

How to Create a Year To Date for Salary Employee's in Payroll Mate [®]

Start by Opening your
Payroll Mate
Program



www.PayrollMate.com (800)-507-1992

The best way to enter YTD for salaried employees is to create a new income category and name it your choice (YTD or Salary YTD) and set the type to variable. When you create the first check you will be able to manually enter the YTD amount and override all the taxes, deductions, etc..to match the employee's YTD figures. Follow the steps in this tutorial.

1 Go to → File → Open Company

2 Select a company to open

3 Click → OK

2013

File Edit Tools Help Order Checks and Supplies

New Company Open Company Delete Company Exit

Print Selected Check Print Multiple Checks Direct Deposit

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

September

09

Le

Open Company

Company Name:

Sample Company 2012

Tutorial

OK Cancel

YTD:

\$14.00

\$11.16

\$2.61

\$0.00

\$0.00

\$3.60

\$11.16

\$2.61

\$1.08

Deduction Details

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

Tutorial Company - Payroll Mate (2013)

File Edit Tools Help Order Checks and Supplies

Company

2013

Checks
Employees
Forms
Reports
Company
Vendor Center

Click → Income Categories

4

5

General Information Federal Tax Information State Tax Information

Income Categories Tax Categories Deduction Categories

Title	Calculation
▶ Regular Hourly Pay	Per Hour
Overtime Hourly Pay	Per Hour
Yearly Salary	Per Year
Bonus	Variable
Tips Received Directly by Employee	Variable
Tips Paid by Employer	Variable
Double-Time	Per Hour
Commission	Variable
Mileage	Per Mile
Piece Work	Per Piece
Fringe Benefits	Fixed
Life Insurance over 50,000	Variable
Sick Pay	Variable
Vacation Pay Hourly	Per Hour
Sick Pay Hourly	Per Hour
Bonus	Per Year

6

Click → Add

Add Edit Delete

Income Details

Title:  

Abbreviation:

Type:

W-2 Box 12 Code:

W-2 Box 14 Abbreviation:

Reported tips (include in "Social security tips" on form W-2)

Omit from Net Pay

Inactive

Taxes Applied:

- Federal Income Tax
- Social Security (Employee)
- Social Security (Employer)
- Medicare (Employee)
- Medicare (Employer)
- Fed Unemployment (Employee)
- State Income Tax
- State Unemployment (Employee)

Deductions Applied:

- 401K (Employee)
- 401K (Employer)
- Health Insurance
- Garnishment
- Deduction

Income Details

Title: Salary YTD

Abbreviation: Salary YTD

Type: Variable

W-2 Box 12 Code:

W-2 Box 14 Abbreviation:

Reported tips (include on Form W-2)

Omit from Net Pay

Inactive

Taxes Applied:

- Federal Income Tax
- Social Security (Employee)
- Social Security (Employer)
- Medicare (Employee)
- Medicare (Employer)
- Fed Unemployment (Employee)
- State Income Tax
- State Unemployment (Employee)

Deductions Applied:

- 401K (Employee)
- 401K (Employer)
- Health Insurance
- Garnishment
- Deduction

OK Cancel

8

Select → Type of calculation

Check the Taxes and Deductions you want applied

9

10

Click → OK

The screenshot shows the 'Tutorial Company - Payroll' application window. The 'Employees' table is displayed with 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	458-45-6546	(456) 455-4264	4561 Helper Lane

Navigation steps are indicated by callouts:

- 11** Go to → Employees: Points to the 'Employees' menu item in the left sidebar.
- 12** Select an Employee: Points to the first row of the 'Employees' table.
- 13** Click → Edit: Points to the 'Edit' button in the top toolbar.

Welcome to the "Modify Employee" Wizard!

Modify Employee Wizard will appear

14

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

15

Click → Next, until Incomes appears

To continue, please click "Next".

Cancel

Next >

Modify Employee

Incomes

- Piece Work [Per Piece] 0.00
- Fringe Benefits [Fixed] 0.00
- Vacation Pay Hourly [Per Hour] 0.00
- Sick Pay Hourly [Per Hour] 0.00
- Bonus [Per Year] 0.00
- Bonus [Variable]
- Tips Received Directly by Employee [Variable]
- Tips Paid by Employer [Variable]
- Commission [Variable]
- Life Insurance over 50,000 [Variable]
- Sick Pay [Variable]
- Salary YTD [Variable]

Check → YTD income created

16

Cancel

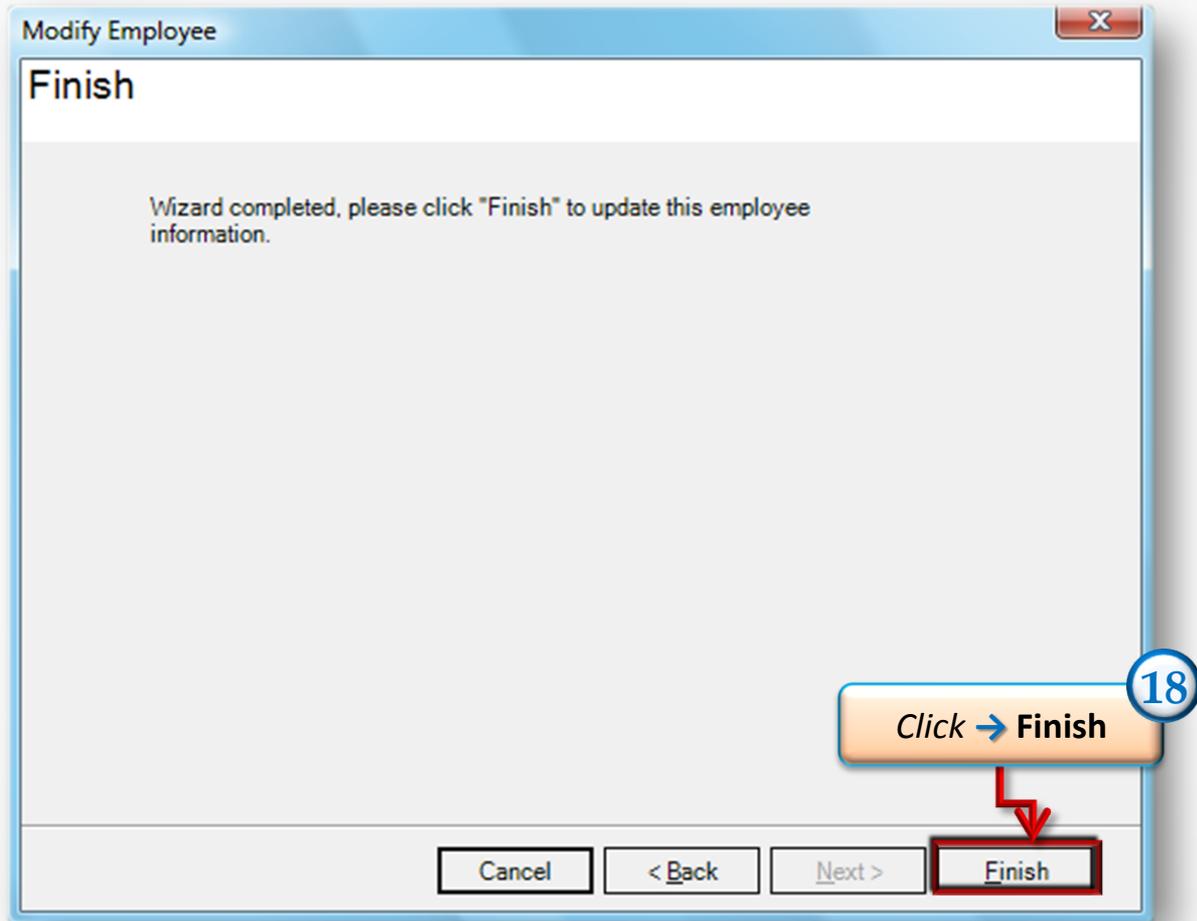
< Back

Next >

Finish

17

Click → Next till Finished appears



Repeat Steps as needed

Tutorial Company - Payroll Mate (2013)

File Edit Tools Help Order Checks and Supplies

New Edit Delete **Pay** Check History Pay Multiple Employees Import Employees

Employees

- All Employees
- Active Employees
- Inactive Employees

2013

Checks

Employees

Forms

Reports

Company

Vendor Center

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

Click → Pay 19

Check Details X

General Information Pay Frequency: Weekly (52 Pay Periods)

Employee: Happy **Select → Dates** Begin Date: Tuesday, December 31, 2013 Recalculate

Check #: 12 Pay Date: Tuesday, December 31, 2013 End Date: Tuesday, December 31, 2013

Income Details **Vacation / Sick Hours**

<u>Income:</u>	<u>Rate:</u>	<u>Type:</u>	<u>Quantity:</u>	<u>Amount:</u>	<u>YTD:</u>	<u>Amount:</u>	<u>YTD:</u>
Salary YTD	0.00	Variable	N/A	0.00	0.00	Vac. hours earned	0.00
						Vac. hours used	0.00
						Sick hours earned	0.00
						Sick hours used	0.00

Tax Details **Deduction Details**

<u>Tax:</u>	<u>Amount:</u>	<u>YTD:</u>	<u>Deduction:</u>	<u>Amount:</u>	<u>YTD:</u>
Federal Income Tax	0.00	209.00			
Social Security (Employee)	0.00	127.10			
Medicare (Employee)	0.00	29.73			
State Income Tax	1.20	6.00			
Local Income Tax	0.00	0.00			
State Disability Insurance (Employee)	0.00	41.00			
<hr/>					
Social Security (Employer)	0.00	127.10			
Medicare (Employer)	0.00	29.73			
Fed Unemployment (Employer)	0.00	12.30			
State Unemployment (Employer)	0.00	20.50			
State Disability Insurance (Employer)	0.00	41.00			

Check Summary

<u>This Check:</u>	<u>Total Incomes:</u>	<u>Total Taxes:</u>	<u>Total Deductions:</u>	<u>Net Pay:</u>
	0.00	1.20	0.00	-1.20
<u>YTD:</u>	0.00	412.83	0.00	-412.83

MEMO:

Check Details X

General Information Pay Frequency: Weekly (52 Pay Periods)

Employee: Happy Helper Begin Date: Tuesday, December 31, 2013 Recalculate

Check #: 12 Pay Date: Tuesday, December 31, 2013 End Date: Tuesday, December 31, 2013

Income Details Vacation / Sick Hours

Income:	Rate:	Type:	Quantity:	Amount:	YTD:		Amount:	YTD:
Salary YTD	5600	Variable	N/A	0.00	0.00	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

Enter → Quarterly Rate 21

Tax Details Deduction Details

Tax:	Amount:	YTD:	Deduction:	Amount:	YTD:
Federal Income Tax	0.00	209.00			
Social Security (Employee)	0.00	127.10			
Medicare (Employee)	0.00	29.73			
State Income Tax	1.20	6.00			
Local Income Tax	0.00	0.00			
State Disability Insurance (Employee)	0.00	41.00			
<hr/>					
Social Security (Employer)	0.00	127.10			
Medicare (Employer)	0.00	29.73			
Fed Unemployment (Employer)	0.00	12.30			
State Unemployment (Employer)	0.00	20.50			
State Disability Insurance (Employer)	0.00	41.00			

Enter → Quarterly Taxes 22

Check Summary

	Total Incomes:	Total T	Total Deductions:	Net Pay:
This Check:	0.00		0.00	-1.20
YTD:	0.00		0.00	-412.83

Click → OK 23

MEMO:

OK Cancel



Congratulations! You now know how to create a year to date for salary paid employee's.

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