



WORKFORCE ONE

Deductions

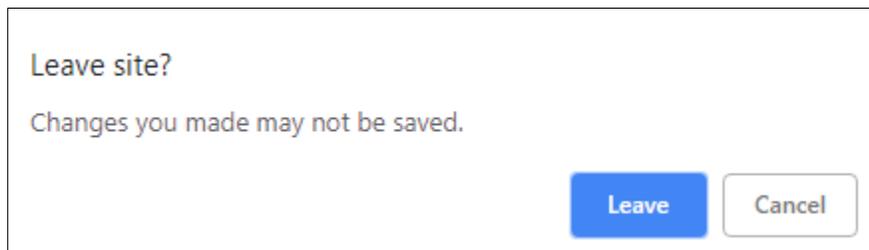
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Introduction

This document is intended as a comprehensive resource for the payroll section of the system. Some things you should note about this document:

- Any time you see an item marked in **bold** it means it is a button or option to select.
- Tables below large screen shots are there to describe the various options in the screen shot above (which normally have a bold rectangle around them).
- Anything in *italics* is the name of the window you are viewing.
- If you ever see this popup below, it means you have not saved your work. Select cancel, save your work, and then you won't get that popup and can continue through the system.



Deductions

There are times when you will need to add or change the deductions for an employee. Deductions have been already set up in the system for your company. In the following example, we will add a deduction.

Note: If you are starting a new deduction to replace a current one, you must stop the old deduction first. See Stopping Deductions on page 12.

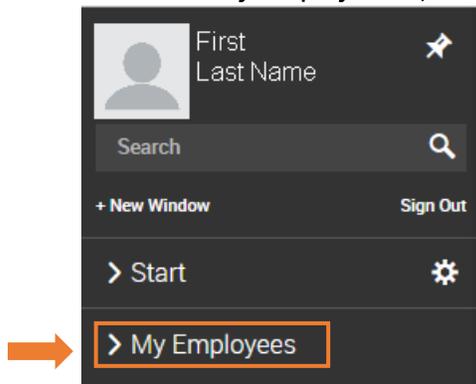
Example: Adding a Deduction

This employee will now have a new deduction, union dues, applied to their payroll.

1. Select the **Hamburger Menu** (highlighted below).

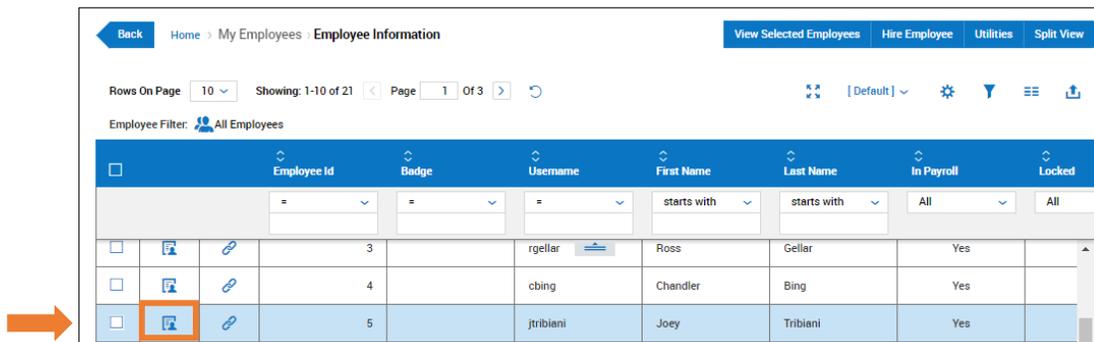


2. Select the **My Employees** option.

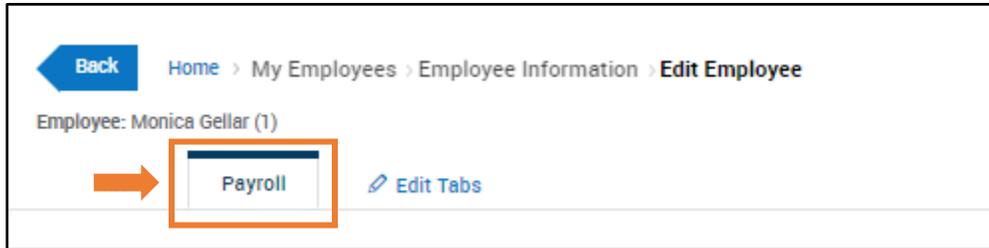


The menu expands.

3. Select **Employee Information** and the following window displays.

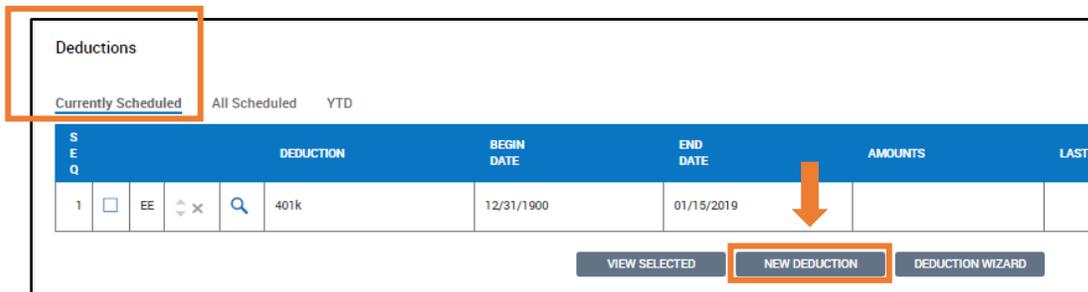


4. Select the  icon for the employee's record.
5. Select the Payroll Tab.



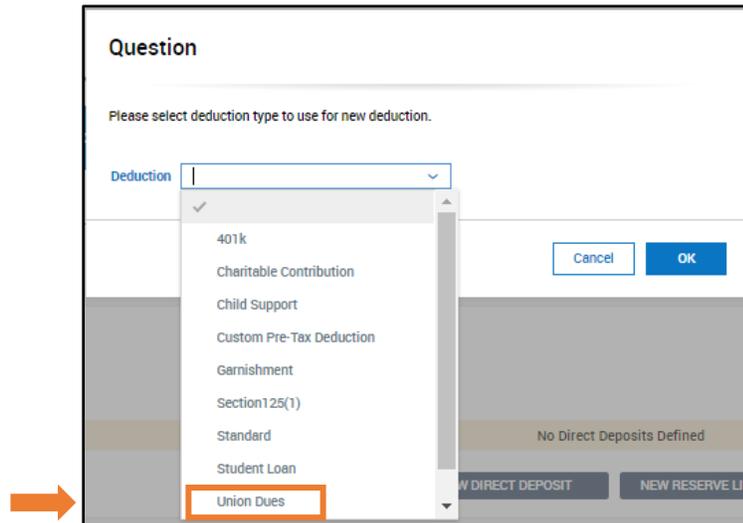
Payroll Tab

6. Go to the Deductions pane.



Deductions Pane

7. Select the New Deduction button highlighted in the screenshot above.
8. In the drop-down menu, select Union Dues as shown in the following screenshot.



Selecting a Deduction

9. Select OK.

Scheduled Deduction

Deduction Union Dues

Begin Date* 02/13/2019 End Date

Priority Sequence 2

Annual Max \$

Annual Max ER \$

Memo

Vendor

Pay Statement Types To Apply To All Pay Statement Types

Goal

ENABLED

Settings

Additional Info

EMPLOYEE

Amount \$* Flat \$ Amount

Minimum N/A

Maximum N/A

Frequency* Every Pay

Arrearage Settings

Arrearage Function

Max Arrearage Recovery Per Pay Statement Flat \$ Amount

Scheduled Deduction

Deduction Pane Explained

Before we continue, let's review the options in the scheduled deductions pane.

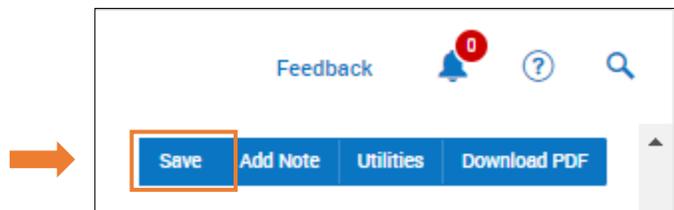
Scheduled Deductions	
Deduction	The deduction we just selected (in this case, Union Dues). It is greyed out because it cannot be edited.
Begin date	This field defaults to today but can be edited to be a future date.
End date	Select an end date, if you do not, it will default to 12/31/9999.
Memo	Add any notes about the new deduction. (Not required)
Vendor	Select any third party for the check disbursement.
Pay Statement Types	The default is All Pay Statement Types but others can be configured.

Settings	
Employee Amount	Enter a value to be deducted. (This is a required field)
Amount Dropdown	There are several varieties of how that number can be calculated—flat rate or based on a certain percentage. If you select the drop-down you will see the many options.
Frequency	This is typically set to Every Pay. But, there are many other options available in that drop-down which include by date, manual deduction, or only scheduled pays. (Scheduled pay means that the deduction will not occur on special payments like bonuses since those are typically not a scheduled pay).

Arrearage Settings

Arrearage Function	<p>Establishes how the system handles deductions when there are insufficient earnings to withhold the scheduled deduction.</p> <ul style="list-style-type: none"> • Discard Underfunded Amount: When there are insufficient earnings to withhold the full deduction amount, the underfunded amount will be discarded. The employer can choose to 'forgive' this amount or enter a manual adjustment to recover the amount from the employee on the next available pay statement. • Arrear the Underfunded: When there are insufficient earnings to withhold the full deduction amount, the underfunded amount will be moved to the Adjustments section of the employee's file to be recovered on the next pay statement with enough earnings. • Discard the Entire EE Deduction: When there are insufficient earnings to withhold the entire deduction amount, the entire deduction amount will be discarded. The employer can choose to 'forgive' this amount or enter a manual adjustment to recover the amount from the employee on the next available pay statement. • Arrear the Entire EE Deduction: When there are insufficient earnings to withhold the full deduction amount, the entire deduction amount will be moved to the Adjustments section of the employee's file to be recovered on the next pay statement with enough earnings.
Max Arrearage Recover Per Pay Statement	<p>Select how to recover the arrearage per pay period. Options are:</p> <ul style="list-style-type: none"> • Flat \$ Amount • % of Gross Earnings • % of Earnings List

10. Apply all the appropriate deduction values in Scheduled Deduction and Settings
11. Select **Save** and your work is complete.



Special Note: To create a Goal for your deduction you need to save the deduction first. Goals are not required.

Setting a Deduction Goal

After adding a deduction, and you save your work, you can establish Goals for the deduction. Deduction Goals are not required. However, a common deduction with goals would be Garnishments or Loan Repayments. Select the Enabled box under goal to establish a goal for this employee's deduction.

1. Under Goal, select the Enabled checkbox.



A screenshot of a 'Goal' section in a software interface. It features a title 'Goal' and a checkbox labeled 'ENABLED'. An orange arrow points to the checkbox, which is highlighted with an orange border.

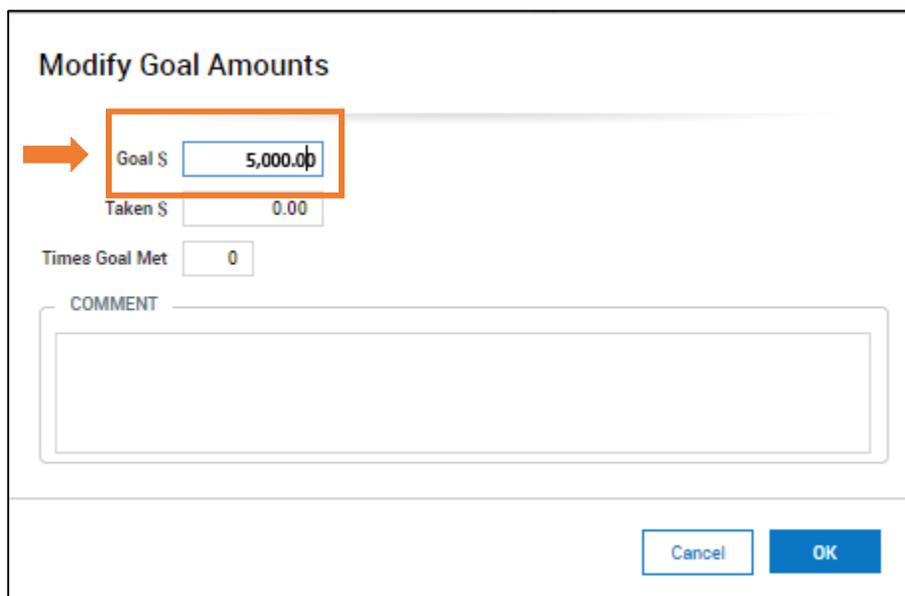
2. To start a new goal deduction, select the text link, **Change Amounts**.



A screenshot of the 'Goal' section showing a table with columns: GOAL, TAKEN TOWARDS CURRENT GOAL, REMAINING, and TAKEN TOTAL. Below the table are fields for 'Times Goal Met' (0) and 'Reset Balance Type' (Never). An orange arrow points to a 'Change Amounts' link, which is highlighted with an orange border.

3. In the next dialog box, enter the goal amount, if any amount has previously been taken, and any comments (not required) in the dialog box.

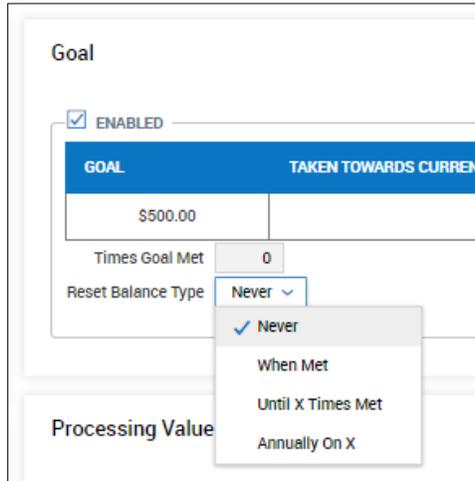
Note: The field, Taken, would be used if the deduction goal was not set up and the deduction had previously taken. This would reduce the overall goal for the employee by the amount already taken.



A screenshot of the 'Modify Goal Amounts' dialog box. It contains fields for 'Goal \$' (5,000.00), 'Taken \$' (0.00), and 'Times Goal Met' (0). There is a 'COMMENT' text area and 'Cancel' and 'OK' buttons at the bottom. An orange arrow points to the 'Goal \$' field, which is highlighted with an orange border.

4. Enter 5000.00 for the goal.
5. Select OK.

After setting your goal, you can choose how often the goal should be reset for the employee from the **Reset Balance Type** drop-down menu.



Goal

ENABLED

GOAL	TAKEN TOWARDS CURRENT
\$500.00	

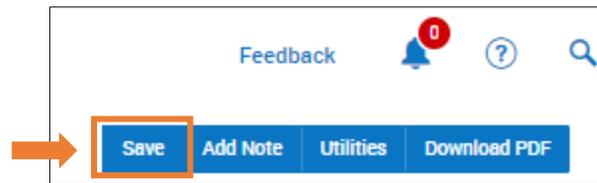
Times Goal Met 0

Reset Balance Type **Never** ▾

- ✓ Never
- When Met
- Until X Times Met
- Annually On X

Processing Value

6. After setting up the goal, select Save to Save your work.



Reviewing Deduction History

If you set up a goal after deductions have been previously taken, you will need to adjust the goal by that amount. We do this by reviewing the current deduction history. This example will show you how to review the deduction history and update the current goal with that amount.

1. From the Goal Pane, select **Taken History** as highlighted in the screenshot above..



Goal

ENABLED

GOAL	TAKEN TOWARDS CURRENT GOAL	REMAINING	TAKEN TOTAL
------	----------------------------	-----------	-------------

Times Goal Met 0

Reset Balance Type **Never** ▾

[Change Amount](#) **Taken History**

2. Select **Taken History** as highlighted in the screenshot above.

Rows On Page: 20 | 8 Rows | Refresh Data | Full Screen | Def

Added	Type	Amount
02/12/2019 12:55p	Pay Statement Closed	\$100.00
02/05/2019 03:31p	Pay Statement Closed	\$100.00
01/29/2019 03:24p	Pay Statement Closed	\$100.00
01/22/2019 03:38p	Pay Statement Closed	\$100.00
01/15/2019 04:33p	Pay Statement Closed	\$100.00
01/09/2019 02:21p	Pay Statement Closed	\$100.00
01/02/2019 03:53p	Pay Statement Closed	\$100.00
12/28/2018 11:02a	Imported	\$2,400.00
Total		\$3,100.00

We can see from this total that they've already had 3,100 taken out of their pay. We can now adjust their goal by that amount.

3. Go back one screen to adjust the Goal by selecting Back.
4. In the Goal Pane select Change Amounts.

Goal

ENABLED

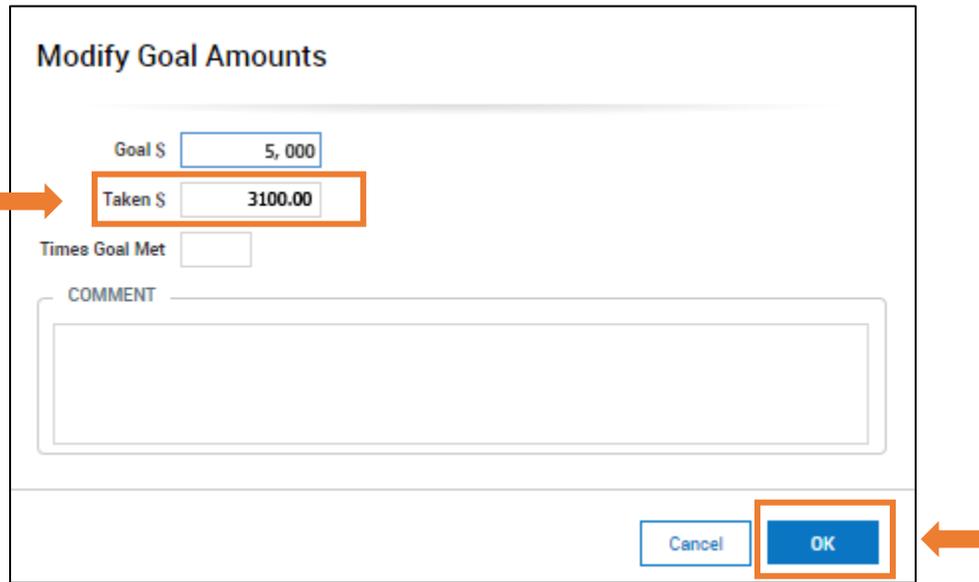
GOAL \$	TAKEN TOWARDS CURRENT GOAL \$	REMAINING \$	TAKEN TOTAL \$
\$5,000.00		\$5,000.00	\$0.00

Times Goal Met: 0

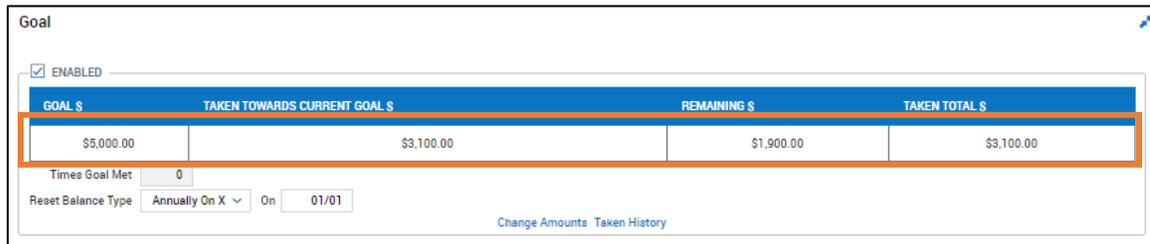
Reset Balance Type: Annually On X On 01/01

[Change Amounts](#) [Taken History](#)

5. Enter the amount previously taken in the text box highlighted in the screen shot below.



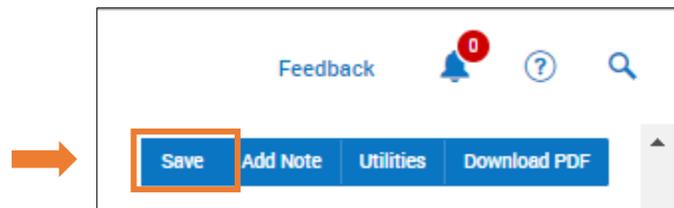
5. Select **OK**.



GOAL \$	TAKEN TOWARDS CURRENT GOAL \$	REMAINING \$	TAKEN TOTAL \$
\$5,000.00	\$3,100.00	\$1,900.00	\$3,100.00

Notice the employee’s goal of \$5,000 has been updated to reflect that \$3,100 has already been deducted and she has 1,900 remaining to meet her goal.

6. Select **Save** from the top right of your screen to save your work.



Update a Deduction

In this example, we want to update the amount of Union Dues, from \$50 to \$150, that will be taken out of our employee’s pay. To maintain an audit trail, we will end this current deduction, and add a new one.

1. From the Deductions pane, select the magnifying glass.

Deductions

Currently Scheduled All Scheduled YTD

Deductions Will Process In Order Listed Below

SEQ	DEDUCTION	BEGIN DATE	END DATE	AMOUNTS
1	Union Dues	01/18/2019	12/31/9999	\$50.00

VIEW SELECTED NEW DEDUCTION DEDUCTION WIZARD

2. Enter the end date for this deduction.

Scheduled Deduction

Deduction Union Dues

Begin Date* 01/18/2019 End Date 12/31/9999

Priority Sequence 2

Annual Max \$ 5,000.00

Annual Max ER \$

Memo

Vendor

Pay Statement Types To Apply To All Pay Statement Types

3. Select Save in the top right of your screen.
4. Now let's add a new deduction and select, Add New Deduction which is beside the save button.



5. Select the deduction, Union Dues, from the drop-down menu.

Question

Please select deduction type to use for new deduction.

Deduction

- 401k
- Charitable Contribution
- Child Support
- Custom Pre-Tax Deduction
- Garnishment
- Section125(1)
- Standard
- Student Loan
- Union Dues

Cancel OK

No Direct Deposits Defined

NEW DIRECT DEPOSIT NEW RESERVE LVI

6. Select OK.
7. Now set the Begin Date for the new deduction.

Scheduled Deduction

Deduction:

Begin Date* End Date

Priority Sequence:

Annual Max \$:

Annual Max ER \$:

Memo:

Vendor:

Pay Statement Types To Apply To:

8. Enter the new amount of \$150 in the Amount Field.

Settings

Additional Info:

EMPLOYEE

Amount \$* Flat \$ Amount

Minimum:

Maximum:

Frequency*:

9. **Save** your work.
10. Select **Back**.

Deductions

[Currently Scheduled](#) [All Scheduled](#) [YTD](#)

Deductions Will Process In Order Listed Below

SEQ	DEDUCTION	BEGIN DATE	END DATE	AMOUNTS
1	Union Dues	01/18/2019	11/02/2019	\$50.00
2	Union Dues	11/03/2019	12/31/9999	\$150.00

11. Notice the deductions above show the original for \$50 ending on 11/02/2019 and the new deduction starting on 11/03/2019 for \$150.

Stopping Deductions

Let's assume that our employee no longer has to pay union dues. We need to stop their dues that are currently being taken out of their paycheck. Also, if we are changing a deduction, we need to stop the current deduction first and then add the new deduction.

1. From the deduction pane, select the magnifying glass, highlighted in the screenshot below, next to the deduction that you want to stop.

Deductions								
Currently Scheduled				All Scheduled		YTD		
Deductions Will Pr								
S	E	Q		DEDUCTION	BEGIN DATE	END DATE		
1	<input type="checkbox"/>	EE	⏏		401k	12/31/1900	01/15/2019	
2	<input type="checkbox"/>	EE	➡		Union Dues	01/15/2019	12/31/9999	

Deductions Pane

2. Enter an End Date, highlighted in the screenshot below.

Scheduled Deduction

Deduction: Union Dues

Begin Date*: 01/15/2019  End Date: 3/1/2019  ←

Priority Sequence: 2

Annual Max \$: 5,000.00

Annual Max ER \$:

Memo:

Vendor: 

Pay Statement Types To Apply To: All Pay Statement Types 

Scheduled Deductions

3. Select the **Save** button on the top right corner to save your work.

