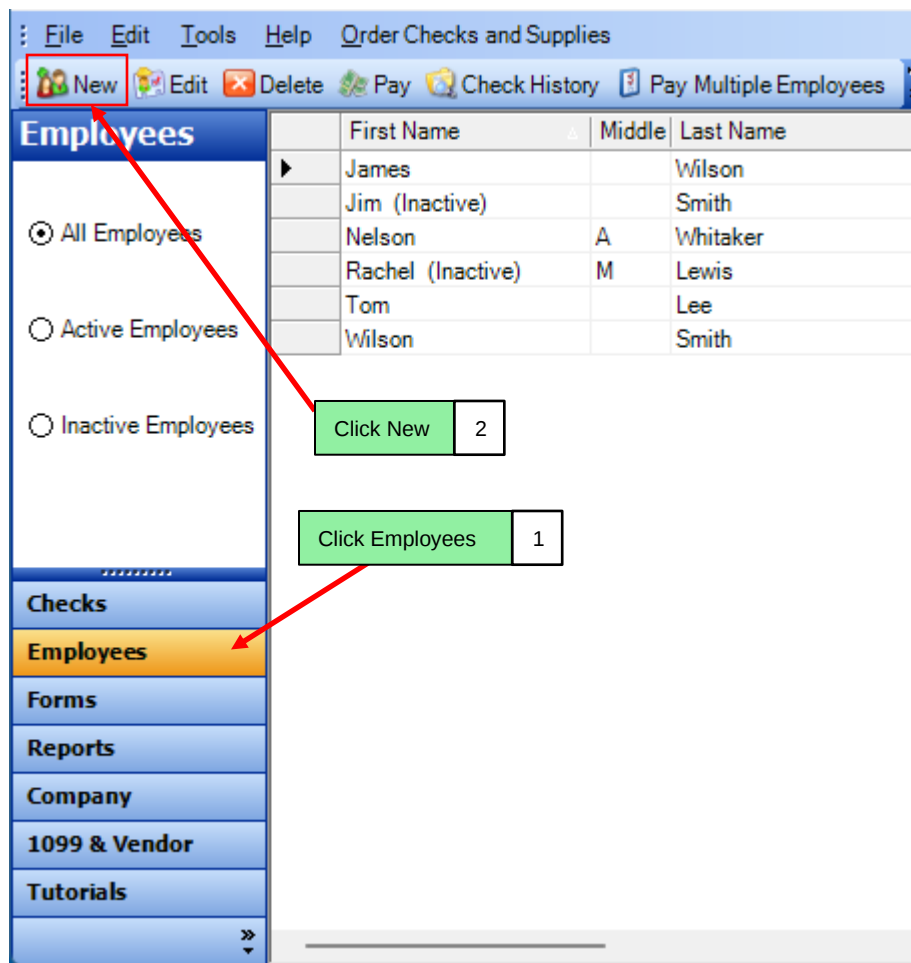
Question

PLEASE REFER TO THE STEPS BELOW:

Answer

Make sure you have the correct company open inside Payroll Mate

1. Click **Employees**
2. Click **New**

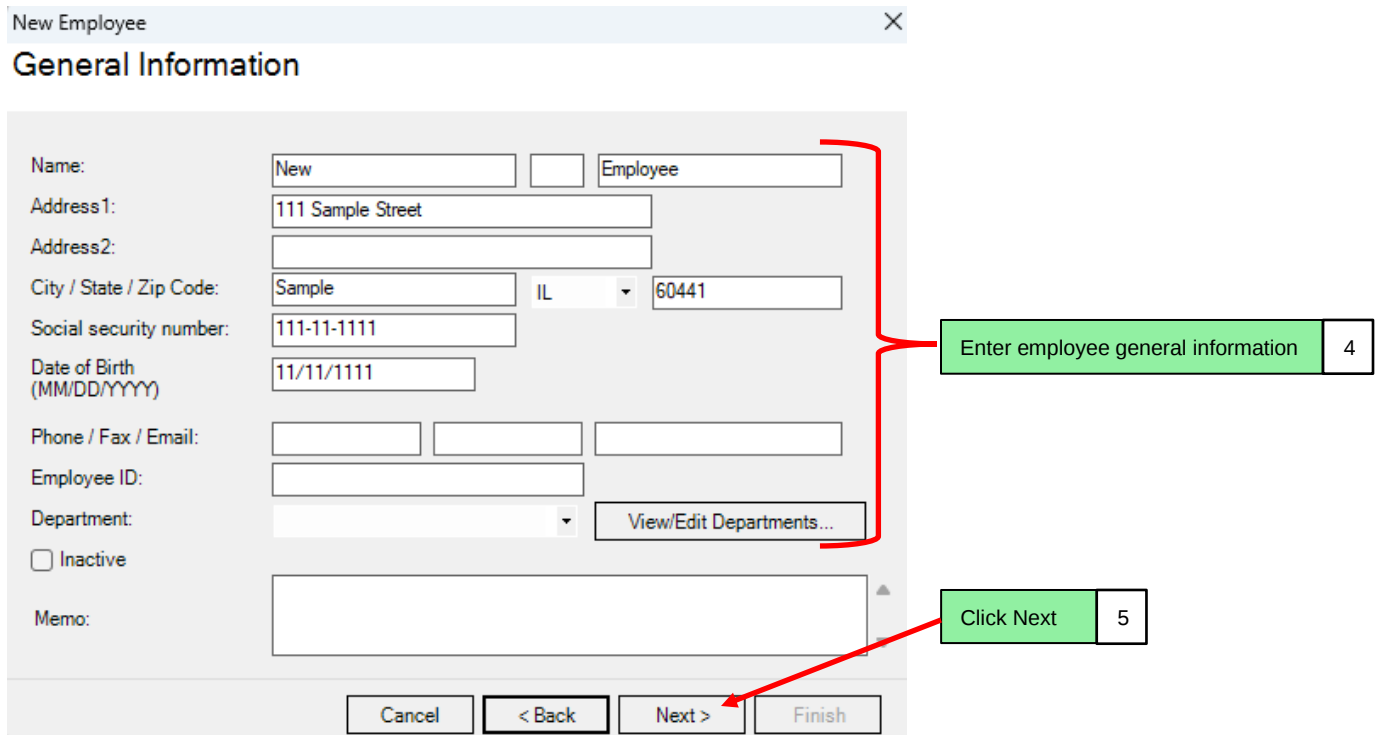


3. Welcome to the New Employee Wizard dialog will open, click **Next**



4. Enter Employee General Information

5. Click **Next**



6. Enter Employee Tax Information

7. Click Next

New Employee

Tax Setup

Federal Income Tax Setup

Filing Status: ☐ Use new W-4 (2020 & beyond)

of Allowances: ☐ Step 2 (2 Jobs) Step 3 (Dependents) \$:

Pay Frequency: Step 4a (Other Income) \$:

Additional Fed. Withholding: Step 4b (Deductions) \$:

W-2 Options

☐ Statutory Employee ☐ Retirement Plan ☐ This employee receives Advance EIC payment

Set the following Taxes to zero on the check

☐ Federal Income ☐ State Income ☐ SS. & Med. (Employee) ☐ SS. & Med. (Employer)

State Income Tax Setup

State:

Additional State Withholding:

IL-W4 Line 1:

IL-W4 Line 2:

NOTE:

Pay extra attention to the "Tax Setup" screen, where you define the employee's filing status, allowances and pay frequency.

Enter employee tax information

6

Click Next

7

8. Select and enter one or more employee incomes

9. Click Next

New Employee

Incomes

[How to Create an Income Category](#)

☒ Regular Hourly Pay [Per Hour]

☐ Overtime Hourly Pay [Per Hour]

☐ Yearly Salary [Per Year]

☐ Double-Time [Per Hour]

☐ Mileage [Per Mile]

☐ Piece Work [Per Piece]

☐ Fringe Benefits [Fixed]

☐ Vacation Pay Hourly [Per Hour]

☐ Sick Pay Hourly [Per Hour]

☐ Bonus [Variable]

☐ Tips Received Directly by Employee [Variable]

☐ Tips Paid by Employer [Variable]

Select and enter employee income(s)

8

Click Next

9

10. **Select employee applicable taxes**
11. **Click Next**

New Employee ×

Taxes [How to Create a Tax Category](#)
[Can't see the Tax you are looking for?](#)

☒	Federal Income Tax	
☒	Social Security (Employee)	
☒	Social Security (Employer)	
☒	Medicare (Employee)	
☒	Medicare (Employer)	
☒	Fed Unemployment (Employer)	
☒	State Income Tax	
☒	State Unemployment (Employer)	
☒	Local Income Tax	
☒	State Disability Insurance (Employee)	
☒	State Disability Insurance (Employer)	
☒	My own tax category	[Per Hour]

Select employee applicable taxes 10

Click Next 11

Cancel < Back Next > Finish

12. **Select and enter applicable employee deductions**
13. **Click Next**

New Employee ×

Deductions [How to Create a Deduction Category](#)

☒	401K (Employee)	[Percentage]	2.000000
☒	401K (Employer)	[Percentage]	1.000000
☐	Health Insurance	[Fixed]	0.00
☐	Child Support	[Percentage]	20.000000
☐	Test Deduction	[Percentage of Net Pay]	0.200000
☐	Supplemental Life Ins	[Fixed]	25.000000

Select and enter employee deductions 12

Click Next 13

Cancel < Back Next > Finish

NOTE: Payroll Mate Option #2 (Direct Deposit) is required in addition to purchasing the standard Payroll Mate Software to use the Direct Deposit optional feature. This screen will not be available or applicable if you have not purchased and enabled Payroll Mate Option #2 (Direct Deposit).

14. Place checkmark **Include in Direct Deposit Process** if employee is included in Direct Deposit
15. Complete the employee banking information
16. Click **Next**

New Employee ×

Direct Deposit

Skip 14 & 15 if employee is not included in Direct Deposit

☐ Include in Direct Deposit Process

Banking Information

Account Type Checking

Bank Routing Number

Account Number

Complete banking information 15

Place checkmark to include in Direct Deposit 14

Click Next 16

Cancel

< Back

Next >

Finish

17. **Select method of calculating vacation/sick hours and enter hours earned, if applicable**
18. **Click Next**

New Employee ×

Vacation / Sick Hours Settings

Method of Calculating Vacation and Sick Hours: ☐ Per Check
☐ Per Total Hours on Check

Vacation Hours Earned Per Check:

Maximum Vacation Hours Earned Per Year: Keep blank for unlimited hours per year; fill with 0.00 for zero hours per year

Sick Hours Earned Per Check:

Maximum Sick Hours Earned Per Year: Keep blank for unlimited hours per year; fill with 0.00 for zero hours per year

Cancel < Back Next > Finish

Skip 17 if employee does not accumulate vacation or sick hours

Select method of calculating and enter hours earned

15

Click Next

18

19. **Click Finish**

New Employee ×

Finish

Wizard completed, please click "Finish" to update this employee information.

Cancel < Back Next > Finish

Click Finish

19

The new employee is now included in the list of employees

File Edit Tools Help Order Checks and Supplies			
New Edit Delete Pay Check History Pay Multiple Employees			
Employees	First Name	Middle	Last Name
▶	Fred		Harris
	James		Wilson
	Jim (Inactive)		Smith
	Justine		Heeney
	Nelson	A	Whitaker
	New		Employee
	Rachel (Inactive)	M	Lewis
	Stella	Ann	Smith
	Test User		Smith
	Tom		Lee
	Wilson		Smith