Enabling Pay Stubs for Remote Payroll Customers

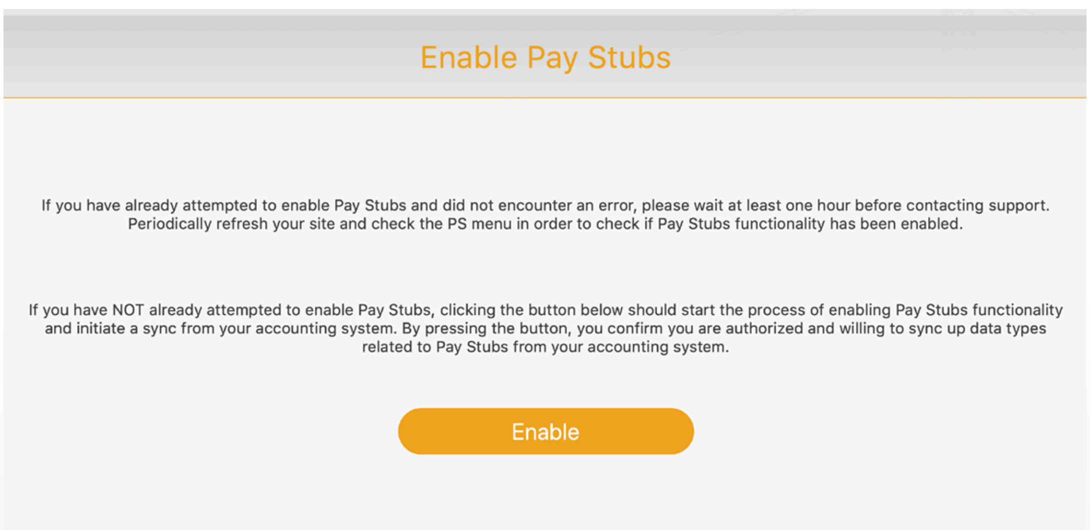
This whitepaper will outline the steps needed to enable Pay Stubs for all Remote Payroll customers. These are the manual steps prior to any development changes. This paper will not go into all the different options that may arise when enabling Pay Stubs for customers, but will go over the general steps to enable this product. Any further questions or customization requests can go through the normal Tier2 question/escalation process.

There are two steps to enable Pay Stubs if the customer already has Remote Payroll setup and is on a site build 336 or later:

Step 1 – Enable Pay Stubs

You will need to be logged in as a Site Administrator or hh2_admin to see the Enable button that will sync all necessary data.

1. Login as System Admin.
2. Click on the PS button.
3. The following screen should appear:



4. Click on the Enable button. This will enable all of the items on the synchronization client remotely and sync up the new Pay Stub data. This process may take up to 24 hours to complete.

5. Once the syncing is complete, you will want to make sure that the company information is set up correctly, as it will show up on the pay stubs. Here are the steps to complete this task:

    a. Click on the Home button.
    b. Click on the System Settings link on the right-hand side of the window.
    c. Click on the Company Information tab.
    d. Make sure that the information here is correct, as it will show up on the Pay Stub.
    e. Click on the Company Logo tab.
    f. Make sure their Logo is uploaded here, as it will also show up on the Pay Stub.
    g. Click on the PS button.
    h. Click on the System Settings link on the right-hand side of the window.
    i. Click on the Pay Stubs tab.
    j. Make sure the Logo Location is set up the way the customer wants it.

Step 2 – Setup User Accounts for any Employees they want to have access to Pay Stubs

All current Remote Payroll users will already now have access to their pay stub. For some companies, not all employees have a login for Remote Payroll, as not every individual in the company has to enter time on their timesheet. Some companies only have a Foreman/ Superintendents code time for their employees.

If you need to add users to hh2 for all employees so that they can have access to their pay stubs, there are two options:

Option 1 (Recommended) – Create logins for all Active Employees

1. Click on the Home button.
2. Click on the User Setup link on the right-hand side of the window.
3. Click on the Auto-Create Users button next to the + sign button in the upper right of the window.

This will automatically create a login for all active employees that currently do not have a login. It will email them automatically to their email on file that they have a user created, and they can set up their password. These newly created users will still not have access to Remote Payroll as they are not part of a payroll group in RP, but will now be able to access their pay stubs.

Option 2 – Manually create logins, one at a time, for Employees

1. Click on the RP button.
2. Click on the Payroll Users link on the right-hand side of the window.
3. Click on the + button in the upper right of the screen.
4. Fill out the required fields.
5. Click on Create User.
6. Now you should see a User Mappings tab on the left. Click on that.
7. Under employee, click to select the correct Employee ID to connect the pay stub to the correct individual based on that login. This is a critical step. If forgotten, then hh2 will not be able to assign the pay stub to this user account correctly.

Option 3 – Setup Accruals to Show on Pay Stubs

If you want to show Accruals, like remaining PTO balances, on Pay Stubs, do the following steps:

1. Click on the PS button.
2. Click on the Accruals link on the right side of the window.
3. Click on the Create Accrual button.
4. Enter the Name of how you want it to show up on the Pay Stub; i.e., PTO Balance
5. Enter the Primary Pay ID, which is the Incrementing pay id in Sage.
6. Click on Create Accrual, and it will give you two more options to select.
7. Check the box 'Is Displayed on Pay Stubs' to show this on the Pay Stub.
8. Enter the Pay ID for the Decrementing Pay Type.

If you do not know the Pay IDs to use that are set up in Sage, you can look them up in hh2 with the following steps:

1. Click on the RP button.
2. Click on the Pay Types link in the lower right of the window.
3. This will list all the Pay IDs in Sage that we have synced over. Click on the one that you want, and note the 'Code.' That will be the Pay ID needed in the Accrual.

If anything comes up during the setup of this process that is not working as expected, please ask a resource or escalate to Tier2 for further assistance.