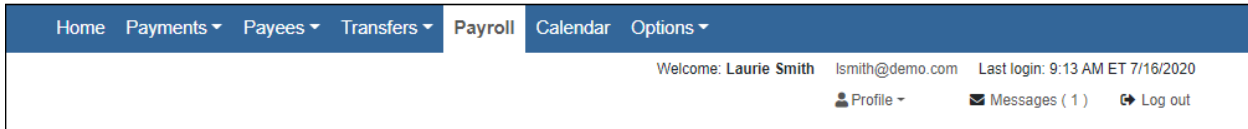


For the initial set up of payroll, subscribers are taken through the Payroll Setup Wizard. This process cannot be bypassed. The process includes establishing the payroll frequency, adding employees, and scheduling the first payroll.

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All names appearing in this document were created using a random name generator. Any resemblance to any person living or dead is purely coincidental. Product enhancements are continually implemented to provide a better user experience; therefore, screens in this guide may not reflect the most current view of bill pay products.

To access this feature, click the Payroll tab.

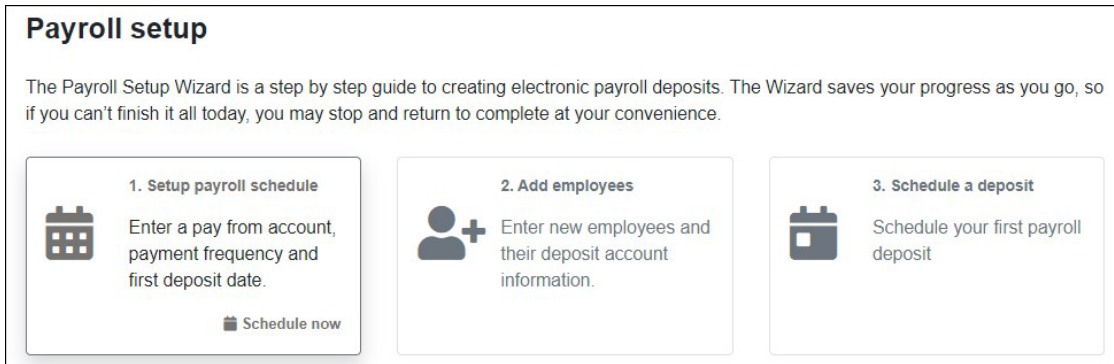


Home Payments ▾ Payees ▾ Transfers ▾ **Payroll** Calendar Options ▾

Welcome: Laurie Smith | lsmith@demo.com | Last login: 9:13 AM ET 7/16/2020


Profile ▾ | Messages ( 1 ) | Log out


The *Payroll* setup page automatically opens. Click *Schedule Now* in the *Setup payroll schedule* to get started.




### Payroll setup

The Payroll Setup Wizard is a step by step guide to creating electronic payroll deposits. The Wizard saves your progress as you go, so if you can't finish it all today, you may stop and return to complete at your convenience.

- 

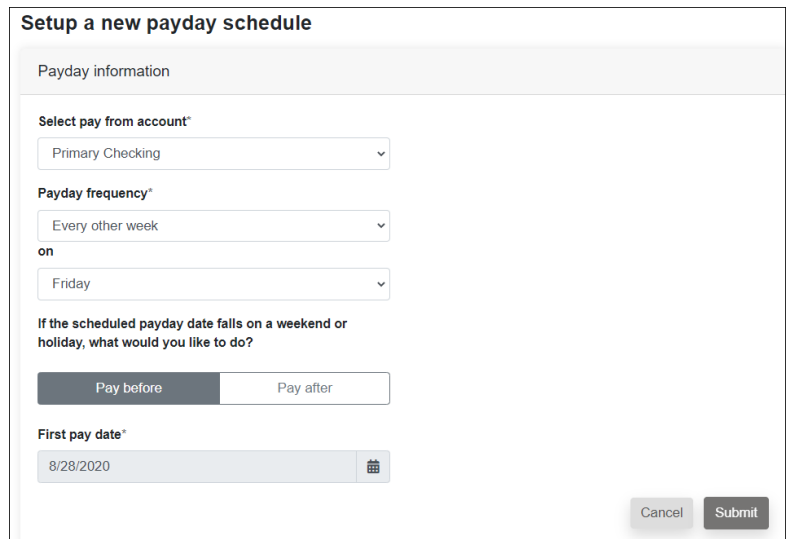
**1. Setup payroll schedule**  
Enter a pay from account, payment frequency and first deposit date.  
[Schedule now](#)
- 

**2. Add employees**  
Enter new employees and their deposit account information.
- 

**3. Schedule a deposit**  
Schedule your first payroll deposit

The payroll schedule establishes the dates on which employees are paid. The system does not automatically schedule payroll based on these dates. Once a schedule is set, a reminder is sent two days prior to the pay date to schedule the payroll deposits. Payday frequency options include:

- Weekly
- Every Other Week
- Twice a Month
- Monthly



### Setup a new payday schedule

Payday information

Select pay from account\*

Primary Checking ▾

Payday frequency\*

Every other week ▾


on

Friday ▾

If the scheduled payday date falls on a weekend or holiday, what would you like to do?

Pay before | Pay after

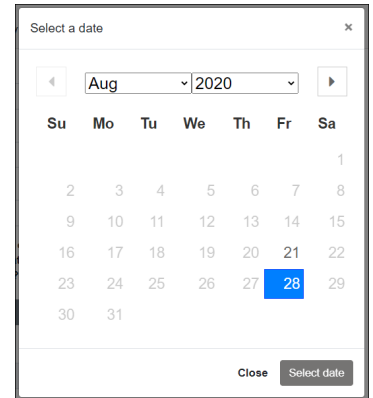
First pay date\*

8/28/2020 

Cancel | Submit

Once the frequency is selected, click the calendar icon to choose the First pay date.

Only applicable dates are available on the calendar. After a date is selected click Select date to close the calendar.



Review your information then click Submit. A confirmation appears. Click Add employee to move to the next step in the process.

### Setup a new payday schedule

✓ You have successfully completed your payday schedule. [Add employee](#)

Payday information

<b>Pay from</b>	<b>Frequency</b>
Primary Checking	Every other week on Friday

**Note:**  
Authorized users will receive an email reminder two days in advance to schedule payroll deposits.

[Return later](#) [Add employee](#)

Subscribers must enter the required information and can choose an employee type from:

- Hourly
- Salary
- Contractor

### Add new employee

Employee information

**Did you know?** We will send a confirmation email to your employees when payroll has been deposited.

<b>First name *</b>	<b>Last name *</b>
<input type="text" value="Samuel"/>	<input type="text" value="Clark"/>
<b>Employee ID number</b>	<b>Email address</b>
<input type="text" value="78545"/>	<input type="text" value="sclark@myemail.com"/>
<a href="#">Tell me more</a>	
<b>Employee status *</b>	<b>Pay type *</b>
<input type="text" value="Active"/>	<input type="text" value="Hourly"/>

Employee account information

Would you like to split the deposit between two bank accounts? [Don't split](#) [Split](#)

**Single account**

<b>Account number *</b>	<b>Confirm account number *</b>
<input type="text" value="888999"/>	<input type="text" value="888999"/>
<b>Routing number *</b>	<b>Confirm routing number *</b>
<input type="text" value="123123123"/>	<input type="text" value="123123123"/>
<b>Account type *</b>	
<input type="text" value="Checking"/>	

[Save and add another](#) [Submit](#)

## Employee account information – Split

If an employee wants a specified amount of each deposit to go into a savings account, subscribers can set up that additional account by clicking Split.

Once all information is completed and reviewed, click Submit. A confirmation appears. Click Schedule Payday to move to the next step in the process.

### Employees

✓ Step 2 is now complete. [Schedule payday](#)

Samuel Clark [View details](#)

[Go to payroll deposits](#) [Schedule payday](#)

Subscribers can now schedule their first payroll. Complete the required information, then click Next.

### Schedule a regular payroll

Payroll information

**Regular deposit date** 8/28/2020  
Payroll dates are based on the frequency selected when the payday schedule was made.

**Pay from account** Primary Checking

Hourly employees

[Deselect all](#) [Select all](#)

Name	Regular pay	Extra pay	Total	Additional items
<input checked="" type="checkbox"/> Samuel Clark	\$ 0.00	\$ 0.00	\$0.00	Employee ID *8545 Split amount No Memo / Comment <a href="#">Add</a>
Hourly subtotal			\$0.00	
Hourly subtotal			\$0.00	
Salary subtotal			\$0.00	
Contractor subtotal			\$0.00	
Deposit total			\$0.00	

[Next >](#)

**NOTE** Payroll must be scheduled and approved two business days prior to the pay date.

- Email reminders stating that payroll is awaiting approval are generated to the primary user and sub users with approval authority.
- If payroll is not approved, it remains in a pending status and must be stopped under View Scheduled Payroll.

## Schedule a regular payroll

Print

### Payroll information

<b>Company</b>	Testing4You	<b>Process date</b>	8/27/2020
<b>Pay from account</b>	Primary Checking	<b>Scheduled by</b>	Sharon Laginess
<b>Regular payroll date</b>	8/28/2020	<b>Frequency</b>	Every other week on Friday

### Hourly employees

Name	Regular pay	Extra pay	Total	Additional items
Samuel Clark	\$100.00	\$0.00	\$100.00	Confirmation # 1371712
Last paid n/a				Employee ID *8545
Amount n/a				Split amount No
				Memo / Comment None
		Hourly subtotal	\$100.00	

Hourly subtotal \$100.00  
Salary subtotal \$0.00  
Contractor subtotal \$0.00  
Deposit total \$100.00

Return to payroll deposits

Once one user for a business account has walked through the *Payroll Setup Wizard* it is longer accessible. All users now see the Payroll dashboard.

Home Payments Payees Transfers Payroll Calendar Options

Welcome: Laurie Smith | lsmith@demo.com | Last login: 9:13 AM ET 7/16/2020

Profile Messages (1) Log out

## Payroll

### Joe's Landscaping

Total employees **5**

Edit Add

Payroll schedule **Monthly on the last business day**

Edit

Next payroll **8/31/2020**

Schedule new

Past payroll **8/6/2020**

View history

Extra payroll **None**

Schedule new

All scheduled payroll

View