

HOW TO SET UP AND MANAGE SHIFT DIFFERENTIALS

Question

PLEASE REFER TO THE STEPS BELOW:

Answer

Payroll Mate comes with the flexibility of being able to create user defined incomes. You can add virtually unlimited incomes as needed.

Please note that Payroll Mate does not track this time and will need to be tracked outside of Payroll Mate.

Create a user defined income:

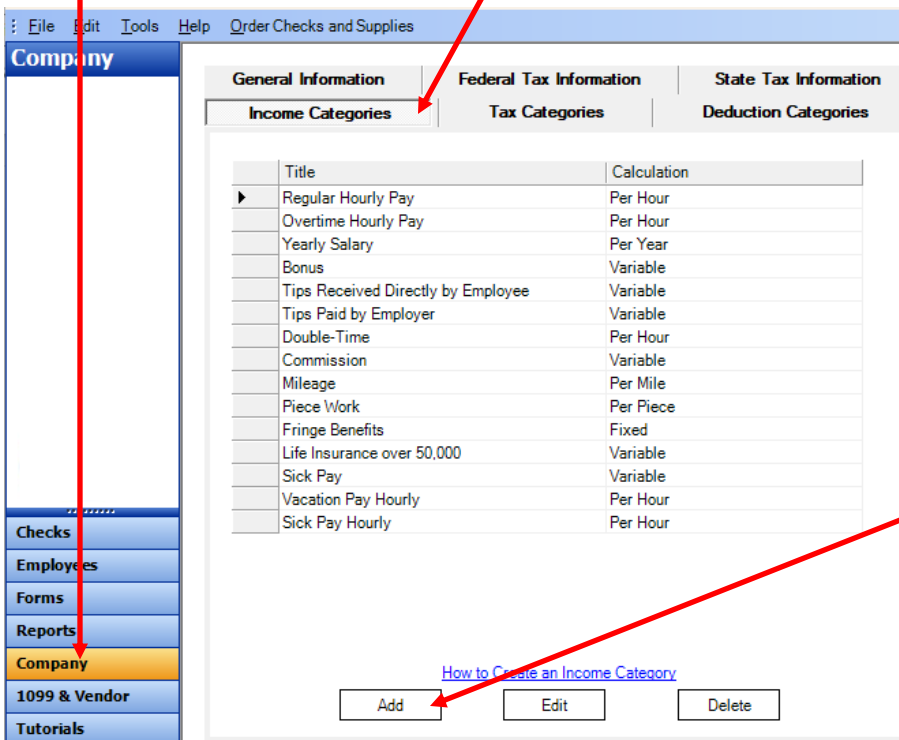
1. Click **Company**
2. Click **Income Category**
3. Click **Add**

Click Company

1

Click Income Category

2



Click Add

3

4. Read the Attention dialog box message, click **I Understand**

Attention

 You are about to custom add a new income category.

Please remember that this newly created category will directly affect your tax forms and reports.

You may need to seek tax advice from your tax professional before creating this new category.

Once you have finished creating this income category and before you start creating real checks, we strongly recommend that you create one or more dummy checks and confirm that all related incomes, taxes and deductions are properly reflected on all tax forms and reports.

Once you start creating actual payroll checks it will be very difficult to fix any errors you may have overlooked at this point.

Click I understand 4

I understand

5. Enter a **Title** for your new income category
6. Select **Type** of calculation
7. Select which **Taxes and Deductions** are exempt from this income (if any)
8. Click **OK**

Income Details

Title:

Abbreviation:

Type:

W-2 Box 12 Code:

W-2 Box 14 Abbreviation:

☐ Reported tips (include in "Social security tips" on form W-2)

☐ Omit from Net Pay

☐ Inactive

Taxes Applied:

- ☒ Federal Income Tax
- ☒ Social Security (Employee)
- ☒ Social Security (Employer)
- ☒ Medicare (Employee)
- ☒ Medicare (Employer)
- ☒ Fed Unemployment (Employee)
- ☒ State Income Tax
- ☒ State Unemployment (Employee)

Deductions Applied:

- ☒ 401K (Employee)
- ☒ 401K (Employer)
- ☐ Health Insurance

OK Cancel

Enter Title 5

Select Type 6

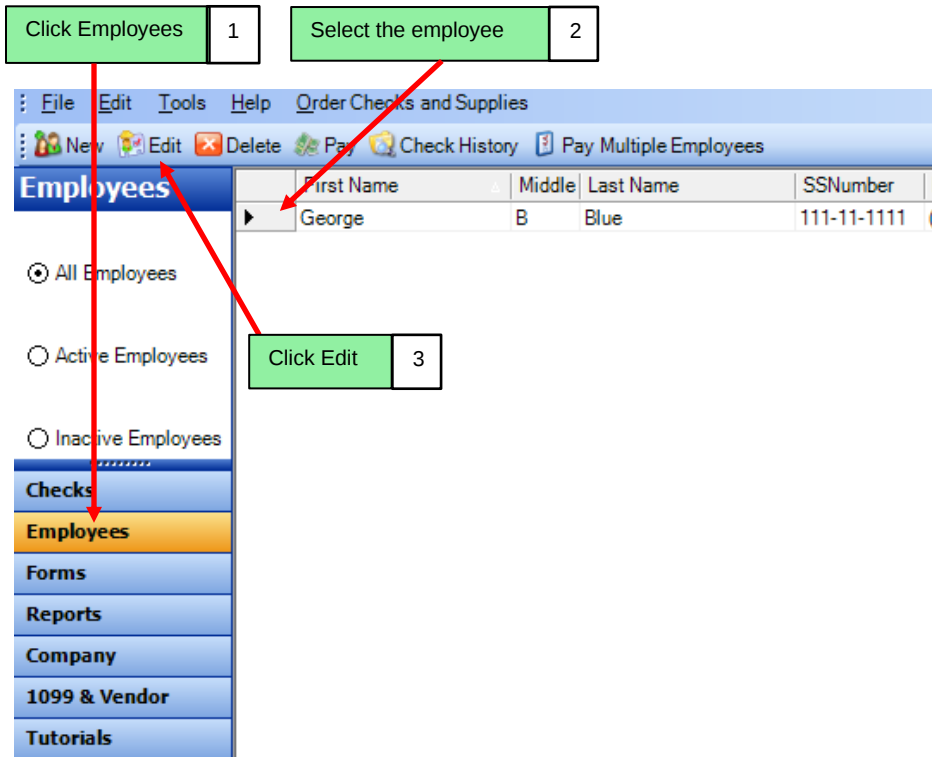
Select Taxes and Deductions 7

Click OK 8

If you are not sure if this income is exempt from taxes you may want to consult your tax adviser. Payroll Mate will not be able to assist with this question.

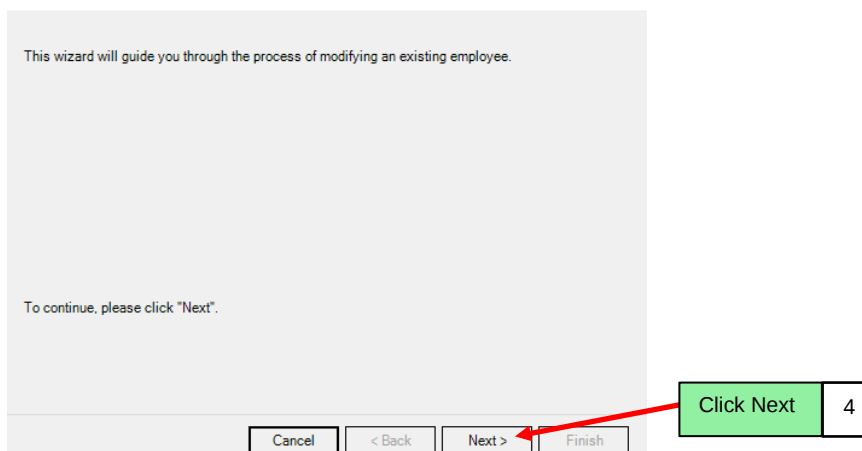
Add this income category to an employee:

1. Click **Employees**
2. **Select the employee** you want to edit
3. Click **Edit**



4. Welcome to the Modify Employee Wizard will appear, click **Next**

Modify Employee ×
Welcome to the "Modify Employee" Wizard!



Continue to click **Next** until you reach the **Incomes** screen

5. **Click the Income** you want to add to this employee (**Example**)
6. **Enter the amount** for the employee
7. Click **Next** until you get to the Finish screen

Modify Employee ×

Incomes [How to Create an Income Category](#)

☒ Regular Hourly Pay	[Per Hour]	22.0000
☐ Overtime Hourly Pay	[Per Hour]	0.0000
☐ Yearly Salary	[Per Year]	0.00
☐ Double-Time	[Per Hour]	0.00
☐ Mileage	[Per Mile]	0.00
☐ Piece Work	[Per Piece]	0.00
☐ Fringe Benefits	[Fixed]	0.00
☐ Vacation Pay Hourly	[Per Hour]	0.00
☐ Sick Pay Hourly	[Per Hour]	0.00
☒ Example:	[Per Hour]	0.8000
☐ Bonus	[Variable]	
☐ Tips Received Directly by Employee	[Variable]	

Click the Income to add 5

Enter the amount 6

Click Next 7

Cancel < Back Next > Finish

8. Click **Finish**

Modify Employee ×

Finish

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

When you create a check for this employee you will notice that there is an additional income line.

Click Finish 8

Cancel < Back Next > Finish