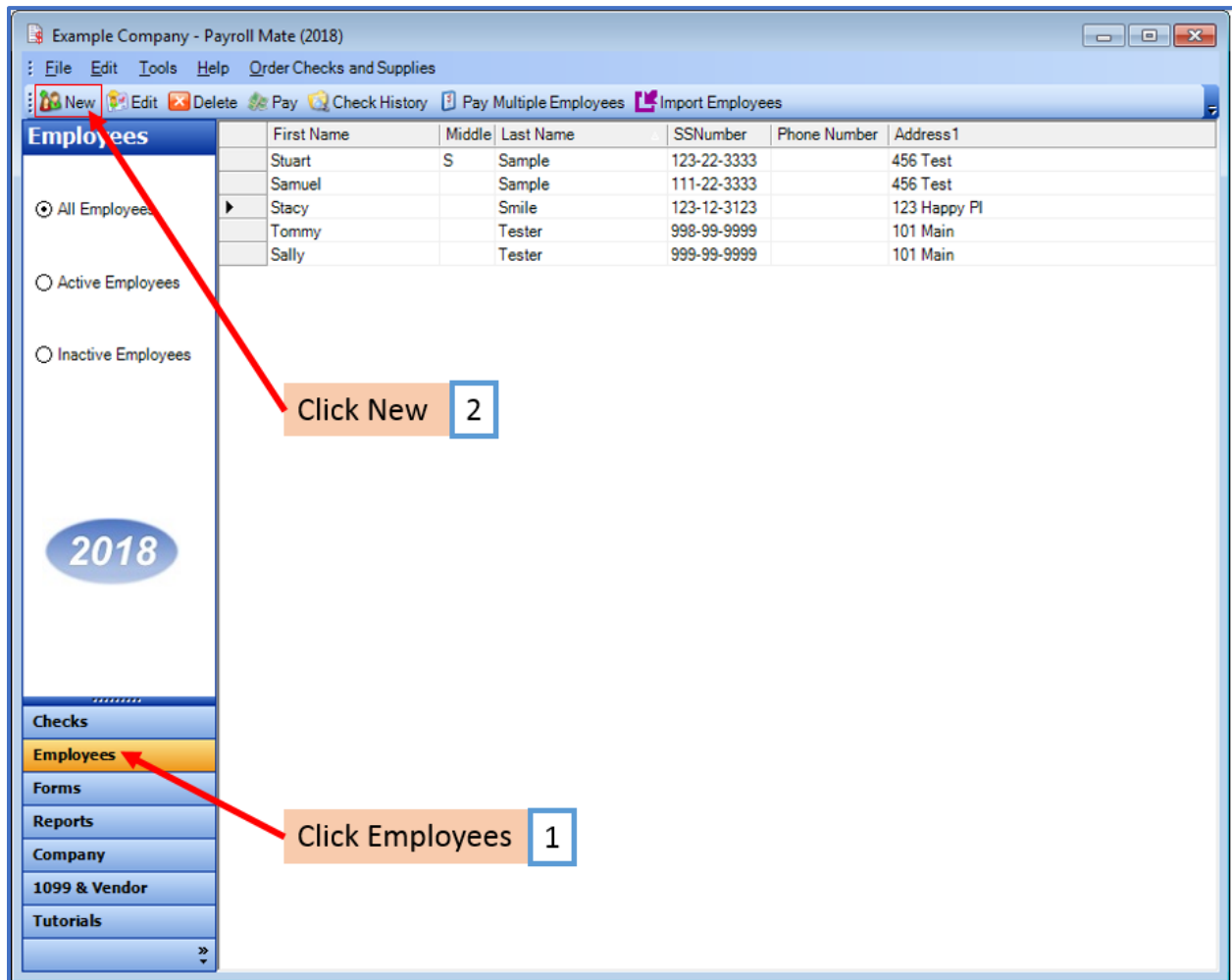


# How to Add a New Employee in Payroll Mate

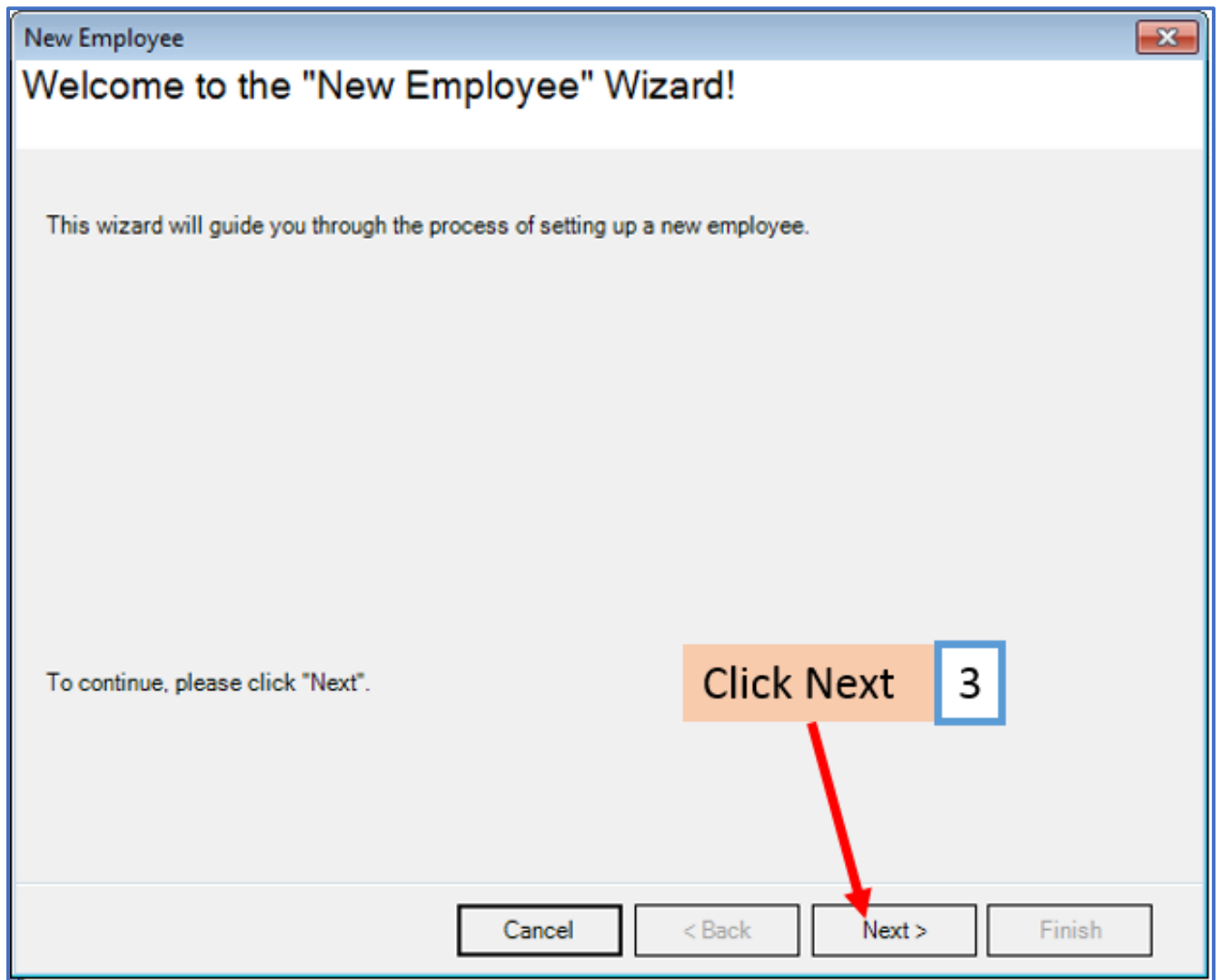
Make sure you have the correct Company open inside Payroll Mate

1. Click Employees from the shortcuts menu
2. Click New from second menu bar



The New Employee Wizard will open

3. Click Next



4. Enter employee general information

5. Click Next

New Employee

General Information Enter employee general information 4

Name: Fred Deaux

Address1: 8980 Blank Rd

Address2:

City: Chicago

State: IL

Zip Code: 60505

Social security number: 888-55-2222

Telephone Number:

Fax Number:

E-mail Address:

☐ Inactive

Memo:

Click Next 5

Cancel < Back Next > Finish

Note: Pay extra attention to the “Tax Setup” screen, where you define the employee’s filing status, allowances and pay frequency

6. Enter employee tax information

7. Click Next

The screenshot shows the 'New Employee Tax Setup' window. At the top, the title bar says 'New Employee' and the window title is 'Tax Setup'. A blue box with the number '6' is next to the title. An orange box with the text 'Enter employee tax information' has a red arrow pointing to the 'Federal Income Tax Setup' section. This section includes fields for 'Filing Status' (Single), 'Number of Allowances' (0), 'Pay Frequency' (Weekly (52 Pay Periods)), and 'Additional Federal Withholding' (0.00). To the right is the 'W-2 Options' section with checkboxes for 'Statutory Employee', 'Retirement Plan', and 'This employee receives Advance EIC payment'. Below this is a section 'Set the following Taxes to zero on the check' with checkboxes for 'Federal Income', 'State Income', 'SS. & Med. (Employee)', and 'SS. & Med. (Employer)'. The 'State Income Tax Setup' section includes 'State' (IL), 'Additional State Withholding' (0.00), 'IL-W4 Line 1' (0), and 'IL-W4 Line 2' (0). At the bottom, a blue box with the number '7' is next to the text 'Click Next'. A red arrow points from this box to the 'Next >' button in the bottom right corner. Other buttons include 'Cancel', '< Back', and 'Finish'.

8. Select and enter one or more employee incomes

9. Click Next

New Employee Incomes

Select and enter employee income(s) 8

<input checked="" type="checkbox"/> Regular Hourly Pay	[Per Hour]	20.0000
<input type="checkbox"/> Overtime Hourly Pay	[Per Hour]	0.00
<input type="checkbox"/> Yearly Salary	[Per Year]	0.00
<input type="checkbox"/> Double-Time	[Per Hour]	0.00
<input type="checkbox"/> Mileage	[Per Mile]	0.00
<input type="checkbox"/> Piece Work	[Per Piece]	0.00
<input type="checkbox"/> Fringe Benefits	[Fixed]	0.00
<input type="checkbox"/> Vacation Pay Hourly	[Per Hour]	0.00
<input type="checkbox"/> Sick Pay Hourly	[Per Hour]	0.00
<input type="checkbox"/> Bonus	[Variable]	
<input type="checkbox"/> Tips Received Directly by Employee	[Variable]	
<input type="checkbox"/> Tips Paid by Employer	[Variable]	
<input type="checkbox"/> Commission	[Variable]	

Click Next 9

Cancel < Back Next > Finish

10. Select employee applicable taxes

11. Click Next

The screenshot shows a software window titled "New Employee Taxes". The main heading is "Select employee applicable taxes" with a blue box containing the number "10". A red arrow points from this heading to a list of taxes. The list includes:

- ☒ Federal Income Tax
- ☒ Social Security (Employee)
- ☒ Social Security (Employer)
- ☒ Medicare (Employee)
- ☒ Medicare (Employer)
- ☒ Fed Unemployment (Employer)
- ☒ State Income Tax
- ☒ State Unemployment (Employer)
- ☒ Local Income Tax
- ☒ State Disability Insurance (Employee)
- ☒ State Disability Insurance (Employer)
- ☒ NY Disability [Percentage]
- ☒ Chicago City Tax [Percentage]

At the bottom, there is a blue box with the text "Click Next" and the number "11". A red arrow points from this box to the "Next >" button. The navigation buttons are "Cancel", "< Back", "Next >", and "Finish".

12. Select and enter applicable employee deductions

13. Click Next

The screenshot shows a software window titled "New Employee" with a sub-header "Deductions". It contains a list of four deduction items, each with a checked checkbox, a label, a type in brackets, and a numerical value in a text box. A red box highlights these four items. An orange callout box with the text "Select and enter applicable employee deductions" and a blue-bordered box with the number "12" has a red arrow pointing to the first item, "401K (Employee)". At the bottom, an orange callout box with the text "Click Next" and a blue-bordered box with the number "13" has a red arrow pointing to the "Next >" button. The bottom of the window features four buttons: "Cancel", "< Back", "Next >", and "Finish".

Item	Type	Value
<input checked="" type="checkbox"/> 401K (Employee)	[Percentage]	4.000000
<input checked="" type="checkbox"/> 401K (Employer)	[Percentage]	2.000000
<input checked="" type="checkbox"/> Health Insurance	[Fixed]	25.000000
<input checked="" type="checkbox"/> Box 12 data	[Percentage]	1.500000

Buttons: Cancel, < Back, Next >, Finish

14. Checkmark if employee is included in Direct Deposit Process, then complete the banking information

15. Click Next

The screenshot shows a software window titled "New Employee" with a sub-header "Direct Deposit". Inside the window, there is a checkbox labeled "Include in Direct Deposit Process" which is currently unchecked. Below this checkbox is a section titled "Banking Information" containing three input fields: "Account Type" (a dropdown menu showing "Checking"), "Bank Routing Number" (a text box), and "Account Number" (a text box). A red arrow points from the checkbox to an orange callout box containing the text "Checkmark and complete banking information if employee is included in direct deposit" and the number "14". Another red arrow points from the "Next >" button at the bottom of the window to an orange callout box containing the text "Click Next" and the number "15". The bottom of the window features four buttons: "Cancel", "< Back", "Next >", and "Finish".

14

15



16. Select method of calculating vacation/sick hours and enter hours earned if applicable

17. Click Next

New Employee

### Vacation / Sick Hours Settings

Select method of calculating and enter hours earned for vacation and/or sick hours **16**

Method of Calculating Vacation and Sick Hours: ☒ Per Check  
☐ Per Total Hours on Check

Vacation Hours Earned Per Check

Maximum Vacation Hours Earned Per Year  Keep blank for unlimited hours per year; fill with 0.00 for zero hours per year

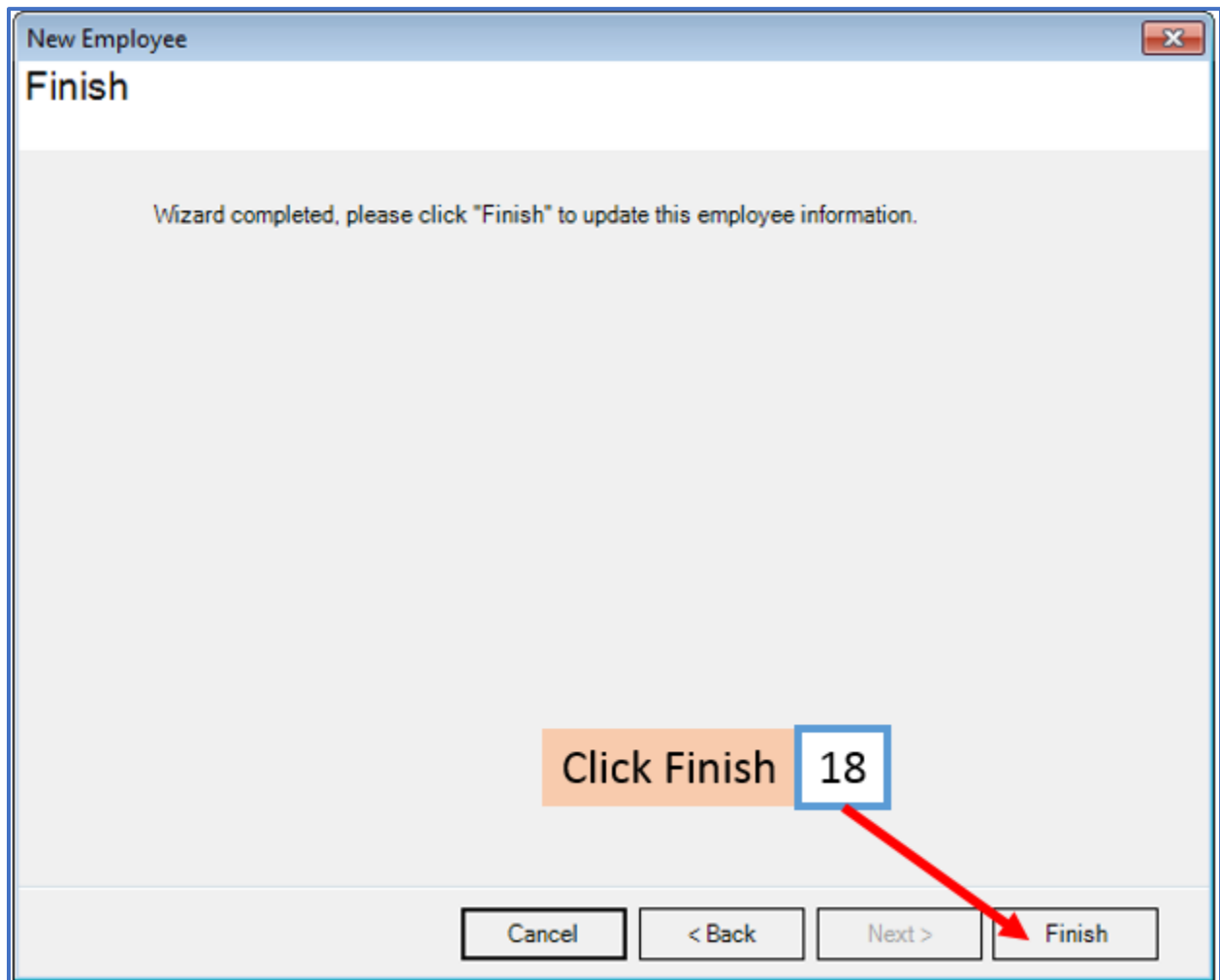
Sick Hours Earned Per Check

Maximum Sick Hours Earned Per Year  Keep blank for unlimited hours per year; fill with 0.00 for zero hours per year

Click Next **17**

Cancel < Back Next > Finish

18. Click Finish



19. New employee is now included in the list of employees

