



# WORKFORCE ONE

Create a Payroll Alert

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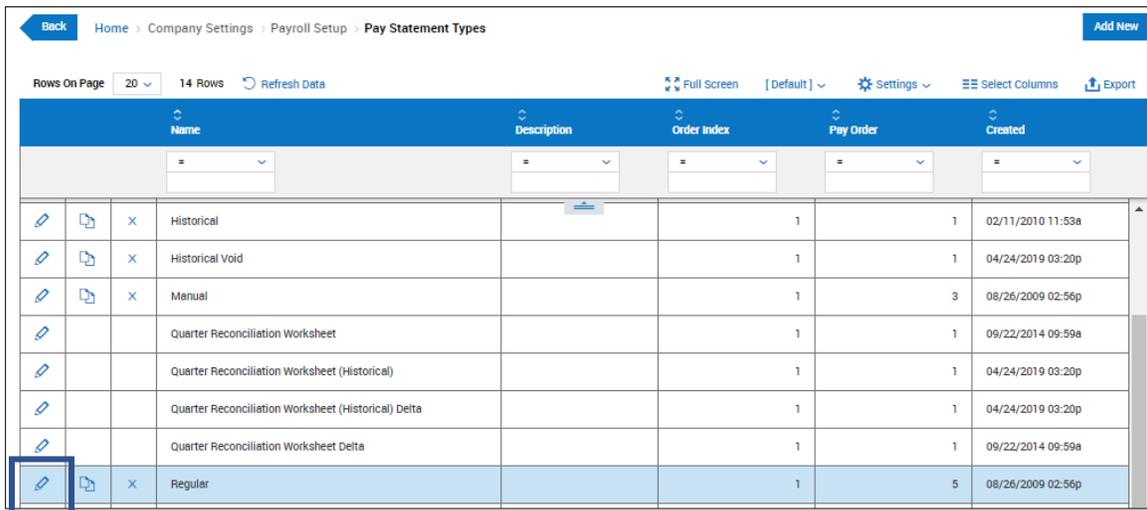
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## Create a Payroll Alert

Now, let's talk about Payroll Alerts. Let's say an employee has moved. The alert will stop you from processing payroll until you've updated any employee's taxes that may result from their move. Alerts will reappear with the subsequent payrolls based on the Payroll To Notify option.

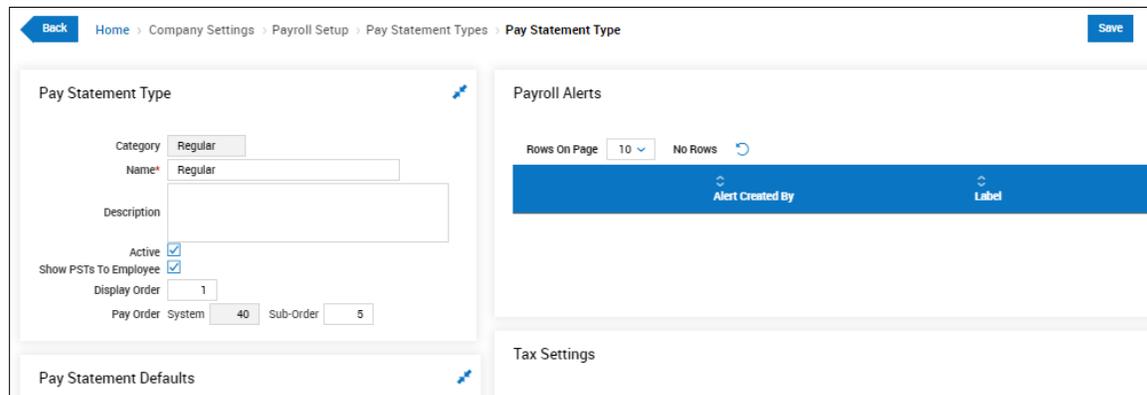
Alerts can require a payroll adjustment or a reconciliation payroll to correct wages, employer or employee, amounts. Let's go through the steps now to set up an alert.

1. Select the hamburger menu.
2. Select **Company Settings**.
3. Select **Payroll Setup**.
4. Select **Pay Statement Types**.  
*The following window will display.*



Back Home > Company Settings > Payroll Setup > Pay Statement Types					Add New
Rows On Page: 20 14 Rows Refresh Data					Full Screen [Default] Settings Select Columns Export
Name	Description	Order Index	Pay Order	Created	
x	Historical		1	1	02/11/2010 11:53a
x	Historical Void		1	1	04/24/2019 03:20p
x	Manual		1	3	08/26/2009 02:56p
	Quarter Reconciliation Worksheet		1	1	09/22/2014 09:59a
	Quarter Reconciliation Worksheet (Historical)		1	1	04/24/2019 03:20p
	Quarter Reconciliation Worksheet (Historical) Delta		1	1	04/24/2019 03:20p
	Quarter Reconciliation Worksheet Delta		1	1	09/22/2014 09:59a
x	Regular		1	5	08/26/2009 02:56p

5. Select the pencil icon next to a type. In our example, we'll select **Regular**.  
*The following window displays.*



Back Home > Company Settings > Payroll Setup > Pay Statement Types > Pay Statement Type Save

**Pay Statement Type**

Category: Regular

Name\*: Regular

Description: [Text Area]

Active:

Show PSTs To Employee:

Display Order: 1

Pay Order System: 40 Sub-Order: 5

Pay Statement Defaults

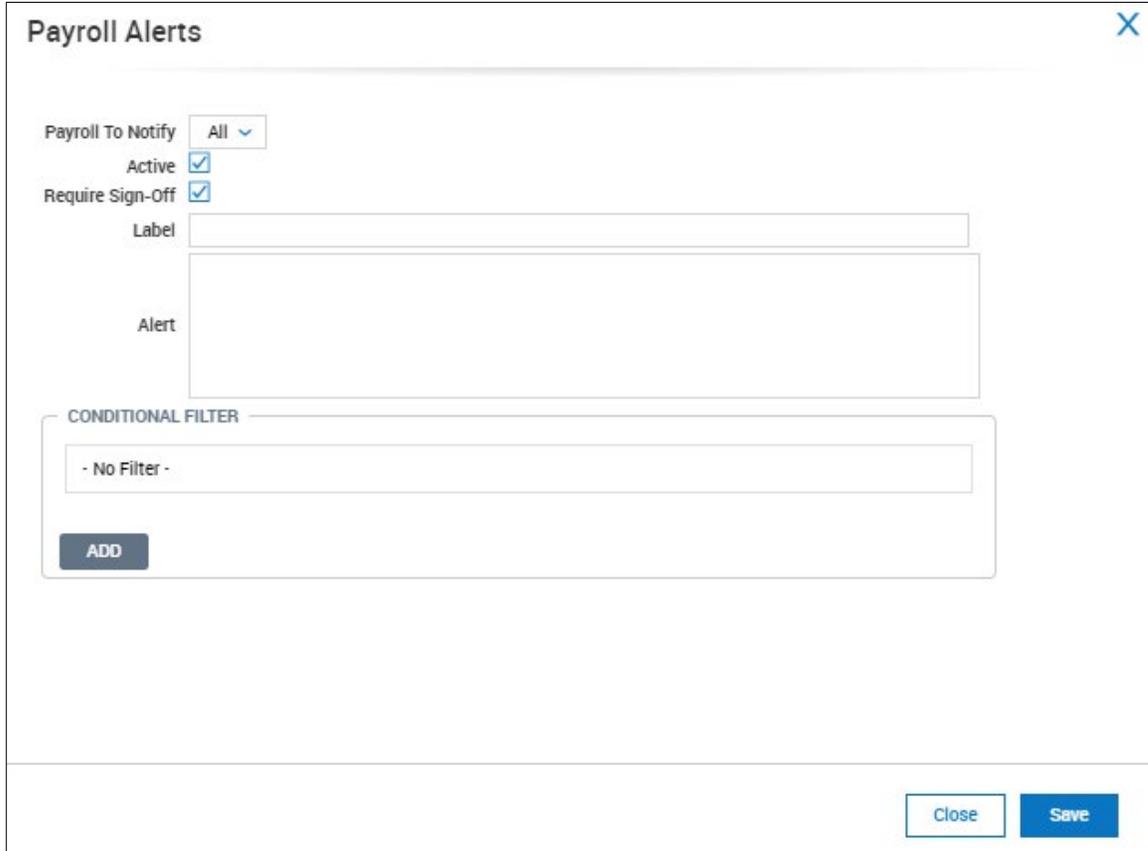
**Payroll Alerts**

Rows On Page: 10 No Rows

Alert Created By	Label

Tax Settings

6. Scroll to the right and in the Payroll Alerts pane and select the **Add Payroll Alert** button.  
*The following pop up window will display.*



**Payroll Alerts** X

Payroll To Notify: All

Active

Require Sign-Off

Label:

Alert:

**CONDITIONAL FILTER**

- No Filter -

7. Select which payroll to notify from the drop-down menu.
8. Select the **Active** checkbox to make it active.
9. Select **Require Sign-Off** button to require a signature before payroll can be processed.
10. Enter a **label** for the alert.
11. Enter your alert text. In this case we could say, "Has home address changed since last payroll?"
12. Select the **ADD** button under Conditional Filter.  
*The following window will display.*

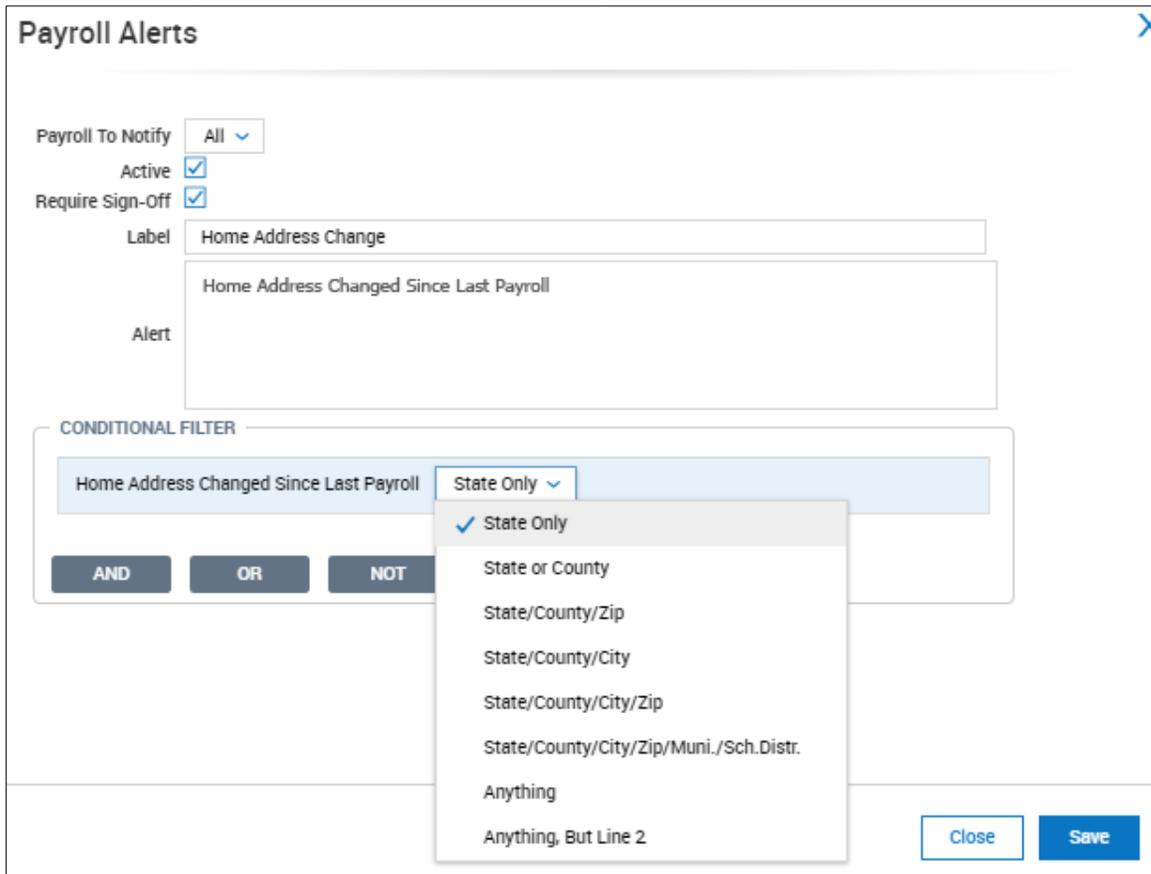
Filters X

Rows On Page  25 Rows ⚙️ 📄

Name	Description
<input type="text" value="starts with"/>	<input type="text" value="like"/>
<input checked="" type="checkbox"/> Home address changed since last payroll	
<input checked="" type="checkbox"/> Needs Recon/Adjustment	For FUTA/SUTA/SUI taxes only
<input type="checkbox"/> PST Has Check	
<input type="checkbox"/> PST Has Direct Deposit	
<input type="checkbox"/> PST Type	
<input type="checkbox"/> Total S. (FF+FB) For Deduction	

13. Select the flag icon next to the chosen filter.

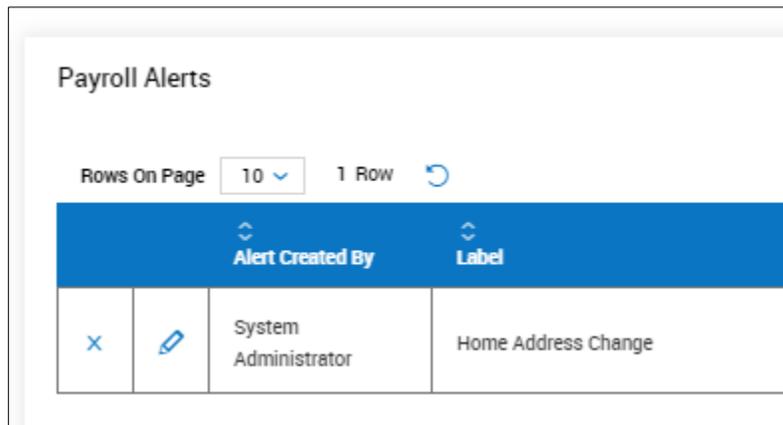
14. In the Payroll Alert window, select the drop-down to further customize the filter.



15. Select the **Save** button.

16. Select the **Save** button again.

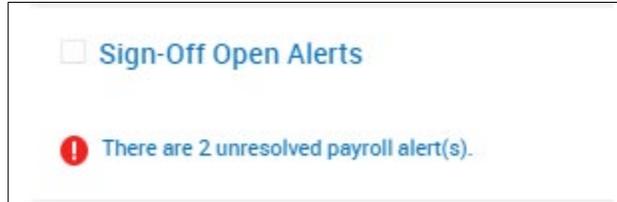
*Now we see we have successfully created a Payroll Alert.*



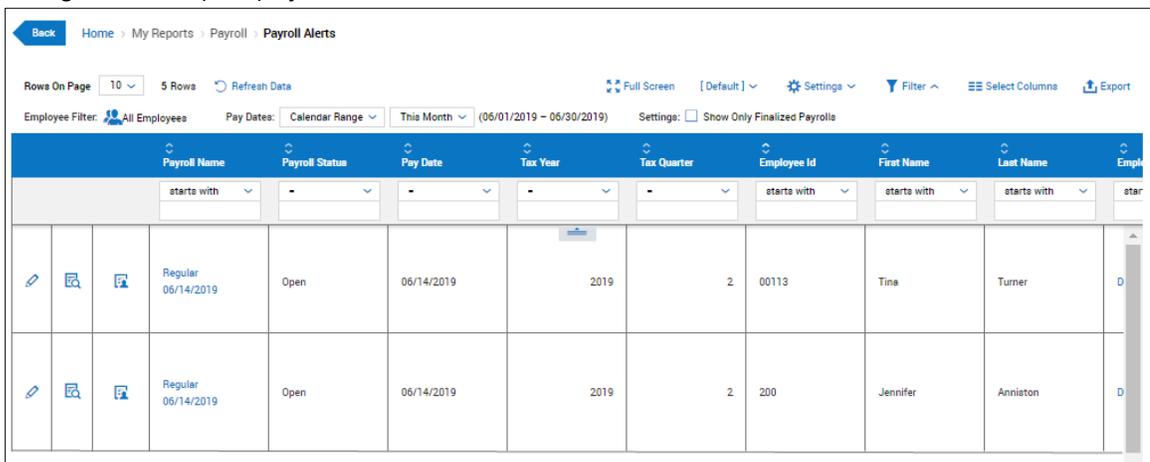
		Alert Created By	Label
		System Administrator	Home Address Change

17. Select the **Save** button again.

So now what happens? Well, when you're in the Payroll Prep window you will see this in the check list.



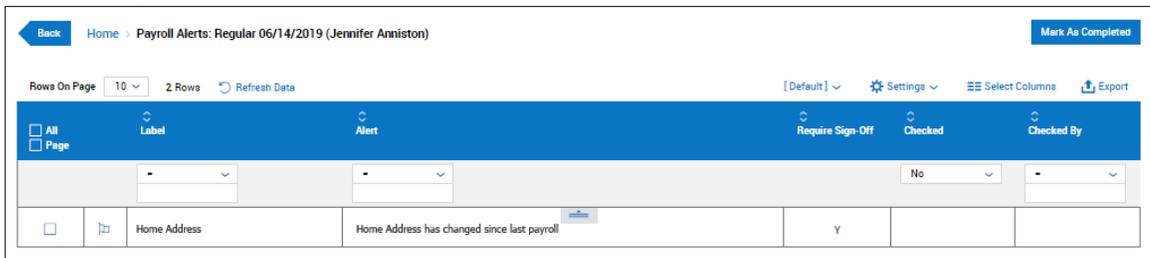
18. Select the hyperlinked text stating there are unresolved payroll alerts and you will be brought to the open payroll alerts window.



Back Home > My Reports > Payroll > Payroll Alerts  
 Rows On Page: 10 5 Rows Refresh Data Full Screen [Default] Settings Filter Select Columns Export  
 Employee Filter: All Employees Pay Dates: Calendar Range This Month (06/01/2019 - 06/30/2019) Settings: Show Only Finalized Payrolls

Payroll Name	Payroll Status	Pay Date	Tax Year	Tax Quarter	Employee Id	First Name	Last Name	Emplo
Regular 05/14/2019	Open	05/14/2019	2019	2	00113	Tina	Turner	D
Regular 05/14/2019	Open	05/14/2019	2019	2	200	Jennifer	Anniston	D

19. Select the pencil icon to review the alert for Jennifer.



Back Home > Payroll Alerts: Regular 06/14/2019 (Jennifer Anniston) Mark As Completed  
 Rows On Page: 10 2 Rows Refresh Data [Default] Settings Select Columns Export

Label	Alert	Require Sign-Off	Checked	Checked By
Home Address	Home Address has changed since last payroll	No		

20. Select the flag icon to review the address change.

21. Once we've ensured that the alert has been reviewed, select the check box.

22. Select the **Mark As Completed** button.

And now you've completed the Alert!