

Payroll Release Notes

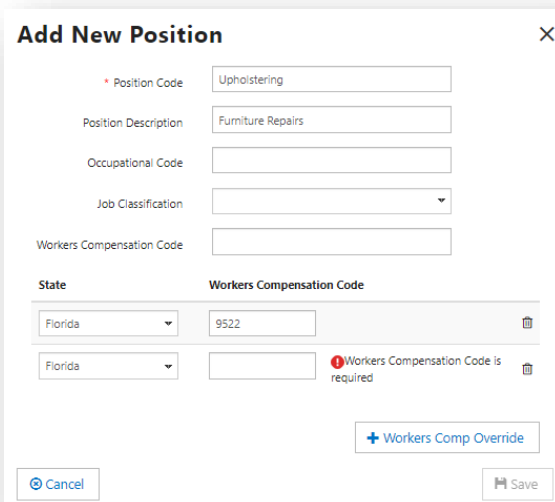
Recent Updates 10/5/2022

GREENSHADES ONLINE PAYROLL

Enhanced Feature - Workers Comp: Addition of Workers Comp Rates and Effective Dates

- **Background:** The workspace level company structures for positions have historically supported the ability to tie a workers compensation code to a position as well as the ability to provide state specific codes against said positions. However, Greenshades had not previously captured worker's comp rates or tracked effective dates for when these codes will be applied.
- **What's new?** The Position setup has been expanded to accept workers compensation rates as well as apply effective dates for when these codes will start being applied. These codes and rates can be expanded to the state level or left as a "default" value for non-state specific uses.

Old Workers Compensation Settings:



The screenshot shows a modal window titled "Add New Position" with a close button (X) in the top right corner. The form contains the following fields and options:

- Position Code:** Text input field containing "Upholstering".
- Position Description:** Text input field containing "Furniture Repairs".
- Occupational Code:** Text input field.
- Job Classification:** Dropdown menu.
- Workers Compensation Code:** Text input field.
- State:** Dropdown menu with "Florida" selected.
- Workers Compensation Code:** Text input field containing "9522".
- State:** Dropdown menu with "Florida" selected.
- Workers Compensation Code:** Text input field.
- Message:** A red error icon and text: "Workers Compensation Code is required".
- Buttons:** "Cancel" (with a refresh icon), "+ Workers Comp Override", and "Save" (with a save icon).

New Workers Compensation Settings:

Add New Position

Position Code: Upholstering

Position Description: Furniture Repairs

Occupational Code:

Job Classification: Labors and Helpers

State	Workers Compensation Code	Workers Comp Rate (as %)	Effective Date
Florida	9522	1.5	09/30/2022
Default			mm/dd/yyyy

+ Workers Comp Override

Cancel Save

Navigation:

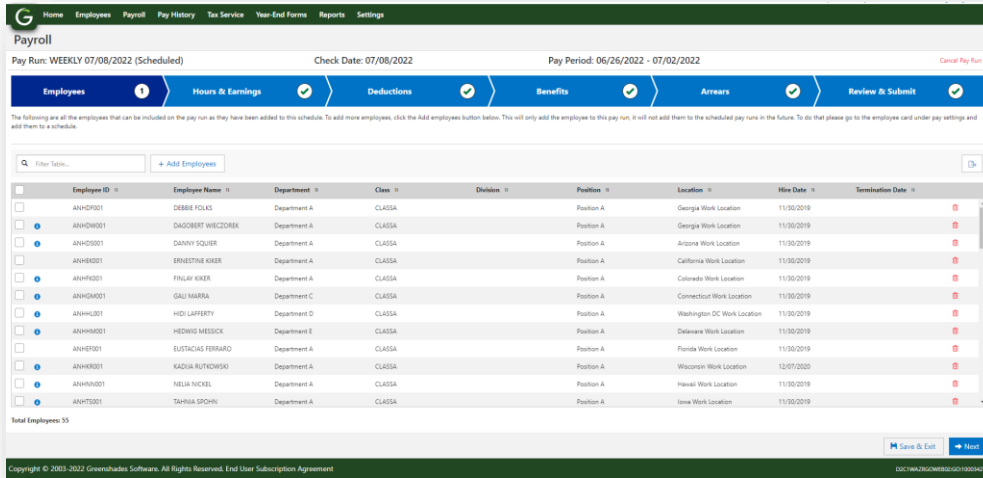
Company Positions Setup: Greenshadesonline.com → Settings Tab → Company Info → Company Structure → Add / Edit Positions

Enhanced Feature - Greenshades API: Employees in Pay Runs + Hours & Earnings in Pay Runs

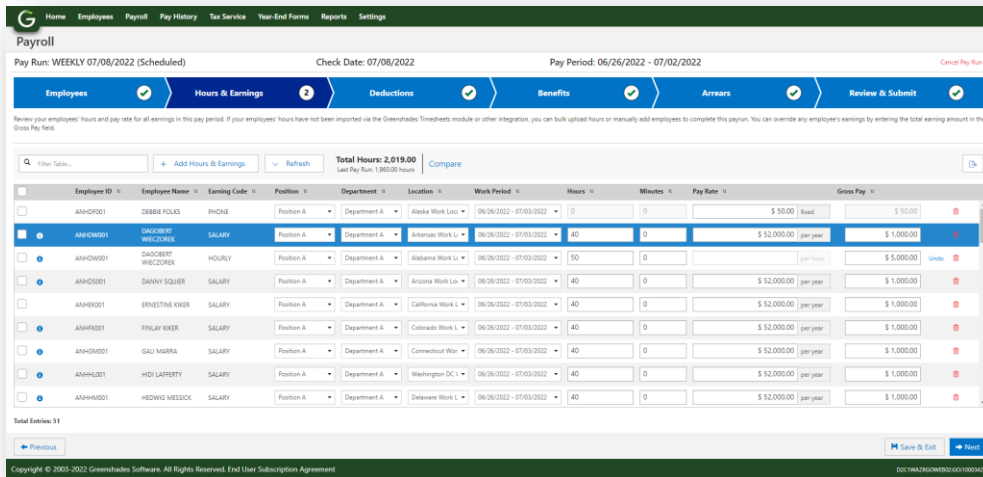
- **Background:** The Greenshades API is a public facing set of endpoints for our clients and partners to utilize with the goal of integrating our data into other systems (i.e. Accounting packages, reporting software, relevant HCM solutions, etc.).
- **What's new?** This latest release has launched endpoints to interact with the data contained within the Employees Step and Hours & Earnings step of the Pay Run Wizard. These endpoints can be used to facilitate direct integrations into active Pay Runs inside of the Greenshades Payroll software.
 - Employee Endpoints:
 - **GET:** Information about all employee/s included in a pay run
 - **POST:** Add an employee to a pay run
 - **PUT:** Modify information about an employee included in a pay run
 - **DELETE:** Remove an employee from a pay run
 - Hours & Earnings Endpoints:
 - **GET:** All pay run earnings in a given pay run
 - **GET:** a pay run earning by its id
 - **POST:** Create new pay run earnings
 - **PUT:** Update existing pay run earnings

- **DELETE:** Remove an existing pay run earning

Employee Endpoints data (in the UI):



Hours & Earnings Endpoints data (in the UI):



Navigation:
[Greenshades API Development Portal](#)

Enhanced Feature - General Ledger: Support dimensions on GL Batch Summary Screen and GL Summary Report

- **Background:** The Post Pay Run GL Batch Review screen as well as the GL summary report did not present the users with the mapped Dimensions.

- **What's new?** To further support our clients that are using dimensional accounting, especially those using Business Central and Sage, we have expanded our GL reporting to ensure that dimensions are included in both the interface and exports of these reports.

General Ledger Account Summary Report (with Dimensions):

Payroll Reports

Select the date range or pay run you would like to view

- Last 30 Days
- Year to Date
- Select Quarter
- Custom Date Range
- Select Pay Run

Pay Run Name: B/W/Weekly
 Pay Period: 05/15/2022 - 05/28/2022
 Check Date: 06/02/2022
 Posted Time: 05/20/2022 12:48 PM

General Ledger Account Summary Report
 This report shows the aggregated summary of your general ledger activity per account. If dimensions are enabled this report will not aggregated.

Pay Run Name: B/W/Weekly
 Pay Period: 05/15/2022 - 05/28/2022
 Check Date: 06/02/2022
 Posted Time: 05/20/2022 12:48 PM

Filter Table...

Entity Code	Account Number	Account Name	Account Type	Debit	Transaction Details	Value	Dimensions
	10010	Tax 1	Liability	\$ 0.00			View Dimensions
	10010	Tax 1	Liability	\$ 234.62			View Dimensions
	10010	Tax 1	Liability	\$ 0.00			View Dimensions
	10010	Tax 1	Liability	\$ 192.88			View Dimensions
	10010	Tax 1	Liability	\$ 0.00			View Dimensions
	10010	Tax 1	Liability	\$ 18.67			View Dimensions
	10010	Tax 1	Liability	\$ 0.00			View Dimensions
	10010	Tax 1	Liability	\$ 45.11			View Dimensions
	10010	Tax 1	Liability	\$ 0.00			View Dimensions
	10010	Tax 1	Liability	\$ 192.88			View Dimensions
	10010	Tax 1	Liability	\$ 0.00			View Dimensions
	10010	Tax 1	Liability	\$ 45.11			View Dimensions
	10010	Tax 1	Liability	\$ 0.00			View Dimensions
	10010	Tax 1	Liability	\$ 0.00			View Dimensions
	10010	Tax 1	Liability	\$ 9.80			View Dimensions
	10010	Tax 1	Liability	\$ 0.00			View Dimensions
	10010	Tax 1	Liability	\$ 10.98			View Dimensions
	10010	Tax 1	Liability	\$ 0.00			View Dimensions
	10015	Net 1	Liability	\$ 0.00		\$ 1,476.41	View Dimensions
	10025	Earning 1	Expense	\$ 333.33		\$ 0.00	View Dimensions
	10025	Earning 1	Expense	\$ 1,000.00		\$ 0.00	View Dimensions
	10025	Earning 1	Expense	\$ 666.67		\$ 0.00	View Dimensions

Transaction Details

Name	Value	Dimensions
CODE Dimension		View Dimensions
DEP Dimension		View Dimensions
TAX		View Dimensions
DEFA		View Dimensions

General Ledger Post Pay Run Batch Review (with Dimensions):

Review General Ledger Batch

This report shows transactions that are associated with a General Ledger batch. Click here to return to your [General Ledger Batch Summary Report](#).

Batch Details

Batch Name: 6/2/2022, 12:00:00 AM
 Batch Status: Pending
 Submit Date:
 Credits: \$2,266.46
 Debits: \$2,266.46

Recalculate Batch

Warning! You have 2 transactions not mapped to an account which are currently held in a Suspense Account. [Click here to review.](#)

Filter Table... Submit Batch

Entity Code	Account Number	Account Name	Account Type	Credit	Transaction Details	Value	Dimensions
	10025	Earning 1	Expense	\$ 0.00			View Dimensions
	10010	Tax 1	Liability	\$ 0.00			View Dimensions
	10010	Tax 1	Liability	\$ 0.00			View Dimensions
	10010	Tax 1	Liability	\$ 9.80			View Dimensions
	10010	Tax 1	Liability	\$ 45.11			View Dimensions
	10010	Tax 1	Liability	\$ 192.88			View Dimensions
	10025	Earning 1	Expense	\$ 0.00		\$ 1,000.00	View Dimensions
	10010	Tax 1	Liability	\$ 192.88		\$ 0.00	View Dimensions

Transaction Details

Name	Value	Dimensions
CODE Dimension		View Dimensions
DEP Dimension		View Dimensions
TAX		View Dimensions
DEFA		View Dimensions

Navigation:

General Ledger Account Summary Report: Greenshadesonline.com → Reports Tab → General Ledger Section Account Summary

General Ledger Post Pay Batch Review: Greenshadesonline.com → Payroll Tab → View Pay Run (in the completed pay run widget) → General Ledger Section → Review Batch

Enhanced Feature - General Ledger: Small enhancements to GL Preview

- Background:** The new **General Ledger Preview** functionality had not yet supported a Credit and Debit summary section. This of course made the feature far less useful when it is meant to be utilized as an “at a glance” tool.
- What’s new?** The feature has been expanded via the following two changes:
 - Credit and Debit totals have been added at the top of the page to allow for a quick review that the ledger is balanced prior to submission
 - The button to access the preview has been visually adjusted on the *Review & Submit* step to separate itself more clearly from the account change functions

General Ledger Preview in the *Review & Submit* Step:

The screenshot shows the 'Review & Submit' step of a payroll process. At the top, there are navigation tabs: Employees, Hours & Earnings, Deductions, Benefits, Arrears, and Review & Submit. Below the tabs, there is a summary section with 'Total Employees: 5', 'Estimated Total Cost: \$ 5,459.86', and 'Estimated Total Tax: \$ 1,840.70'. A 'Review General Ledger' button is highlighted with a red box.

General Ledger Preview

The data shown is for informational purposes only and cannot be exported as these transactions are not generated until payroll is submitted.

Account Number	Account Name	Debit	Credit	Employee ID	Check Date	Type	Dimensions	Details
10029	Earning 5	\$ 4,950.00	\$ 0.00	ANHSP001	06/29/2022	Earning	View Dimensions	View Details
10015	Net 1	\$ 0.00	\$ 3,619.16	ANHSP001	06/29/2022	NetWage	View Dimensions	View Details
10010	Tax 1	\$ 0.00	\$ 644.00	ANHSP001	06/29/2022	Tax	View Dimensions	View Details
10010	Tax 1	\$ 0.00	\$ 71.78	ANHSP001	06/29/2022	Tax	View Dimensions	View Details
10010	Tax 1	\$ 0.00	\$ 195.30	ANHSP001	06/29/2022	Tax	View Dimensions	View Details
10010	Tax 1	\$ 0.00	\$ 49.50	ANHSP001	06/29/2022	Tax	View Dimensions	View Details
10010	Tax 1	\$ 0.00	\$ 63.36	ANHSP001	06/29/2022	Tax	View Dimensions	View Details
10010	Tax 1	\$ 0.00	\$ 306.90	ANHSP001	06/29/2022	Tax	View Dimensions	View Details
10010	Tax 1	\$ 306.90	\$ 0.00	ANHSP001	06/29/2022	Tax	View Dimensions	View Details
10010	Tax 1	\$ 0.00	\$ 29.70	ANHSP001	06/29/2022	Tax	View Dimensions	View Details
10010	Tax 1	\$ 29.70	\$ 0.00	ANHSP001	06/29/2022	Tax	View Dimensions	View Details
10010	Tax 1	\$ 0.00	\$ 71.78	ANHSP001	06/29/2022	Tax	View Dimensions	View Details
10010	Tax 1	\$ 71.78	\$ 0.00	ANHSP001	06/29/2022	Tax	View Dimensions	View Details
10010	Tax 1	\$ 0.00	\$ 101.48	ANHSP001	06/29/2022	Tax	View Dimensions	View Details
10010	Tax 1	\$ 101.48	\$ 0.00	ANHSP001	06/29/2022	Tax	View Dimensions	View Details

Credits: \$ 5,459.86
Debits: \$ 5,459.86

Close

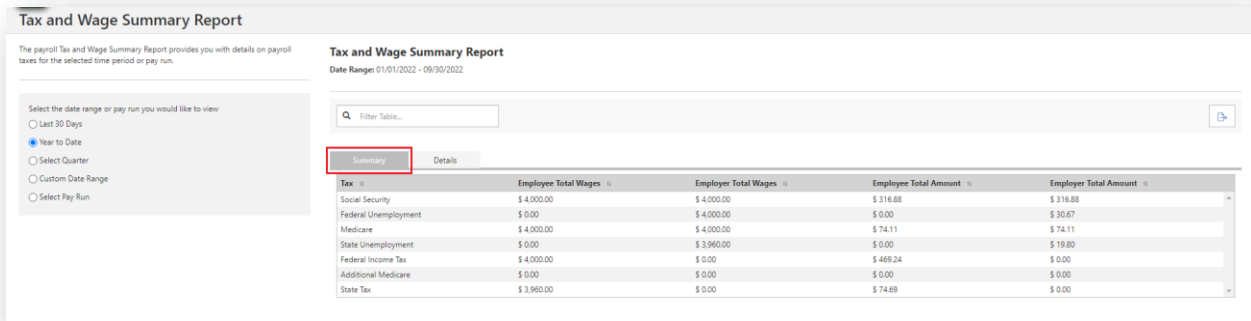
Navigation:

General Ledger Preview: Greenshadesonline.com → Payroll Tab → Start / Continue Pay Run → Review & Submit

Enhanced Feature - Reporting: Tax and Wage Summary Report Expanded

- Background:** Practitioners and their accountants did not have a Greenshades provided report that summarized the total tax liabilities (EE/ ER) per pay run, or across other date ranges, that was sectioned into tax type totals. The current report only provided a detail view that would likely not fit the less detailed reporting requirements of some users.
- What’s new?** The newly added “summary” tab in the report provides a way for clients to quickly see the total amounts that need to be paid out from their payrolls sectioned by logical Tax Types (i.e. Federal Income Tax, State Taxes, etc.).

New Tax and Wage “Summary” Tab:



New Tax and Wage “Summary” Tab (exported):

Tax Category	Employee Total Wages	Employer Total Wages	Employee Total Amount	Employer Total Amount
Social Security	\$4000.00	\$4000.00	\$316.88	\$316.88
Federal Unemployment	\$0.00	\$4000.00	\$0.00	\$30.67
Medicare	\$4000.00	\$4000.00	\$74.11	\$74.11
State Unemployment	\$0.00	\$3960.00	\$0.00	\$19.80
Federal Income Tax	\$4000.00	\$0.00	\$469.24	\$0.00
Additional Medicare	\$0.00	\$0.00	\$0.00	\$0.00
State Tax	\$3960.00	\$0.00	\$74.69	\$0.00
Totals			\$934.92	\$441.46
Total Taxes Debited				\$1376.38

Navigation:

Tax and Wage Summary Report: Greenshadesonline.com → Reports Tab → Tax and Wage Summary Report

Tax Announcement – Fix for CA SDI Multi-state results

Summary: Due to a prevailing tax issue with a partnering software, Greenshades payroll tax calculations have changed the way they apply CA SDI. Previously, in multi-state work scenarios, employees may have received too little or \$0 in CA SDI withholdings.

Impact: The provided fix will remedy issues for employees that have their primary work location set as CA to ensure the SDI will only be taken as CA SDI. Additionally, the total amount of SDI taken will be for all earnings in that pay period, even if the employee worked across multiple states, not just CA.

Navigation:

Pay Runs: Greenshadesonline.com → Payroll Tab → Start / Continue Pay Run → Preview Paystub

Recent Updates 9/14/2022

GREENSHADES ONLINE PAYROLL

Performance Enhancements– Pay Run Wizard Hours & Earnings

- **Background:** Payroll users have reported that the action to add or remove hours or earnings rows was occasionally slow and unresponsive. The Pay Run Wizard is at the center of the payroll product and is therefore a top priority to not only be deeply functional, but to operate quickly and without error.
- **What's new?** The performance for both the addition and removal of Hours or Earnings rows in the Pay Run Wizard have been greatly optimized. The changes will result in faster and smoother operation when adding Hours and/or Earnings in the Pay Run Wizard.

Improved Hours & Earnings actions:

Payroll

Pay Run: WEEKLY 07/08/2022 (Scheduled) Check Date: 07/08/2022 Pay Period: 06/26/2022 - 07/02/2022 Cancel Pay Run

Employees ✓ Hours & Earnings 2 Deductions ✓ Benefits ✓ Arrears ✓ Review & Submit ✓

Review your employee's hours and pay rate for all earnings in this pay period. If your employee's hours have not been imported via the Greenshades Timesheets module or other integration, you can bulk upload hours or manually add employees to complete this payroll. You can override any employee's earnings by entering the total earning amount in the Gross Pay Field.

Filter Table... + Add Hours & Earnings Refresh Total Hours: 2,019.00 Compare
Last Pay Run: 1,960.00 hours

Employee ID	Position	Department	Location	Work Period	Hours	Minutes	Pay Rate	Gross Pay			
ANH0F001	Position A	Department A	Alaska Work Locati	06/26/2022 - 07/03/2022	0	0	\$ 50.00 fixed	\$ 50.00	✖		
ANH0W001	DAGOBERT WIECZOREK	SALARY	Position A	Department A	Arkansas Work Loca	06/26/2022 - 07/03/2022	40	0	\$ 52,000.00 per year	\$ 1,000.00	✖
ANH0W001	DAGOBERT WIECZOREK	HOURLY	Position A	Department A	Alabama Work Loca	06/26/2022 - 07/03/2022	50	0	per hour	\$ 5,000.00	Undo
ANH0S001	DANNY SQUIER	SALARY	Position A	Department A	Arizona Work Locati	06/26/2022 - 07/03/2022	40	0	\$ 52,000.00 per year	\$ 1,000.00	✖
ANH0K001	ERNESTINE KIKER	SALARY	Position A	Department A	California Work Loca	06/26/2022 - 07/03/2022	40	0	\$ 52,000.00 per year	\$ 1,000.00	✖
ANH0N001	FINLAY KIKER	SALARY	Position A	Department A	Colorado Work Loca	06/26/2022 - 07/03/2022	40	0	\$ 52,000.00 per year	\$ 1,000.00	✖
ANH0M001	GALI MARRA	SALARY	Position A	Department A	Connecticut Work L	06/26/2022 - 07/03/2022	40	0	\$ 52,000.00 per year	\$ 1,000.00	✖

Navigation:

Pay Runs (Hours & Earnings Step): Greenshadesonline.com → Payroll Tab → Start / Continue Pay Run → Hours & Earnings Steps

Performance Enhancements– Pay Run Wizard Review & Submit (Recalculates)

- Background:** Edits applied within the “View Paystub” screen of the Review & Submit step will lead to a recalculation of those changes. Payroll users have reported that these calculations may be slow to complete. It is common for admins to submit last minute changes through the Review & Submit step of the wizard, leaving it to be a high priority area to properly support.
- What’s new?** Changes have been made to how the payroll system will save these edits from the “View Paystub” screen. The employee’s paystub will now quickly recalculate and bring the user back to the review and submit page once complete.

Example of an employee recalculation:

ASHFORD BEACHAM
 Employee ID: ANH40001
 Department: Department B
 Work Location: Wisconsin Work Location
 Position: Position B
 Hire Date: 11/20/2019
 HR Status: Active

Paycheck Summary
 Net Pay: \$ 1,761.75
 Total Hours: 40 Hour(s) 0 Minute(s)
 Gross Pay: \$ 2,000.00
 Total Deductions: \$ 0.00
 Total Employee Taxes: \$ 238.25
 Payment Method: Paper Check

Earnings

Code Name	Pay Stub Name	Position	Department	Location	Hours	Minutes	Amount	Year To Date
SALARY	SALARY	POSB	DEPB	WISCONSIN	40	0	\$ 2,000.00	\$ 2,000.00
Totals					40 Hour(s)	0 Minute(s)	\$ 2,000.00	

Benefits

Code Name	Pay Stub Name	Arrears Balance	Amount	Year To Date
Totals		\$ 0.00	\$ 0.00	

Deductions

Code Name	Pay Stub Name	Arrears Balance	Amount	Year To Date
Totals		\$ 0.00	\$ 0.00	

Time Off

Code Name	Pay Stub Name	Balance	Used	Accrued
Totals				

Buttons: Cancel, Save and Recalculate Taxes

Navigation:

Pay Runs (Review & Submit): Greenshadesonline.com → Payroll Tab → Start / Continue Pay Run → Review & Submit

Tax Announcement – Ohio JEDD Taxes

Summary: Due to a prevailing tax issue with a partnering software, Greenshades payroll tax calculations have been temporarily changed to effectively ignore all Ohio JEDD taxes from our payroll tax calculations. This will imply that any employees working in Ohio under a locality that would normally be affected by JEDD taxes will NOT have them withheld via the GS Payroll software.

Impact: Since Greenshades Payroll will temporarily not withhold JEDD taxes, this will imply that the practitioner / client is responsible for determining applicable JEDD withholdings for relevant employees and facilitating payment outside of Greenshades Software. To reiterate, this is a temporary change. We expect this to be resolved and to start pulling JEDD taxes out via payroll again in 2022-Q4.

Navigation:

Pay Runs: Greenshadesonline.com → Payroll Tab → Start / Continue Pay Run → Preview Paystub

Recent Updates 8/26/2022

GREENSHADES ONLINE PAYROLL

New Feature - New Pay Run Type: Adjustment Pay Runs (Initial Rollout)

- **Feature Description:** In the Greenshades online Payroll module, Adjustment Pay Runs are used to remediate mistakes or make changes to the results of an already submitted and processed

pay run. Adjustments are a very standard operation for payroll practitioners as payrolls are not always perfect. There are many scenarios and types of mistakes that these practitioners may need to address. The goal of this tool is to provide users a clear and comprehensive way to make these very important, and potentially complex, amendments. The process that Greenshades uses to approach these problems is to allow a user to start by finding their historical pay run that they expect requires changes. The tool will help the user determine if an Adjustment Pay Run is indeed the right avenue for correction. Assuming it is, the tool will create a new pay run that is populated with the inputs of the selected source pay run. At this point, you can imagine the problem being “As a payroll practitioner, I wish that I entered X instead of Y before submitting the original pay run, so that my employees were paid as intended”. As such, the user will be tasked with making changes to the values of the original pay run and turning them into what they wish were entered the first time. After entering these new values, Greenshades’ intelligent pay run calculations will determine the earnings, benefits, deductions, arrears, and tax differences between the original run and this new Adjustment Pay Run. Upon pay run submission, resulting net checks (positive or negative), and future arrearages, will be generated for the affected employees. The most important idea to keep in mind when using this tool is to always remember to enter the values that you “wish” you had in the first place and let Greenshades do the rest.

- **Key Feature Information:**

- Employees who were **NOT** included in the original pay run that you have chosen to adjust, cannot be added to the adjustment run (refer to [What this tool is not](#)).
- Tax overrides will **NOT** be pulled from the original pay run into an *Adjustment Pay Run*.
- YTD tax auto adjustments are calculated at the time that this amendment pay run is started. This means that if the tax auto adjust may be triggered from amounts that were 'accrued' on pay runs that took place *after* the pay run that is being adjusted. The resulting Auto Adjustment will appear on the *Adjustment Pay run*.
- It is not advisable to pull employees into an *Adjustment Pay Run* if they do not actually require an adjustment be made. This can cause unintended consequences from recalculations (i.e. Tax override will not be accounted for, tax auto adjustments may trigger, accidental edits could be performed, etc.). Even if there were no resulting changes, and no other issues occurred, those employees would still be distributed a \$0 check, which will inevitably confusion Employees and potentially lead to inconsistent reporting.
- Garnishments cannot be “edited” in an *Adjustment Pay Run*, just as they cannot be in the standard pay run wizard. They will still recalculate based on changes to earnings or employee disposable income.

- Pay Runs or checks that were voided cannot be adjusted
- Adjustments can be made up to the start of the current calendar year. You may not adjust pay runs from prior years.
- **What this tool is:** The tool is best positioned to amend the following mistakes (as well as some others not mentioned):
 - Employee(s) was overpaid
 - Employee(s) was paid in the wrong location
 - Employee(s) was paid via incorrect earning codes
 - Employee(s) were paid, and therefore taxed, against the wrong location
 - Employee(s) were assigned incorrect deduction / benefit codes or deduction / benefit amounts
 - Employee(s) were included in a pay run that should not have been
- **What this tool is not:** This tool is incredibly useful to remediate individual pay run based errors. However, it does not meet every use case. Consider the below as situations where this tool may not be the correct solution alongside the options to consider:
 - **Scenario:** Employee(s) were underpaid or not included in a prior pay run
 - **Proposed Solution:** Create a Special Pay Run and include the missed employees or add the additional earnings that were not included in prior runs
 - **Scenario:** Looking to edit, remove, or add a tax that was not pulled in the original run and is NOT a result of other changes in the adjustments (i.e. location changes)
 - **Proposed Solution:** This tool should not be used to adjust specific taxes or tax amounts. Taxes can and will change based on resulting input changes, but the tool is not meant to edit the resulting taxes into the numbers the user desired. This practice is typically advised against, but in rare scenarios the client should contact support for assistance via the *Manual Transactions Tool*
 - **Scenario:** Making subject wage adjustments at quarter end
 - **Proposed Solution:** Contact Support for assistance. The representatives can utilize the *Manual Transactions Tool* or request next level support assistance.
- **Will I, as the reader, benefit from this feature?**
 - If you have a business that often receives last minute, or post pay run timesheet submissions (i.e. staffing)
 - If you have complicated benefits or deductions and / or tiered models that require great attention (these setups are more prone to mistakes)

- If you have a commission-based businesses or sales models that will pay monies in advance and need to remediate later
- **Who can use this feature?** This will be rolled out to pilot clients for a short period. The full rollout will be dependent on received feedback or required changes. **Upon request, this feature can be turned on for your workspace at any time.**

Starting an Adjustment Pay Run:

The screenshot displays the Payroll Dashboard interface. At the top, there is a navigation menu with options: Home, Employees, Payroll, Pay History, Tax Service, Year-End Forms, Reports, and Settings. The main content area is divided into several sections:

- Payroll Dashboard:** Shows current and in-progress payroll runs with 'Continue Pay Run' buttons.
- Upcoming Pay Runs:** Lists scheduled runs with check dates and pay periods.
- Other Payroll Actions:** Includes buttons for 'Run Special Payroll', 'Calculators', 'Generate ACH Prenote', 'Reports', and 'Void Checks'.
- Last Payroll:** Features a donut chart showing a total of \$3,938.78, broken down into Employee Net Pay, Employee Taxes, Benefits, and Deductions.
- Recent Pay Runs:** A table listing past runs with columns for Check Date, Type, Name, and Cost. The 'Adjust' button for the most recent run is highlighted with a red box.

Check Date	Type	Name	Cost	Action
09/01/2022	Scheduled	WEEKLY 09/01/2022	\$ 3,938.78	Adjust View
08/31/2022	Scheduled	MONTHLY 08/31/2022	\$ 143,145.13	Adjust View
08/27/2022	Special	Second LM Adj Test	\$ 33,112.48	Adjust View
08/25/2022	Adjustment	WEEKLY 09/01/2022 - Adjustment	-\$ 269.13	View

The Adjustment Triage Step:

Adjust a prior pay run

You selected **MONTHLY 08/31/2022 (Scheduled)** for adjustment.

What do you need to change?

- Underpaid wages
- Overpaid wages
- Void or cancel a check
- Employee paid in wrong location (affecting minimum wage or taxes)
- Adjust benefit or deduction code
- Specific manual adjustment (potentially affecting taxes)

Overpaid wages
 Select "Adjust Payrun," find the employee(s), and adjust hours or wages to the values they should have been. When complete, this process will create an adjustment check or wage repayment; all applicable tax adjustment/deduction arrears will be recouped from future paychecks automatically.

[Adjust Payrun](#)

Selecting the Employees to include in the Adjustment:

Adjust a prior pay run

You selected **WEEKLY 09/01/2022 (Scheduled)** for adjustment.

The employees who were issued checks from this payrun are listed below. Select each employee that should be adjusted. Only the employees selected below will be included in the adjustment pay run.

Filter Table...

<input type="checkbox"/>	Employee ID	Employee Name	Department	Class	Division
<input checked="" type="checkbox"/>	ANHDF001	DEBBIE FOLKS	Department A	CLASSA	
<input type="checkbox"/>	ANH0W001	DAGOBERT WIECZOREK	Department A	CLASSA	
<input checked="" type="checkbox"/>	AF5FM001	FALLON MESSICK	Department A	CLASSA	
<input type="checkbox"/>	AF5PO001	PICERIOUS OGREN	Department A	CLASSA	
<input type="checkbox"/>	AF5TW001	TIRION WESTBROOKS	Department B	CLASSB	

[Previous](#) [Submit](#)

Adjustment Pay Run - Hours & Earnings Step:

Home Employees Payroll Pay History Tax Service Year-End Forms Reports Settings

Payroll

Info: The Adjustment Pay Run is pre-filled with information from the pay run you selected. To make adjustments at any step, replace the original amount with the value you want.

Pay Run: WEEKLY 09/01/2022 - Adjustment (Adjustment) Check Date: 09/01/2022 Edit info Pay Period: 08/21/2022 - 08/27/2022 Original Pay Run: WEEKLY 09/01/2022 (Scheduled) Cancel Pay Run

Employees 1 Hours & Earnings 2 Deductions 3 Benefits 4 Arrears 5 Review Adjustments 6

Review your employees' hours and pay rate for all earnings in this pay period. If your employees' hours have not been imported via the Greenshades Timesheets module or other integration, you can bulk upload hours or manually add employees to complete this payrun. You can override any employee's earnings by entering the total earning amount in the Gross Pay field.

Filter Table... + Add Hours & Earnings Refresh Total Hours: 40.00 Last Pay Run: 40.00 hours Compare

Employee ID	Employee Name	Earning Code	Position	Department	Location	Work Period	Hours	Minutes	Pay Rate	Gross Pay
ANHDF001	DEBBIE FOLKS	BONUS	Position A	Department A	Alaska Work Loc	08/20/2022 - 08/27/2022	0	0	\$ 1,500.00 fixed	\$ 1,500.00
AFSN001	FALLON MESSICK	SALARY 2	Position A part 2	Department A	Massachusetts W	08/20/2022 - 08/27/2022	40	0	\$ 50,000.00 per year	\$ 961.54

Total Entries: 2

Previous Save & Exit Next

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Adjustment Pay Run – Review:

Home Employees Payroll Pay History Tax Service Year-End Forms Reports Settings

Payroll

Info: The Adjustment Pay Run is pre-filled with information from the pay run you selected. To make adjustments at any step, replace the original amount with the value you want.

Pay Run: Multiple Adjustments - Adjustment (Adjustment) Check Date: 08/24/2022 Edit info Pay Period: 08/14/2022 - 08/22/2022 Original Pay Run: Multiple Adjustments (Special) Cancel Pay Run

Employees 1 Hours & Earnings 2 Deductions 3 Benefits 4 Arrears 5 Review Adjustments 6

Review and submit your payroll for this period. If any changes are required to properly calculate this pay run, you may go back to any prior step and update any necessary fields. To override any calculated values for submission on this pay run, click edit to enter the desired final values. Please note that once you have clicked Submit, you will be unable to undo or cancel this pay run.

Total Employees: 1 Total Wage Repayment Arrears: -204.01

Filter Table... Adjustments: 1 | Paper Paycheck: 0 Direct Deposit: 1 Change

Result Type	Employee ID	Employee Name	Hours	Minutes	Gross Pay	Taxable Wages	Standard Deductions	Wage Repayment Deduction	Employee Taxes	Net Pay	Benefits Total	Employer Taxes	View Paystub
Adjustment	ANHDF001	DEBBIE FOLKS	25	0	\$ 850.00	\$ 850.00	\$ 0.00	\$ 204.01	\$ 225.32	\$ 420.67	\$ 0.00	\$ 65.02	View Paystub
Desired	ANHDF001	DEBBIE FOLKS	50	0	\$ 2,625.00	\$ 2,625.00	\$ 20.00	\$ 0.00	\$ 697.13	\$ 1,907.87	\$ 0.00	\$ 199.28	
Original	ANHDF001	DEBBIE FOLKS	25	0	\$ 2,062.50	\$ 2,062.50	\$ 20.00	\$ 0.00	\$ 555.30	\$ 1,487.20	\$ 0.00	\$ 156.26	
Prior Adjustment	ANHDF001	DEBBIE FOLKS	0	0	-\$ 37.50	-\$ 37.50	\$ 0.00	-\$ 28.06	-\$ 9.44	\$ 0.00	\$ 0.00	-\$ 2.88	
Prior Adjustment	ANHDF001	DEBBIE FOLKS	0	0	-\$ 250.00	-\$ 250.00	\$ 0.00	-\$ 175.95	-\$ 74.05	\$ 0.00	\$ 0.00	-\$ 19.12	

Previous Last Saved: 8:03:15 PM Save & Exit Next

Navigation:

Adjustment Pay Run: Greenshadesonline.com > Payroll Tab >Recent Pay Runs >Adjust

Enhanced Feature - Pay Run Wizard: Combined Hours & Earnings (Initial Rollout)

- **Feature Description:** With the goal of creating a more fluid and comprehensive Pay Run Experience, Greenshades has combined the Hours and Earnings stages of the Pay Run Wizard. The user interface and imports have all been updated to operate via a single page or import respectively
- **Key Feature Information:** This combined view will be the new standard for the product moving forward. That said, for the coming months, Greenshades will continue to support the ability to import this data in the historical format of Hours and Earnings as separate files. Once the change has gone live, if this separation is required to maintain smooth operation for your business, you may request to keep the separated import option. In addition, this change has added some other improvements found below
 - Active clients that receive this combined functionality will be provided both separated and combined import options at first
 - All newly onboarded clients will be provided the combined Hours & Earnings functionality / import only
 - One row in the interface no longer implies one employee. Each row in the new wizard will indicate a single work week (7 days)
 - The Hours compare tool has been visually reworked
- **Will I, as the reader, benefit from this feature?**
 - All clients should benefit from this change as the new functionality will present a more fluid and straightforward management of employee hours / earnings.
 - This change is specifically impactful for users looking to import a single file for Hours & Earnings or clients that are accustomed to managing this data in one place or table (common in many other HCM systems)
- **Who can use this feature?** This will be rolled out to pilot clients for a short period. The full rollout will be dependent on received feedback or required changes. **Upon request, this feature can be turned on for your workspace at any time.**

Standard Hours Step (separated from earnings):

Payroll

Pay Run: BIWEEKLY 08/26/2022 (Scheduled) Check Date: 08/26/2022 Pay Period: 08/07/2022 - 08/20/2022 [Cancel Pay Run](#)

Employees (1) Hours (2) Earnings (3) Deductions (4) Benefits (5) Arrears (6) Review & Submit (7)

Review your employees' hours for this pay period. If your employees' hours have not been imported via the Greenshades Timesheets module or other integration, you can bulk upload hours or manually add employees to complete this payroll.

7 Total Employees 3 Unique Hours Codes 385.00 Total Hours (Last Pay Run 0.00 (+385.00 hours)) [Compare to Last Payroll](#)

 [+ Add Hours](#) [Refresh Timesheets](#)

Employee ID	Employee Name	Earning Code	Pay Stub Name	Position	Department	Location	Hours	Minutes			
<input type="checkbox"/>	41742	Worst change	INCN	INCN	0109		test1	6	0	+	-
<input type="checkbox"/>	41742	Worst change	HOURLY	HOURLY	0109		test1	3	0	+	-
<input type="checkbox"/>	41725	Whatever Toast	INCN	INCN	0109		QA	40	0	+	-

New Hours & Earnings combination:

Payroll

Pay Run: BIWEEKLY 09/08/2022 (Scheduled) Check Date: 09/08/2022 Pay Period: 08/21/2022 - 09/03/2022 [Cancel Pay Run](#)

Employees 1 **Hours & Earnings** 2 **Deductions** 3 **Benefits** 4 **Arrears** 5 **Review & Submit** 6

Review your employees' hours and pay rate for all earnings in this pay period. If your employees' hours have not been imported via the GreenShades Timesheets module or other integration, you can bulk upload hours or manually add employees to complete this payroll. You can override any employee's earnings by entering the total earning amount in the Gross Pay field.

Filter Table... + Add Hours & Earnings Refresh **Total Hours: 80.00** Compare Last Pay Run: 80.00 hours

Employee ID	Employee Name	Earning Code	Position	Department	Location	Work Period	Hours	Minutes	Pay Rate	Gross Pay
ANHR001	KADIA RUTNOWSKI	SALARY	Position A	Department A	Wisconsin Work Loc	08/16/2022 - 08/23/2022	13	20	\$ 52,000.00 per year	\$ 333.33
ANHR001	KADIA RUTNOWSKI	SALARY	Position A	Department A	Wisconsin Work Loc	08/23/2022 - 08/30/2022	40	0	\$ 52,000.00 per year	\$ 1,000.00
ANHR001	KADIA RUTNOWSKI	SALARY	Position A	Department A	Wisconsin Work Loc	08/30/2022 - 09/06/2022	26	40	\$ 52,000.00 per year	\$ 666.67

Adding earnings via the new Hours & Earnings combination:

09/08/2022 (Scheduled) Check Date: 09/08/2022 Pay Period: 08/21/2022 - 09/03/2022

Hours & Earnings 2 **Deductions** 3 **Benefits** 4 **Arrears** 5 **Review & Submit** 6

pay rate for all earnings in this pay period. If your employees' hours have not been imported via the GreenShades Timesheets module or other integration, you can bulk upload hours or manually add employees to complete this payroll. You can override any employee's earnings by entering the total earning amount in the Gross Pay field.

Add Earnings

- Add Employees
- Select Codes
- Add Details**

Add Details

Add details to the selected employees to add earning codes.

Employee ID	Employee Name	Earning Code	Position	Department	Location	Work Period	Hours	Minutes	Pay Rate
AFSNY001	Nancy Yeaker	HIGHER HOUR	Position A	Department D	Alabama Wo	08/23/2022	40	0	\$ 50.00 per hour

Apply this earning code to current and future payruns? (active employees only)

[Previous](#) [Cancel](#) [Save](#)

Navigation:

Combined Hours & Earnings Step: Payroll Tab > Open Pay Run > Hours & Earnings

New Page - Employee Information: Payroll Arrears Page (Initial Rollout)

- **Feature Description:** A new page has been added to the employee card to view arrears balances and their history of changes. This page is for informational and viewing purposes only. Its need is primarily a result of the Wage Repayment Arrears that will surface via negative net earnings submitted by an *Adjustment Pay Run*.
- **Key Feature Information:** This page accessible at a per employee view. As a result, this page will not replace arrears reports for the purpose of reviewing arrears across the entire Workspace / Company.

- **Will I, as the reader, benefit from this feature?** All clients can benefit from this page since it is not a change to functionality, but a new page that will assist in making arrear information more visible and well understood
- **Who can use this feature?** This will be rolled out to pilot clients for a short period. The full rollout will be dependent on received feedback or required changes. **Upon request, this feature can be turned on for your workspace at any time.**

New Arrears Page:

Employee Arrears
DEBBIE FOLKS
Digital Employee Folder

This screen shows current balance and history for Employee Arrears, which are amounts owed to an employer as a result of a pay run miscalculation. To change that way that arrears are generated, edit the configuration of the underlying deduction, benefit, or tax code from the Payroll Codes page.

Show currently \$0 balance arrears

Filter Table...

Code	Type	Repayment Option	Date	Source	Check Number	Change	Balance
Wage Repayment	Deduction	Full	08/24/2022	Payrun	1634	-\$ 73.87	\$ 73.87
			08/22/2022	Payrun	1633	\$ 121.61	\$ 82.40
			08/22/2022	Payrun	1631	\$ 100.00	\$ 104.01
			08/22/2022	Payrun	1626	-\$ 204.01	\$ 204.01
			08/22/2022	Payrun	1625	-\$ 28.06	\$ 28.06
Fixed	Deduction	Full	08/22/2022	Payrun	1633	\$ 20.00	\$ 0.00

Wage Repayment Help Text:

Code

Wage Repayment ⓘ

This earnings code is internally generated due to a resulting negative net earning. This was likely the result of an adjustment against this employee.

Navigation:

Payroll Arrears Page: Greenshadesonline.com > Employees Tab > Select an Employee > Payroll > Arrears

New Feature - Pay Run Wizard: Show GL Preview at the Review and Submit step

- **Feature Description:** A new option has been added to the *Review and Submit* step of the Pay Run wizard to allow users to see the GL transactions that will be produced from completing the current Pay Run. Clicking the link Labeled “Preview General Ledger” will present users with all pending GL transactions so that they can review and confirm that the transactions data, as well as their current account mappings, are correct before submitting the Pay Run.

- **Key Feature Information:** Note that there is intentionally no ability to download or export this information since these transactions have NOT actually occurred until after payroll submission. Exporting this data before actual creation would lead to falsified and incorrect accounting.
- **Will I, as the reader, benefit from this feature?** All clients that Utilize the Greenshades General Ledger post pay run can and should benefit from this feature. It is advised for your practitioner to review these transactions before the submission of every pay run
- **Who can use this feature?** This feature is live for all clients

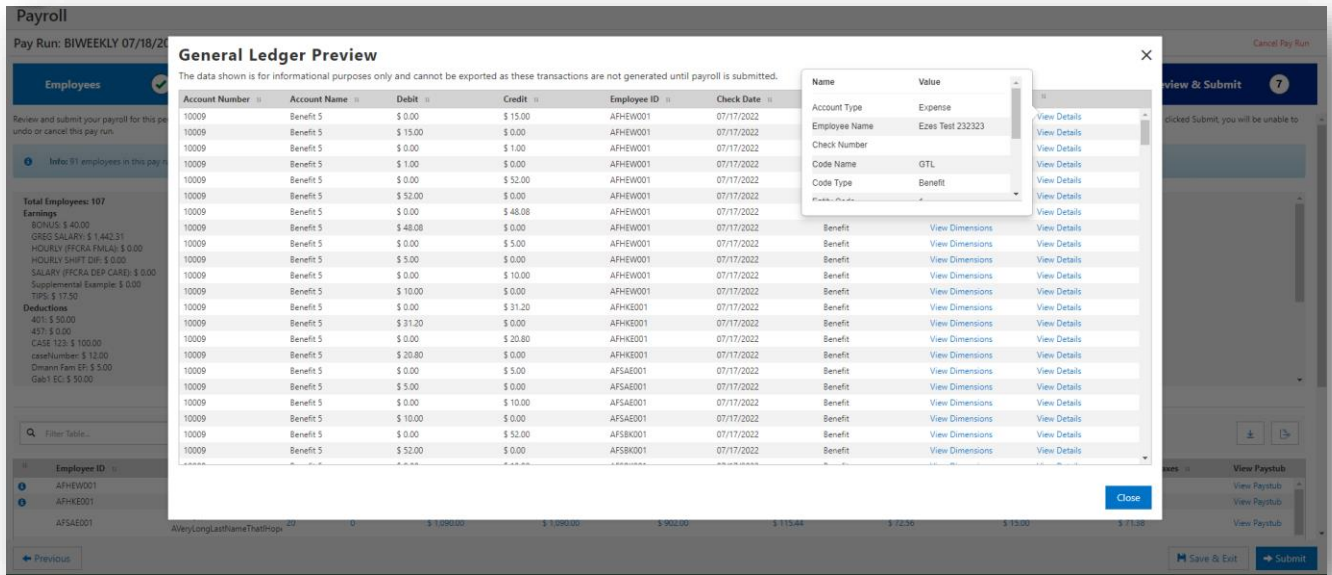
Accessing the General Ledger Preview:

Review and submit your payroll for this period. If any changes are required to properly calculate this pay run, you may go back to any prior step and update any necessary fields or cancel this pay run.

Total Employees: 14		Estimated Total Cost: \$ 13,216.11
Earnings		
BONUS: \$ 125.00		FFCRA SICK: \$ 0.00
HOURLY 2: \$ 0.00		OT: \$ 0.00
SALARY: \$ 12,000.00		SALARY PTO: \$ 0.00
Deductions		
401K: \$ 0.00		Banks: \$ 48.63
HEALTH EF: \$ 0.00		HEALTH EO: \$ 25.00
HSA Deduction Catchup: \$ 0.00		HSA FAMILY: \$ 50.00
Standard Deduction: \$ 0.00		
Benefits		
HEALTH EO: \$ 25.00		HSA Benefit: \$ 0.00
HSA FAMILY: \$ 25.00		Standard Benefit: \$ 25.00
Other Taxes		

Total Employees: 14 | Paper Paycheck: 11 | Direct Deposit: 3
Change [Preview General Ledger](#)

The General Ledger Preview:



Navigation:

General Ledger Preview: Greenshadesonline.com > Payroll > Open Pay Run > Review & Submit > Preview General Ledger

Recent Updates 8/3/2022

GREENSHADES ONLINE PAYROLL

New Feature - New Employee Fields: Custom Fields

- Feature Description:** The list of standard employment information is important for all Greenshades clients; however, these fields do not provide any flexibility in the form of custom identification to meet client specific business needs. Many clients require information such as: Company specific IDs, noteworthy dates, operational qualifiers, and more that are very specific to their own operations that would not be useful to other Greenshades clients. To provide these clients a more personalized employee set up experience that can solve this explained pain point, we are introducing Custom Fields. These fields will provide clients the ability to define their own list of identifiers that directly relate to all, or even a subset, of their employees. The fields will serve as way for our clients to define a level of employee identification beyond standard HCM qualifiers.
- Additional Information:** Custom Fields, by nature of them being client specific, are used as identifiers for informational purposes only. These fields are not meant to be controllers or

inputs for Greenshades products. Moreover, this feature should **not** be thought of as a “one size fits all” solution for adding to the data types that Greenshades maintains and supports. The below pieces of information will assist in creating a better definition of what these fields are used for:

- **Common use cases for Custom Fields:**
 - Maintaining Unique company IDs
 - Tracking important employee level dates (i.e. tenure)
 - Adding additional contact information (i.e. phone numbers or addresses)
 - Assigning business specific notations for employee achievements, operations, or feats
- **How Custom Fields are managed:**
 - *Custom Fields* are a function of Greenshades Online (GO) and are controlled at the client Administrator level
 - *Custom Fields* are not controlled by or viewable at the employee level or via Green Employee (GE)
 - The *Custom Field's* value assigned against their employees can be managed in bulk or one at a time through the *Custom Fields* settings or in the employee profile
- **Reporting on Custom Fields:**
 - HR or Payroll level Reports will NOT automatically pull in Custom Fields as additional columns
 - Reporting will be expanded on a one-by-one basis, or as requested, to have these new fields as an included set of data points
- **Who will benefit from this feature?** Any client, payroll or not, that is looking to expand their employee information with additional dates, IDs, or other piece of information about the EEs employment
- **Who can use this feature?** This will be rolled out to early access clients for a short period. The full rollout will be dependent on received feedback or required changes. **Upon request, this feature can be turned on for your workspace at any time.**

[New Custom Fields Page:](#)

Home Employees Payroll Pay History Tax Service Year-End Forms Reports Settings

Custom Fields Management

Company Info

Access Settings

Payroll

Employee Services

Welcome and Home

New Hire Onboarding

Timesheets

Benefits

Pay History

Evaluation

I-9

Expense Reports

Certification Management

HR Document Library

Direct Deposit

W-4

Profile

Custom Fields

Organization Chart

Time Clock Kiosk

Time Off Policies

Custom Fields

Use custom fields to supplement data in profile.

Filter Table...

Field name	Type	is
Age	integer	<input type="checkbox"/>
Graduation Date	date	<input type="checkbox"/>
Anniversary	date	<input type="checkbox"/>
boolean	boolean	<input type="checkbox"/>
date	date	<input type="checkbox"/>
date and time	dateTime	<input type="checkbox"/>
decimal	decimal	<input type="checkbox"/>
dollar	dollar	<input type="checkbox"/>
whole number int	integer	<input type="checkbox"/>
percent	percentage	<input type="checkbox"/>
text	text	<input type="checkbox"/>
multiline	textSubline	<input type="checkbox"/>
is Smoker	boolean	<input type="checkbox"/>
enum	enum	<input type="checkbox"/>
Rtz	boolean	<input type="checkbox"/>
List of items	enum	<input type="checkbox"/>

Setting up a new custom field:

Add Custom Field

Field name

Age

Type

Whole number [Integer]

A decimal that ends with a percent (%) sign

Whole number [Integer]

Any whole number

List items [Enum]

Allows only values listed in the EnumValues collection

Managing Assignments:

Custom Fields

Use custom fields to supplement data in profile.

Filter Table... + Add Custom Field Manage employee data

Field name	Type [What's this?]
Age	integer
Graduation Date	date
Anniversary	date
boolean	
date	
date and time	
decimal	
dollar	
whole number int	
percent	
text	
multiline	
is Smoker	
enum	
Ritz	
List of items	

Bulk manage Custom Fields

Export Custom Fields data

Use this wizard to export data for all employees, make your updates, and then import back in to Greenshades. We recommend you do this all in the same session, so you avoid accidentally overwriting any data newer than your download.

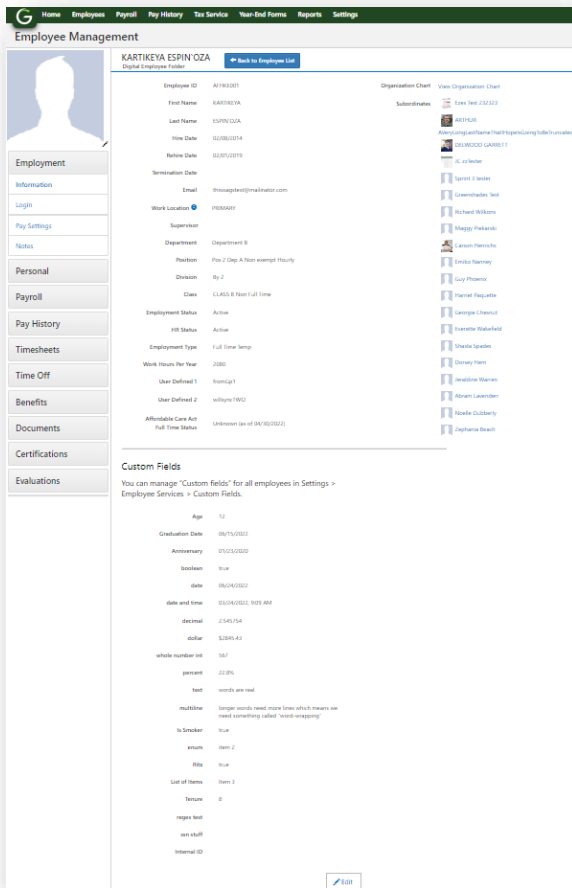
[Download](#)

Info: Custom Fields data downloaded. Update custom-fields-template.xlsx with your changes and then select "Next".

[Cancel](#) [Next](#)

A	B	C	D	E	F	G	H	I	J	K	L
Employee Id	Age	Graduation Date	Anniversary	boolean	date	date and time	decimal	dollar	whole number int	percent	text
AFHEW001	24	6/8/2022 12:00:00 AM	6/17/2022 12:00:00 AM	True	6/2/2022 12:00:00 AM	4/15/2021 08:00:00 AM	1.258757	\$2432.56	515	22.84%	some text
AFHKE001	20	6/15/2022 12:00:00 AM	1/23/2020 12:00:00 AM	True	6/24/2022 12:00:00 AM	3/24/2022 09:09:00 AM	2.545754	\$2845.43	567	22.8%	words are real
AFSBA001	7	3/22/2022 12:00:00 AM	6/15/2022 12:00:00 AM		6/15/2022 12:00:00 AM	3/22/2022 12:00:00 AM					
ANHC001	24		6/17/2022 12:00:00 AM	True	6/2/2022 12:00:00 AM		1.258757	\$2432.56		22.84%	some text

Custom Fields inside the Employee Information section:



Navigation:

Custom Fields Setup / Settings: Greenshadesonline.com > Settings Tab > Employee Services > Custom Fields

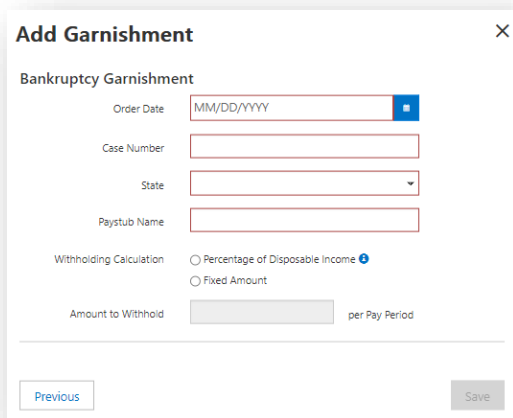
Custom Fields Individual Employee Management: Greenshadesonline.com > Employees Tab > Employment > Information

Enhanced Feature – New Payroll Settings: Expanded Garnishments Options

- **Background:** Payroll client's required additional qualifiers and rules to properly handle Garnishment orders. Up until now the Greenshades solution supported basic functionality but could benefit from additional fields to control the way clients can start, stop, and identify Garnishment orders against their EEs.
- **What's new?** The below fields have been added to expand our Garnishment functionality:
 - **Start Date (Required):** This date will be used to determine when payrolls will start to include the Garnishment against the EE.

- **End date of Garnishment (Optional):** New option to stop the Garnishment after a desired point in time (day).
- **Agency Name (Required):** Identifier to track the federal agency who issued the Garnishment.
- **Total Amount (Optional):** The summed amount to collect before the Garnishment is stopped. This halt will take priority over end date.
- **Note:** The above options have been added to **all** Garnishment types. The one exception is that Total Amount has not added to Child Support as it is not applicable.

Previously: Bankruptcy Garnishments Setup:



The screenshot shows a web form titled "Add Garnishment" with a close button (X) in the top right corner. The form is for "Bankruptcy Garnishment" and contains the following fields and options:

- Order Date:** A text input field with a date mask "MM/DD/YYYY" and a blue calendar icon on the right.
- Case Number:** A text input field.
- State:** A dropdown menu.
- Paystub Name:** A text input field.
- Withholding Calculation:** Two radio button options: "Percentage of Disposable Income" (which is selected) and "Fixed Amount".
- Amount to Withhold:** A text input field followed by the text "per Pay Period".

At the bottom of the form, there are two buttons: "Previous" on the left and "Save" on the right.

Now: Bankruptcy Garnishments Setup:

Add Garnishment

Bankruptcy Garnishment

Order Date: MM/DD/YYYY

Start Date: MM/DD/YYYY

End Date: MM/DD/YYYY

Agency Name: _____

Case Number: _____

State: _____

Payscale Name: _____

Withholding Calculation: Percentage of Disposable Income Fixed Amount

Amount to Withhold: _____ per Pay Period

Total Amount: _____

Previous Save

The Garnishment will be withheld in pay run/s up until this date including any run that has this date in its Pay Period range.

Order Date: MM/DD/YYYY

Start Date: MM/DD/YYYY

End Date: MM/DD/YYYY

The Garnishment will be withheld in pay run/s up until this date including any run that has this date in its Pay Period range.

Navigation:

Garnishment Assignments: Greenshadesonline.com > Employees > Select an Employee > Payroll Section > Codes > Garnishments Section > Add Garnishment or Edit existing Garnishment

Enhanced Feature – New Garnishments Details and Updated Summary Reports

- Background:** Garnishments maintained very minimal reporting information against them and the options to view their data was limited. The Garnishment withholding themselves could be tracked on a transactional basis, but not at a summary level across all Employees. Importantly, users did not have a summary level of data to show requesting parties the targeted totals and remaining amounts of the Garnishment.
- What's new?** With the addition of the new Garnishment fields, new and updated reports have been made available for all users. The product now supports a detailed report to show Garnishments at a transactional level (Details Report) and to show them a summary of their current state across all their EEs in the system ("Summary Report"). Lastly, the employee code setup view will show the remaining balance for Garnishments with targeted "Total amounts".

Garnishments Details Report (UPDATED):

Select the date range or pay run you would like to view

- Last 30 Days
- Year to Date
- Select Quarter
- Custom Date Range
- Select Pay Run

Garnishment Details Report
 The Garnishment Details Report shows your garnishments for the selected time period or pay run.
 Date Range: 06/29/2022 - 07/29/2022

Filter Table...

Check Date	Employee ID	Employee Name	Case Number	Agency Name	Order Date	Start Date	End Date	State	Amount	Starting Balance	Remaining Balance
07/29/2022	AFHEW001	Ezes Test 232323	CASE A2824		Fri Jan 01 2021 00:00	Fri Jan 01 2021 00:00	Sun Dec 31 0000 23: AK		\$ 166.34	0	0
07/29/2022	AFSAE001	ARTHUR AleryLongL	1985		Wed Mar 11 2020 00:00	Wed Mar 11 2020 00:00	Sun Dec 31 0000 23: FED		\$ 16.00	0	0
07/29/2022	AFSAE001	ARTHUR AleryLongL	FED		Fri May 01 2020 00:00	Fri May 01 2020 00:00	Sun Dec 31 0000 23: FED		\$ 40.00	0	0
07/29/2022	AFSAE001	ARTHUR AleryLongL	FED not Tax		Wed Jan 01 2020 00:00	Wed Jan 01 2020 00:00	Sun Dec 31 0000 23: FED		\$ 50.00	0	0
07/29/2022	AFSBK001	BOWMANE ABCDE	BANKS		Fri Oct 02 2020 00:00	Fri Oct 02 2020 00:00	Sun Dec 31 0000 23: DE		\$ 0.00	0	0
07/29/2022	AFSBK001	BOWMANE ABCDE	CHLD GARN		Thu Feb 11 2021 00:00	Thu Feb 11 2021 00:00	Sun Dec 31 0000 23: CA		\$ 0.00	0	0
07/29/2022	AFSPM001	FALLON MESSICK	CHLD SUPP		Sat Aug 01 2020 00:00	Sat Aug 01 2020 00:00	Sun Dec 31 0000 23: FL		\$ 300.00	0	0
07/29/2022	AFSPF001	GIUSEPPINA FONT	A123		Sat May 01 2021 00:00	Sat May 01 2021 00:00	Sun Dec 31 0000 23: AK		\$ 0.00	0	0
07/29/2022	AFSPF001	GIUSEPPINA FONT	A234		Tue Jun 01 2021 00:00	Tue Jun 01 2021 00:00	Sun Dec 31 0000 23: AL		\$ 0.00	0	0
07/29/2022	AFSPF001	GIUSEPPINA FONT	FED TAX		Sat Aug 01 2020 00:00	Sat Aug 01 2020 00:00	Sun Dec 31 0000 23: FED		\$ 0.00	0	0
07/29/2022	AFSH001	HARLEIGH SPOPHN	STUD LOAN		Sat Aug 01 2020 00:00	Sat Aug 01 2020 00:00	Sun Dec 31 0000 23: FED		\$ 285.92	0	0
07/29/2022	AFSH001	HOLDA FEKETE	STATE FL		Sat Aug 01 2020 00:00	Sat Aug 01 2020 00:00	Sun Dec 31 0000 23: FL		\$ 0.00	0	0
07/29/2022	AFSH001	HARTWIN TERRONES	OTHER FED		Sat Aug 01 2020 00:00	Sat Aug 01 2020 00:00	Sun Dec 31 0000 23: FED		\$ 0.00	0	0
07/29/2022	AFSK001	KEMBLE STEFFEY	SlwInCSPercent		Wed Jan 01 2020 00:00	Wed Jan 01 2020 00:00	Sun Dec 31 0000 23: FED		\$ 0.00	0	0
06/30/2022	AFSW001	WYBER JASPER	ChildGarn		Tue May 31 2022 00:00	Tue May 31 2022 00:00	Sun Dec 31 0000 23: AL		\$ 0.04	0	0
06/30/2022	AFSW001	WYBER JASPER	Bankrupt		Tue May 31 2022 00:00	Tue May 31 2022 00:00	Sun Dec 31 0000 23: AL		\$ 1.00	0	0
06/30/2022	AFSW001	WYBER JASPER	ChildGarn		Tue May 31 2022 00:00	Tue May 31 2022 00:00	Sun Dec 31 0000 23: AL		\$ 1.00	0	0
06/30/2022	AFSW001	WYBER JASPER	TaxLevy		Tue May 31 2022 00:00	Tue May 31 2022 00:00	Sun Dec 31 0000 23: FED		\$ 1.00	0	0
06/30/2022	AFSW001	WYBER JASPER	OtherFed		Tue May 31 2022 00:00	Tue May 31 2022 00:00	Sun Dec 31 0000 23: FED		\$ 1.00	0	0
06/30/2022	AFSW001	WYBER JASPER	StateGarn		Tue May 31 2022 00:00	Tue May 31 2022 00:00	Sun Dec 31 0000 23: AL		\$ 1.00	0	0
06/30/2022	AFSW001	WYBER JASPER	Student		Tue May 31 2022 00:00	Tue May 31 2022 00:00	Sun Dec 31 0000 23: FED		\$ 1.00	0	0
06/30/2022	AFSW001	WYBER JASPER	ChildGarn		Tue May 31 2022 00:00	Tue May 31 2022 00:00	Sun Dec 31 0000 23: AL		\$ 4.08	0	0

Garnishments Summary Report (NEW):

Garnishment Summary Report
 The Garnishment Summary Report shows the current status of garnishments across a workspace.

Filter Table...

Employee ID	Employee Name	Case Number	Agency Name	Type	State	Starting Balance	Remaining Balance
AFHEW001	Ezes Test 232323	CASE A2824		ChildSupport	AK	0	0
AFSAE001	ARTHUR AleryLongLastNameThatHopeIsC	1985		StudentLoan	FED	0	0
AFSAE001	ARTHUR AleryLongLastNameThatHopeIsC	FED		FederalTaxLevy	FED	0	0
AFSAE001	ARTHUR AleryLongLastNameThatHopeIsC	FED not Tax		StudentLoan	FED	0	0
AFSBK001	BOWMANE ABCDE	CHLD GARN		ChildSupport	CA	0	0
AFSBK001	BOWMANE ABCDE	BANKS		Bankruptcy	DE	0	0
AFSE001	Potaeto STURDIVANT	CHLD SUPPORTEL		ChildSupport	FL	0	0
AFSE001	Potaeto STURDIVANT	FEDERALTAXLEVY		FederalTaxLevy	FED	0	0
AFSE001	Potaeto STURDIVANT	STUDENTLOAN		StudentLoan	FED	0	0
AFSPM001	FALLON MESSICK	CHLD SUPP		ChildSupport	FL	0	0
AFSPF001	GIUSEPPINA FONT	FED TAX		FederalTaxLevy	FED	0	0
AFSPF001	GIUSEPPINA FONT	A123		ChildSupport	AK	0	0
AFSPF001	GIUSEPPINA FONT	A234		ChildSupport	AL	0	0
AFSH001	HARLEIGH SPOPHN	STUD LOAN		StudentLoan	FED	0	0
AFSH001	HOLDA FEKETE	STATE FL		StateWage	FL	0	0
AFSH001	HARTWIN TERRONES	OTHER FED		OtherFederal	FED	0	0
AFSK001	KEMBLE STEFFEY	SlwInCSPercent		StudentLoan	FED	0	0
AFSW001	WYBER JASPER	ChildGarn		ChildSupport	AL	0	0
AFSW001	WYBER JASPER	Bankrupt		Bankruptcy	AL	0	0
AFSW001	WYBER JASPER	TaxLevy		FederalTaxLevy	FED	0	0
AFSW001	WYBER JASPER	Student		StudentLoan	FED	0	0
AFSW001	WYBER JASPER	StateGarn		StateWage	AL	0	0

Navigation:

View the Garnishment Reports: Greenshadesonline.com > Reports > Garnishment Details Report or Garnishments Summary Report

GREENSHADES ONLINE PAYROLL

New Feature - New Admin Access Level: Limited Payroll Admins

- **Feature Description:** A new admin level, known as a Limited Payroll Admin, will provide the user the ability to manage and run payroll in a restricted format for only their assigned subset of employees. These Admins are limited, which by Greenshades definition, indicates that they will not have access to change larger workspace level settings or view the information of employees outside of their assignment. The assignment of specific employees will be at a group level, which is defined by a variety of category options (i.e. department, position, location, etc.).
- **Limited Payroll Admin access to each module of Greenshades Online:**
 - Setting controls:
 - Will **not** have access to workspace level control settings (i.e. *Company information and Access Settings*)
 - Will **not** be able to change workspace level Payroll settings (i.e. code settings, GL mappings, Schedule settings)
 - Will be able to configure certain employee settings for employees that they manage
 - Will be able to manage notifications
 - Employee controls:
 - Will be able to edit personal and employment information about employees that they have been given access to
 - Will **not** be able to add or remove employees
 - Will be able to manage employee level code controls for employees that they have access to
 - Will be able to manage other HR functions, however these modules access can be refined during the admin setup
 - Payroll controls:
 - Will be able to create *scheduled, special or adjustment level* pay runs for all employees that they have been given access to
 - Will **not** be able to create pay runs for employees outside of their access
 - Will only possess the ability to operate current and / or completed pay runs where they have access to all the employee groups in the run at minimum
 - Will **not** possess the ability to operate current and / or completed pay runs where they have access to only specific employees from that run
 - Will only possess the ability to void checks for employees that their employee group has given them access to
 - Will only possess the ability to Generate ACH files, print pay registers, and perform other post pay run actions for employees that their employee group has given them access to
 - Will only see payroll errors in the “Warnings Requiring Your Attention” widget for employees that their employee group has given them access to
 - Reporting controls:
 - Will be able to run payroll reporting for all employees that they have access to, even if they did not personally run the pay run that produced those results

- Will **not** be able to report on, or see the data, of employees that they do not have access to, even if their employees shared a run with other employees outside of their control
- **Who will benefit from this feature?**
 - Payroll clients that need split their pay runs across multiple practitioners.
 - Payroll clients that want to run confidential payrolls.
 - Payroll clients that would like to restrict their payroll practitioners from accessing higher level functions (i.e. settings, quarterly reports, and more)
- **Who can use this feature?** This will be rolled out to early access clients for a short period. The full rollout will be dependent on received feedback or required changes. **Upon request, this feature can be turned on for your workspace at any time.**

Defining Limited Payroll Admins:

Limited Payroll Administrator ✕

Providing this user the Limited Payroll Admin access level will grant them the same basic functionality as a Limited Administrator by allowing access only to specific sets of employees. In addition to a standard Limited Admin, these users will be able to:

- Run payroll for their assigned employee groups
- View limited payroll reports for their assigned employee groups
- Review active and prior payroll data only for the employee in their assigned employee groups

Limited Payroll Admin Setup:

Administrator Access Details

Greenshades Online Access for Test

Use this section to configure Greenshades Online administrator rights for Test. Greenshades Online administrators may log into GreenshadesOnline.com to perform a variety of HR management tasks and to configure how their employees will be able to use GreenEmployee.com. Companies often choose members of their payroll, HR, and/or IT staff to be administrators. Use this tab to add administrators, remove administrators, or edit administrator access rights.

Greenshades Online Role

Super Administrator
 Limited Administrator
 Payroll Administrator

Access to Modules
Select the modules this administrator may access:

All Modules
 No Modules
 Specific Modules

Benefits
 Certification Management
 Direct Deposit
 Documents
 Evaluations
 Everything Benefits Integration
 Expense Reports
 I-9
 New Hires
 Pay History
 Payroll
 Payroll Tax Service
 Profile
 State W-4
 Tax Filing Center
 Time Off
 Timesheets
 W-4

Limited Payroll Administrator
Select access of a Payroll Practitioner to a group of employees.

Access to Employees
Select the employees this administrator may access:

All Employees
 No Employees
 Group of Employees

The administrator employee access rules will apply to all modules except Benefits and Payroll Tax Service.

Access will be restricted by department. [Change](#)

(Blank)
 DEPA
 DSPB
 DSPC

Access to Impersonate Employees
 This administrator may impersonate employees.

[← Back](#) [Save](#)

Creating a Pay Run as a Limited Payroll Admin:

Run Payroll

Select the employee group to include in the payroll.

Employee Group(s) to Include	Status	
Location FLORIDA	Not in Active Payrun	<input checked="" type="checkbox"/>
Location NEWYORK	Not in Active Payrun	<input checked="" type="checkbox"/>
Location WISCONSIN	Not in Active Payrun	<input type="checkbox"/>

Cancel
Create Pay Run

Comparing limited and non-limited admins:

	Payroll Administrator	Limited Payroll Administrator
Payroll: Active / completed Pay Runs and Reports	Full access to all Employees	Granted full access for associated groups
Payroll: Process, submit, review, report on, file ACH, deposit checks against, and maintain the general ledger pay runs	Full access to all Employees	Limited access to managed Employees
Employee Tab: Payroll Codes and Tax Parameters	Full access to all Employees	Limited access to managed Employees
Workspace Settings: Company Info	Full Access	Not Applicable
Workspace Settings: Employee, Tax, and Notification options	Changes affect all employees	Settings options will be determined by the enabled modules Limited access to managed Employees when module is available
Workspace Settings: Payroll Settings (i.e. code management, general ledger mapping, and schedule management)	All HR and Payroll level settings	Not Applicable

Navigation:

Admin Access Settings: Greenshadesonline.com > Settings > Access Settings > Administrator Access > Access Control > Add / Edit Administrator

New Feature – General Ledger: Suspense Accounts

- Feature Description:** As a payroll practitioner or accountant, setting up your General Ledger to be correctly mapped and balanced is an incredibly important function. When a payroll is completed, and it's generated General Ledger batch reveals an unbalance set of transactions

between debits and credits, it is very likely that something is wrong with your GL setup / mapping assignments. Previously, in the Greenshades GL functionality, there was no clear way to understand which transactions caused this to happen. To assist clients that run into these scenarios, a new General Ledger Feature and account type known as a “Suspense Account” has been added to the GL offering. This account works essentially as a “**lost transactions**” bin. It will be used to collect all GL transactions that did not fall into another account as defined by the users GL mappings. This new account will also be accompanied by the new “Suspense Transactions Details” report that will show the users each of the transactions that fell into the Suspense account and therefore were not for in other mappings.

- **Key Takeaways:**

1. Moving forward your general ledger will *never* have a batch that results in different Debits and Credits since all unmapped transactions will now fall into the suspense account.
2. You will now have a standard function and reviewable reported of all unmapped transactions through their Suspense Account.
3. You will **not** be required to assign an actual ledger account against the new suspense account. However, completing this process is highly recommended. If utilizing our syncing products, you will not be able to “Sync” transactions that fell into the Suspense account unless you have assigned a ledger Account. Failing to do so will restrict syncing as long as these unmapped transactions exist.

Suspense Account – Account assignment:

Earnings Benefits Deductions Garnishments Taxes Accounts

General Ledger Mapping: Payment Accounts

This account is often called the "payroll clearing" account and is used to reconcile the net payment amount of the payroll to the transaction from your bank account.

Filter Table...

	Credit Entity Code	Credit Account Number
Do not split	10	None

[Edit Mappings](#)

General Ledger Mapping: Suspense Accounts

This account will be used to capture any and all unmapped transactions. If transactions fall into this account, a report will be created after GL Batch creation for you to review the items yet to be mapped. Choosing a specific account is required if you plan to sync these entries to your accounting package.

Suspense Account: 03-6030-01

[Edit Account](#)

Edit Suspense Account

Choose Suspense Account

Search...

Federal Tax Levy 000004	Liability
Federal Tax Levy Garn	
00-1220-00 00-1220-00	Income
Deduction Withholding (CR2)	
00-1235-00 00-1235-00	Income
Deduction Withholding (CR)	

[Submit](#)

Reviewing Suspense Account transactions in Post Pay Batch review:

Batch Details

Batch Name: 9/2/2022, 12:00:00 AM
Batch Status: Pending
Submit Date:
Credits: \$78,307.70
Debits: \$78,307.70

Recalculate Batch

⚠ Warning! You have 78 transactions not mapped to an account which are currently held in a Suspense Account. [Click here to review.](#)
 ⚠ Warning! You have transactions in Suspense with no Account mapped. As a result your GL is not balanced. You must assign a Suspense account [here](#) in order to sync these transactions

Filter Table... Submit Batch

Entity Code	Account Number	Account Name	Account Type	Credit
	10029	Earning 5	Expense	\$ 0.00
	10029	Earning 5	Expense	\$ 0.00
	10029	Earning 5	Expense	\$ 0.00
	10029	Earning 5	Expense	\$ 0.00
	10029	Earning 5	Expense	\$ 0.00
	10029	Earning 5	Expense	\$ 0.00
	10029	Earning 5	Expense	\$ 0.00
	10029	Earning 5	Expense	\$ 0.00
None	None	Suspense	None	\$ 78,307.70

Suspense Account Transactions Details Report:

Home Employees Payroll Pay History Tax Service Year-End Forms Reports Settings

Admin Application

Select the date range or pay run you would like to view
 Select General Ledger Batch
Batch Name: 8/1/2022, 12:00:00 AM
Batch Status: Pending
 Change

☆ **General Ledger Suspense Transaction Details Report**
 The General Ledger Suspense Transaction Details Report shows transactions that were sent to the Suspense Account for the current batch.
 Click here to go to the [Batch Report](#).
 Click here to return to your [General Ledger Batch Summary Report](#).

Filter Table...

Entity Code	Account Number	Account Name	Account Type	Credit	Debit
Unknown	Unknown		Suspense	\$ 0.00	\$ 49.60
Unknown	Unknown		Suspense	\$ 0.00	\$ 11.60
Unknown	10003	Deduction 4	Income	\$ 0.00	\$ 407.43
Unknown	Unknown		Suspense	\$ 0.00	\$ 49.60
Unknown	10003	Deduction 4	Income	\$ 0.00	\$ 11.60
Unknown	10003	Deduction 4	Income	\$ 0.00	\$ 16.00
Unknown	10003	Deduction 4	Income	\$ 0.00	\$ 49.60
Unknown	10003	Deduction 4	Income	\$ 0.00	\$ 4.09
Unknown	Unknown		Suspense	\$ 0.00	\$ 11.60
Unknown	10003	Deduction 4	Income	\$ 0.00	\$ 49.60
Unknown	Unknown		Suspense	\$ 0.00	\$ 0.48
Unknown	10003	Deduction 4	Income	\$ 0.00	\$ 11.60
Unknown	10003	Deduction 4	Income	\$ 0.00	\$ 15.73

Navigation:

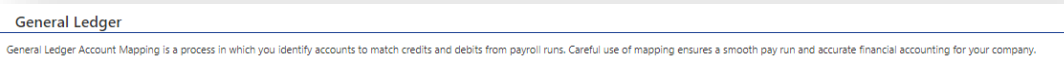
Suspense Account Assignment: Greenshadesonline.com > Settings > Payroll > General Ledger > Accounts > General Ledger Mapping: Suspense Accounts

General Ledger Batch Review: Greenshadesonline.com > Payroll > View Prior Pay Run > Review Batch (under the General Ledger Section)

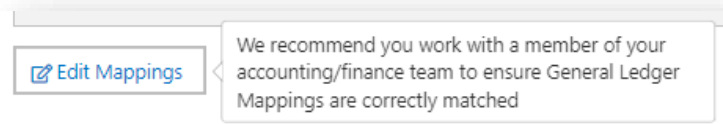
Suspense Account Report: Greenshadesonline.com > Reports > Suspense Account Transactions Details Report

Enhanced Feature - General Ledger: Improved Text

- **Background:** General Ledger setup can be a complicated process for clients. Knowing this, we stated looking for areas to improve the information we provide in the product. We understand that contextual descriptions and warnings are important and can help you through the process.
- **What's new?** Small information changes are being to the General Ledger screens to help better guide clients through the General Ledger mapping process. The released changes are as follows:
 1. The General Ledger informational banner has been revised to better explain the mapping process



2. The “Edit Mappings” button will notify the user of its functionality upon hover over



Navigation:

General Ledger Mapping Screens: Greenshadesonline.com > Settings > Payroll > General Ledger

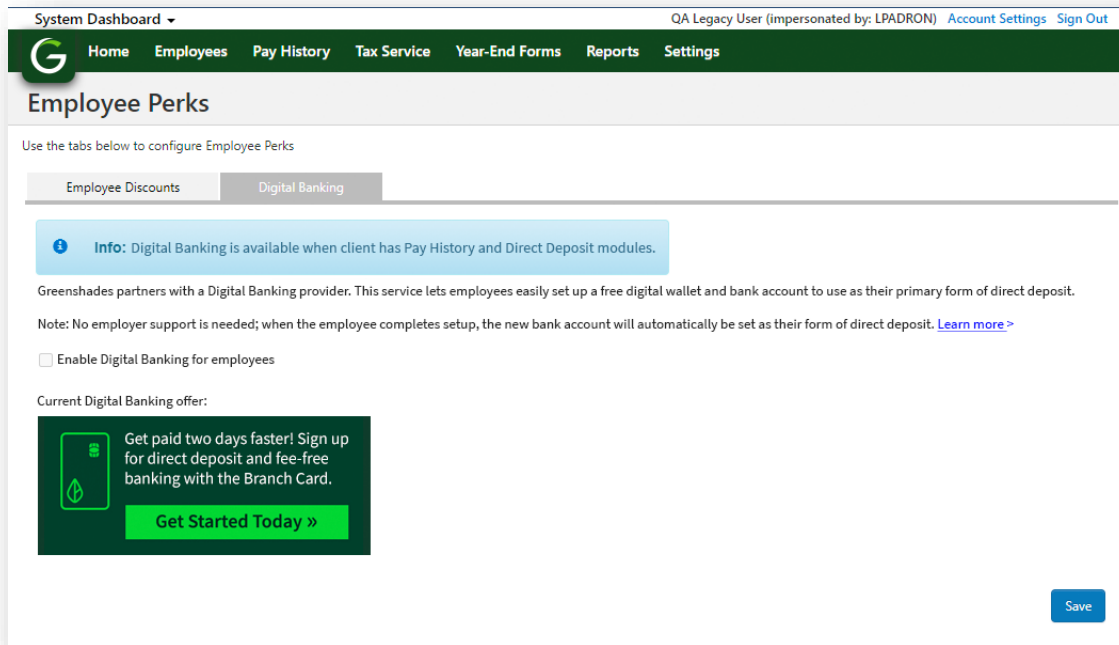
New Feature – Employee Direct Deposit: Branch On / Off Setting

- **Background:** All employees of clients that utilize our direct deposit module currently have access to our Branch integration. This enables an employee to instantly setup a Branch account and connect it as a Greenshades DD account through only a few clicks. Once the account is created the employee will have access to a free digital bank and the ability to receive funds up to 2 days faster than standard DD.

We understand that some of our clients would like to control their employee’s access to the Branch integration. This could be due to other third party partnerships, misunderstanding of the Branch offering, or other unknown factors to Greenshades.

- **What's new?** To empower our employers with the desired control over the offerings presented to their employees, a workspace level setting has been added to the Employee Perks settings as a new tab called “Digital Banking”. Here you will have the ability to:
 1. Turn the Branch integration **on** or **off** for all employees at anytime
 2. Clients can [Learn More](#) about Branch and what the integration can offer for your employees

New Digital Banking Settings:



Navigation:

Setting to turn Branch on or off: Greenshadesonline.com > Settings > Employee Service > Employee Perks > Digital Banking

Changed Feature – Code Transitions: Locking down the ability to change "Tax Types" and "Wage Types"

- **Background:** At any time, in the code settings for creation or edits of a code, as an admin you may choose the taxation rules for that code via the "Tax Type" and "Wage Type" options. These options will control the taxation methods for Deductions / Benefits or Earnings codes respectively. After initial creation and actual use of those codes, that setting could be edited at any time. Unfortunately, making that change after prior payrolls have been executed could cause a variety of unintended issues, such as:
 - For new payrolls, this changed tax or wage type could affect resulting withholdings or subject wages
 - For historical reporting, the changed types will create strange totals at the code level, especially when filing tax forms such as 941s
- **What Changed?** To protect clients from creating unintended historical taxation confusion, both the "Tax Type" and "Wage Type" options will be restricted from editing after that code has been utilized in a **submitted payroll**.
 - Key things to note:

- Codes, and therefore the use of them as they pertain to employees, will always maintain their history
- You may freely edit wage or tax types on a code until a payroll has been ran that utilized said code
- If you require different taxations or code setups, it is advised to create or remove codes to fit the requirements instead of editing current code taxation related settings. This is the best practice to avoid the aforementioned issues.

Earnings Code Wage Type (restricted from edit):

The screenshot shows a web interface for editing an earning code. On the left is a sidebar with a menu: 'Code Details' (selected), 'Calculation Details', 'Maximums', 'Scheduling', 'Year-End Forms', and 'Related Earning Codes'. At the bottom of the sidebar are buttons for 'Save All Changes' and 'Cancel'. The main area is titled 'Code Details' and contains the following fields:

- Code Name: HOURLY
- Pay Stub Name: HOURLY
- Description: Add a description or additional information you may need to reference later.
- Wage Type: Regular (highlighted with a red box)
- Reported Earnings (Usually used for Tips)
- Subject to SUTA
- Subject to FUTA

Navigation:

Code Setup Screens: Greenshadesonline.com > Settings > Payroll > Codes > Earnings / Deductions / Benefits Tabs > Add / Edit Code

Changed Feature – Pay Run Results Report: Changed to a download only report

- **Background:** The Pay Run results contains all data at a detailed level for a single pay run or collection of pay runs over the chosen period. This report generated all this data into a navigable table in the product. You could review the information in the product or choose to download it and analyze separately. Unfortunately, the functionality of allowing this data to be displayed in the product was very slow and would occasionally fail to ever produce the results, especially for very large sets of data.
- **What Changed?** Due to performance concerns, we will be changing this report to be a download only version and it will no longer show the data in the product. This change facilitates the ability for all payroll clients to properly utilize the Pay Run Results report whenever required.

Old Pay Run Results Report:

Pay Run Results Report

This report shows the earnings, taxes, deductions and benefits that are in the checks in the given date range or payrun.

Pay Run Results Report
Date Range: 05/31/2022 - 06/30/2022

Select the date range or pay run you would like to view

- Last 30 Days
- Year to Date
- Select Quarter
- Custom Date Range
- Select Pay Run

Filter Table...

Employee ID	Employee Name	Pay Run Name	Check Date	Check Number	Name	Amount	Hours Worked	Base Pay Rate	Effective Pay Rate	Location Code	Location State	Work Period
AF18K001	BOWMANE ABCDEFGHI	Test Live June 20	06/22/2022	11	GREG SALARY	\$ 684.93	40h 0m	\$ 10.00000	\$ 17.12	CALIFORNIA	CA	06/05/2022 - 06/12/2022
AF18H001	DOREN MCSWEENEY	Test Live June 20	06/22/2022	12	GREG SALARY	\$ 684.93	40h 0m	\$ 10.00000	\$ 17.12	CALIFORNIA	CA	06/05/2022 - 06/12/2022

New Pay Run Results Report:

Pay Run Results Report

This report shows the earnings, taxes, deductions and benefits that are in the checks in the given date range or payrun.

Pay Run Results Report
Date Range: 05/31/2022 - 06/30/2022

Select the date range or pay run you would like to view

- Last 30 Days
- Year to Date
- Select Quarter
- Custom Date Range
- Select Pay Run

This report is only available as a download

[Download Report](#)

Navigation:

Code Setup Screens: Greenshadesonline.com > Settings > Payroll > Codes > Earnings / Deductions / Benefits Tabs > Add / Edit Code

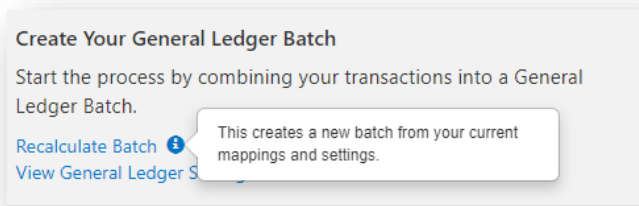
Recent Updates 6/1/2022

GREENSHADES ONLINE PAYROLL

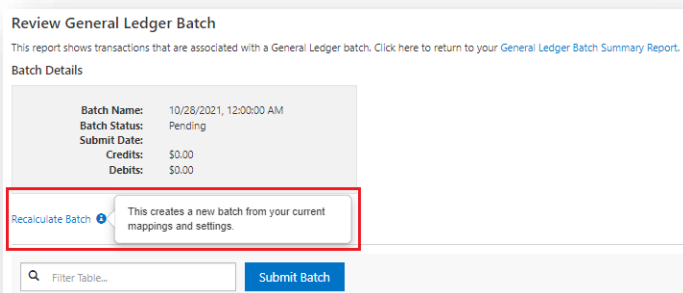
Enhanced Feature - General Ledger: Recalculate GL batch improvements

- **Summary:** The recalculate General Ledger functionality was not shown in enough areas of the UI. Moreover, it's functionality was not well enough articulated to users.
- **Changed items in the User Interface:**
 - Add the feature to the Batch Review Page
 - Add info text next to the feature's action button
 - A warning pop-up is shown to users after clicking the function to ensure they understand how this could impact transactions that were already imported or synced prior

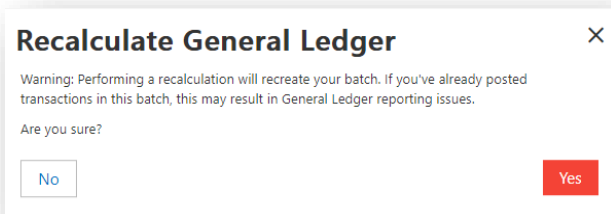
Post Pay Run Screen (updated Recalculate batch function):



Batch Review Screen (newly added Recalculate batch function):



Informational Warning before submitting a recalculate:



Navigation:

General Ledger Post Pay Run Screen: Greenshadesonline.com > View Pay Run > (scroll) "Submit Transactions to the General Ledger" section

General Ledger Batch Review Screen: Greenshadesonline.com > View Pay Run > (scroll) "Submit Transactions to the General Ledger" section > Review Batch

New Feature – Benefit / Deduction Code Setup: Catch-up Support

- **Previously:** Greenshades payroll did not formally support catch-up contributions with proper tax shielding via a standard in product code setup for benefits or deduction codes.
- **Today:** The product now fully supports the process to add and apply catch-up codes for all relevant Tax Types (see list below):
 - Traditional 401k
 - Roth 401k
 - HSA (single and family)
 - 403(b)
 - Roth 403(b)
 - Simple IRA

Catch-up code checkbox in code setup:

New Benefit Code

Code Details
Employer Contribution Details
Maximums & Arrears
Year End Forms
Effective Dates

Employer Contribution Details

Rate Type: Fixed Amount
Tax Type: Traditional 401(k)
Catch Up:
Employer Contribution: \$ 20.00 Biweekly
Scheduling Method:
 Split Evenly on All Pay Checks
 Even Amount per Month
 Pay All on First Pay Check of Month
 Imputed Income

Previous Cancel Next

Setting up Catch-up Maximum:

Edit Deduction Code

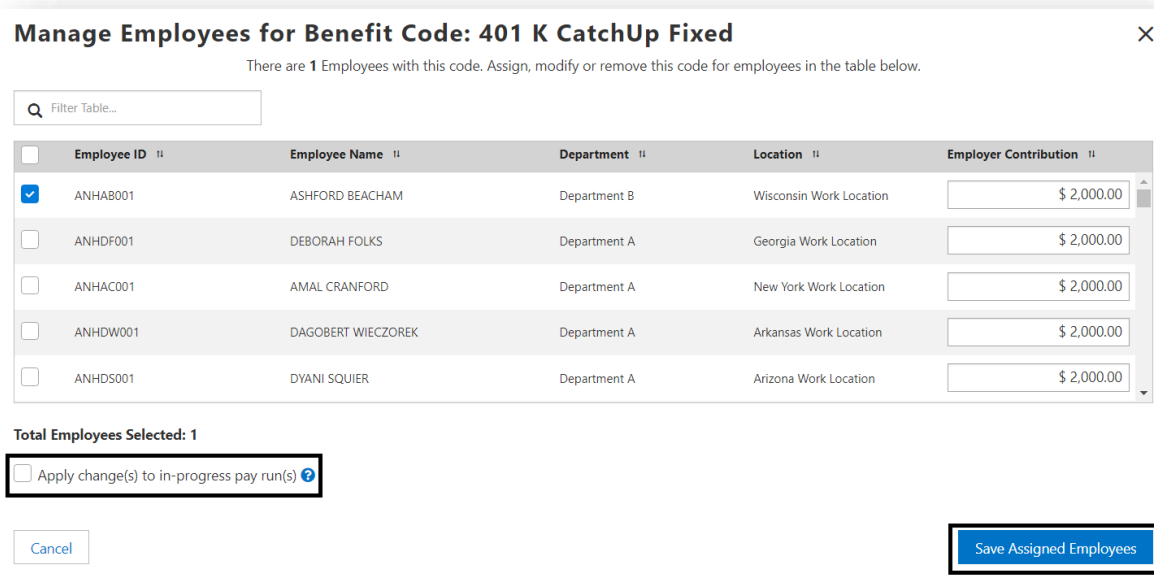
Code Details
Employee Contribution Details
Maximums & Arrears
Year End Forms
Effective Dates
Related Benefit Codes

Maximums & Arrears

Maximums: \$ 6,500.00 per Year Remove
+ Add Maximum
Arrears: Allow and track Arrears

Save All Changes Cancel

Assigning Employees to the Catch-up codes:



Navigation:

Build Catch-up Codes: Greenshadesonline.com > Settings > Payroll > Deduction / Benefit Codes > New / Edit Code

Enhanced Feature - Benefit / Deduction Code Setup: New Shared Code Group functionality

- Previously:** Shared Code Groups were a rarely used and misunderstood feature that supported a small selection of use cases. The most important of these, was to combine maximum amount limits on a selection of different retirement codes to ensure employees did not exceed the IRS limits when contributing to multiple plan types.
- Today:** With the addition of catch-up codes, the use cases for these groups, as well as their necessity to be utilized, grew greatly. The above use case is still valid, but more importantly these groups are REQUIRED for users to facilitate automatic transitioning of employees from their base retirement or HSA codes to their catch-up contribution codes after reaching base limits.
- The below images portray great examples of how you may want to utilize these setups for your employees
- Terminology Reference:
 - Group Name:** This is just an identifier for the user to reference. Nothing downstream will be impacted by this name.
 - Group Type:** Use this to select the types of codes that can be applied to this group. The list includes the option of Benefit, Deductions, custom, or HSA. The HSA option is used to allow limits to be equally shared between benefits and deduction types.

- Plan Type: This selection will choose the focus of the group, essentially as “Retirement”, “HSA”, or a custom type called “Other”
 - Group Description: This description is a way for the user to recall the specific purpose of that group. As an example, “This group will create the shared limit for employee deductions of Roth and standard 401k plans”
 - Code selections: Apply the relevant Deduction and Benefit codes to the group. Consider that these selectable codes will be filtered based on your above setup selections. Only codes related to the selected Group Type and Plan Type will be shown in the creation process.
 - Catch-up Code selections: Catch-ups will appear separately in the Catch-ups menu of the Shared Code Group window only when they are applicable.
 - Shared Maximums: This is where your combined maximum between the codes in the group will be defined. For something like retirement contributions, these are often straightforward as defined by the IRS that year. In the case of a Retirement deduction group setup, it would almost always simply be the employee contribution limit for that year (Ex. \$20,500 in 2022).
- Please consult with Greenshades support for additional details or questions on how to properly setup and manage Shared Code Groups

Shared Code Groups (Retirement Example):

Edit Test Deduction

Group Name:

Group Type:

Plan Type:

Group Description:

Deduction: ✕

Deduction: ✕

Shared Maximum: Per Year

Edit Test Benefit

Group Name:

Group Type:

Plan Type:

Group Description:

Benefit: ✕

Benefit: ✕

Shared Maximum: Per Year

Shared Code Groups (HSA Examples):

Edit HSA Group ✕

Group Name:

Group Type:

Plan Type:

Group Description:

Deduction: ✕

Benefit: ✕

Shared Maximum: Per Year

Edit HSA Catchup ✕

Group Name:

Group Type:

Plan Type:

Group Description:

Benefit: ✕

Deduction: ✕

Benefit (Catch-up): ✕

Shared Maximum: Per Year
(Non Catch-up) ?

Navigation:
Build Shared Code Groups: Greenshadesonline.com > Settings > Payroll > Shared Code Groups

Enhanced Feature – Pay Run Wizard: Visual improvements to the Pay Stub review screen

- Previously:** The “Benefit” and “Deduction” sections of the Pay Stub review were lacking YTD accrued amounts. Moreover, the way information was displayed in the “Taxes” section was hard to properly read the column totals and YTD amounts.
- Today:** These issues have been addressed in two ways. First, YTD accrued amounts have been added to the “Benefit” and “Deduction” sections. Secondly, the “Taxes” section UI has been reimagined to read more clearly to the user.

New Pay Stub Review Screen:

KARTIKEYA ESPIN'OZA									
Paycheck Summary Employee ID: 47463201 Department: Department 3 Work Location: PRIMARY Position: Pos 2, Dep 4 Non exempt Hourly Hire Date: 02/27/2014 HR Status: Active									
Net Pay: \$ 1,155.57 Total Hours: 120 Hours(0 Min)(0 Sec) Gross Pay: \$ 1,948.73 Total Deductions: \$ 793.16 Total Employee Taxes: \$ 454.41 Payment Method: Direct Deposit									
Earnings									
Code Name	Pay Stub Name	Position	Department	Location	Hours	Minutes	Amount	Year To Date	
SALARY	Salary	POS2A	DEPA	PRIMARY	40	0	\$ 666.67	\$ 666.67	Clear
GREG SALARY	GREG SALARY	POS2A	Adam Department	CALIFORNIA	40	0	\$ 641.03	\$ 1,282.47	Clear
GREG SALARY	GREG SALARY	POS2A	Adam Department	CALIFORNIA	40	0	\$ 641.03	\$ 1,282.47	Clear
Totals					120 Hours(0 Minutes)		\$ 1,948.73		
Benefits									
Code Name	Pay Stub Name	Amount Balance	Amount	Year To Date					
esof EO	esof Employee Only	\$ 0.00	\$ 52.00	\$ 156.00	Clear				
401	401	\$ 0.00	\$ 0.00	\$ 0.00	Clear				
Health EO	HEALTH Employee Only	\$ 0.00	\$ 0.00	\$ 0.00	Clear				
401K	401K	\$ 0.00	\$ 0.00	\$ 0.00	Clear				
Dirnarr Fam Efam	Fam Employee Family	\$ 0.00	\$ 0.00	\$ 0.00	Clear				
Totals		\$ 0.00	\$ 52.00						
Deductions									
Code Name	Pay Stub Name	Amount Balance	Amount	Year To Date					
Health EO	HEALTH Employee Only	\$ 0.00	\$ 0.00	\$ 0.00	Clear				
Dirnarr Fam EF	Fam Employee Family	\$ 0.00	\$ 10.00	\$ 30.00	Clear				
OTHER FEES	Other Federal Government OTHER FEES	\$ 0.00	\$ 328.75	\$ 1,028.84	Clear				
401K	401K	\$ 0.00	\$ 0.00	\$ 0.00	Clear				
401	401	\$ 0.00	\$ 0.00	\$ 0.00	Clear				
Totals		\$ 0.00	\$ 338.75						
Taxes									
Tax Name	Amount Balance	Taxable Wages	Amount	Year To Date					
Employer Medicare Tax	\$ 0.00	\$ 1,948.73	\$ 28.13	\$ 87.25	Clear				
Employer Social Security Tax	\$ 0.00	\$ 1,936.73	\$ 120.20	\$ 367.67	Clear				
Federal Unemployment Tax	\$ 0.00	\$ 1,936.73	\$ 11.63	\$ 35.58	Clear				
North Dakota State Unemployment Tax	\$ 0.00	\$ 1,940.73	\$ 38.97	\$ 119.10	Clear				
Employee Taxes	\$ 0.00		\$ 168.91	\$ 608.34	Clear				
Additional Medicare	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	Clear				
Arizona State Tax	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	Clear				
California Employment Training Tax	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	Clear				
California SDF	\$ 0.00	\$ 1,936.73	\$ 21.32	\$ 63.23	Clear				
California State Tax	\$ 0.00	\$ 1,932.73	\$ 111.06	\$ 345.83	Clear				
California State Unemployment Tax	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	Clear				
Colorado State Tax	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	Clear				
Federal Income Tax	\$ 0.00	\$ 1,936.73	\$ 168.82	\$ 503.48	Clear				
Medicare	\$ 0.00	\$ 1,936.73	\$ 28.11	\$ 87.99	Clear				
Minnesota State Tax	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	Clear				
Mississippi State Tax	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	Clear				
North Dakota State Tax	\$ 0.00	\$ 656.67	\$ 4.00	\$ 4.00	Clear				
Social Security	\$ 0.00	\$ 1,936.73	\$ 120.20	\$ 367.67	Clear				
Warren County Tax Transparr Tax	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	Clear				
Wisconsin State Tax	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	Clear				
Employee Taxes	\$ 0.00		\$ 454.41	\$ 1,392.20					
Total Taxes	\$ 0.00		\$ 453.32	\$ 2,000.54					

Navigation:

Build Shared Code Groups: Greenshadesonline.com > Payroll > Start / Continue Pay Run > Review and Submit Step > View pay stub

Recent Updates 5/11/2022

GREENSHADES ONLINE PAYROLL

Improved Feature - General Ledger: Track voided flag against GL transactions

- **Problem:** Users did not have a clear and simple way to understand which of their General Ledger transactions were inside of a voided pay run or individual paycheck. Accounting teams will likely want to remove or ignore these transactions since monies weren't moved in these scenarios.
- **Solution:** The [General Ledger Transaction Details Report](#) will now clearly identify, via an added column of data, whether or not each individual transaction has been voided

New flag in the report's "View Details" preview:

General Ledger Transaction Details Report
The General Ledger Transaction Details Report shows your general ledger activity on a per-transaction basis for the selected time period or pay run.
Date Range: 04/10/2022 - 05/10/2022

Filter Table...

Account Number	Account Name	Debit	Credit	Employee ID	Check Date
00-1235-00	00-1235-00	\$ 0.00	\$ 15.00	AFHKE001	04/29/2022
00-1220-00	00-1220-00	\$ 15.00	\$ 0.00	AFHKE001	04/29/2022
00-1235-00	00-1235-00	\$ 0.00	\$ 10.00	AFHKE001	04/29/2022
00-1220-00	00-1220-00	\$ 10.00	\$ 0.00	AFHKE001	04/29/2022
10019	Net 5	\$ 0.00	\$ 25.00	AFHKE001	04/29/2022
00-1235-00	00-1235-00	\$ 25.00	\$ 0.00	AFHKE001	04/29/2022

Transaction Details

Name	Value
Check Date	04/29/2022
Check Number	1651
Code Name	HOURLY
Entity Code	3
Voided	false
Test description	
Dimension	Value Name

View Details

Navigation:

General Ledger Transaction Details Report: Greenshadesonline.com > Reports > General Ledger Transaction Details

Improved Feature - Positive Pay File Customization: Chase Bank, PNC, and Huntington

- **Background:** Positive Pay Files are used to provide various banks with information about distributed checks. They use this data to confirm that the later cashed checks are indeed valid and can be pulled from the respective accounts.
- **Problem:** Each bank has its own format. Greenshades will need to support each individual format of the respective bank for the client.
- **Solution:** Greenshades has expanded the support for a variety of customers via creating custom positive pay file formats for the following banks as of 05/10/2022:
 - Chase Bank

- PNC Bank
- Huntington Bank
- US Bank

Note: Utilization of these file types must be requested from support or implementation reps

Performance Improvement - Optimize calculation persistence in the Payroll Wizard

- **What we heard:** Changes or updates to information within the Pay Run wizard steps have been slow to save (i.e. location, departments, amounts, etc.).
- **How we addressed it:** Critical changes have been made to the way in which the product saves these inputs. As a result, users should expect to experience a “noticeable” decrease to the time it takes to save these changes in the UI and therefore the amount of time they must wait until they can make another edit. Expect at minimum a 20% decrease in wait times per change.

Navigation:

Pay Run Wizard: Greenshadesonline.com > Payroll > Continue / Run Payroll > Hours / Earnings / Deductions / Benefits / Arrears steps

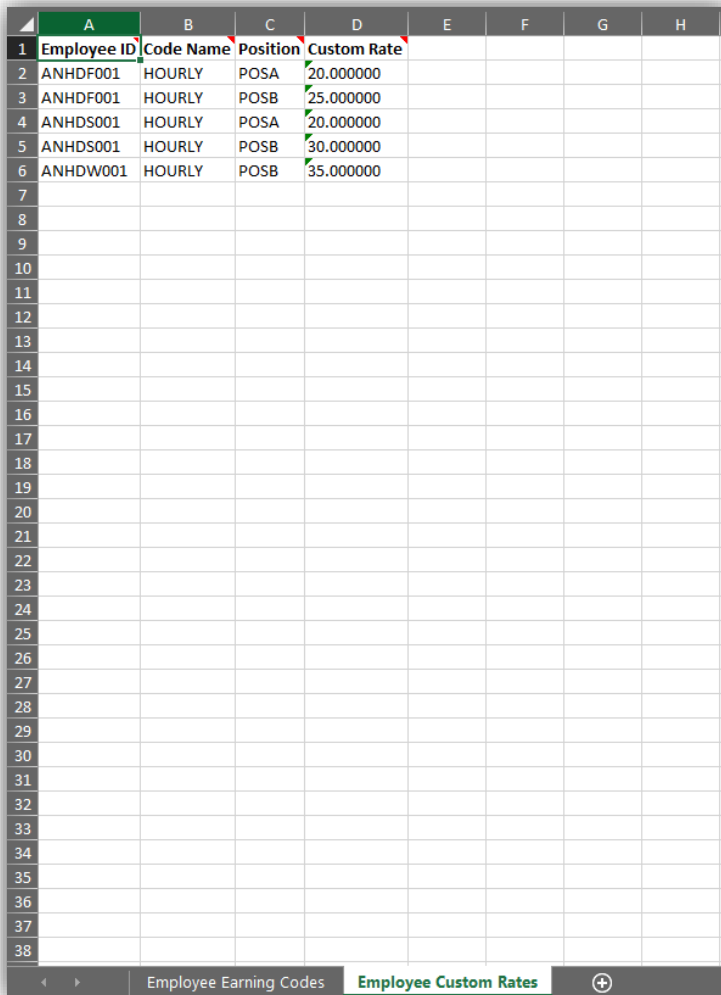
Recent Updates 3/30/2022

GREENSHADES ONLINE PAYROLL

Improved Feature - Import: Support custom rates for Bulk The Bulk Earnings code rate import has been expanded to handle Custom Rates

- A separate Sheet on the Code Export has been added for the user to specify Position based custom rates
- **Important Note:** Import documents in the old format will no longer be importable. Please ensure a new export is always downloaded before using the Bulk Manage feature.

New Custom Rates import sheet:



	A	B	C	D	E	F	G	H
1	Employee ID	Code Name	Position	Custom Rate				
2	ANHDF001	HOURLY	POSA	20.000000				
3	ANHDF001	HOURLY	POSB	25.000000				
4	ANHDS001	HOURLY	POSA	20.000000				
5	ANHDS001	HOURLY	POSB	30.000000				
6	ANHDW001	HOURLY	POSB	35.000000				
7								
8								
9								
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Navigation:

Bulk Manage Earnings Codes: Greenshadesonline.com > Settings > Payroll > Earnings Codes > Bulk Manage Codes

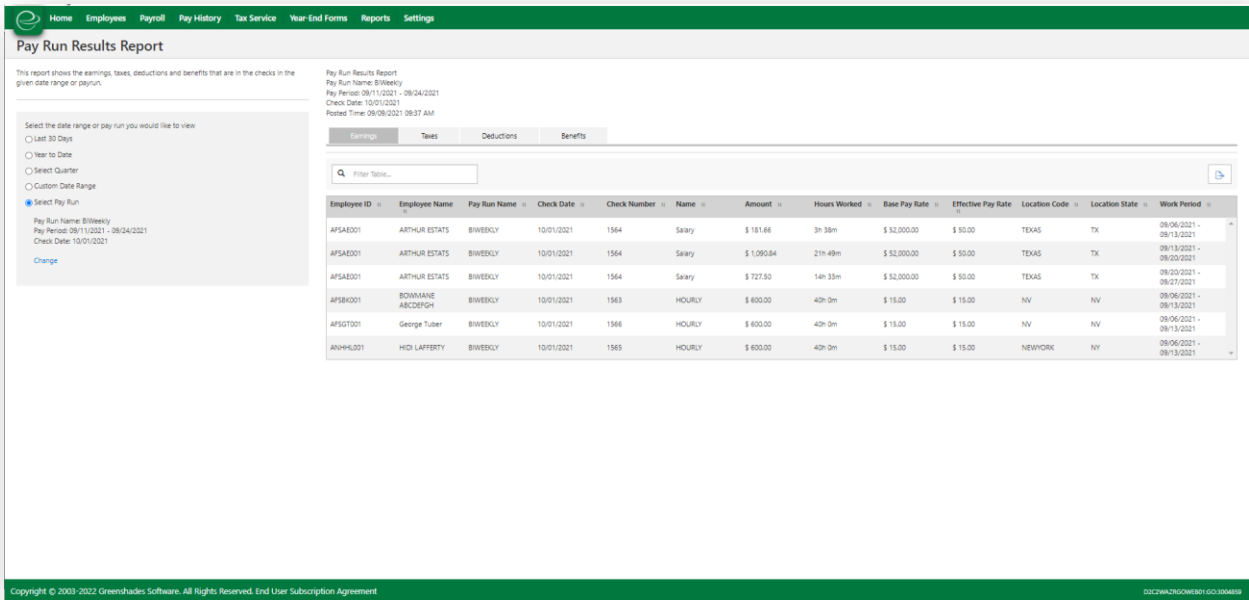
New Feature - Reporting: Add new "Pay Run Results" report

A new report has been surfaced that provides clients with a comprehensive data set, at an itemized level, of all the earnings, deductions, taxes, and benefits of each employee per pay run.

The report will feature the following fields:

- All Tabs
 - Employee ID
 - Employee Name
 - Pay Run Name
 - Check Date
 - Check Number
 - Name
 - Amount
- Earnings Tab Only
 - Hours Worked
 - Base Pay Rate
 - Effective Pay Rate
 - Location Code
 - Location State
 - Work Period
- Deductions Tab Only
 - Deduction Type
 - Tax Info
- Taxes Tab Only
 - Subject wages
 - Gross Subject Wages
 - Gross Wages
 - Rate
 - Employer Tax (Yes / No)
 - State
- Benefits Tab Only
 - Benefit Type
 - Tax Info

Pay Run Results Report:



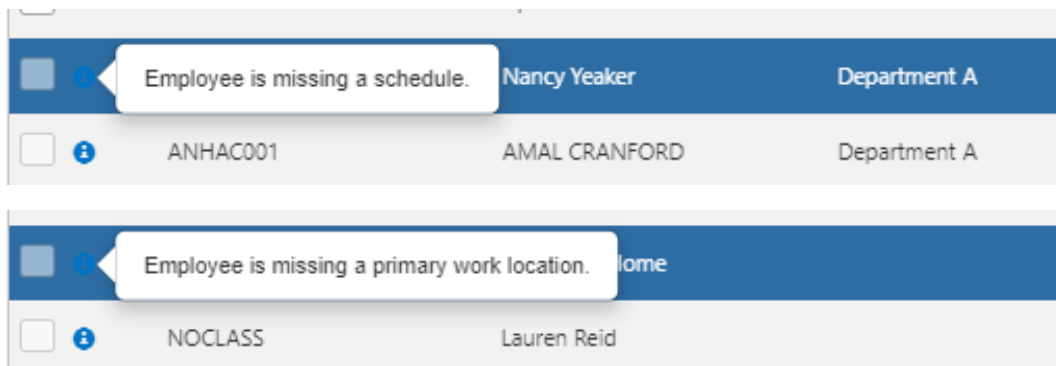
Navigation:

New Report: Greenshadesonline.com > Reports > Pay Run Results

Improved Feature - Pay Run Wizard: Non-scheduled EEs should not be added to pay runs

- **Previously** – Employees that are not assigned to a pay schedule and / or do not have a primary work location could be selected and visually added to a pay run. However, these EEs would never actually save or be ran in the payroll
- **Now** – The User Interface will not allow you to add employees without one or both of the following qualifiers to be added:
 - No Pay Schedule is assigned to the employee
 - No Primary Work Location is assigned in the employee information section
- **Warning Message** (shown below) – If an employee is missing the above data, the shown messages will be displayed.

Pay Run Wizard: Add Employees Window with Warnings:



Navigation:

Pay Run Wizard (Add Employees): Greenshadesonline.com > Payroll > Run Payroll > Employees Tab > Add Employee

GREENSHADES ONLINE PAYROLL

Improved Feature - Reporting: General Reporting enhancements

The full collection of Payroll reports has been reviewed and refined via the following list of changes:

- Add the Check Date field to all reports where most appropriate
- Rename reports to be clearer in their intent (Summary vs. Details levels)
- The links from the “Payroll Reports section” match the date from the reports in the “Reports tab”

List of Reporting changes:

Report Name	New Report Name	Data Changes
All Statements Report	Pay Statements Details Report	N/A
Benefit and Deduction Report	Benefit and Deduction Details Report	N/A
Employee Arrears Report	Employee Arrears Summary Report	N/A
Garnishment Post Pay Run Report	Garnishment Details Report	Add Check Date Column
General Ledger Report	General Ledger Account Summary Report	Remove Post Batch button
General Ledger Breakdown Report	General Ledger Transaction Details Report	Add Check Date Column
Hours Breakdown Report	Employee Hours Summary Report	Add Check Date Column to Each Hours Popover
Liability Details Report	New Report	N/A
Liability Report	Liability Summary Report	Add Group column to report. Add to Reports Dashboard in place of Pay History version if Payroll module is enabled. Add to Reports Dashboard.
Pay Run Register Details Report	New	Check Date Column, All Columns from Pay Run Register, Filtering Options for Check Date, Last 30 Days, Year to Date, Select Quarter, Custom Date Range
Positive Pay File Report	Positive Pay File Details Report	Add All Filter Options
Wage Breakdown Report	Employee Wage Summary Report	N/A
FFCRA Liability Adjustment Report	FFCRA Liability Adjustment Summary Report	N/A
Form 941 Quarter End Report	Form 941 Quarter End Summary Report	N/A
Form W-2 Annual Report	Form W-2 Annual Summary Report	N/A
SUTA Report	Employee Quarterly SUTA Summary Report	N/A
Worker's Compensation Report	Worker's Compensation Details Report	N/A
Retirement Report	Retirement Details Report	Add Check Date Column
Employee Earnings Report	Employee Earnings Summary Report	N/A
Benefit & Deduction Report	Benefit and Deduction Details Report	Add Check Date Filter Option.
General Ledger Batch Summary Report	N/A	Add to Reports Dashboard.
Unlinked Transactions Report	N/A	Add to Reports Dashboard.
Pay Run Summary Report	N/A	N/A

Navigation:

Reporting: Greenshadesonline.com > Reports

Payroll Reporting: Greenshadesonline.com > Payroll > Other Payroll Actions > Reports

New Feature - Reporting: New Multiple Worksite (BLS) Report

A new report to capture the required data elements for the Multiple Worksite Reports has been added to the reporting section. The report will feature the following:

- Business Name (Worksite name)
- Address (Worksite location)
 - This is the employees primary work location that is shown on their “Employee Card”
 - **Note:** For WFH workers will show the location that is assigned, not the company default location
- Number of Employees (worked on the 12th of each month)
 - The counts are determined per month, as specified in the worksheet.

- If the worker did not work hours on the 12th exactly, they are not counted
- Wages of each Worksites (Quarterly)
 - This number is calculated as the subject wage for all checks in the selected date range (based on check dates)

New Multiple Worksite Report:

☆ Multiple Worksite Report
The Multiple Worksite Report provides employee count and the wages for your work locations according to the BLS 3020 form.

The screenshot shows the 'Multiple Worksite Report' interface. On the left, there are filters for 'Select the date range or pay run you would like to view', with options for 'Last 30 Days', 'Year to Date', and 'Select Quarter'. The 'Year' is set to 2020 and the 'Quarter' is 'January - March'. Below these are options for 'Custom Date Range'.

Business Name	Address	January	February	March	Wages of Worksites
PRIMARY	2014 10th Ave E #202 Williston, ND 58801	1	2		\$ 17,723.42
SECONDARY	405 Beeland St Greenville, AL 36037	3	7	1	\$ 16,307.64
	Null, Null Null		1		\$ 785.00
MD and St.Louis Tax	2014 10th Ave E #202 Williston, ND 58801		2		\$ 4,711.55
Nevada	2102 Calumet Ln Elko, NV 89801		1	1	\$ 583.54
New York (state and local)	64 Woodbine St Brooklyn, NY 11221		1		\$ 1,403.73

Navigation:

Reporting: Greenshadesonline.com > Reports > Multiple Worksite Report

Improved Feature - Code Settings: Earnings Code export added alongside bulk management

As of the first release in 2022, the Earnings code section received a new Bulk Manage Codes feature that allows users to make mass assignments of rates for employees.

A new option to export the code information has been added alongside of the bulk assignment functionality.

New Earnings Code Export option:

Payroll Code Settings

All master-level Payroll codes for Earnings, Benefits, Deductions, and Time Off are created and managed from each of their respective sections.

Earning Codes

View, add, and modify the earning codes available for payroll.

Earning Code	Pay Stub Name	Rate Type	Category	Wage Type	Default Amount
Hourly 2	Hourly 2	Per Hour	Other	Regular	\$ 20.00
Hourly 2 OT	Hourly 2 OT	Per Hour	Overtime	Regular	\$ 0.00
Hourly Buford	Hourly Buford	Per Hour	Other	Regular	\$ 0.00
HOURLY DT	Hourly DT	Per Hour	Doubletime	Regular	\$ 0.00
HOURLY OT	Hourly OT	Per Hour	Overtime	Regular	\$ 0.00
Hourly PTO	Hourly PTO	Per Hour	Paid Time Off	Regular	\$ 15.00
HOURLY SHIFT DIF	HOURLY SHIFT DIF	Per Hour	Shift Differential	Regular	\$ 0.00
KITCH HOURLY	Kitchen Hourly	Per Hour	Other	Regular	\$ 22.00
KITCH SHIFT DIF	KITCH SHIFT DIF	Per Hour	Shift Differential	Regular	\$ 0.00
OTP	OTP	Per Hour	Overtime Premium	Regular	\$ 0.00
Primestaff test	Regular Pay	Per Hour	Other	Regular	\$ 25.00
SALARY	Salary	Per Year	Other	Regular	\$ 52,000.00
SALARY (FFCRA DEP CARE)	Salary (FFCRA DEP CARE)	Per Year	Paid Time Off	FFCRA Leave	\$ 40,000.00
SALARY (FFCRA FMLA)	Salary (FFCRA FMLA)	Per Year	Paid Time Off	FFCRA Leave	\$ 40,000.00
SALARY (FFCRA SICK)	Salary (FFCRA SICK)	Per Year	Paid Time Off	FFCRA Leave	\$ 40,000.00
SALARY DT	SALARY DT	Per Year	Doubletime	Regular	\$ 0.00
SALARY OT	SALARY OT	Per Year	Overtime	Regular	\$ 0.00
SALARY PTO	SALARY PTO	Per Year	Paid Time Off	Regular	\$ 50,000.00

Navigation:

Earnings Codes: Greenshadesonline.com > Settings > Payroll > Codes > Earnings Codes

Improved Feature - General Ledger: Add GL Status / Timestamp

Multiple General Ledger screens have been updated to provide sync submission status information. See the below examples of the new “Current Status” field.

Post Pay Run Review Screen:

Marked done by [redacted] on 10/18/2021

Post Transactions to the General Ledger

Create Your General Ledger Batch

Start the process by combining your transactions into a General Ledger Batch.

Recalculate General Ledger
View General Ledger Settings

11 General Ledger Accounts
\$ 13,024.49 Combined Total Amount
Most recent submit: Jan 31, 2022 @ 12:34:00 PM
Current status: Submitted

Post Batch Review Batch

Undo

General Ledger Batch Summary Report Screen

Payroll Reports

★ General Ledger Batch Summary Report
This report shows all General Ledger batches. See more details about each batch by clicking the Review link.

Filter Table... Batch Status

Batch Name	Batch Status	Most recent submit	Associated Pay Run	Pay Period	Check Date	Transaction Count	Credits	Debits	
Payrun - 2019-10-31	Completed	01/31/2022, 12:34:56 PM	Weekly	10/14/2019 - 10/20/2019	10/21/2019	10	\$ 0.00	\$ 203.06	Review
Payrun - 2021-01-22	Completed	01/31/2022, 12:34:56 PM	BiWeekly	01/03/2021 - 01/15/2021	01/22/2021	92	\$ 4,906.33	\$ 9,026.33	Review
Payrun - CORRECTION: SUTA Liabilities - 2021-01-22	Completed	01/31/2022, 12:34:56 PM	-	-	-	2	\$ 50.00	\$ 50.00	Review
TEST	Pending	01/31/2022, 12:34:56 PM	-	-	-	1	\$ 136.52	\$ 0.00	Review
Payrun - Tip Testing - 2019-11-15	Completed	01/31/2022, 12:34:56 PM	Tip Testing	11/08/2019 - 11/08/2019	11/15/2019	6	\$ 3,477.39	\$ 3,477.39	Review
Testing Split DD	Pending	01/31/2022, 12:34:56 PM	Testing Split DD	11/01/2021 - 11/12/2021	11/12/2021	19	\$ 3,795.12	\$ 3,481.79	Review
Payrun - 2020-09-18	Completed	01/31/2022, 12:34:56 PM	BiWeekly	08/30/2020 - 09/12/2020	09/18/2020	1229	\$ 11,147.43	\$ 18,043.96	Review
Payrun - CORRECTION: SUTA Liabilities - 2021-02-19	Completed	01/31/2022, 12:34:56 PM	-	-	-	2	\$ 12.98	\$ 12.98	Review
10/29/2021, 12:00:00 AM	Pending	01/31/2022, 12:34:56 PM	BiWeekly	10/09/2021 - 10/23/2021	10/29/2021	61	\$ 4,469.87	\$ 8,534.62	Review
Payrun - CORRECTION: SUTA Liabilities - 2021-08-15	Completed	01/31/2022, 12:34:56 PM	-	-	-	2	\$ 40.00	\$ 40.00	Review
10/1/2021, 12:00:00 AM	Submitted	01/31/2022, 12:34:56 PM	BiWeekly	09/11/2021 - 09/24/2021	10/01/2021	88	\$ 4,192.00	\$ 7,992.00	Review
Payrun - 2020-06-05	Completed	01/31/2022, 12:34:56 PM	Weekly	05/25/2020 - 05/31/2020	06/05/2020	308	\$ 3,764.82	\$ 3,518.71	Review
All the things	Submitted	01/31/2022, 12:34:56 PM	-	-	-	155	\$ 4,713.73	\$ 9,232.25	Review
Payrun - 2021-07-23	Completed	01/31/2022, 12:34:56 PM	BiWeekly	07/05/2021 - 07/18/2021	07/23/2021	46	\$ 3,259.84	\$ 3,259.84	Review
Payrun - Test Check Number - 2020-02-28	Completed	01/31/2022, 12:34:56 PM	Test Check Number	02/06/2020 - 02/06/2020	02/28/2020	26	\$ 0.00	\$ 0.00	Review
Payrun - 2021-08-13	Completed	01/31/2022, 12:34:56 PM	BiWeekly	07/25/2021 - 08/07/2021	08/13/2021	207	\$ 12,951.62	\$ 24,447.56	Review

Navigation:

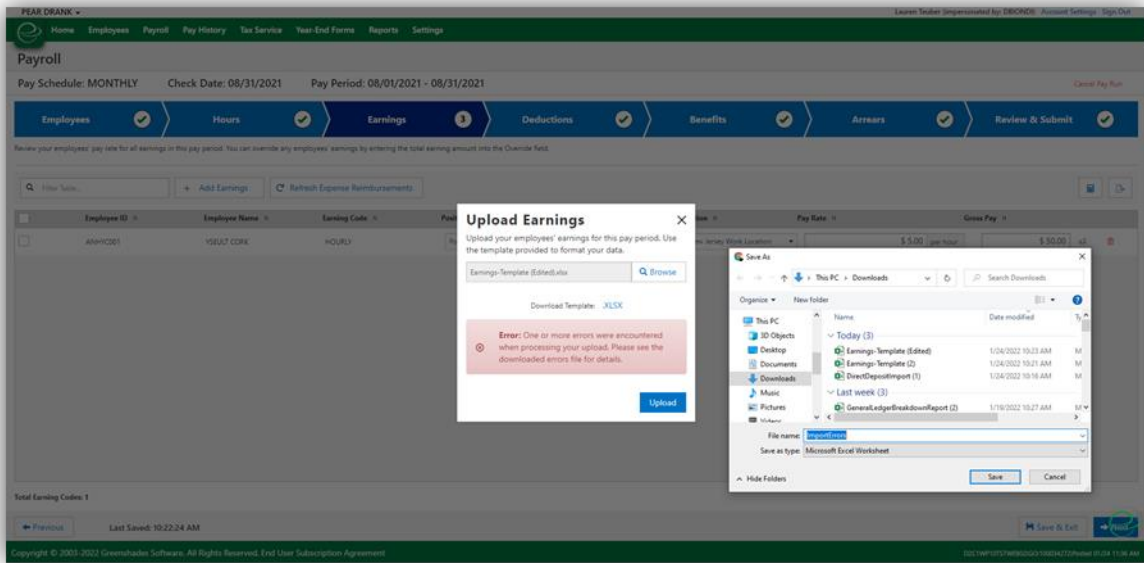
Post Pay Run Review: Greenshadesonline.com > Payroll > Last Payroll > View > Review Batch

General Ledger Batch Summary Report: Greenshadesonline.com > Payroll > Last Payroll > View > Review Batch > General Ledger Batch Summary Report

New Feature – Pay Run Wizard: Benefits Import Enhancement

- Importing Benefits has been improved to produce an exported report of errors whenever an import fails
 - Initially you will be returned text will explain that errors were found on the import. Then the error report will automatically download for review.
 - This error report will be the same as the base import, but with an added column to describe the data issues found on the file
- **Important Note:** This functionality was added for the hours, earnings, and Deductions steps previously. To recap, it is now live for Hours, Earnings, Deductions, and Benefits steps of the Pay Run Wizard.

Error on Earnings import with new download:



Error Report Example:

	A	B	C	D	E	F	G	H	I
1	Errors	EmployeeID	Earning Code	Department Code	Position Code	Location	Start Date	Earning Amount	Adjustment Amount
	Employee 'ANHJV001' not found in workspace Location 'Empty' not found Department 'Department B' not found Position 'Deprnm' not found								
2		ANHJV001	HOURLY	Department B	Deprnm	Empty	07/22/2021	500	

Navigation:

Benefits Import: Greenshadesonline.com > Payroll > Run Payroll > Benefits Step > Add Benefits > Upload > Import

Performance Improvements – Reduce UI load times and remove unused components

File sizes and dependencies for the user interface have been reduced, thus improving the load times and perceived responsiveness of the UI in a variety of payroll screens.

Navigation:

Payroll: Greenshadesonline.com > Payroll

Recent Updates 2/16/2022

Navigation:

Greenshadesonline.com > Setting > Payroll > General Ledger

Greenshadesonline.com > Payroll > Continue Pay Run > Calculator Icon

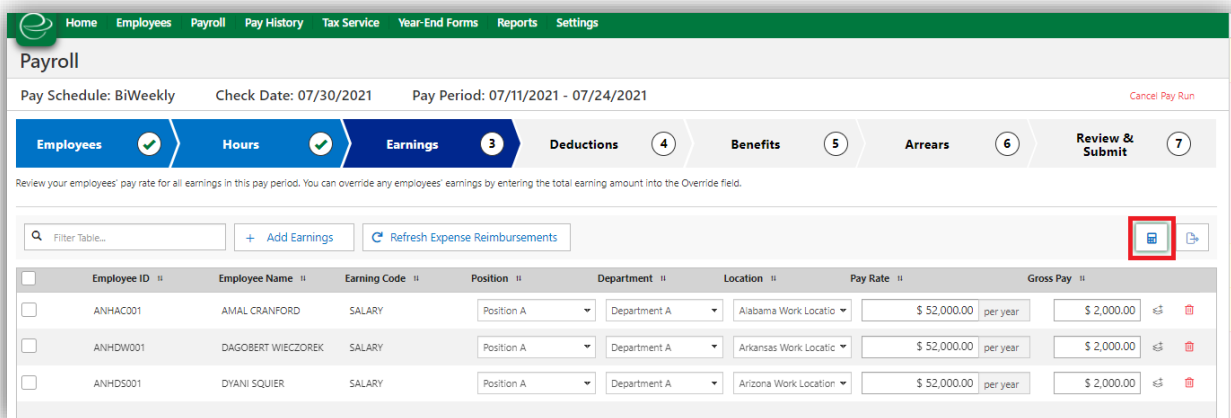
Improved Feature - Pay Run Wizard: Gross-up calculator fixed

The Gross-up calculator in the Pay Run wizard has been enabled. The newly live version of this feature will:

- Re-enable the base feature functionality
- Provide minor changes to how the calculator is taxing
- The calculator will now allow any location to be applied to its setup

We encourage users to experiment with this feature in your payroll via the following navigation (Icon shown below).

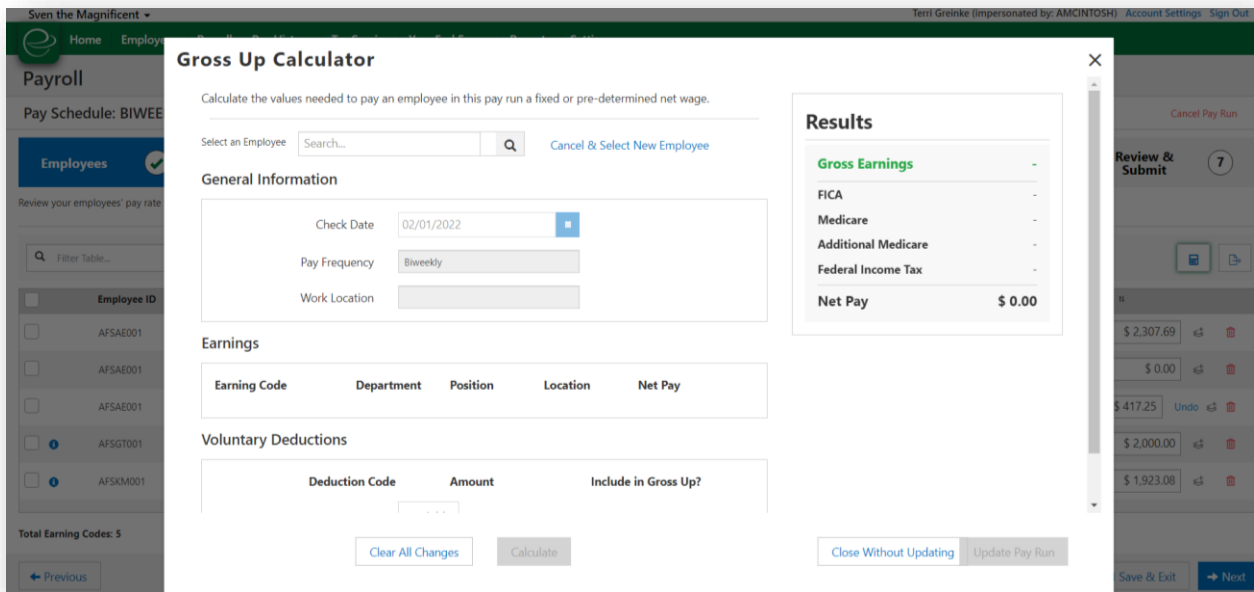
Gross-up navigation: Greenshadesonline.com > Payroll > Continue Pay Run > Calculator Icon



The screenshot shows the 'Payroll' section of the Greenshadesonline.com interface. The top navigation bar includes 'Home', 'Employees', 'Payroll', 'Pay History', 'Tax Service', 'Year-End Forms', 'Reports', and 'Settings'. The main header displays 'Payroll' and 'Pay Schedule: BiWeekly'. Below this, the 'Check Date: 07/30/2021' and 'Pay Period: 07/11/2021 - 07/24/2021' are shown. A progress bar indicates the current step is 'Earnings' (3), with other steps being 'Employees' (1), 'Hours' (2), 'Deductions' (4), 'Benefits' (5), 'Arrears' (6), and 'Review & Submit' (7). A 'Cancel Pay Run' link is visible in the top right. Below the progress bar, a message states: 'Review your employees' pay rate for all earnings in this pay period. You can override any employees' earnings by entering the total earning amount into the Override field.' A search bar labeled 'Filter Table...' is present, along with '+ Add Earnings' and 'Refresh Expense Reimbursements' buttons. A table lists three employees with their details, including Employee ID, Name, Earning Code, Position, Department, Location, Pay Rate, and Gross Pay. A calculator icon is highlighted in a red box in the top right corner of the table area.

Employee ID	Employee Name	Earning Code	Position	Department	Location	Pay Rate	Gross Pay
ANHAC001	AMAL CRANFORD	SALARY	Position A	Department A	Alabama Work Locatio	\$ 52,000.00 per year	\$ 2,000.00
ANHWD001	DAGOBERT WIECZOREK	SALARY	Position A	Department A	Arkansas Work Locatic	\$ 52,000.00 per year	\$ 2,000.00
ANHDS001	DIYANI SQUIER	SALARY	Position A	Department A	Arizona Work Location	\$ 52,000.00 per year	\$ 2,000.00

Gross-up calculator in action:



Improved Feature - General Ledger: Move Mapping default to top

General Ledger mapping previously would add new mappings to the bottom of the list instead of the top. With the new change, new mappings are added to the top.

- This is to better accommodate our users that start their mapping process with the most general cases covered first
- The more detailed mappings will be the latest considerations; therefore, they should be moved to the top of the mapping order when added

General Ledger Mapping wizard:

General Ledger Mapping: Deductions

Map Accounts

Map your General Ledger accounts below.

Order matters. Use the action icons next to each mapping to shift that mapping's priority. General Ledger activity will be mapped using the first mapping that applies in priority order, from top to bottom.

Location	Debit Entity Code	Debit Account	Credit Entity Code	Credit Account	
Alabama Work Location	None	Deduction 1	None	Deduction 1	+ ⋮
Alaska Work Location	None	Deduction 2	None	Deduction 2	+ ⋮
Arizona Work Location	None	Deduction 3	None	Deduction 3	+ ⋮
Arkansas Work Location	None	Deduction 4	None	Deduction 4	+ ⋮
Florida Work Location	None	Deduction 5	None	Deduction 5	+ ⋮

+ Add Mapping

Previous Submit

Recent Updates 1/26/2022

Navigation:

Greenshadesonline.com > Employees > Selected Employee > Pay Settings

Greenshadesonline.com > Setting > Payroll > Codes

Greenshadesonline.com > Payroll > Continue Pay Run

New Feature - Pay Settings: New HSA Direct Deposit setup

- Newly added functionality to deposit HSA allocated funds directly into specified accounts
 - o Any benefits or deductions marked as HSA will be deposited into the specified account for the chosen employee
- This account setup is separated from the standard Direct Deposit setup as the allocation has no dependency on the standard Direct Deposit allocation splits
 - o Only 1 HSA account can be set up and assigned per employee
 - o The account type can be selected as a checking or savings

HSA Deposits Setup Page:

The screenshot shows the 'Employee Management' interface for 'DEBORAH FOLKS'. The 'Payment Method' section is active, showing options for 'Pay by direct deposit' and 'Pay by paper check'. Below this, there are two 'Account' setup sections, 'Account 1' and 'Account 2', each with fields for Routing Number, Account Number, Type, Allocation Type, and Allocation Amount. A red box highlights the 'HSA Account' section, which includes a description and an 'Add Account' button. The 'Pay Schedule' section is also visible at the bottom.

HSA Deposits Account Setup:

HSA Account

Here you can setup this employee's HSA Account information in order to deposit HSA funds directly into their account post payroll.

Account X

Routing Number:

Account Number:

Type:

- Checking
- Savings

Pay Schedule

Assign this employee to a pay schedule. Choose "None" for employees who are not paid by this company. If you are changing the pay schedule of an employee in the middle of pay period, you may need to reconcile this within the pay run wizard.

Pay Schedule:

[Advanced Settings...](#)

By clicking save, this employer is authorizing the initiation of credit entries and adjustment debit entries to the account(s) listed above. This employer has verified that the information above is accurate and the affected employee has agreed to release the employer from any liability resulting from any incorrect information above.

New Feature - Code Settings: Earnings codes import (Bulk Manage Fields)

- The Earnings codes import / export process has been enabled to allow for bulk operation of Employee earnings rates

New "Bulk Manage Fields" feature:

Payroll Code Settings

All master-level Payroll codes for Earnings, Benefits, Deductions, and Time Off are created and managed from each of their respective sections.

Earning Codes Benefit Codes Deduction Codes Time Off Codes Shared Code Groups

Earning Codes

View, add, and modify the earning codes available for payroll.

Earning Code	Pay Stub Name	Rate Type	Category	Wage Type	Default Amount	
BONUS	BONUS	Fixed Amount	Other	Supplemental	\$ 0.00	
COMMISSION	COMMISSION	Fixed Amount	Business Expense	Regular	\$ 0.00	
HOL HOURLY	Holiday Hourly	Per Hour	Holiday	Regular	\$ 0.00	
HOURLY	HOURLY	Per Hour	Other	Regular	\$ 15.00	
HOURLY OT	HOURLY OT	Per Hour	Overtime	Regular	\$ 0.00	
HOURLY FCRA SICK	HOURLY FCRA SICK	Per Hour	Paid Time Off	FCRA Leave	\$ 0.00	
HOURLY OT	HOURLY OT	Per Hour	Overtime Premium	Regular	\$ 0.00	
HOURLY OT PREM	HOURLY OT PREM	Per Hour	Overtime Premium	Regular	\$ 0.00	
HOURLY PTO	HOURLY PTO	Per Hour	Paid Time Off	Regular	\$ 20.00	
SALARY	SALARY staff	Per Year	Other	Regular	\$ 52,000.00	
SALARY 2	SALARY 2	Per Year	Other	Regular	\$ 52,000.00	
SALARY 2 OT	SALARY 2 OT	Per Year	Overtime	Regular	\$ 0.00	
SALARY HOLIDAY	SALARY HOLIDAY	Per Year	Holiday	Regular	\$ 52,000.00	
SALARY OT	SALARY OT	Per Year	Overtime	Regular	\$ 0.00	
SALARY PTO	SALARY PTO	Per Year	Paid Time Off	Regular	\$ 52,000.00	
SD MULTIPLIER	SD MULTIPLIER	Per Hour	Shift Differential	Regular	\$ 0.00	
TIPS	TIPS	Fixed Amount	Business Expense	Tips	\$ 0.00	

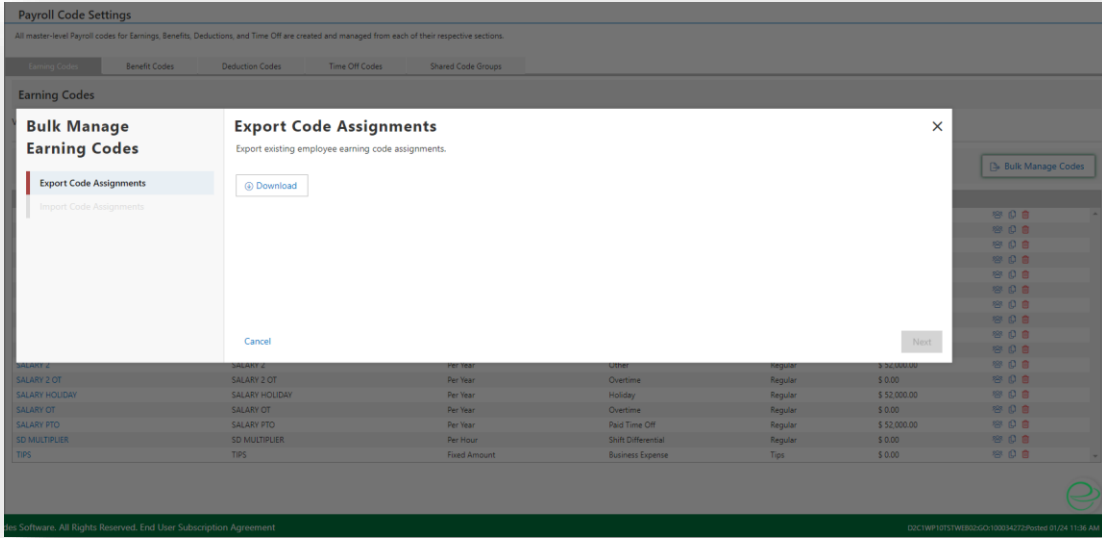
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- Using the new "Bulk Manage Fields" wizard you may...
 - o Export the full list of earnings data for all employees
 - o Assign new rates and amounts at the individual employee level
 - o Review an exported list of errors to determine the pieces of data that caused errors and why

- **Note:** The Export of current assignments is always required before the Import step to safeguard users from unintentionally overwriting with old data

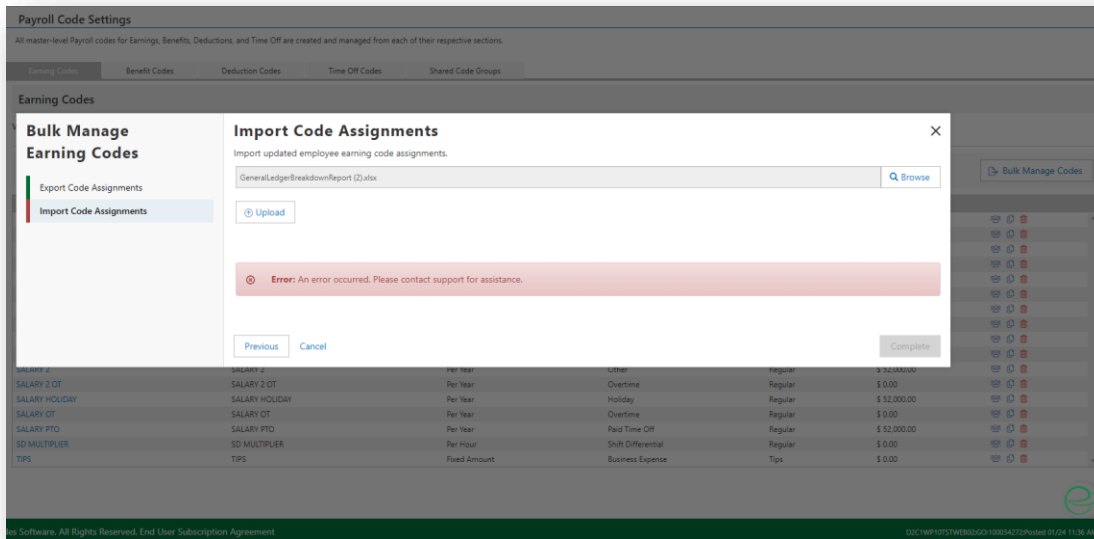
Export current assignments:



Review exported data and adjust:

	A	B	C	D	E	F	G	H	I	J
	First Name	Last Name	Name	Employee ID	Department	Position	Location Name	Amount	Start Date	End Date
1	AMAL	CRANFORD	SALARY	ANHAC001	DEPA		ALABAMA	52000.000000	1/1/2020 12:00:00 AM	
2	DEBORAH	FOLKS	SALARY	ANHDF001	DEPA		ALASKA	52000.000000	1/1/2020 12:00:00 AM	
3	DEBORAH	FOLKS	HOURLY	ANHDF001	DEPA		ALASKA	20.000000	4/1/2021 12:00:00 AM	
4	DEBORAH	FOLKS	HOURLY OT	ANHDF001	DEPA	Position A	ALASKA	0.000000	4/16/2021 12:00:00 AM	
5	DYANI	SQUIER	SALARY	ANHDS001	DEPA		ARIZONA	52000.000000	1/1/2020 12:00:00 AM	
6	DYANI	SQUIER	SALARY OT	ANHDS001	DEPA		FLORIDA	0.000000	1/1/2020 12:00:00 AM	
7	DYANI	SQUIER	HOURLY	ANHDS001	DEPA		ALABAMA	20.000000	1/1/2020 12:00:00 AM	
8	DYANI	SQUIER	HOURLY OT	ANHDS001	DEPA		ALABAMA	0.000000	1/1/2020 12:00:00 AM	
9	DAGOBERT	WIECZOREK	SALARY	ANHDS001	DEPA		ALABAMA	0.000000	1/1/2020 12:00:00 AM	
10	DAGOBERT	WIECZOREK	SALARY PTO	ANHDS001	DEPA		ALABAMA	0.000000	1/1/2020 12:00:00 AM	
11	DAGOBERT	WIECZOREK	SALARY OT	ANHDS001	DEPA		ALABAMA	0.000000	1/1/2020 12:00:00 AM	
12	DAGOBERT	WIECZOREK	SALARY PTO	ANHDS001	DEPA		ALABAMA	0.000000	1/1/2020 12:00:00 AM	
13	DAGOBERT	WIECZOREK	SALARY OT	ANHDS001	DEPA		ALABAMA	0.000000	1/1/2020 12:00:00 AM	
14	DAGOBERT	WIECZOREK	SALARY PTO	ANHDS001	DEPA		ALABAMA	0.000000	1/1/2020 12:00:00 AM	
15	ERNESTINE	KIKER	HOURLY	ANHEK001	DEPA		CALIFORNIA	20.000000	1/1/2020 12:00:00 AM	
16	FINLAY	KIKER	HOURLY	ANHEK001	DEPA		CALIFORNIA	20.000000	1/1/2020 12:00:00 AM	
17	GALI	MARRA	HOURLY	ANHEK001	DEPA		CALIFORNIA	20.000000	1/1/2020 12:00:00 AM	
18	GALI	MARRA	HOURLY	ANHEK001	DEPA		CALIFORNIA	20.000000	1/1/2020 12:00:00 AM	
19	HIDI	LAFFERTY	HOURLY	ANHHL001	DEPA		DC	20.000000	1/1/2020 12:00:00 AM	
20	TAHNTIA	SPOHN	HOURLY	ANHTS001	DEPA		IOWA	20.000000	1/1/2020 12:00:00 AM	
21	TAHNTIA	SPOHN	HOURLY FFCRA SICK	ANHTS001	DEPA		IOWA	25.000000	4/1/2021 12:00:00 AM	
22	YSEULT	CORK	HOURLY	ANHYS001	DEPB		NEWJERSEY	30.000000	1/1/2020 12:00:00 AM	
23	YSEULT	CORK	HOURLY	ANHYS001	DEPB		NEWJERSEY	30.000000	1/1/2020 12:00:00 AM	
24	YSEULT	CORK	SD MULTIPLIER	ANHYS001	DEPB		NEWJERSEY	0.000000	4/1/2021 12:00:00 AM	

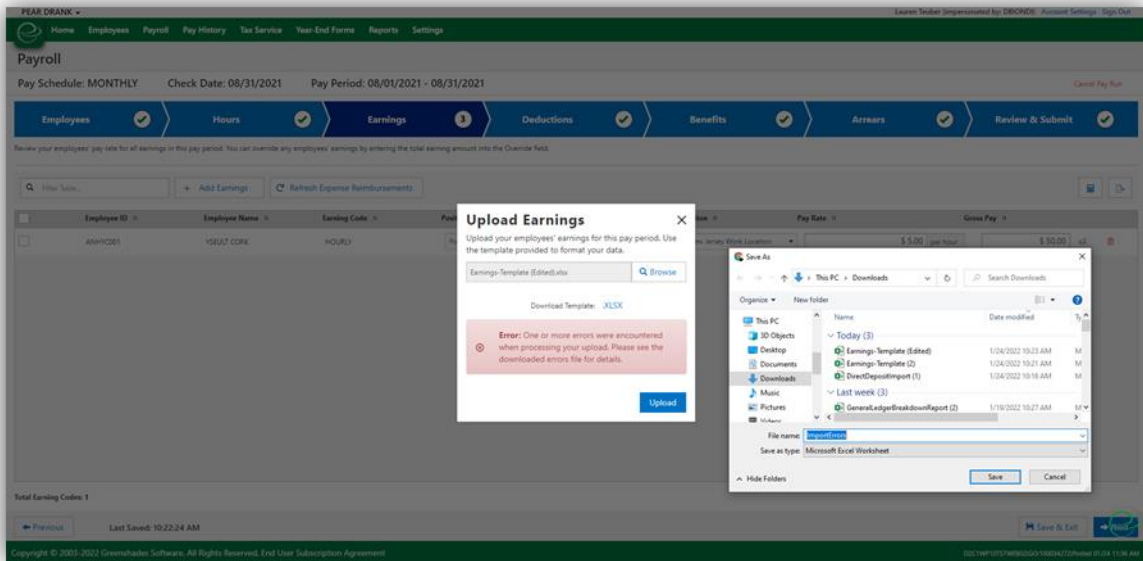
Import new assignments (with error):



New Feature – Pay Run Wizard: Deductions and Earnings Import Enhancement

- Importing Earnings or Deductions has been improved to produce an exported report of errors whenever an import fails
 - o Initially you will be returned text will explain that errors were found on the import. Then the error report will automatically download for review.
 - o This error report will be the same as the base import, but with an added column to describe the data issues found on the file
- **Important Note:** This functionality was added for the hours import step last release. To recap, it is now live for Hours, Earnings, and Deductions steps of the Pay Run Wizard.

Error on Earnings import with new download:



Error Report Example:

	A	B	C	D	E	F	G	H	I
1	Errors	EmployeeID	Earning Code	Department Code	Position Code	Location	Start Date	Earning Amount	Adjustment Amount
	Employee 'ANHYV001' not found in workspace								
	Location 'Empty' not found								
	Department 'Department B' not found								
	Position 'Deprn' not found								
2		ANHYV001	HOURLY	Department B	Deprn	Empty	07/22/2021	500	

Improved Feature - Pay Run Wizard: Hours and Earnings import accepts Null Locations

- The Pay Run Hours / Earnings imports will no longer error when no location is specified. Now the process of populating the Work location from the import will populate based on the below criteria (in priority order):
 1. If a value is specifically entered in the import field, the location will populate with that chosen value.
 2. If the field is left blank, then the location will populate with the Employee’s specific location for the chosen earnings code
 3. If there is no employee specific earnings code location, then the location will populate with the “Work Location” for that Employee found in their Employee Information section
 4. If no Employee work location, then error and explain that the employee does not have a location setup

Example: Scenario 3 shown

Employee “Work Location” in the employee information section:

YSEULT CORK
Digital Employee Folder

[← Back to Employee List](#)

Employee ID: ANHYC001 [Organization Chart](#) [View Organization Chart](#)

First Name: YSEULT

Last Name: CORK

Hire Date: 12/01/2019

Rehire Date:

Termination Date:

Email:

Work Location ⓘ New Jersey Work Location

Supervisor:

Department: Department B

Position: Position B

Division:

Earnings Import Example for the above employee with no location entered:

	A	B	C	D	E	F	G	H	I
1	EmployeeID	Earning Code	Department Code	Position Code	Location	Start Date	Earning Amount	Adjustment Amount	
2	ANHYC001	HOURLY				07/22/2021	500		
3									
4									
5									

Employee earnings code is properly populated with the Employee "Work Location"

Rule: MONTHLY Check Date: 08/31/2021 Pay Period: 08/01/2021 - 08/31/2021

Employees ✓
 Hours ✓
 Earnings 3
 Deductions ✓
 Benefits ✓
 Arrears ✓

employees' pay rate for all earnings in this pay period. You can override any employees' earnings by entering the total earning amount into the Override field.

able... + Add Earnings Refresh Expense Reimbursements

Employee ID	Employee Name	Earning Code	Position	Department	Location	Pay Rate
ANHYC001	YSEULT CORK	HOURLY			New Jersey Work Location	\$ 500.00 per hour

Recent Updates 12/22/2021

Improved Feature - Multi-State taxation:

- Payroll calculations for employees working across multiple jurisdictions were improved to ensure withholding accuracy for SIT, SUTA, SDI, and other taxes.
- SUTA withholdings will always be calculated against the Employee's set Work Location in their employee information
- Payrun Wizard Review step now contains "Earnings locations" and "Position" columns

Pilario Ackerman
Employee ID: ACK0001
Department: Support Services
Work Location: Louisiana
Position: Consultant/Support
Hire Date: 06/02/2013
HR Status: Other

Paycheck Summary
There was an error calculating payroll information for 1 employee(s).
442.94
Gross Pay: \$ 543.00
Total Deductions: \$ 100
Total Employee Taxes: \$ 37.06
Payment Method: Direct Deposit

Earnings

Code Name	Pay Stk Name	Position	Department	Location	Hours	Minutes	Amount	
Hourly	Hourly	ATC	ACCT	KENTUCKY	15	0	\$ 225.00	Clear
Hourly	Hourly	ATC	ADMIN	OHIO	21	0	\$ 315.00	Clear
Total Taxes					36 Hours	0 Minutes	\$ 540.00	

- The Tax Parameters screen will also show warnings on said locations where no specific W-4 parameters are set for that employee

Employer Medicare Tax Exempt: No

Social Security Exempt: No

Medicare Exempt: No

Additional Medicare Exempt: No

Texas State Unemployment Tax Exempt: No

There are no specified tax parameters chosen for this tax. Default values will be used until edited.

- **Important Note:** When no tax parameters are specified, defaults parameters will be utilized

Improved Feature – Blended OT:

- Calculation changed for OVERTIME codes to adhere to proper FLSA OT standards
- Overtime Premium and standard Overtime codes will now produce the same resulting total earnings.
- For Payroll Frequencies of Bi-weekly, Twice a Month, Monthly, etc. Overtime is calculated on a weekly basis and the result of each week is summed together in the payrun

How to Calculate Blended OT:

Step 1 – Calculate RROP as follows:

1. Multiply each earning code by its total hours
2. Add the resulting earnings totals together
3. Then divide by total hours worked

Step 2 - Determine the total base earnings amount (without Overtime):

1. Multiply each earning code by its total hours
2. Add the resulting earnings totals together

Step 3 - Determine the Overtime earnings

1. The determined RROP is multiplied by 0.5
2. The result is multiplied by the total OT hours, which is determined as the total hours over 40 in that work week

Step 4 – Sum your Base Earnings with your Overtime earnings

Example:

- Hours and Rates:
 - o 20 hours Code A at \$15/hr
 - o 20 hours Code B at \$25/hr
 - o 10 hours total OT (on Code B - base rate \$25 in this case)
- **[Step 1]** RROP = $(20 * \$15 + 30 * \$25) / 50 = \$21/\text{hour}$
- **[Step 2]** Base Earnings = $(20 * \$15) + (20 * \$25) + (10 * 25) = (\$300) + (\$500) + (\$250) = \1050
- **[Step 3]** Overtime = $(0.5 * \$21) * 10 = \$10.5 * 10 = \$105$
- **[Step 4]** $\$1050$ (Base Earnings) + $\$105$ (Overtime) = $\$1155$

Note: The above resulting pay will be the same no matter what codes are used as OT as long as it is the same total **OT** hours and total **Base Code** hours.

New Feature – HAS Family Support

- HSA family plans for deductions and benefits have been added
- Validation in the code setup interface to ensure an Employee can only be applied either a family or single HSA plan (not both)

Employee Contribution Details

Rate Type: Fixed Amount

Tax Type: [Dropdown]

Employee Contribution: [Dropdown]

Scheduling Method: Health Savings Account - Family

Traditional 401(k)
403(b)
457
Roth 401(k)
Roth 403(b)
Roth 457
Simple IRA
Custom

Previous Cancel

New Feature - Payrun Wizard Hours Import Enhancement:

- The Hour import tool in the Payrun Wizard will produce an error report if issues are found on the imported file
- The report will explain the discrepancies or issues in each line of the import (example below)

	A	B	C	D	E	F	G	H	I
	Errors	EmployeeID	Earning Code	Department Code	Position Code	Location	Start Time	Hours Worked	Minutes Worked
1	EarningCode 'Pots' not found	ANHEF001	Pots			HAWAII	12/5/2021	40	
2	Employee 'Sandwich' not found in workspace	Sandwich	HOURLY			CALIFORNIA	11/29/2021	40	
3	Employee Sandwich does not have a work period that satisfies the start date 11/29/2021	ANHNN001	HOURLY			OHIO	12/15/2021	40	
4	Employee ANHNN001 does not have a work period that satisfies the start date 12/15/2021	ANHSH001	SALARY		INDIANA	12/01/2021	40		

Recent Updates 2/8/2021

Benefit and Deduction Modals

Benefit and Deduction codes can now be configured as separate, unrelated codes for most benefit and deduction code types. These codes are also now managed in separate workflows and is most useful in scenarios where an employee paid deduction does not have a corresponding employer paid benefit (ex: an employee paid uniform deduction). No changes were made to health insurance code workflows.

General Ledger Settings

Fixed a minor bug where different tabs on the General Ledger settings weren't always loading correctly when no filters were set. These tabs now load correctly.

Payroll Calculations

Fixed an issue where an entire pay run would fail to load if it included an employee whose start date is after the pay period end date. Now, these employees won't be automatically included if they were not employed during the pay period.

ACH File – Hash Totals

In some instances, ACH files were erroring after submission to the clients bank due to incorrect hash values. We fixed the underlying calculation for this and this should not recur.

Recent Updates 1/25/2021

Pay Run Loading Improvements

Fixed a sporadic issue where clicking too fast between different pay run steps, the wizard would redirect infinitely. Users could only refresh the page to fix the issue. Now, users should not hit this issue anymore.

Recent Updates 1/9/2021

Holiday Settings for Pay Schedules

Added a new option to pay schedules where a check date may fall on a weekend or holiday. The new option is to change the check date to the nearest business day in the same week (ex: A Saturday check will be paid on Friday, and a Sunday holiday is paid on Monday).

Tax Display Updates

Break out employer paid taxes and employee paid taxes more clearly in the 'View Paystubs' modal on the final step of the pay run wizard.

Bank Account Settings

Added help text to bank account settings for the Origin ID and Taxpayer ID fields.

Taxability for Negative Deductions

Fixed issue where negative deductions were being treated as a positive pre-tax amount. Now, these negative deductions do not reduce taxable wages.

UI Improvements

Fixed a minor bug where clicking on a schedule in the schedule list would first load the last schedule the user had looked at, and then would load the correct schedule next.

Recent Updates 12/23/2020

Homepage Warnings for Benefit Codes

Updated the homepage warnings for benefit codes to be more clear, reduce duplicate errors, and stop warning for configurations that are correct.

Payroll Pay Schedules and Timesheets Pay Groups

These two concepts share similar overlapping settings (specifically work week and pay schedule settings). Now, these two values must be mapped to each other to prevent conflicting configurations that lead to incorrect payroll calculations.

Hours Step Improvements

Fixed an issue with timeouts occurring on the hours step where the amount of hours an employee worked was taking 30+ seconds to load from Greenshades timesheets.

Premium Shift Pay

Premium shift pay is now fully supported in earnings codes. Earning code rates can now be set to be based on another earning code and include either a rate addition or rate multiplier to handle special circumstances. These codes can also be used on employee timesheets for shift differential tracking.

Pay Run UX Improvements

Filters that are set in one step of a pay run now persist throughout the rest of the steps within a pay run.

Recent Updates /12/9/2020

State W4

Updated behavior for employee tax parameters where these were uploaded from a previous system that did not account for state-specific requirements. Specifically, the state of Oklahoma does not recognize certain Filing Status options that the Federal W-4 allows. These state's filing status options now match the allowed values.

Code Frequency Options

Added robust settings for all fixed amount earning, benefit, and deduction codes and removed the corresponding global settings. Now, each fixed amount code can specify if the total rate should be applied over multiple checks or be included in a single check.

Group Term Life Taxability

Users now have the option of making their Group Term Life imputed income subject to Federal Income Tax and/or State Income Tax.

Holiday Earning Codes Updates

Added option to holiday earnings codes to not reduce a salary employee's hours worked.

Catchup 401k Deductions

Users now have the ability to set up a specific 401k catchup deduction that will only be applied once the standard 401k deduction limit has been met.

Review and Submit

Added subject wages to the review and submit step of the pay run wizard.

UI Improvements

Fixed an issue where bolding text causes the text to run past the standard column width.

Performance Improvements

The payroll product in general was loading inactive employees who are ineligible for pay runs and code or schedule assignments. Now, these employees will no longer be loaded in scenarios where they should not be to improve performance.

Recent Updates 11/25/2020

Overtime Calculations

Added warnings to a pay run when overtime hours are included in a pay run, but those overtime hours are in a work week that extends past the end of the pay period.

W-2 Compatibility

Added Box 12 and Box 14 code values to the screens for master code settings on earnings codes. These values were previously set during initial implementation of the payroll product only and were not visible to end users until now.

Special Pay Runs – Time Off

Special pay runs now include an option to include Time Off accruals

Pay Run Performance Improvements

The earnings step in a pay run was sending too much data back to the screen that wasn't actually used. We reduced the amount of data that is sent to this screen to reduce the load time.

Arizona State Taxes

Fixed an issue where the tax engine for Arizona state taxes needed a tax rate of 0.0 and not simply 0.

Recent Updates 11/11/2020

Schedule Settings

Performance improvements to the schedules list in payroll settings to improve loading times for large (5,000+ employee) companies. As part of this change, inactive employees can only be assigned to a pay schedule from the employee card.

Visual Improvements

Added highlighting to delete functionality on grids so its easier for the admin to understand which item is being deleted.

Data Testing Updates

Added additional data update options for clients who are implementing and updating employee information.

Warning Improvements

Improve warnings for inactive employees who are not in a pay schedule.

Improve error messages on homepage when a Pennsylvania work location is missing a Political Sub Division.

Recent Updates 10/28/2020

Bankruptcy Garnishments

Bankruptcy garnishments are now natively support within the payroll module and can be assigned to any employee as needed. These garnishments act like all other garnishments and automatically pull in to appropriate pay runs as configured.

Foreign Military Base Taxes

On the employee profile, an employee's location can be set to a military base. When that employee is paid via payroll, they are taxed correctly. This is most useful for employees who are working part-time for a US-based company while stationed abroad.

Marital Status	Married
Address Line 1	123 Main St
Address Line 2	
Address Line 3	
Military Address ⓘ	<input checked="" type="checkbox"/>
City	APO - Air/Army Post Office
State	AA - Armed Forces of the Americas
Zip Code	12345
Country	United States

Cancel

Save

Earnings Import Improvements

When Uploading the earnings import, some errors result in a non-specific error of "Error: Failed to import for the following reasons: null". We've updated these to be more specific and useful, for example: "Error: Failed to import for the following reasons: Invalid Base Code Name value ('Salary')"

General UI Improvements

- Added better tooltips to earnings imports
- Update the minutes and hours on the final pay stub preview modal so that 40 hours, 61 minutes appears correctly as 41 hours, 1 minute
- Improved loading times for the pay schedule modal

Recent Updates 10/7/2020

Bank Account Number Validation

When entering a bank account number, leading 0s will work as expected and we've added better warnings when a bank account number appears incorrectly formatted.

Ambiguous Error Prevention

In some instances, conflicting changes or requests to the payroll databases were causing transient errors. We've made some changes handle these situations better to prevent internal and user impacting errors.

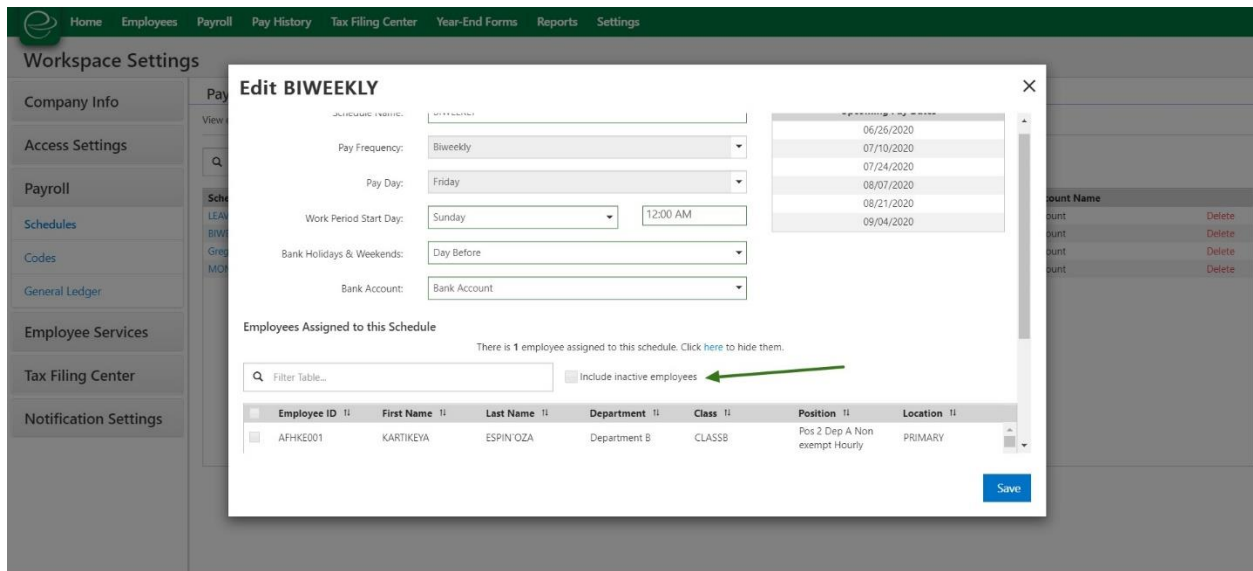
General UI Improvements

Hover over text no longer blocks input fields

Recent Updates 9/23/2020

Add Inactive Employee Filter to Assignment Grids

Schedule assignment grids now have an 'Include Inactive Employees' filter. This allows the admin to show/hide inactive employees from the selection list, making it easier to find specific employees or to select all active employees only.



Added Validation to Bank Account Inputs

Added better guidance and warning text to the bank account screen in case a user inputs an invalid check number.

Workers Comp Codes

Workers Compensation Codes are now supported on the employee's position, and this code is used throughout payroll as needed.

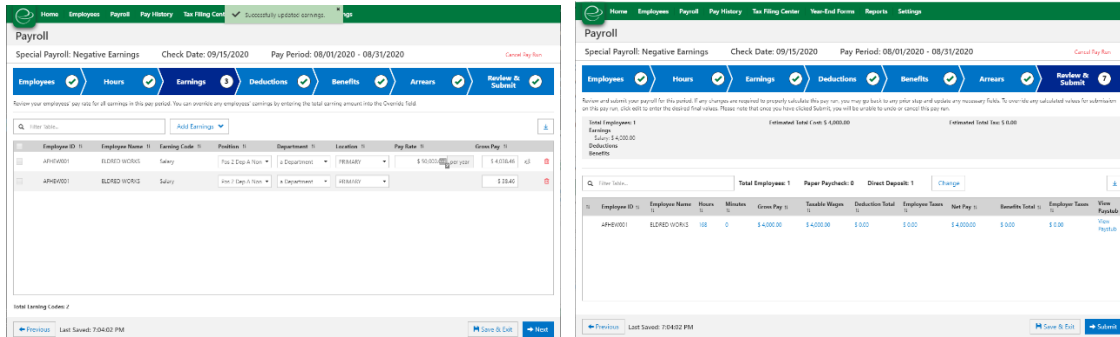
Recent Updates 8/31/2020

Work From Home Employees

An employee's work location can now be set to 'Work From Home'. Use this option if you wish to withhold taxes based on the employee's home location instead of this work location. This option is frequently used by employers that need to treat an employee's home location as their work location. This may be because organizations meet the economic nexus requirements and fulfill other regulations.

Negative Earnings During Pay Run

Admins can now enter or upload negative earnings for an employee during a pay run. The amount input boxes in the pay run accept negative values, and an employee can have both negative and positive amounts for the same earnings codes during a pay run. These values will show as separate lines on the employee's pay stub. If negative earnings result in a negative net pay, an error will display on the final step and the employees wages must be greater than or equal to \$0.



Gross Up Calculator Updates

The gross up calculator now automatically includes an employee's regular deductions in its calculations. These deductions can easily be removed from the calculation as well.

General Ledger Improvements

A subset of clients were experiencing significant performance issues with the General Ledger settings. We completely rewrote all these pages to improve loading speeds.

Handle New Timesheets "Activity" Features

The timesheets products now allow for custom "Activities" to be added to timesheets, so the payroll product also handles the results from those entries correctly.

Minor UI Improvements

Cleaned up some loading icons throughout payroll, fixed some minor display bugs for some totals, and fixed some help tips that were loading off screen.

Recent Updates 8/13/2020

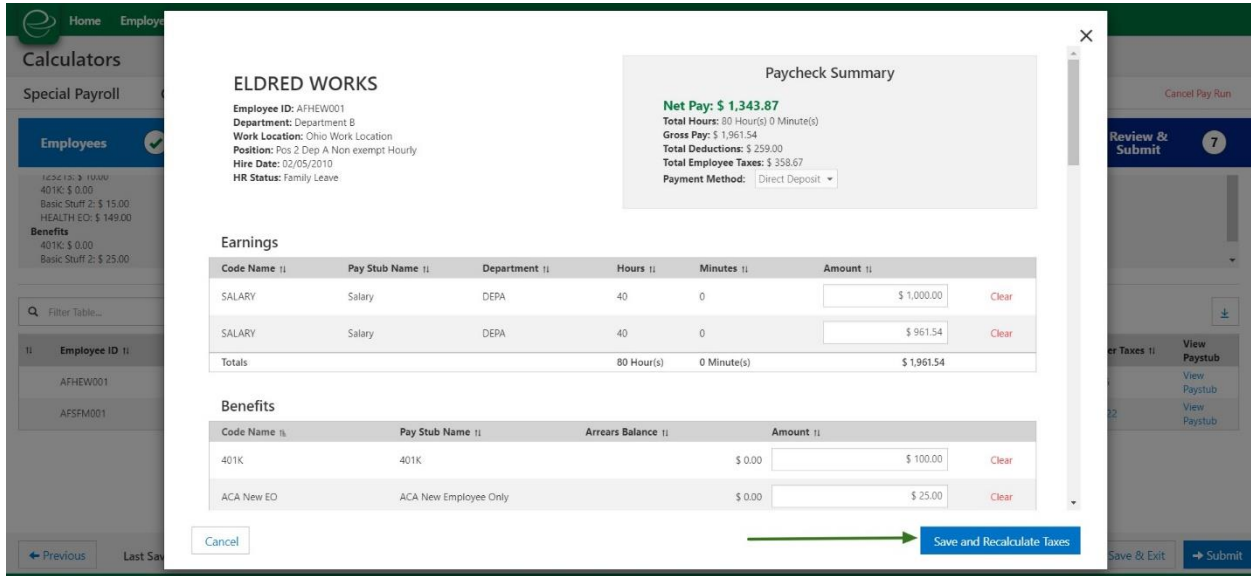
Employee Earnings Report

New report shows the total earnings for each employee between a given time period. This report includes columns for: Regular Pay, Non Taxable Earnings, Supplemental Pay, Overtime, Doubletime, Reported Earnings/Tips, Non-reported Tips, Pay Adjustments (Minimum Wage Adjustments), and Gross Earnings.

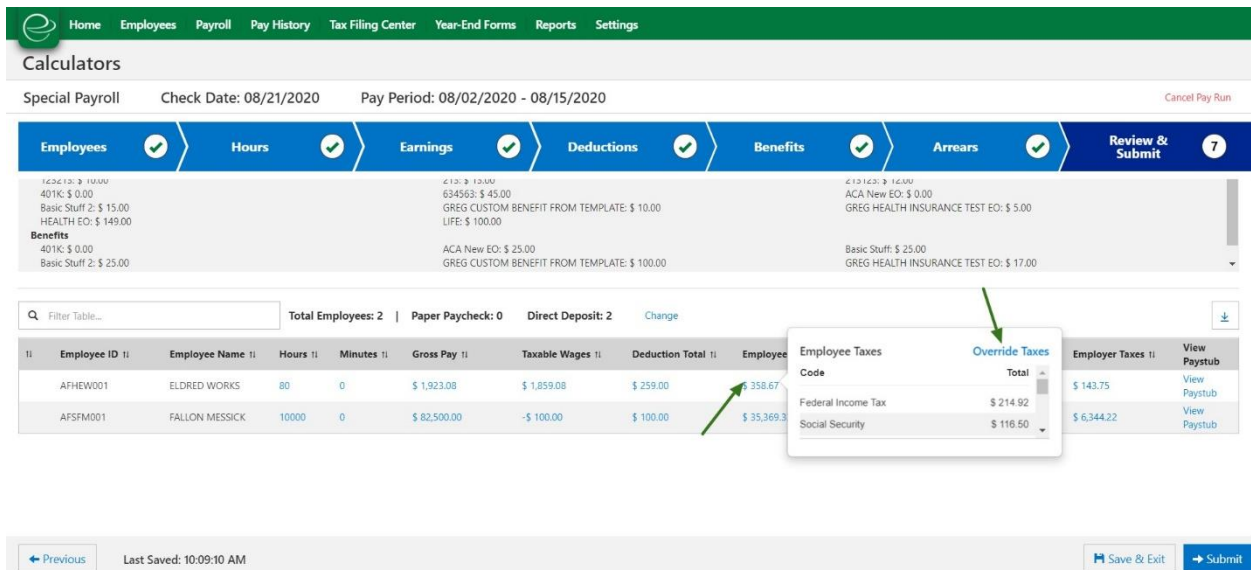
Employee Tax Calculations

Change the workflows for overriding employee values on the final step of a pay run to prevent unintentional mistakes.

The preview pay check modal no longer allows the user to override taxes directly. Instead, the admin can change the earnings, benefits, and deductions amounts for the pay run and the save button will automatically recalculate taxes.



In order to change tax amounts on a pay run, the admin will need to navigate to the tax amounts directly in order to override these.



Minor UI Improvements

- Add explanation text to the employees step of a pay run.

Recent Updates 7/29/2020

Calculator Print Options

By default, both payroll calculators now have printer-friendly view to print the calculation results or save as a PDF.

The screenshot shows the 'Gross-Up Calculator' interface. At the top is a green navigation bar with links: Home, Employees, Payroll, Pay History, Tax Filing Center, Year-End Forms, Reports, and Settings. Below this is a 'Calculators' header. The main section is titled 'Gross-Up Calculator' and includes a sub-header: 'Calculate the values needed to pay an employee a fixed or pre-determined net wage.'

Input fields include: 'Select an Employee' (dropdown with 'ARTHUR ESTATUS' and a search icon, plus a 'Clear All' link), 'General Information' (Check Date: 10/07/2020, Pay Frequency: Biweekly, Work Location: MO and St.Louis Tax), and 'Earnings' (Earning Code: Phone Stipend, Net Pay: \$ 50.00).

On the right, a 'Results' panel displays employee details (ARTHUR ESTATUS, Employee ID: AFSAE001, Department: DEPB, Position: Pos 2 Dep B Non Exempt Hourly) and a table of deductions and payments:

Check Date	10/07/2020
Pay Frequency	Biweekly
Work Location	MOSTL
Phone Stipend	\$ 54.15
Gross Pay	\$ 54.15
FICA	(\$ 3.36)
Medicare	(\$ 0.79)
Additional Medicare	(\$ 0.00)
Federal Income Tax	(\$ 0.00)
Net Pay	\$ 50.00

A green arrow points to a printer icon in the top right corner of the Results panel.

Various Technical Updates

- Work locations now import faster from the core Greenshades Online database to payroll
- Payroll data is sent to other modules faster once a pay run is completed

Recent Updates – 7/20/2020

New Report Showing Changes to Employee Compensation

A new report has been added to the Payroll Reports section that shows all changes to employee code assignments and values. This can be used to see changes in employee compensation within payroll.

Improvements to taxability for codes with \$0 on the pay run

Some minor backend improvements to handle codes that have been included on a pay run this year, but not on this pay run. This has previously been causing a rare error.

Recent Updates – 7/13/2020

Showing garnishment on a pay run within the deductions step when an employee is manually added to the pay run.

This addresses an issue where if an employee is added manually to a pay run, we were not seeing garnishment information in the deductions step. This item also makes the garnishment read-only during a pay run.

Baxter the Brave Lauren Teuber Account Settings Sign Out

Home Employees Payroll Pay History Tax Filing Center Year-End Forms Reports Settings

Payroll

Pay Schedule: Bimonthly Check Date: 07/17/2020 Pay Period: 07/01/2020 - 07/16/2020 Cancel Pay Run

Employees Hours Earnings **Deductions** Benefits Arrears Review & Submit

Review your employees' deductions for this pay period. You can override the amount of an employee's deduction by entering the total deduction amount for that code.

afsd

Employee ID	Employee Name	Deduction Code	Pay Stub Name	Percent Gross	Fixed Amount	Total Deduction Amount
AFSDM001	DOREEN MCSWEENEY	Test Benefit Code EF	Test Benefit Code Employee Family		\$ 1,000.00	\$ 1,000.00
AFSDM001	DOREEN MCSWEENEY	Test Dental EF	Test Dental Employee Family		\$ 125.00	\$ 125.00
AFSDM001	DOREEN MCSWEENEY	Test for Pretax	Test for Pretax		\$ 541.67	\$ 541.67
AFSDM001	DOREEN MCSWEENEY	123456-ABC	123456-ABC			\$ 100.00

Total Deduction Codes: 13

Prevent users from deleting bank accounts that are tied to active pay schedules.

If a bank account is associated with an active pay schedule, that bank account cannot be deleted.

Bank Account Settings

Company Info **Bank Accounts** Access Settings Payroll Schedules Codes General Ledger Employee Services Tax Filing Center Notification Settings

View, edit, modify existing bank accounts or add new bank accounts from this page.

Name	Routing Number	Account Number	Financial Institution	Origin ID	Payer ID
BankyBank	123456789	123456789	Banky Bank	1234567897	1234567899
Default Account	000123000	123456789	My Bank	23-1010101	23-0101010

Bank Account cannot be deleted because it is used in at least one pay schedule.

Baxter the Brave Lauren Teuber Account Settings Sign Out

Home Employees Payroll Pay History Tax Filing Center Year-End Forms Reports Settings

Payroll Codes

KAREN SA HALDERMAN [← Back to Employee List](#)

Payroll Codes General Ledger Allocation

Earnings

Code	Pay Stub Name	Calculation Method	Department	Work Location	Position	Tax Type	Amount
HOURLY		Hourly	999	PRIMARY		Regular	\$ 10.00

[+ Add Earning](#)

Benefits

Code	Pay Stub Name	Calculation Method	Work Location	Amount	Arrears Balance
Test Benefit Code EF	Test Benefit Code Employee Family	Fixed Amount	SECONDARY	\$ 1,000.00	\$ 1,000.00
Test Dental EF	Test Dental Employee Family	Fixed Amount	SECONDARY	\$ 250.00	\$ 0.00
Test for Pretax	Test for Pretax	Fixed Amount	SECONDARY	\$ 1,000.00	\$ 0.00

[+ Add Benefit](#)

Deductions

Code	Pay Stub Name	Calculation Method	Amount	Arrears Balance
Test Benefit Code EF	Test Benefit Code Employee Family	Fixed Amount	\$ 1,000.00	\$ 1,000.00
Test Dental EF	Test Dental Employee Family	Fixed Amount	\$ 250.00	\$ 0.00
Test for Pretax	Test for Pretax	Fixed Amount	\$ 500.00	\$ 0.00

[+ Add Deduction](#) [+ Add Garnishment](#)

Time Off

Code	Pay Stub Name	Accrual Method	Balance
Salary PTO	Salary PTO	Fixed Annually	0.00

[+ Add Time Off](#)

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New Administrative Wage Garnishment types

We've added two new garnishment types: "Other Federal" and "Other State". These are for garnishments that do not fit our pre-existing garnishment types. These garnishments can be set to deduct a minimum amount from disposable earnings as well as a percentage of disposable earnings to withhold.

Employee Name Calculation Method Work Location

LOW ER SECONDARY

LOW ER SECONDARY

Add Garnishment

Select a Garnishment to add to this employee

Garnishment Code

- Garnishments
- Child or Spousal Support
- Federal Tax Levy
- Student Loan
- Other State
- Other Federal

[Next](#)

Other minor UI enhancements

Create Earning Code



Calculation Details

Rate Type

 Contributes to Regular Rate of Pay

Earning Category



Default Amount



Default Location

Default Department

Default Position

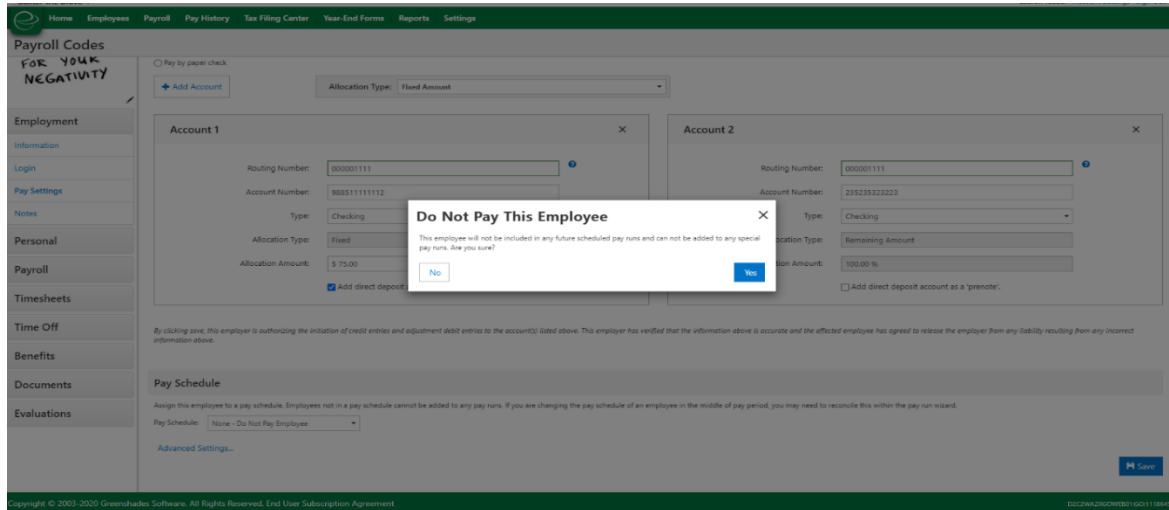
Previous

Next

Recent Updates – 6/23/2020

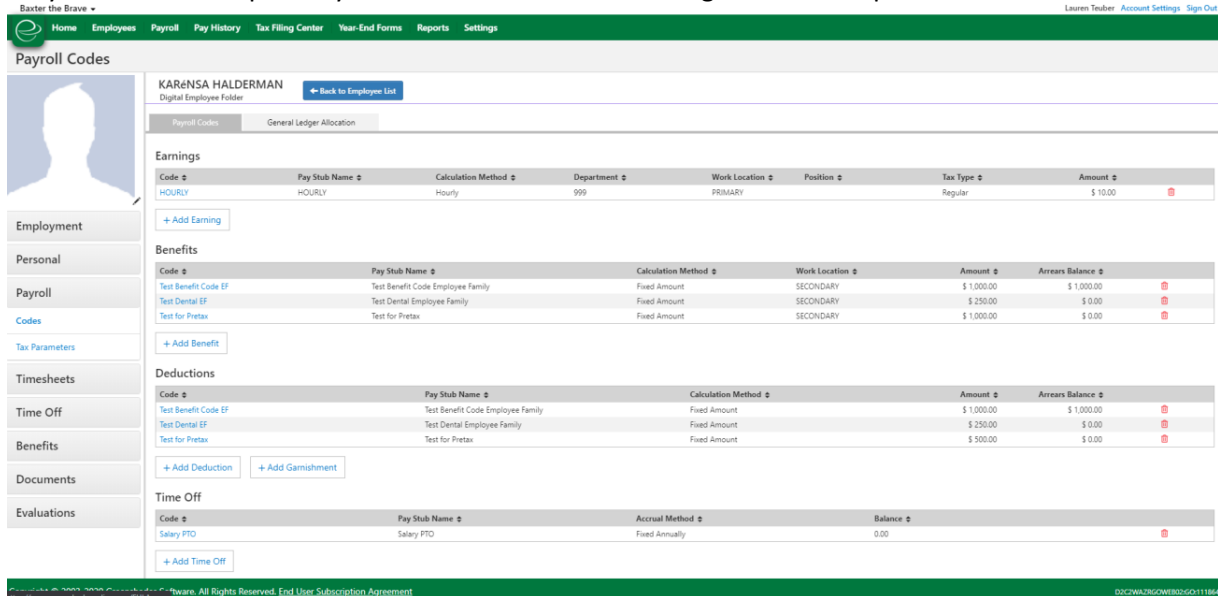
Ability to assign an employee to a schedule of “none”.

This functionality allows you to set an employee to a default schedule of “none”. This can be used when you have an employee in our application that is not paid through payroll.



Setting up garnishments for employees

We have enhanced the process to setup a garnishment for an employee. If garnishments are present, they will be listed separately from deductions and include garnishment-specific fields.



Baxter the Brave Lauren Teuber Account Settings Sign Out

Home Employees Payroll Pay History Tax Filing Center Year-End Forms Reports Settings

Payroll Codes

code	pay stub name	calculation method	department	work location	position	tax type	amount
HOURLY	HOURLY	Hourly	999	PRIMARY		Regular	\$ 10.00

[+ Add Earning](#)

Benefits

Code	Pay Stub Name	Calculation Method	Work Location	Amount	Arrears Balance
Test Benefit Code EF	Test Benefit Code Employee Family	Fixed Amount	SECONDARY	\$ 1,000.00	\$ 1,000.00
Test Dental EF	Test Dental Employee Family	Fixed Amount	SECONDARY	\$ 250.00	\$ 0.00
Test for Pretax	Test for Pretax	Fixed Amount	SECONDARY	\$ 1,000.00	\$ 0.00

[+ Add Benefit](#)

Deductions

Code	Pay Stub Name	Calculation Method	Amount	Arrears Balance
Test Benefit Code EF	Test Benefit Code Employee Family	Fixed Amount	\$ 1,000.00	\$ 1,000.00
Test Dental EF	Test Dental Employee Family	Fixed Amount	\$ 250.00	\$ 0.00
Test for Pretax	Test for Pretax	Fixed Amount	\$ 500.00	\$ 0.00

[+ Add Deduction](#)

Garnishments

Code	Garnishment Type	Calculation Method	Amount
A12345	Child or Spousal Support Garnishment	Fixed Amount	\$ 50.00

[+ Add Garnishment](#)

Time Off

Code	Pay Stub Name	Accrual Method	Balance
Salary PTO	Salary PTO	Fixed Annually	0.00

[+ Add Time Off](#)

Update to the ordering of taxes when viewing an employee's paystub

When viewing a paystub we will display the taxes being paid during the pay period alphabetically followed by taxes that have not been paid alphabetically.

Code Name	Pay Stub Name	Year To Date	Arrears Balance	Amount
Employer Social Security Tax	Employer Social Security Tax	\$ 4,636.53	\$ 0.00	\$ 1,636.92
Employer Medicare Tax	Employer Medicare Tax	\$ 1,084.35	\$ 0.00	\$ 382.83
Federal Income Tax	Federal Income Tax	\$ 16,869.06	\$ 0.00	\$ 8,346.44
Social Security Tax	Social Security Tax	\$ 4,636.53	\$ 0.00	\$ 1,636.92
Medicare	Medicare	\$ 1,084.35	\$ 0.00	\$ 382.83
Additional Medicare	Additional Medicare	\$ 0.00	\$ 0.00	\$ 0.00
Federal Unemployment Tax	Federal Unemployment Tax	\$ 42.00	\$ 0.00	\$ 0.00
Florida State Unemployment Tax	Florida State Unemployment Tax	\$ 0.00	\$ 0.00	\$ 0.00
New York Employer Compensation Expense Tax	New York Employer Compensation Expense Tax	\$ 0.00	\$ 0.00	\$ 0.00
New York SDI	New York SDI	\$ 0.00	\$ 0.00	\$ 0.00
Totals		\$ 28,352.82	\$ 0.00	\$ 12,385.94

[Cancel](#)

[Save](#)

Fixed amount earning enhancements

We've made the process of adding a fixed amount earning more flexible. When creating the earning code, we now provide the ability to specify the default amount and frequency in which it should be paid.

Create Earning Code



Calculation Details

Rate Type	Fixed Amount	
	<input type="checkbox"/> Contributes to Regular Rate of Pay	?
Earning Category	Other	?
Default Amount	\$ 50.00	Monthly ?
Default Location	PRIMARY	
Default Department	Department A	
Default Position	Pos 1 Dep A Non exempt Salary	

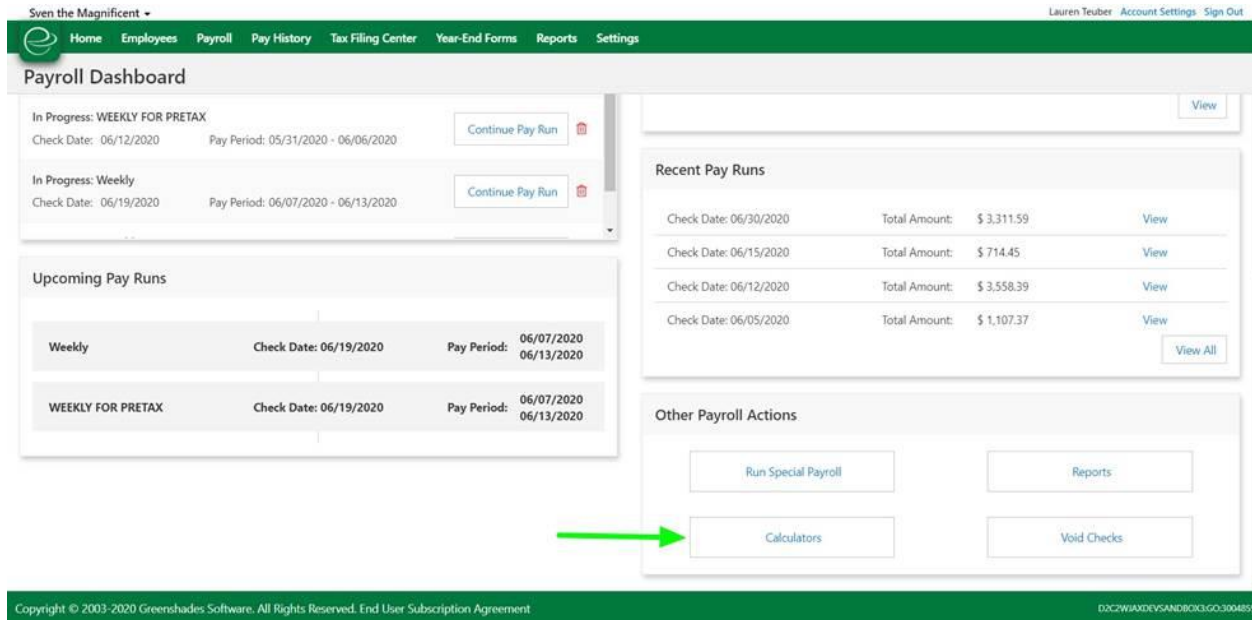
Previous

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Recent Updates – 6/17/2020

Our payroll dashboard now has a section called “Calculators”. This page is accessible from the payroll dashboard.

The calculators are available through a new button on the payroll dashboard that hosts our Gross Up Calculator and a “What-if” scenario-based calculator.

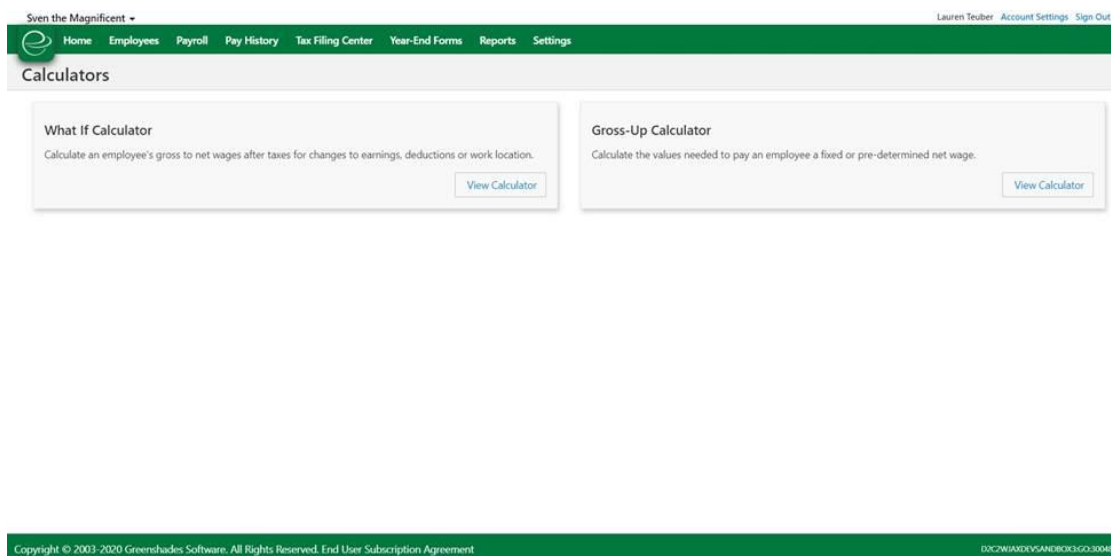


The screenshot shows the Payroll Dashboard interface. At the top, there is a navigation bar with the following items: Home, Employees, Payroll, Pay History, Tax Filing Center, Year-End Forms, Reports, and Settings. The user's name, Lauren Teuber, and links for Account Settings and Sign Out are also visible.

The main content area is titled "Payroll Dashboard" and contains several sections:

- In Progress:** Two entries for "WEEKLY FOR PRETAX" and "Weekly" with their respective check dates and pay periods, each with a "Continue Pay Run" button.
- Upcoming Pay Runs:** A table showing upcoming runs for "Weekly" and "WEEKLY FOR PRETAX" with check dates of 06/19/2020 and pay periods of 06/07/2020 - 06/13/2020.
- Recent Pay Runs:** A table listing recent runs with check dates (06/30/2020, 06/15/2020, 06/12/2020, 06/05/2020) and total amounts (\$3,311.59, \$714.45, \$3,558.39, \$1,107.37). Each entry has a "View" button, and there is a "View All" button at the bottom.
- Other Payroll Actions:** A section with four buttons: "Run Special Payroll", "Reports", "Calculators", and "Void Checks". A green arrow points to the "Calculators" button.

At the bottom of the dashboard, there is a copyright notice: "Copyright © 2003-2020 Greenshades Software. All Rights Reserved. End User Subscription Agreement" and a unique identifier: "D0C2W0AXDEVSANDBOX3GO3004859".



The screenshot shows the "Calculators" page. The navigation bar is the same as in the previous screenshot. The main content area is titled "Calculators" and contains two calculator options:

- What If Calculator:** A box with the description "Calculate an employee's gross to net wages after taxes for changes to earnings, deductions or work location." and a "View Calculator" button.
- Gross-Up Calculator:** A box with the description "Calculate the values needed to pay an employee a fixed or pre-determined net wage." and a "View Calculator" button.

At the bottom of the page, there is a copyright notice: "Copyright © 2003-2020 Greenshades Software. All Rights Reserved. End User Subscription Agreement" and a unique identifier: "D0C2W0AXDEVSANDBOX3GO3004859".

Ability to specify a net amount to pay an employee and calculating the gross wages needed to pay that amount.

This functionality allows you to enter a net amount and be able to calculate up what needs to be paid in gross wages.

Gross-Up Calculator
Calculate the values needed to pay an employee a fixed or pre-determined net wage.

Select an Employee:

General Information

Check Date:

Pay Frequency:

Work Location:

Earnings

Earning Code:

Net Pay:

Voluntary Deductions

Deduction Code:

Results

DYANI SQUIER
Employee ID: ANH0001
Department:
Position:

Check Date	06/16/2020
Pay Frequency	Biweekly
Work Location	ARIZONA
SALARY	\$ 2,669.52
Gross Pay	\$ 2,669.52
FICA	(\$ 185.51)
Medicare	(\$ 38.71)
Additional Medicare	(\$ 0.00)
Federal Income Tax	(\$ 392.22)
Arizona State Tax	(\$ 72.06)
Arizona State Tax	(\$ 0.00)
Net Pay	\$ 2,000.00

Calculated: 06/16/2020 09:58 AM

Edit Benefit & Deduction Code

Benefit Details

Code:

Pay Stub Name:

Description:

Benefit Category:

Calculation

Calculation Method:

Employer Contribution:

Tax Type:

Apply before taxes

Imputed Income

Deduction Details

Rate Type:

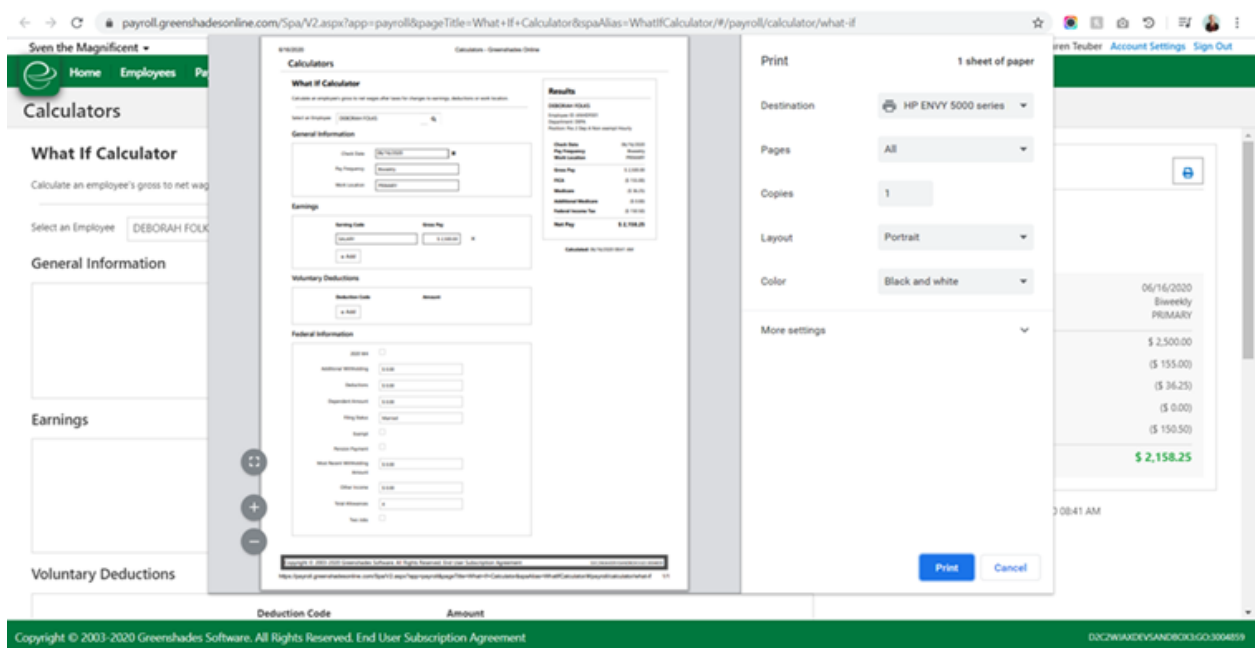
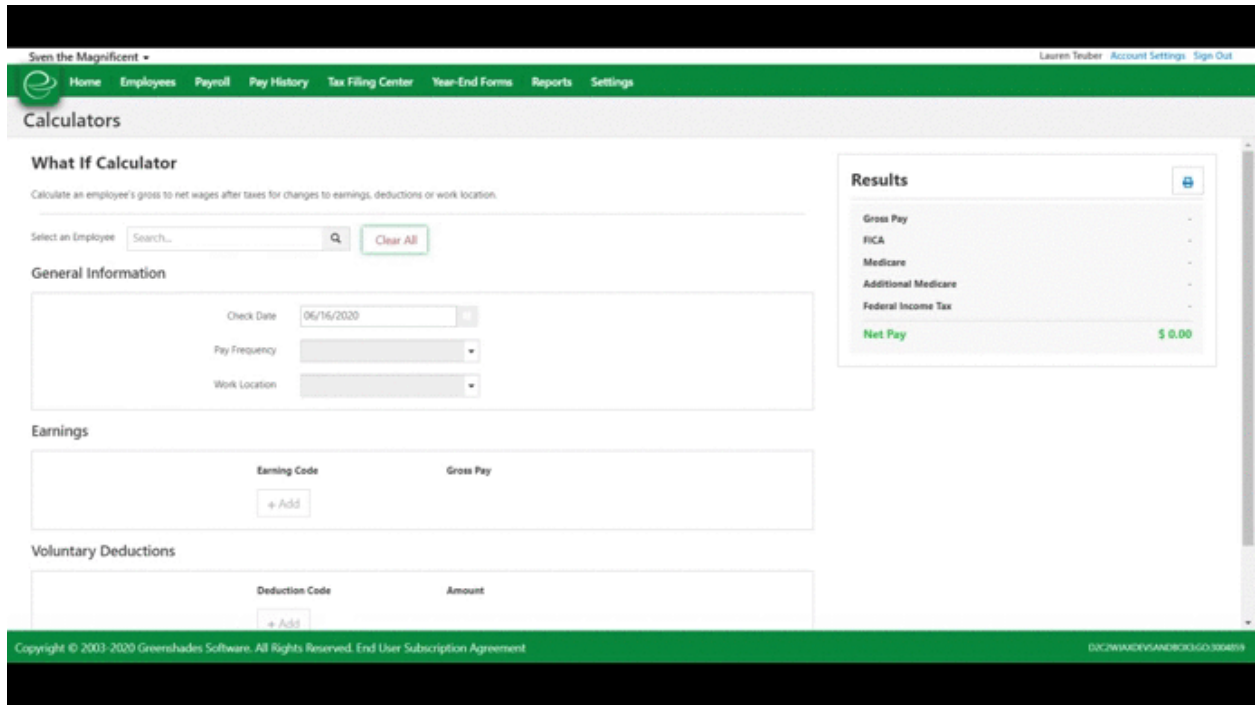
Deduction Category:

Employee Deduction:

Benefit Arrears Details

Ability to run a “what if” scenario and see what an employee’s paycheck would look like if certain changes are made.

This functionality allows you to enter an amount and be able to calculate what exactly needs to be paid. The output of this can be printed and provided to employees.



New Report – Codes assigned by Employee

The Code Assignments report shows all payroll codes currently assigned to employees. This report can be filtered based on code type (benefit, deductions, etc.) and list the details associated with it (employee ID, code name, amount, rate, start/end date). This report can be accessed through the "Reports" section of the payroll dashboard.

Recent Updates – 5/22/2020

Liability Report Date Range Changes:

You can now view your liability report by custom date ranges or preset date ranges (including quarterly, yearly and the past 30 days).

Baxter the Brave Lauren Teuber Account Settings Sign Out

Home Employees Payroll Pay History Tax Filing Center Year-End Forms Reports Settings

Payroll Reports

The Liability Report provides you with details on payroll liabilities for the selected time period or pay run.

Liability Report
Pay Run Name: SemiMonthly
Pay Period: 03/16/2020 - 03/31/2020
Check Date: 04/15/2020
Posted Time: 04/10/2020 10:25 AM

Select the date range or pay run you would like to view

- Last 30 Days
- Year to Date
- Select Quarter
- Custom Date Range
- Select Pay Run

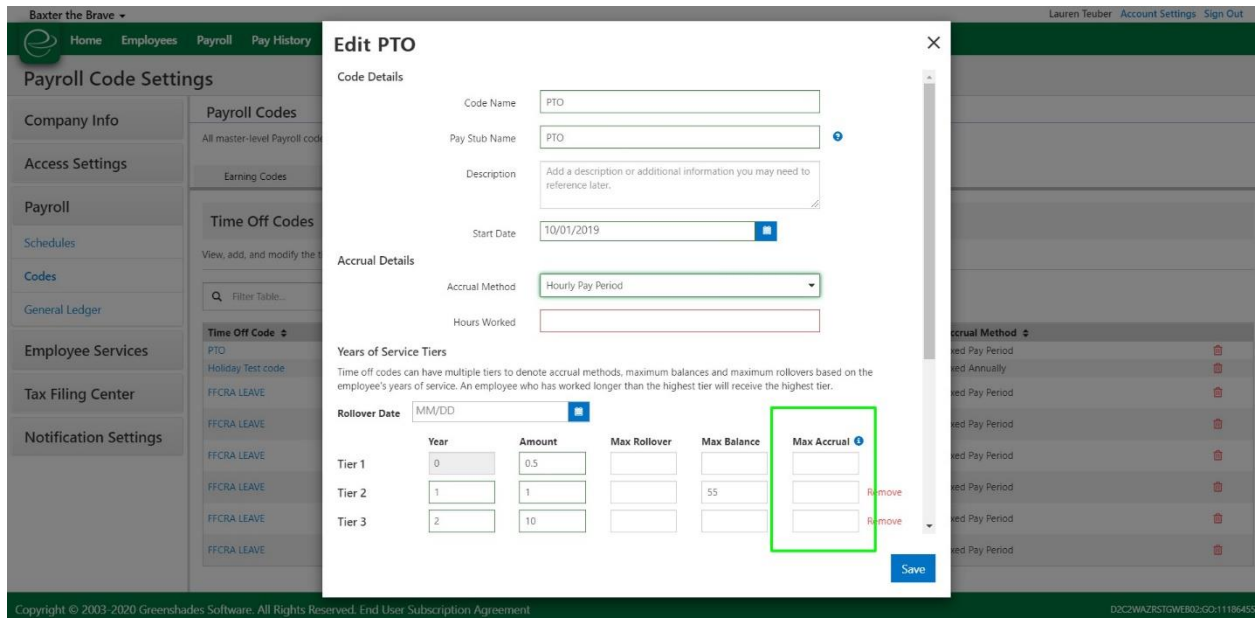
Pay Run Name: SemiMonthly
Pay Period: 03/16/2020 - 03/31/2020
Check Date: 04/15/2020
[Change](#)

Filter Table...

Code	Type	Group	Amount
401K Test 2020	Deduction		\$ 0.00
Additional Medicare	Tax	Employee	\$ 0.00
arrears test guy	Benefit		\$ 275.00
arrears test guy	Deduction		\$ 400.00
Employer FICA Tax	Tax	Employer	\$ 506.49
Employer Medicare Tax	Tax	Employer	\$ 118.46
Federal Income Tax	Tax	Employee	\$ 871.77
Federal Unemployment Tax	Tax	Employer	\$ 41.54
FICA	Tax	Employee	\$ 506.49
Florida State Unemployment Tax	Tax	Employer	\$ 0.00
HEALTH EO	Benefit		\$ 162.51
HEALTH EO	Deduction		\$ 162.51
Laz Sample Health Ins EO	Benefit		\$ 3.25
Laz Sample Health Ins EO	Deduction		\$ 2.17
LIFE	Deduction		\$ 0.00
Life test 2020	Benefit		\$ 0.00
Life test 2020	Deduction		\$ 0.00
Medicare	Tax	Employee	\$ 118.46

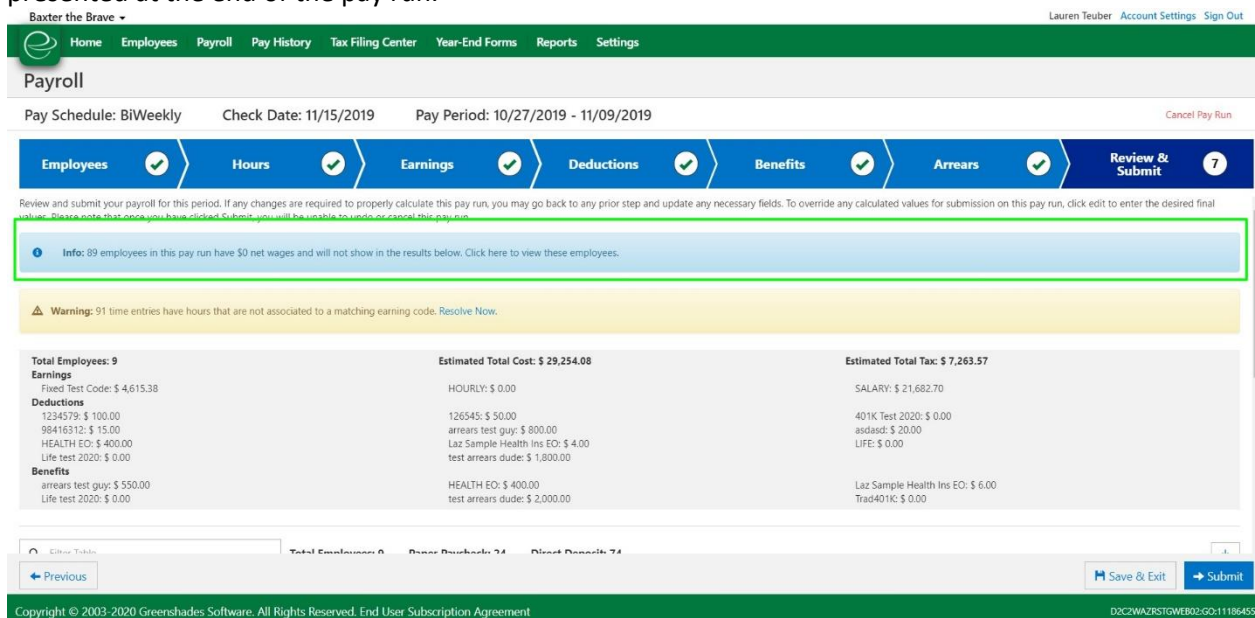
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Ability for admins to set accrual maximums for time off codes that are accrued on an hourly, per pay run basis. This is particularly useful for clients in California where they may need to be able to set an accrual maximum on time off codes in payroll:



Remove \$0 checks from pay run:

Admins will be alerted at the end of the pay run of employees that have no net wages. We now provide the option to remove those employees from the pay run by being able to select a list of employees presented at the end of the pay run.



Baxter the Brave Lauren Teuber Account Settings Sign Out

Home Employees Payroll Pay History Tax Filing Center Year-End Forms Reports Settings

Payroll

Pay Schedule: BiWeekly Cancel Pay Run

Employees ✔

Review and submit your payroll for this period. If any changes are made, please note that once you have clicked Submit, you cannot edit any values.

Info: 89 employees in this pay run have \$0 net wages.

Warning: 91 time entries have hours that are not within the pay period.

Total Employees: 9

Earnings
Fixed Test Code: \$ 4,615.38

Deductions
1234579: \$ 100.00
98416312: \$ 15.00
HEALTH EO: \$ 400.00
Life test 2020: \$ 0.00

Benefits
arrears test guy: \$ 550.00
Life test 2020: \$ 0.00

[← Previous](#)

Remove Employees Pay Run

You have 89 employees with \$0 Net Wages. If you would like to remove any employees from this pay run, please select them below. This will not affect arrears, but the employee will not receive a pay check.

<input type="checkbox"/>	Employee ID	Employee Name	Hours	Net Wages	Benefits	Deductions
<input type="checkbox"/>	ANHDF001	DEBORAH FOLKS	0	0	0	0
<input type="checkbox"/>	ANHDS001	DYANI SQUIER	0	0	0	0
<input type="checkbox"/>	ANHDW001	DAGOBERT WIECZOREK	0	0	0	0
<input type="checkbox"/>	ANHEF001	EUSTACIA FERRARO	0	0	0	0
<input type="checkbox"/>	ANHEK001	ERNESTINE KIKER	0	0	0	0
<input type="checkbox"/>	ANHEL001	Document Testy	0	0	0	0
<input type="checkbox"/>	ANHF001	FINLAY KIKER	0	0	0	0
<input type="checkbox"/>	ANHGM001	GALI MARRA	0	0	0	0
<input type="checkbox"/>	ANHGT001	GIACOBBE TOULD	0	0	0	0

Not Now
Remove Selected

Review & Submit 7

After reviewing this pay run, click edit to enter the desired final pay date.

[Save & Exit](#) [Submit](#)

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New FFCRA Report available:

In the payroll module, we now have a payroll report to assist clients with FFCRA. The FFCRA Liability Adjustment Report details the liabilities and FFCRA credits for a selected time period. We've also calculated the adjusted liability and these values can be used when completing Form 941 and/or Form 7200.

Baxter the Brave Lauren Teuber Account Settings Sign Out

Home Employees Payroll Pay History Tax Filing Center Year-End Forms Reports Settings

Payroll Reports

The FFCRA Liability Adjustment Report details the liabilities and FFCRA credits for your selected time period. We've also calculated the adjusted liability. These values can be used when completing Form 941 and/or Form 7200.

Select the date range or pay run you would like to view

Last 30 Days

Year to Date

Select Quarter

Custom Date Range

Select Pay Run

Pay Run Name: SemiMonthly
Pay Period: 03/16/2020 - 03/31/2020
Check Date: 04/15/2020

[Change](#)

FFCRA Liability Adjustment Report

Pay Run Name: SemiMonthly
Pay Period: 03/16/2020 - 03/31/2020
Check Date: 04/15/2020
Posted Time: 04/10/2020 10:25 AM

\$ 2,121.67 Total Liability	\$ 0.00 Total FFCRA Credit	\$ 2,121.67 Adjusted Liability
---------------------------------------	--------------------------------------	--

[Download](#)

Liability	Amount
Federal Income Tax	\$ 871.77
Employer Social Security	\$ 506.49
Employee Social Security	\$ 506.49
Employer Medicare	\$ 118.46
Employee Medicare	\$ 118.46

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Addition of Garnishment reports top the existing payroll reports list:

Garnishments is now available in the reports section of payroll in addition to the payroll reports package.

The screenshot shows the 'Payroll Reports' section of the software. A green box highlights the 'Garnishment Post Pay Run Report' at the bottom of the list. The menu includes: Liability Report, General Ledger Report, Employee Changes Report, Employee Arrears Report, and Garnishment Post Pay Run Report. Each report has a 'View Report' button to its right.

This screenshot shows the details for the 'Garnishment Post Pay Run Report'. It includes the following information:

- Pay Run: **SemiMonthly**
- Pay Period: 03/16/2020 - 03/31/2020
- Check Date: 04/15/2020
- Posted Time: 04/10/2020 10:25 AM

Below this information is a 'Select Pay Run' button and a search filter for the table. The table contains the following data:

Employee ID	Employee Name	Case Number	State	Amount
AFHEW001	ELDRED WORKS	98416312	FED	\$ 15.00
AFHEW001	ELDRED WORKS	asdasd	AS	\$ 20.00
AFHEW001	ELDRED WORKS	126545	FED	\$ 50.00
AFHEW001	ELDRED WORKS	1234579	AS	\$ 100.00

Clarifying the ACH file warnings on the post pay run screen:

We've added some additional information to the existing warning when the number of employees in an ACH file doesn't match the number of employees whose settings indicate they should be receiving a direct deposit as the result of a pay run. In the case where an employee was included in a pay run but has a \$0 net check, we're explaining that because they don't have anything to deposit and thus aren't included in the file.

View Your Positive Pay File Report

View the positive pay file created by this pay run.

4 of 8 employees are included in this ACH files. 4 of these employees have zero net pay and are excluded.

Download Your Direct Deposit ACH File

Download your ACH file in order to pay your employees via direct deposit.

⚠️ 4 Direct Deposits

\$ 117,433.21 Total Net Wages

File Last Created: 03/27/2020 at 10:00 AM

[Print Direct Deposit Stubs](#)

[Refresh Direct Deposit Data](#)

Download

Distribute Pay Checks

Distribute paper checks yourself or request for Greenshades to Print and Mail these paychecks via Pay History.

65 Total Paychecks

\$ 244,796.56 Total Net Wages

[Print Pay Stubs](#)

Distribute

Paycheck Summary

Net Pay: \$ 0.00

Total Hours: 0 Hour(s) 0 Minute(s)

Gross Pay: \$ 0.00

Total Deductions: \$ 0.00

Total Employee Taxes: \$ 0.00

Payment Method: Direct Deposit Paper Check Direct Deposit

Add additional information on the “Review and Submit” step of the pay run:

On the final step of the pay run, we display how many paper checks will be generated and how many direct deposits will be included in the ACH file so the admin can catch and correct any errors prior to submitting the pay run. (Also note: the code summaries at the top are now in alphabetical order!)

Baxter the Brave Lauren Teuber Account Settings Sign Out

Home Employees Payroll Pay History Tax Filing Center Year-End Forms Reports Settings

Payroll

Pay Schedule: BiWeekly Check Date: 11/15/2019 Pay Period: 10/27/2019 - 11/09/2019 Cancel Pay Run

Employees Hours Earnings Deductions Benefits Arrears Review & Submit

Total Employees: 9 Estimated Total Cost: \$ 29,254.08 Estimated Total Tax: \$ 7,263.57

Earnings
Fixed Test Code: \$ 4,615.38

Deductions
1234579: \$ 100.00
98416312: \$ 15.00
HEALTH EO: \$ 400.00
Life test 2020: \$ 0.00

Benefits
arrears test guy: \$ 550.00
Life test 2020: \$ 0.00

HOURLY: \$ 0.00
126545: \$ 50.00
arrears test guy: \$ 800.00
Laz Sample Health Ins EO: \$ 4.00
test arrears dude: \$ 1,800.00
HEALTH EO: \$ 400.00
test arrears dude: \$ 2,000.00

SALARY: \$ 21,682.70
401K Test 2020: \$ 0.00
adcsd: \$ 20.00
LIFE: \$ 0.00
Laz Sample Health Ins EO: \$ 6.00
Trad401K: \$ 0.00

Filter Table... Total Employees: 9 Paper Paycheck: 24 Direct Deposit: 74

Employee ID	Employee Name	Hours	Minutes	Gross Pay	Taxable Wages	Deduction Total	Employee Taxes	Net Pay	Benefits Total	Employer Taxes	View Paystub
AFSLP001	LATONYA PEPPER	0	0	\$ 4,615.38	\$ 4,615.38	\$ 0.00	\$ 1,201.63	\$ 3,413.75	\$ 0.00	\$ 380.76	View Paystub
AFSEG001	DELWOOD GARRETT	80	0	\$ 1,923.08	\$ 1,873.08	\$ 50.00	\$ 254.44	\$ 1,618.64	\$ 50.00	\$ 154.53	View Paystub
AFSDM001	DOREEN MCSWEENEY	80	0	\$ 1,923.08	\$ 1,873.08	\$ 50.00	\$ 363.93	\$ 1,509.15	\$ 50.00	\$ 154.53	View Paystub

Previous Save & Exit Submit

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Add real-time success/error messages through payroll:

The payroll module will now include toast messages when user actions are successful or fail, but we don't want to interrupt the user. You can read more about the philosophical differences between the two here, but here's what it looks like in payroll:

Baxter the Brave On Testing (Impersonated by LPA020) Account Settings Sign Out

Home Employees Payroll Pay History Tax Filing Center Year-End Forms Reports Settings

Payroll

Pay Schedule: BiWeekly Check Date: 11/15/2019 Pay Period: 10/27/2019 - 11/09/2019 Cancel Pay Run

Employees Hours Earnings Deductions Benefits Arrears Review & Submit

Total Employees Unique Hours Codes Total Hours Compare to Last Payroll

Filter Table... Add Hours Refresh Timesheets

Add Hours

Add details to the selected employee to add new hours

Employee ID	Employee Name	Earning Code	Pay Stub Name	Position	Department	Location	Hours	Minutes
AFHEW001	ELDRED WORKS	Cash Money	Cash Money	Pos 1 Dep A Non exempt	2500	PRIMARY	1	0

Previous Add Codes

Employee ID	Employee Name	Earning Code	Pay Stub Name	Position	Department	Location	Hours	Minutes
AFSEG001							0	0
AFSDM001							0	0
AFSDK001							0	0
AFSBK001	ABCDEFGHIJKLMNORSTUVWXYZ			Pos 1 Dep A Non exempt Salary	Department A	PRIMARY	80	0
AFSBA001	BURDONNELL ACEVES	SALARY	Salary	Pos 1 Dep B Non exempt Salary	Department A	PRIMARY	80	0
AFSAE001	ARTHUR STATS	SALARY	Salary	Pos 1 Dep A Non exempt Salary	Department A	PRIMARY	81	0
AFHKE001	KARTIKEYA ESPIN OZA	SALARY	Salary	Pos 2 Dep A Non exempt Hourly	Department A	PRIMARY	80	0
AFHEW001	ELDRED WORKS	SALARY	Salary	Pos 2 Dep A Non exempt Hourly	Department A	PRIMARY	80	0
AFHEW001	ELDRED WORKS	SALARY	Salary	Pos 1 Dep A Non exempt Salary	Department A	PRIMARY	2	0

Total Hour Codes: 0

Previous Last Saved: 1:09:05 PM Save & Exit Next

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Recent Updates – 5/12/2020

Navigation:

Greenshadesonline.com > Employees > Select Employee > ACA Details > Offers and Enrollment

Enhanced Feature

Platform users with a basic Payroll package (does not contain Benefits) will now be able to manage self insured dependent coverage information that is needed for end of year reporting on the 1095-C form. Administrators are now able to enter dependent enrollment information for any self insured medical coverage the employee was enrolled into.

System Dashboard QA Onboarding User (impersonated by: KMGINNIS) Account Settings Sign Out

Home Employees Payroll Pay History Year-End Forms Reports Settings

Employee Management

TIRION LANISTER [← Back to Employee List](#)
Digital Employee Folder

Plan Offer and Enrollment

This grid displays your employee's current plan healthcare offers and enrollment. Add an Offer and Enrollment below and then select a plan code from the drop down list to indicate the coverage level plan for which the employee was offered coverage. There may be multiple plan offers and/or enrollment during a given plan year if the employee changed coverage levels due to a Qualifying Life Event or if you follow a non-calendar plan year. You may not, however, have overlapping dates of offers within the same plan group or enrollment across all plan groups. To indicate that an employee enrolled in the offered coverage for a given date range, please check the "Enrolled" checkbox.

Filter by Year: 2020

Plan Code	Plan Group Name	Start Date	End Date	Employee-Only Monthly Cost	Enrolled?
ACA MEC	1C Populate	01/01/2019	Ongoing	\$5.00	<input checked="" type="checkbox"/>
ACA MEC + MVP	1A Populate	01/01/2019	Ongoing	\$1.00	<input checked="" type="checkbox"/>
BEN4 EF	1C Populate	01/01/2019	Ongoing	\$5.00	<input checked="" type="checkbox"/>
Kyle Test EO	1A Populate	01/01/2019	Ongoing	\$1.00	<input checked="" type="checkbox"/>

[+ Add New Offer Dates and Costs](#)

Dependent Enrollment

If your organization is providing self insured coverage, then the individuals covered will need to be reported on Part III of the 1095-C form at the end of the year. Use the space below to enter any dependent coverage information to be used for this purpose.

Spouse-typed dependents are not shown because the employee was not offered any Employee + Spouse or Employee + Family coverage level types.

AndAnother Child - Child - DOB 8/1/2000

Plan Code	Plan Group Name	Start Date	End Date
+ Add New Enrollment			

Another Child - Child - DOB 8/3/2009

Plan Code	Plan Group Name	Start Date	End Date
+ Add New Enrollment			

bees bees - Child - DOB 10/18/2019

Plan Code	Plan Group Name	Start Date	End Date
+ Add New Enrollment			

Kid Westbrooks jack - Child - DOB 1/26/1990

Plan Code	Plan Group Name	Start Date	End Date
+ Add New Enrollment			

[Save](#)

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This data will also display on the ACA details page for the employee to track what will display on the 1095-C Part III.

Recent Updates – 4/20/2020

Ability To Specify A Deduction So That The Deduction Is Made Before Taxes Are Withheld.

- This functionality allows you to have a deduction come out before taxes are withheld.

Note: This will not impact an employee's tax calculation if enabled.

Create Benefit Code

Deduction Details

Rate Type: Fixed Amount

Deduction Category:

Employee Deduction: \$ 0.00

Apply before taxes

[Previous](#) [Next](#)

Edit Benefit & Deduction Code

Benefit Details

Code: Test Benefit Code EC

Pay Stub Name: Test Benefit Code Employee Child

Description: Created with the health insurance wizard

Benefit Category: Other

Calculation

Calculation Method: Fixed Amount

Employer Contribution: \$ 800.00

Tax Type: Section 125 Plan

Apply before taxes

Imputed Income

Deduction Details

Rate Type: Fixed Amount

Deduction Category: Other

Employee Deduction: \$ 3,200.00

Benefit Arrears Details

[Cancel](#) [Save](#)

Add/Change Employee Schedule from Employee Card

- You can now access the employee schedule directly from the employee card.

The screenshot shows the 'Employee Management' page for 'FALLO MESSICK'. The 'Direct Deposit' section is active, showing options for 'Pay by direct deposit' (selected) and 'Pay by paper check'. An 'Add Account' button is present. A modal window titled 'Account 1' is open, containing fields for 'Routing Number', 'Account Number', 'Type' (set to 'Checking'), and 'Allocation Type' (set to 'Entire Amount'). Below the modal, there is a 'Pay Schedule' section with a dropdown menu set to 'Weekly work week test'. A 'Save' button is located at the bottom right of the page.

Check ordering

- We've introduced the ability to specify in what order checks are numbered. You can now specify whether to order them alphabetically by an employee's last name, first name or numerically by their employee ID.

Note: In the case where first name and last name match, we will then sort by the employee ID.

Change in the order of columns where General Ledger information is presented.

- We've changed how columns are displayed when viewing and/or changing General Ledger data. We now display Debits in one column followed by Credits. This change is more in line with existing GL setups today.

Entity Code	Account Number	Account Name	Account Type	Debit	Credit
	00-1220-00	00-1220-00	Income	\$ 0.00	\$ 84.06
	00-1220-00	00-1220-00	Income	\$ 8,851.31	\$ 0.00
	00-1235-00	00-1235-00	Income	\$ 0.00	\$ 422.54
	00-1235-00	00-1235-00	Income	\$ 3,717.94	\$ 0.00
	00-2020-00	00-2020-00	Income	\$ 0.00	\$ 1,500.00
	00-2029-00	00-2029-00	Income	\$ 34.06	\$ 0.00
	00-2033-00	00-2033-00	Income	\$ 0.00	\$ 1,840.31
	00-2045-00	00-2045-00	Income	\$ 0.00	\$ 1,744.86
	00-2045-00	00-2045-00	Income	\$ 211.54	\$ 0.00
	00-6010-02	00-6010-02	Income	\$ 1,500.00	\$ 0.00

Ability to send Garnishments information separately to General Ledger.

- We've now made it easier to map Garnishments to GL transactions. Instead of displaying it lumped as one transaction, we now provide the ability to map garnishments down to the agency level.

General Ledger Settings

General ledger entries are created after every pay run. Use the settings below to create mappings for entries for specific general ledger accounts.

Earnings Benefits Deductions Taxes Payment Account **Garnishments**

General Ledger Mapping: Garnishments

Add or edit the mapping between garnishments and general ledger accounts. Any value not mapped will be included in the default account's total after every pay run.

Filter Table...

Debit Account Name	Credit Account Name	Garnishment Type
00-1220-00	00-1235-00	Child Support
00-1235-00	00-1220-00	Student Loan

[Edit Mappings](#)

Change employee's payment method before payroll is submitted.

- Before submitting a payroll, you can now switch an employee's payment method between direct deposit or a paper check. You can only switch between paper check to direct deposit if direct deposit is already setup for that employee.

Paycheck Summary

Net Pay: \$ 0.00
Total Hours: 0 Hour(s) 0 Minute(s)
Gross Pay: \$ 0.00
Total Deductions: \$ 0.00
Total Employee Taxes: \$ 0.00
Payment Method: Direct Deposit ▼
Paper Check
Direct Deposit