Employer Guide

January 2017

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Employer Guide
erm.ezwebadvantage.com

Welcome to Employers Resource, your solution for secure, online payroll processing, employee data management and reporting. Take a moment to review this Employer Guide to see all of the available solutions that will help you eliminate manual processing of reports, payroll and more.

LOGGING IN

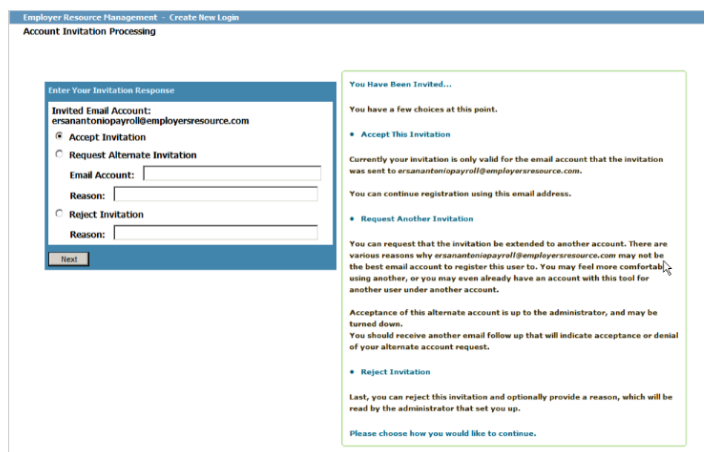
FIRST TIME LOGIN

The ezWEB first time login process is quick and easy.

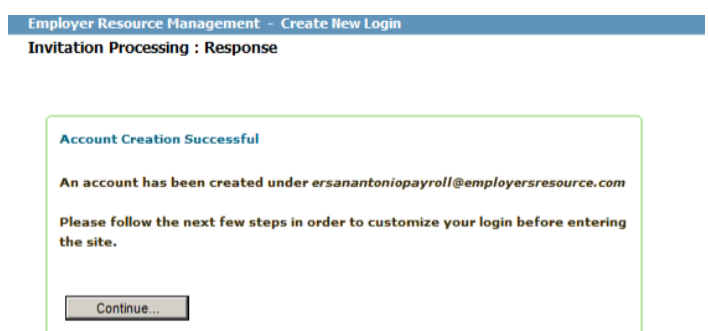
1. You will receive an email invitation from your Employers Resource branch administrator to create your login.

2. Within the e-mail, click on the 'Click Here to Respond' link to initiate the process. It will open an internet browsing window for the ezWEB URL. As you progress, each screen will give an explanation of each of the fields.

3. Click NEXT to accept the invitation.

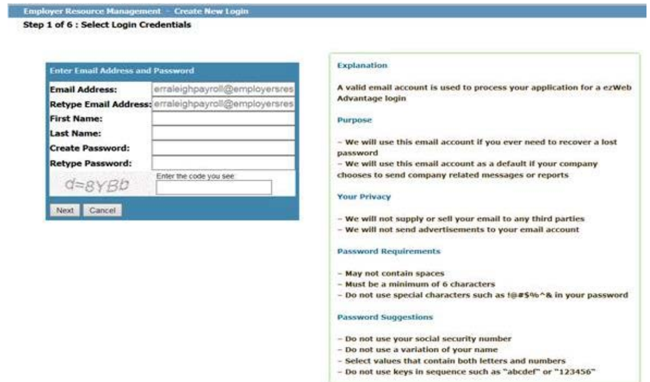


4. A confirmation of your acceptance will display. Click CONTINUE. This will also notify your branch administrator that you've accepted the invitation.



5. Enter your first and last name, password and captcha code.

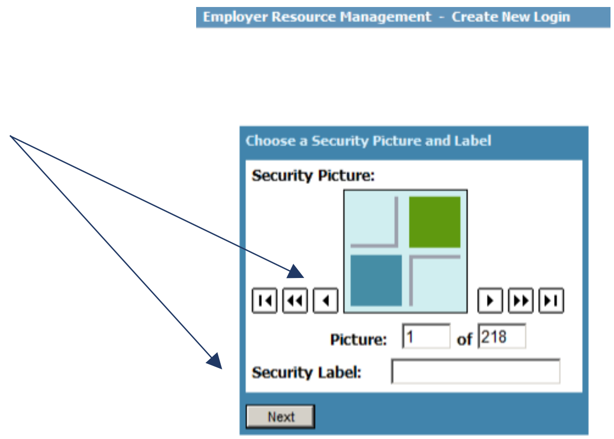
6. Click NEXT



NOTE: Due to the confidential nature of the information available in the system, leading industry security standards are used to keep your data secure. Therefore you will create additional validation credentials to assist in the security process.

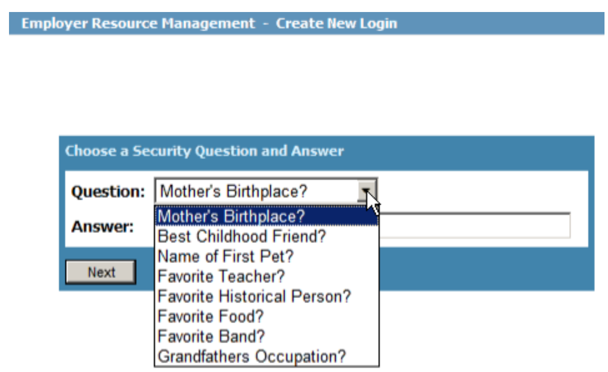
7. Choose a personalized picture and enter a label to identify your login

8. Click NEXT

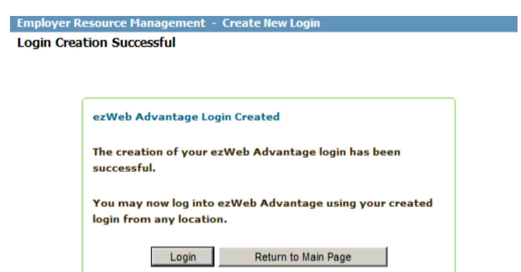


9. Select and answer a security question. Click NEXT

NOTE: For security, each time you login from a new computer these items will be necessary.



10. Your login creation is now complete. Click on LOGIN.



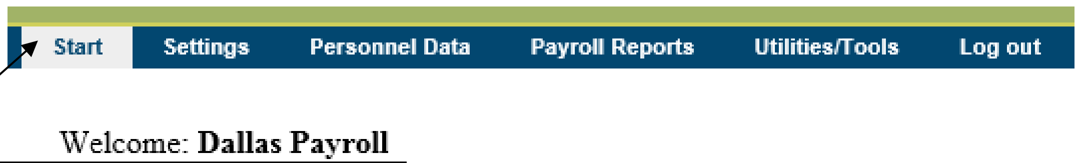
Ongoing Login

Navigate to erm.ezwebadvantage.com. Enter your user e-mail address and password. REMINDER: For security, each time you login from a new computer these items are necessary.

Forgot Your Password

Employers Resource provides a safe and secure way to retrieve your account in the event you have forgotten your password. Log in using your email address as usual and click on the 'I forgot my password!' link on the displayed page.

YOUR MENUS



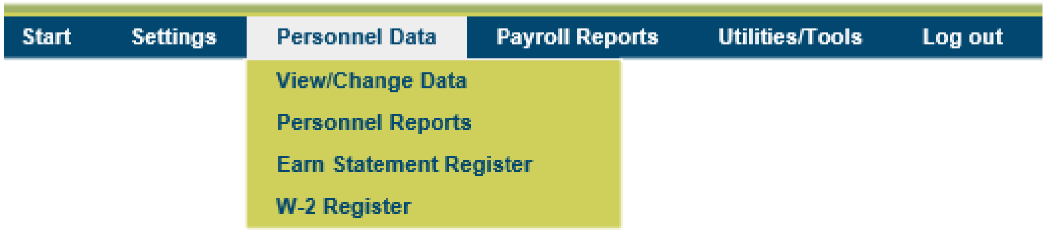
Start

Your Welcome Screen – this default screen appears after you've successfully logged in.

Settings

Login Settings – update and change your password, name, security question and answer, the anti-phishing picture and security label and personalization of the application colors and more.

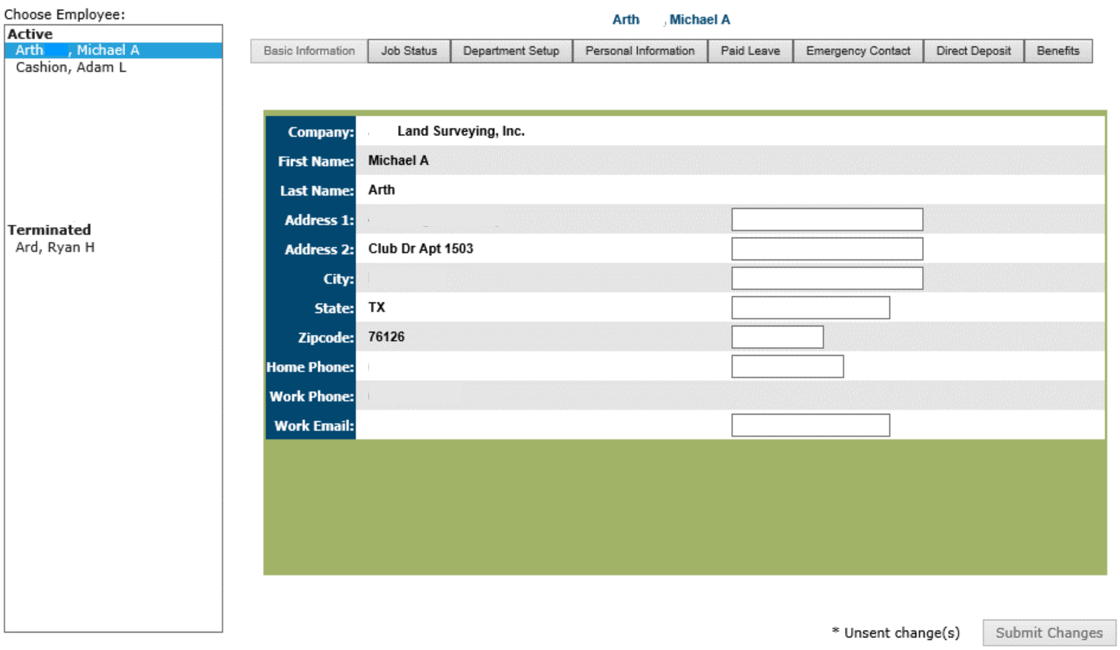
Manage Access – use this to tie your personal data to your company login. One login for both sets of data. Follow the instructions on the screen.



PERSONNEL DATA

View/Change Data

Gives all the employment, PTO, Benefits and HR data available for all of your employees. Employees are listed on the left had side. Tabs across the top provide access to more screens with additional information.



Click on a tab to view the following (any item in italics can be modified):

- Basic Information: first and last name, *address, city, state, zip, home phone*, work phone, work e-mail.
- Job Status: occupational description, *status, employment type (regular, seasonal, etc.), full/part time, EEO category, client hire date*, company hire date, anniversary date, review date, *pay rate, pay type (hourly, exempt, etc.), pay period* and standard hours.
- Department Setup: *department 1*, department 2, etc.
- Personal Information: *birthdate*, *gender*, *race*, *veteran status*, alien expiration.
- Paid Leave: view only for each type of leave, YTD accrual, taken, available and carried forward.
- Emergency Contact: *contact name*, relationship, phone number.
- Direct Deposit: view only information for each account set up for employee.
- Benefits: view only information for each benefit an employee has; includes benefit name, dependent coverage, dependent count and benefit effective date.

Personnel Reports

Benefits: A listing of the benefits that employees are currently enrolled in, or have historically been enrolled in.

Employee Anniversary Report: This report shows the anniversary date, as well as the length of time that has passed since the hire date for the employees.

Employee Hires: This report shows name, hire date and status.

Employee Information Sheet: This report shows full basic information and job status for the employees.

Employee Paid Leave: This report shows all of the paid leave information by leave code.

Employee Review Dates: This report shows review dates and length of service.

Personnel Information: This report contains general employee information.

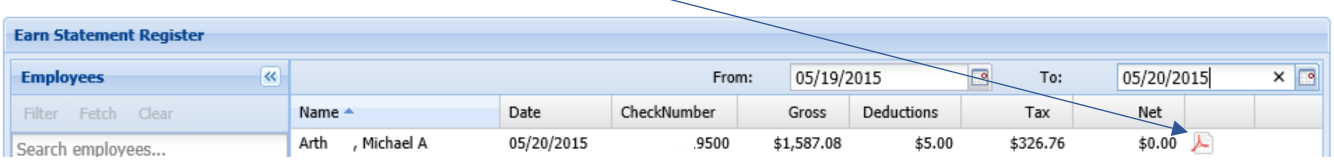
Status Change Log: This reports contains all changes made in the system.

Terminations: This report is a listing of all employee terminations.

Wage Change History: This report is a historical listing of wage changes for all available employees.

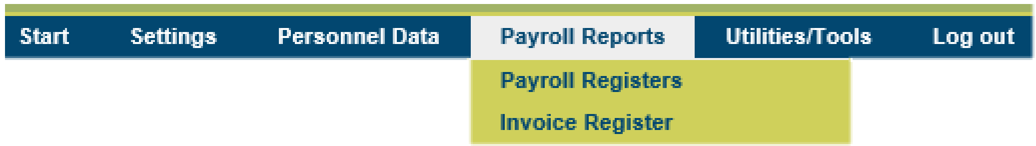
Earn Statement Register

A listing of earning statements for all available employees. Can filter by employee or date. Displays name, check date, check number, gross wages, deductions, taxes and net pay. Click on PDF icon to view earnings statement.



W-2 Register

A listing of all available W-2's for all available employees. Click on the year to view the W-2. Within the pop-up, use the viewer tools to save, print and zoom.



Payroll Reports

Payroll Registers

This is a brief listing of the reports available in the system. For further detail about them, see the REPORTS main section in this guide. Reports includes the some or all of the following reports:

401K: Provides a listing of 401K contributions.

Deduction: Provides a listing of deductions for all available employees.

Deduction Credit Back: Provides a listing of deductions that are credited back to the client.

Earnings: Provides earnings for all available employees.

Employee Cost Report: Employee Cost Report with values allocated per the Invoice Format.

In-House/Payroll Journal: Provides earnings, deductions and taxes broken down by payroll code with amounts for all available employees.

Overtime: Provides a list of overtime hours and amounts for employees based on check date.

Quarterly Deductions: Provides deductions by employee, by code, by quarter for all available data years.

Quarterly Earnings: Provides earnings by employee, by code, by quarter and includes month-to-date and year-to-date amounts.

Quarterly Taxes: Provides taxes withheld and tax basis by code, by quarter. Includes year-to-date amount and includes all data years.

Time Worksheet Notes: A report of all the notes associated with a selected Pay Period Worksheet.

Time Worksheet Report: This report displays all the values entered in to the on-line payroll entry interface.

Invoice Register

A listing of ERM invoices with date, amount, invoice number and batch number.

Utilities/Tools

Time Entry

The place to enter employees' hours and wages. See the TIME ENTRY WORKSHEET main section in this guide for further detail.

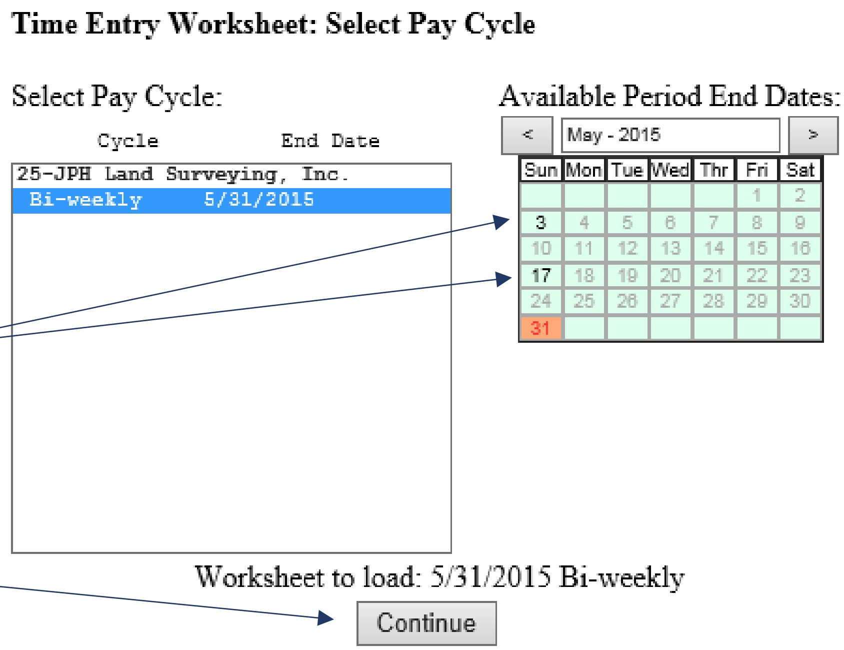
Log Out

Click to log out of ezWEB. Best practice is to log out of the system before closing your browser window.

TIME ENTRY WORKSHEET

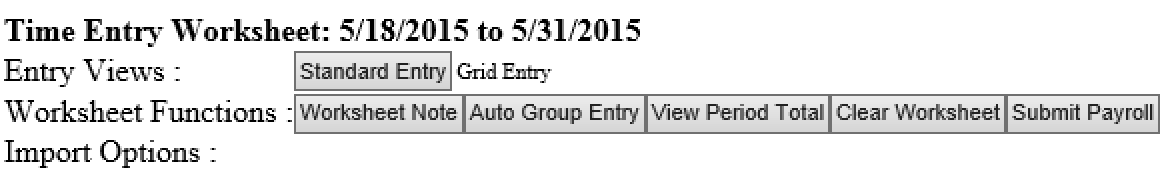
1. From the Start menu select Utilities/Tools > Time Entry > Entry Worksheet

2. Click on the pay cycle to process (if you have more than one).
3. Verify the pay period end date. The calendar will default to the most recent pay period end date. All period end dates will be bolded. See note below.
4. Click CONTINUE



NOTE: Only change the calendar when the date is not accurate for the pay period you're submitting hours for, you're reporting hours for a future pay period, or you're reporting hours for a past pay period.

Overview of Entry Worksheet



At the top is the Entry Worksheet header. It displays the pay period you previously selected.

Entry Views: Select between Standard Entry (employee by employee) and Grid Entry (spreadsheet style).

Worksheet Functions. These are usable for both Standard and Grid Entry.

Worksheet Note – this is to communicate big picture items in regard to this payroll (staff and/or company items).

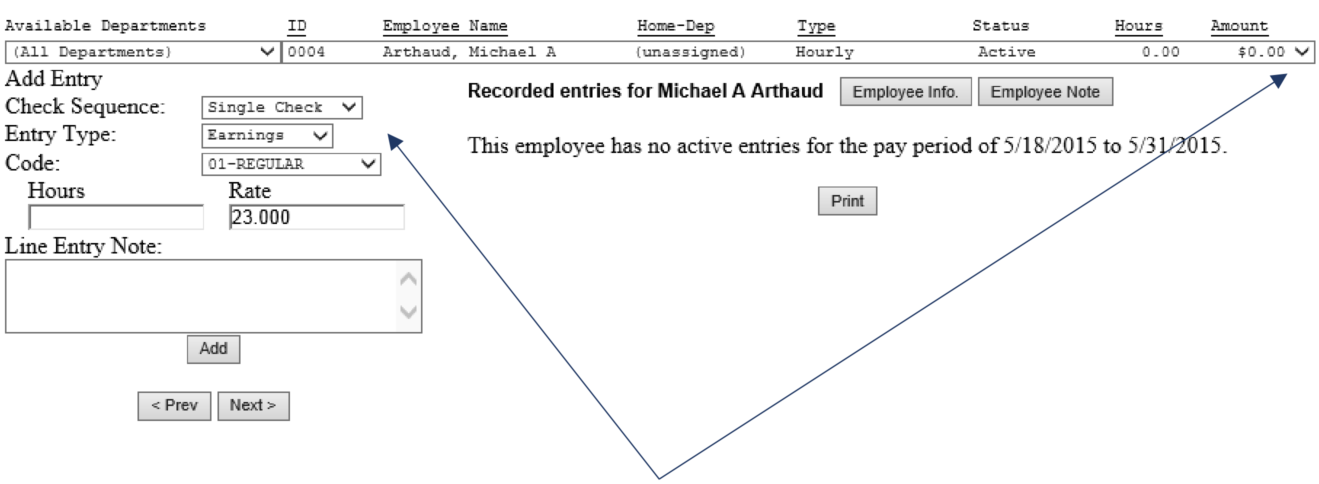
Auto Group Entry – use this to enter common earnings, deductions, reimbursements, etc. for a specific group. For example, use this feature to pay all exempt employees holiday pay, or all sales staff a commission.

View Period Total – a view of all employees' hours and wages by paycode to be submitted, includes total hours and amounts.

Clear Worksheet - this will remove ALL entries on the time worksheet. This is a great feature to use during training. You can enter time, add entries, practice with the defaults and Auto Group Entry, and then clear the worksheet. Your password will be required.

Submit Payroll – use when you are ready to submit your payroll.

Standard Entry



1. Select your employee.
   Using the drop down arrow in the selection bar, select your employee. You can filter your employee list by department, using the Available Departments drop down bar.

2. Select Add Entry features.
   Using drop down arrows for selection bars, enter the following:
   Check Sequence: Is this the first (single) check or second check for this employee for the current pay period?
   Entry Type: Is this entry type an earning or a deduction? Other options may be listed, for example No Pay and Last Check.
   Code: Select a pay code that is appropriate with either the earning or deduction type selected previously. You may not have access to all entry types and codes. See your supervisor if you need additional access.

Department and Account: Select the department and account for this entry. If you do not see department or account options, your company does not track earnings by department or account. Continue to the next step. **NOTE**: The department entry box defaults to the employee's home department. Modify the selection only if this entry should be tied to an alternate department. If you need to modify, add or delete departments or accounts contact your supervisor before proceeding.

3. Enter hours, amounts, or pieces with rates.
   Depending on the entry type, enter the appropriate numbers for hours, dollars, pieces and rates. When entering piecework, the rate may default based on the piecework pay code selected. If not, add the rate. The system will calculate any totals.

4. Enter a Line Item note.
   Use this for individual line-item time entry notifications. I.e. a rate increase for the next pay period or a bonus check needs to reflect a specific net (take home) pay.

5. Click ADD.

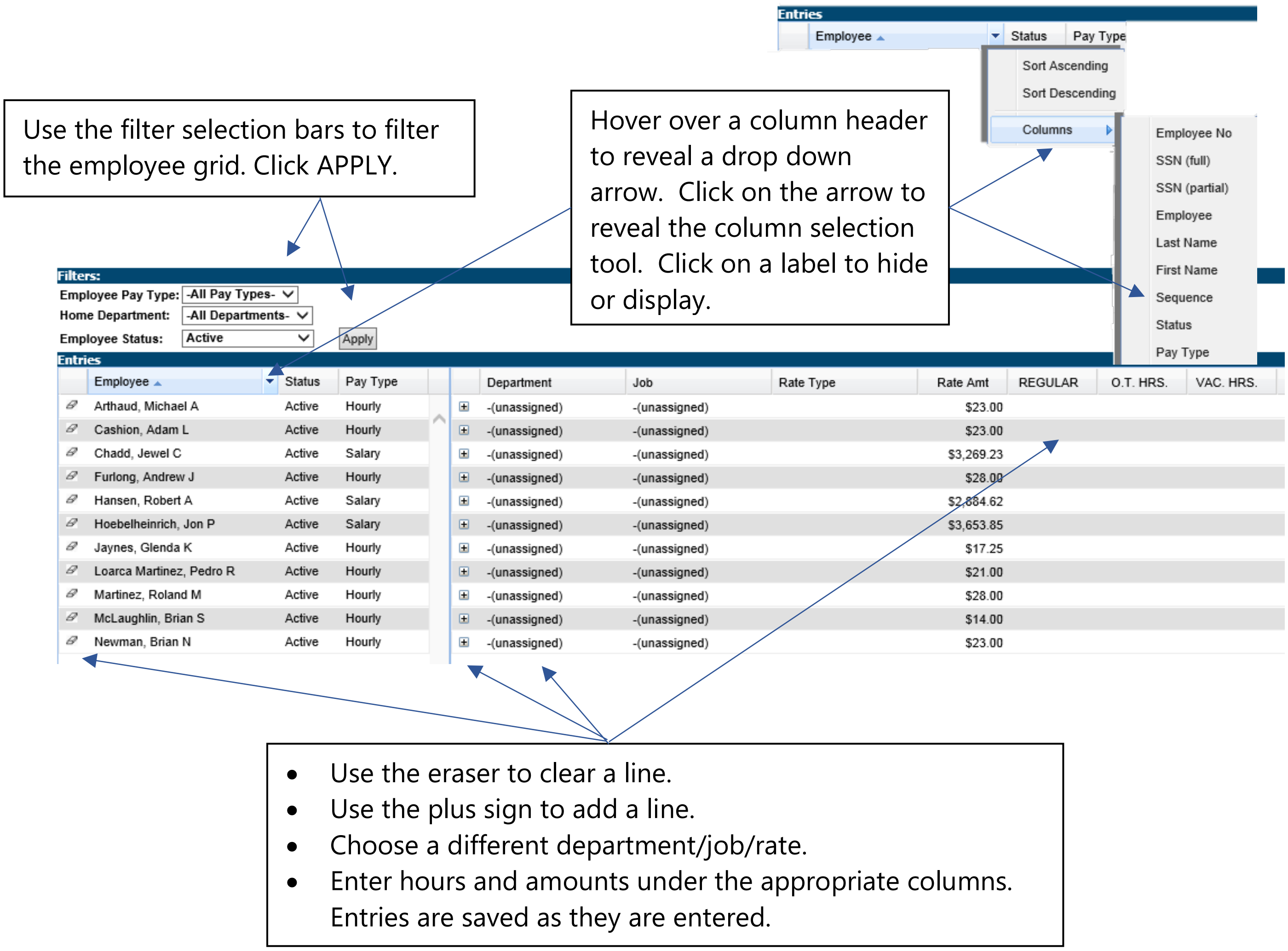
6. Repeat to add additional earnings for the same employee or choose a new employee.

Additional notes:

- After each entry, click the Add button. This will save each entry and will display it on the screen. At any time after the transaction has been added, you can log out. When you are ready, log back in to make any changes, add more entries and/or to complete the time worksheet.
- Employee Info: click on this button to display the employee's status, hire date, current pay rate, wage history and paid leave balances.
- Employee Note: use this to add a note specific for the employee. I.e. changes to deductions, contributions or even change in employment status. Don't forget to send in appropriate forms for each.
- Use the navigation keys PREV and NEXT to navigate between employees in addition to the employee drop down selection bar.

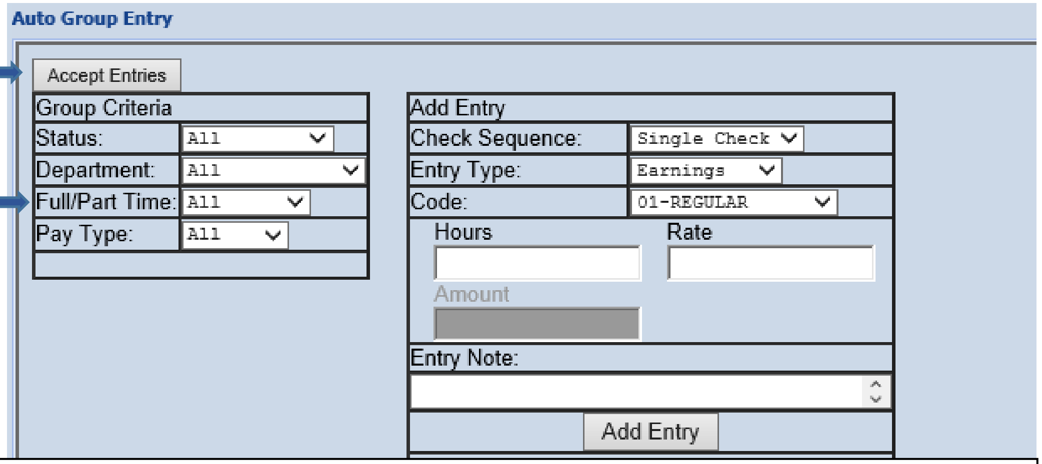
Grid Entry

The Grid Entry allows the entering of hours, amounts, etc. for all employees in an easy to navigate spreadsheet view.

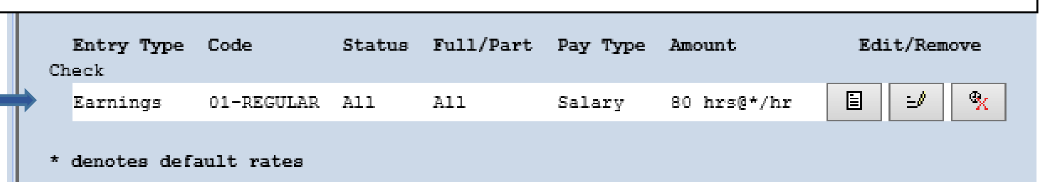


Auto Group Entry

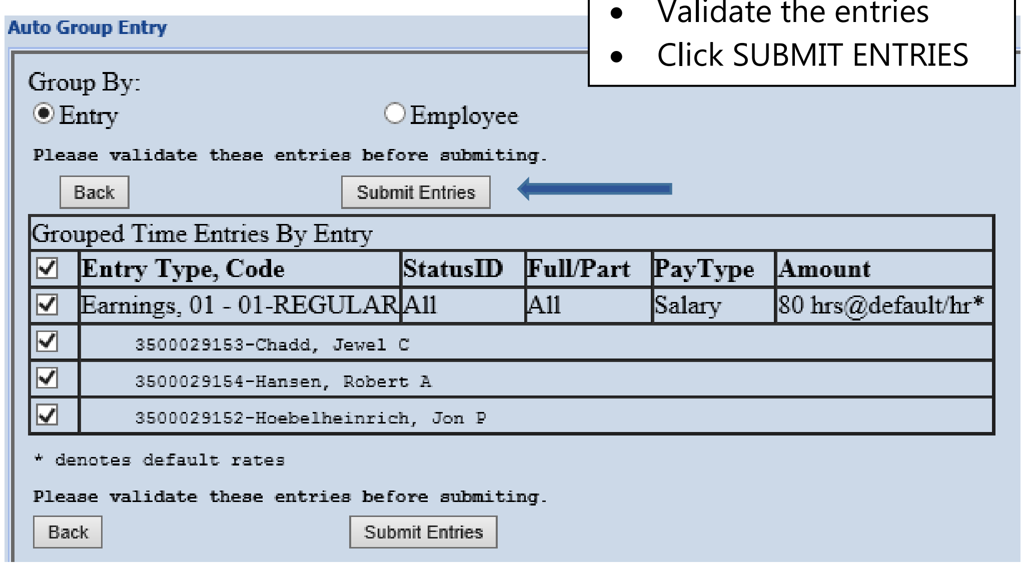
Add hours and amounts for all or some employees with just a couple of clicks of the mouse.



- Choose from drop down selection bars to enter auto entries by status, department, F/P time, pay type, check sequence, pay type, and pay code. Click ADD ENTRY.
- Add a note, edit or delete any entry.
- Click ACCEPT ENTRIES



- Validate the entries
- Click SUBMIT ENTRIES



After submitting, entries will appear on the time entry worksheet.

Submit payroll

1. Verify the worksheet. At any time you can select the VIEW PERIOD TOTAL button to open a second window that displays current entries. You can sort the view to assist with your review by clicking on the column title. To simplify the report, select ☑Hide Details. **NOTE**: Pay special attention to the totals and grand totals while verifying payroll.

2. When you are ready to submit payroll for processing, click SUBMIT PAYROLL. The system will automatically review all employees. If you get a window showing all active employees that are missing data, you will need to give a reason why the employee was either left blank or will not be getting paid this pay period. Select a reason for each and click CONTINUE/

3. Enter your password and click CONFIRM to finalize the payroll.

4. The next screen is a receipt for the time worksheet entries. You can print a copy of the receipt or log the receipt number for future reference. Since data is securely housed and can be accessed at any time, a printed report is only optional.

5. Click FINISH.

NOTE: you can submit changes until your branch has imported and processed. To correct entries, re-enter your Time Entry Worksheet. A green check mark will be displayed next to all entries that have been submitted. To make a change, select the un-submit button, enter your password and make the necessary corrections. Click SUBMIT PAYROLL again when you are ready. *If however*, the timesheet is grayed out, the entries have been imported and processed. You will need to contact your branch for any revisions. The system will notify your branch that the file is ready for import.

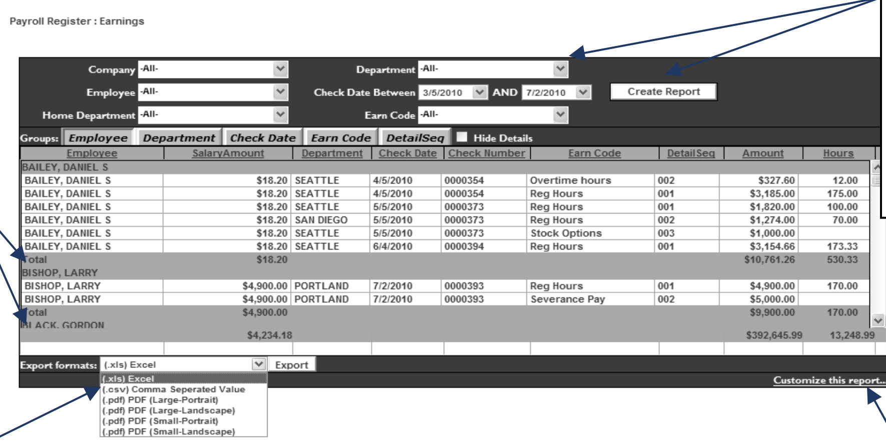
REPORTS

You can access your reports through the menu bar at the top of the page.

There are many reports all ready to go. Below is an example of one of the many reports ezWEB has available. The report can be filtered and grouped as well as customized to the format that best works for you.

You may filter by any or all of the information available at the top of the report and click 'Create Report'.

Grouping will allow you to see subtotals of the information you chose to group by.

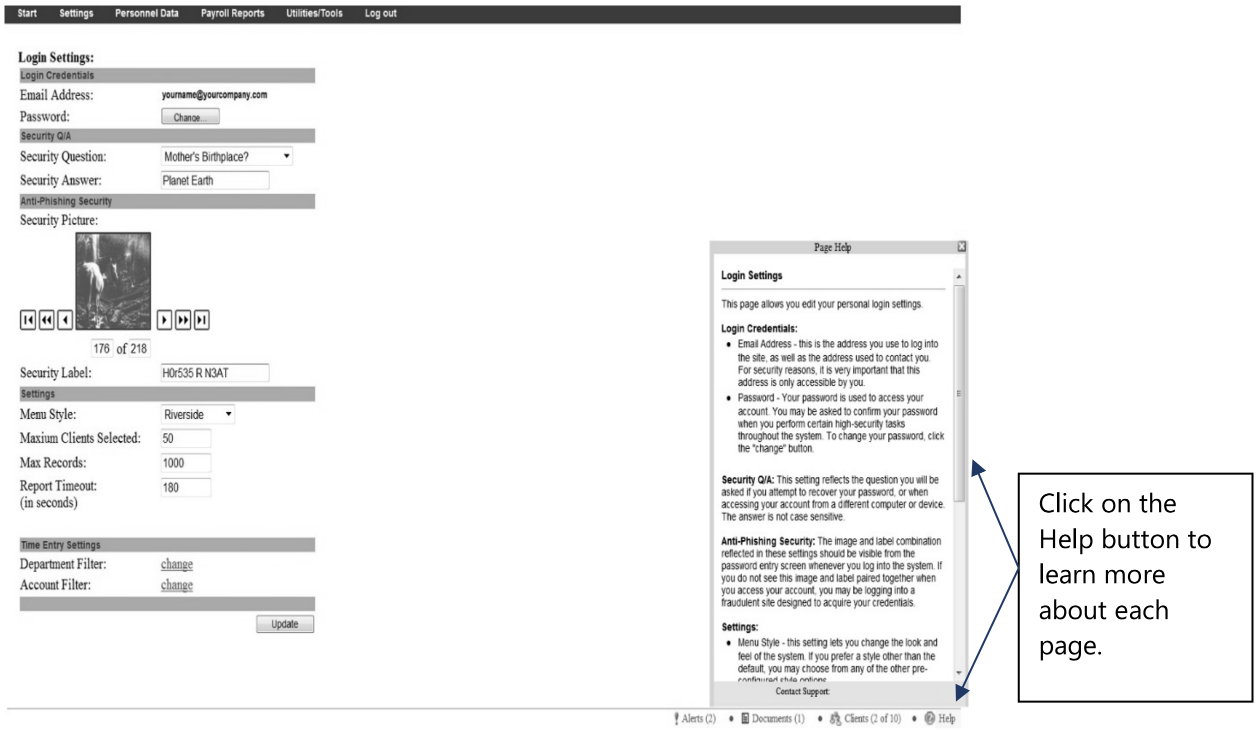


Export your report in the format that best suits your needs.

Customize your report by adding or removing fields and filters as well as other formatting options.

HELP

To assist in navigating through ezWEB, a Help window is provided on each page to answer frequently asked questions and give you some best practices of using the site.



ezWEB will soon become an invaluable tool to you and your company!