

# *How to Add a Deduction in Payroll Mate®*

Start by Opening your  
**Payroll Mate**  
Program



**1** Go to → File → Open Company

**2** Select a company to open

**3** Click → OK

2013

Checks  
Employees  
Forms  
Reports  
Company  
Vendor Center

Check Preview [09/04/2013] - Check # [1]  
Check Summary for "Leader Smith"  
Pay Period: From: 09/01/2013 To: 09/03/2013  
Net Pay: \$146.83

Open Company

Company Name:  
Sample Company 2012  
Tutorial

OK Cancel

Deduction Details

Title:	Amount:	YTD:
Garnishment	\$1.80	\$1.80

YTD:  
\$14.00  
\$11.16  
\$2.61  
\$0.00  
\$0.00  
\$3.60  
\$11.16  
\$2.61  
\$1.08

Tutorial Company - Payroll Mate (2013)

File Edit Tools Help Order Checks and Supplies

**Company**

General Information Federal Tax Information State Tax Information

Income Categories Tax Categories Deduction Categories

Title	Calculation
▶ 401K (Employee)	Percentage
401K (Employer)	Percentage
Health Insurance	Fixed
Garnishment	Percentage

Go to → Company 4

Click → Deduction Categories 5

Click → Add 6

2013

Checks  
Employees  
Forms  
Reports  
Company  
Vendor Center

Add Edit Delete

**Deduction Details box will appear**

**Deduction Details**

**7**

**Name the Deduction.** For example; you can enter child support, housing allowance, Simple IRA and garnishment

**8**

Title: Deduction

Calculation: Percentage

Abbreviation: Deduction

Paid by:

Default

Quarterly Rates:

Cutoff:

Inactive

**9**

Choose a **Calculation** for the deduction

W-2 Options

Use on Box 10 (Dependent Care Benefits)

Use on Box 12

Use on Box 14 (Other)

Exemptions

OK Cancel

**Deduction Details**

Title:  Calculation:

Abbreviation:  Paid by:

Default Quarterly Rates:     Cutoff:

Inactive

W-2 Options

Use on Box 10 (Dependent Care)

Use on Box 12

Use on Box 14 (Other)

Exemptions

Choose whether the deduction is paid by Employee or Employer

10

Enter in amount of deduction, depending on what calculation was chosen

11

Deduction Details

Title: Deduction Calculation: Percentage

Abbreviation: Deduction Paid by: Employee

Default Quarterly Rates: 0.5000 0.5000 0.5000 0.5000 Cutoff: 7000

Inactive

W-2 Options

- Use on Box 10 (Dependent Care Benefits)
- Use on Box 12
- Use on Box 14 (Other)

Exemptions

OK Cancel

Check the boxes if you want the deduction to appear on the W2s

12

**Deduction Details**

Title:  Calculation:

Abbreviation:  Paid by:

Default Quarterly Rates:     Cutoff:

Inactive

W-2 Options

Use on Box 10 (Dependent Care Benefits)

Use on Box 12

Use on Box 14 (Other)

Exemptions  This Item Will Be Exempt From:

- Medicare (Employee)
- Medicare (Employer)
- Fed Unemployment (Employer)
- State Income Tax
- State Unemployment (Employer)
- Local Income Tax
- State Disability Insurance (Employee)

Click → OK

**Check the taxes** from which this deduction **will be exempt**. The taxable wages for any tax you check will be reduced by the amount of this deduction, which results in lower tax. **13**

Click → OK **14**

Tutorial Company - Payroll Mate (2013)

File Edit Tools Help Order Checks and Supplies

**Company**

General Information Federal Tax Information State Tax Information

Income Categories Tax Categories Deduction Categories

Title	Calculation
▶ 401K (Employee)	Percentage
401K (Employer)	Percentage
Health Insurance	Fixed
Garnishment	Percentage
Deduction	Percentage

The deduction you created will appear in deduction categories

15

Add Edit Delete

2013

Checks  
Employees  
Forms  
Reports  
Company  
Vendor Center

Tutorial Company - Payroll Mate (2013)

File Edit Tools Help Order Checks and Supplies

New Edit Delete Pay Check History Pay Multiple Employees

**Employees**

- All Employees
- Active Employees
- Inactive Employees

First Name	Middle	Last Name	SSNumber	Phone Number	Address 1
Happy		Helper	463-84-6319	(646) 165-4654	2345 Kind Ln
Leader		Smith	456-45-6546	(456) 453-4264	4561 Helper Lane
Trouble		Question	456-45-6565	(456) 456-6654	46456 Problem Dr

Go to → Employees 16

2013

Checks

**Employees**

Forms

Reports

Company

Vendor Center

17

Double click on the employee the deduction is being applied to

Modify Employee box will appear 18

Modify Employee

Welcome to the "Modify Employee" Wizard!

This wizard will guide you through the process of modifying an existing employee.

Cancel < Back **Next >** Finish

Click → Next, until Deductions appears 19

Modify Employee

**Deductions**

<input type="checkbox"/>	401K (Employee)	[Percentage]	0.00
<input type="checkbox"/>	401K (Employer)	[Percentage]	0.00
<input type="checkbox"/>	Health Insurance	[Fixed]	0.00
<input type="checkbox"/>	Garnishment	[Percentage]	1.0000
<input checked="" type="checkbox"/>	Deduction	[Percentage]	0.5000

Cancel < Back **Next >** Finish

Check the box of the deduction that was created 20

Click → Next , until finish appear 21

\*After you finish applying the Deduction to the employees, check to make sure the Deduction appear on the check\*

The screenshot shows the 'Tutorial Company - Payroll Mate (2013)' application window. The 'Pay' button in the top toolbar is highlighted with a red box and a callout bubble labeled '23' that says 'Click → Pay'. Below the toolbar, a table of employees is displayed, with the 'Leader' row highlighted in grey and a callout bubble labeled '22' that says 'Click the employee that has the deduction'. The table has the following data:

First Name	Middle	Last Name	SSNumber	Phone Number	Address1
Happy		Helper	463-84-6319	(646) 165-4654	2345 Kind Ln
Leader		Smith	456-45-6546	(456) 453-4264	4561 Helper Lane
Trouble		Question	456-45-6565	(456) 456-6654	46456 Problem Dr

On the left side of the window, there is a sidebar with a '2013' year selector and a navigation menu with options: Checks, Employees (highlighted), Forms, Reports, Company, and Vendor Center.

Check Details



General Information

Pay Frequency: Weekly (52 Pay Periods)

Employee: Leader Smith

Begin Date: Thursday, September 05, 2013

Recalculate

Check #: 3

Pay Date: Thursday, September 05, 2013

End Date: Thursday, September 05, 2013

Income Details

Vacation / Sick Hours

Income:	Rate:	Type:	Quantity:	Amount:	YTD:
Regular Hourly Pay	9.00	Per Hour	0.00	0.00	0.00

	Amount:	YTD:
Vac. hours earned	0.00	0.00
Vac. hours used	0.00	0.00
Sick hours earned	0.00	0.00
Sick hours used	0.00	0.00

Tax Details

Deduction Details

Tax:	Amount:	YTD:
Federal Income Tax	0.00	0.00
Social Security (Employee)	0.00	0.00
Medicare (Employee)	0.00	0.00
State Income Tax	0.00	0.00
Local Income Tax	0.00	0.00
State Disability Insurance (Employee)	0.00	0.00
hiu	0.00	0.00

Deduction:	Amount:	YTD:
Deduction	0.00	0.00

Once you see that the deduction is applied to the employee just **Click → Cancel**

24

The **Deduction** is applied to the employee

25

Check Summary

	Total Incomes:		Total Deductions:	Net Pay:
This Check:	0.00	0.00	0.00	0.00
YTD:	0.00	0.00	0.00	0.00

MEMO:

OK

Cancel



***Congratulations. You created your own deduction category!***

**www.PayrollMate.com**

**1-800-507-1992**