Introduction

At its heart, CYMA is an employee-centric system. By this we mean that the details of all payroll calculations performed during payroll check processing come from the individual settings at the employee level. These settings include:

- What taxes are calculated for each employee?
- What are the individual tax rates for each employee tax element?
- What GL accounts are used for expenses and payroll tax liabilities?
- What W-2 Boxes are updated?

This flexibility to configure each employee in great detail is a tremendous feature in CYMA – but it also places a burden on the Payroll Administrator to ensure that each employee is properly configured. For example, if you neglect to configure an employee with a SUTA tax feature, then no SUTA calculations will occur for that employee and employee wages will not be reported on SUTA tax forms and reports.

CYMA has a very powerful construct that you can use to virtually **eliminate improper setup** – we call it a **"Template Employee"** – an employee record that has been created specifically for the purpose of copying when setting up a new employee. Proper use of the Template Employee feature will both reduce the amount of time it takes to set up a new employee and ensure that all key employee attributes – from GL accounts to the number of exemptions – is correct.

How Many Template Employee Should You Create?

We recommend that you set up as many Template Employees as possible to cover the most common "types" of employees in your organizations.

Template Employees could be very simple:

EmpID	Description
M0	Married, 1 Exemption
M1	Married, 1 Exemption
S0	Single, 0 Exemptions

Since each Template Employee is a separate employee record (no different than "Active" employees), creating a "M0" Template Employee with a Federal Tax feature preset to "Married, Zero" means that choosing this Template Employee to copy when creating a new employee record ensures that the new employee is loaded with the correct Federal Tax settings.

Or perhaps your organization uses different Pay and Deduction features for employees in different roles:

- Sales Personnel – Salary, Commission, Bonus, Non-Taxable Expense Reimbursement, No hourly pay features
- Production Workers – Regular Hours, Overtime, Double-time, Piece Work Pay, Uniform Deduction

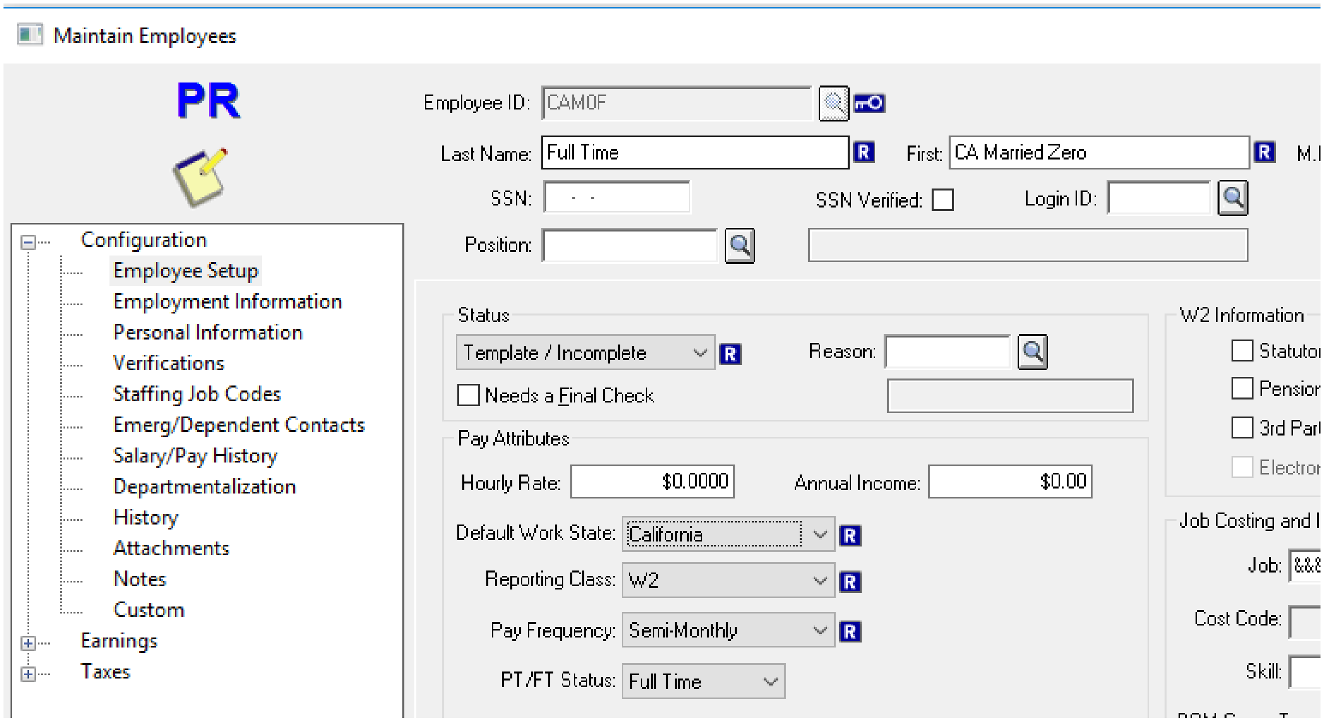
Or maybe you have employees in multiple states and need different tax features depending on the states:

- California Employees – California SDI, California State Tax, California SUTA, Employment Training Tax, FUTA, Federal Tax
- Arizona Employees – Federal, AZ State, AZ SUTA, FUTA, Job Training Tax
- Florida Employees – Federal Income Tax, FL SUTA, FUTA

Or perhaps you have employees in multiple departments and use different GL accounts for properly allocating labor expense - the list is endless and will vary by the exact nature of your organization. But in any case, choosing to copy an existing Template employee when creating a new employee record will reduce the time it takes to add the new employee and help ensure they are configured properly.

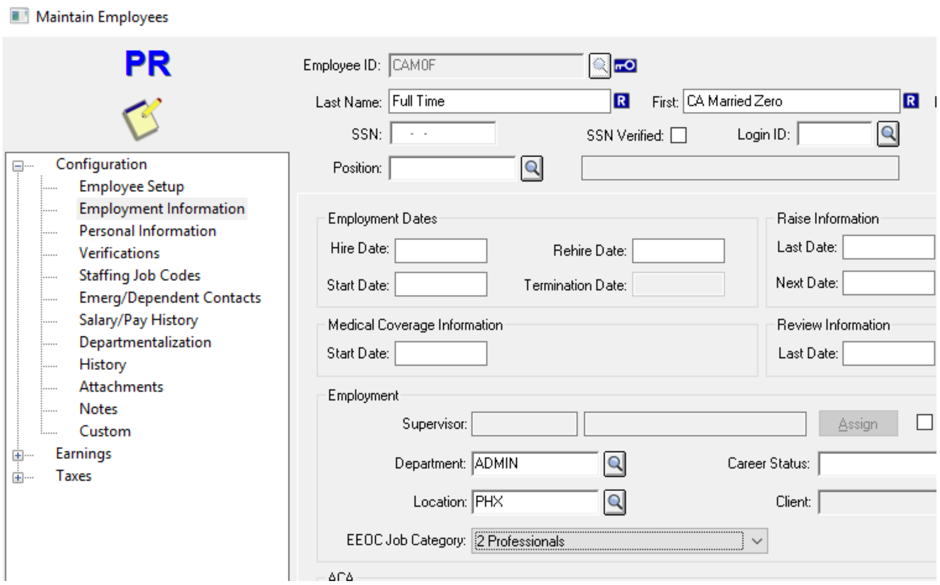
Creating a Template Employee

Create a Template Employee exactly as you would an "Active Employee" – simply change the Status field to "Template/Incomplete", as below:

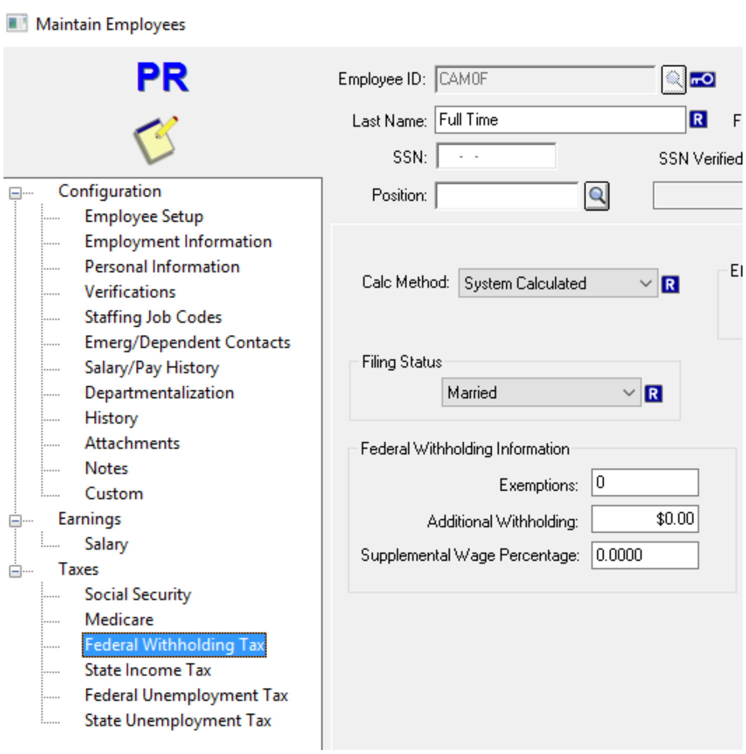


Configure the Template employee as completely as possible – add Pay Features, Pre-Tax Deductions, Tax Features and Other Deductions that would commonly be used on new employees.

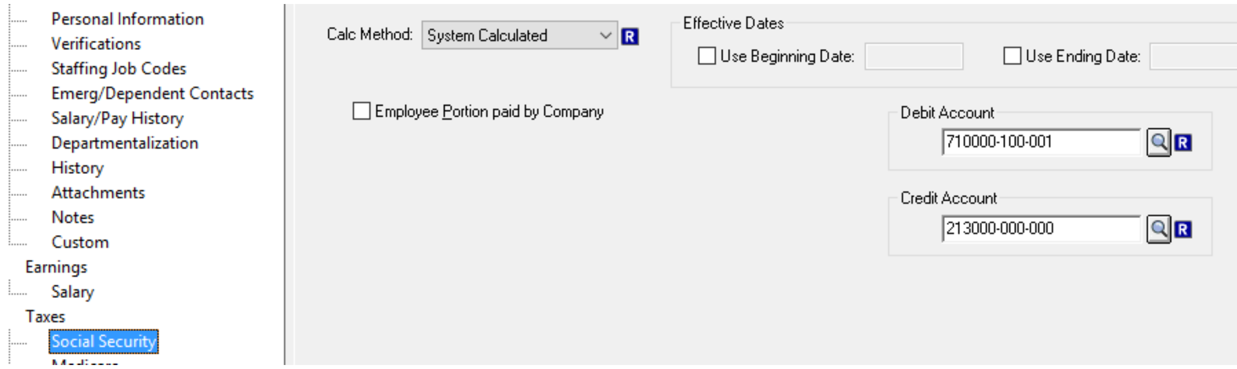
If you are setting up Template Employees based on Department, Location or other criteria – fill those fields on the Template Employee – here is an example of a Temple Employee for Department = ADMIN and Location = Phoenix.



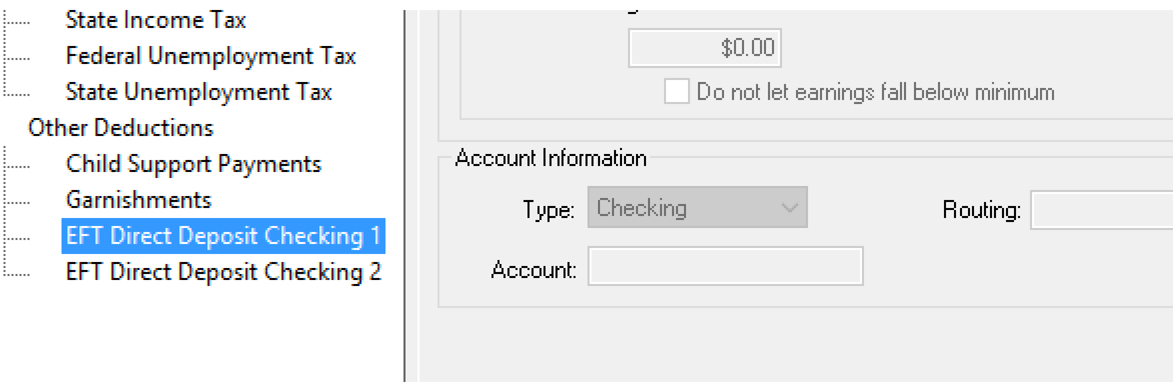
Configure Tax Settings as you would for a “real employee”:



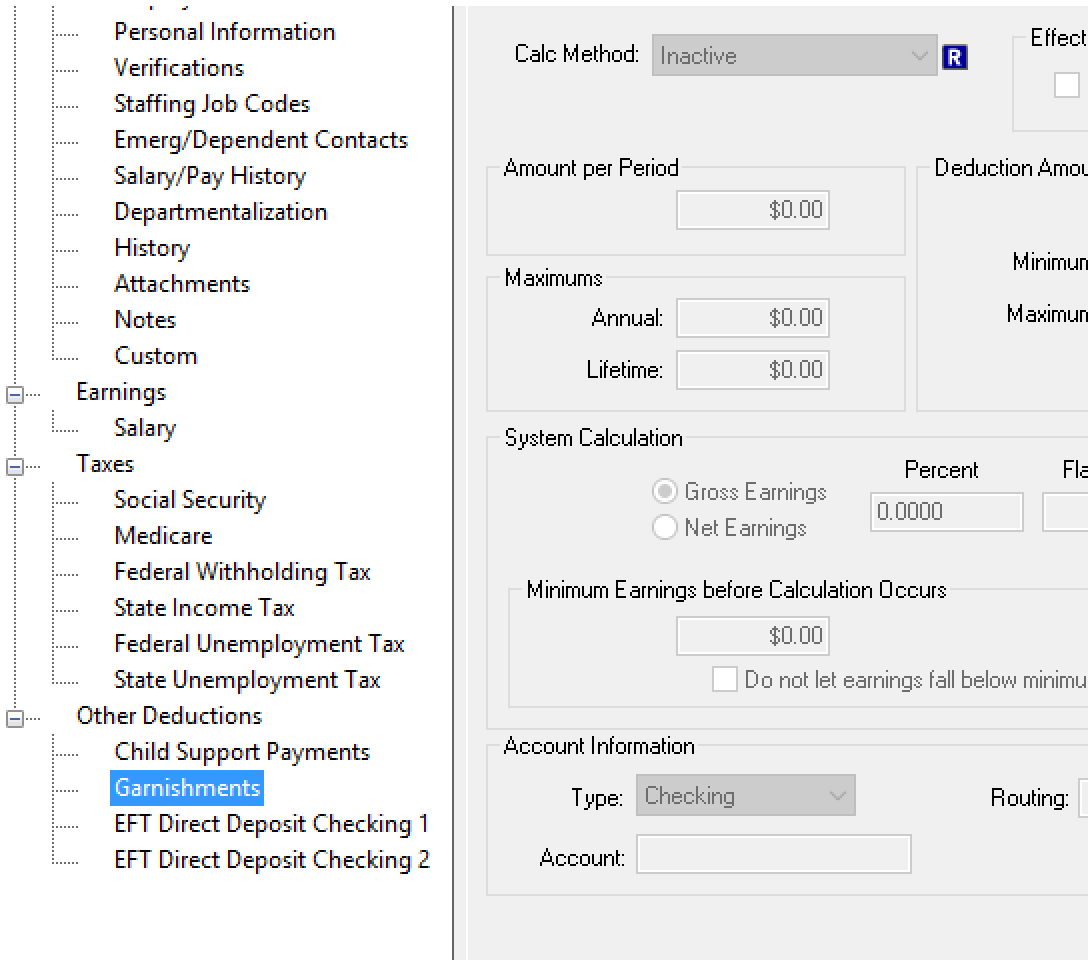
Template Employees are especially helpful to ensure that GL Account settings are correct whenever you allocate payroll expense and liabilities to different subaccounts (department, fund, state, etc.).



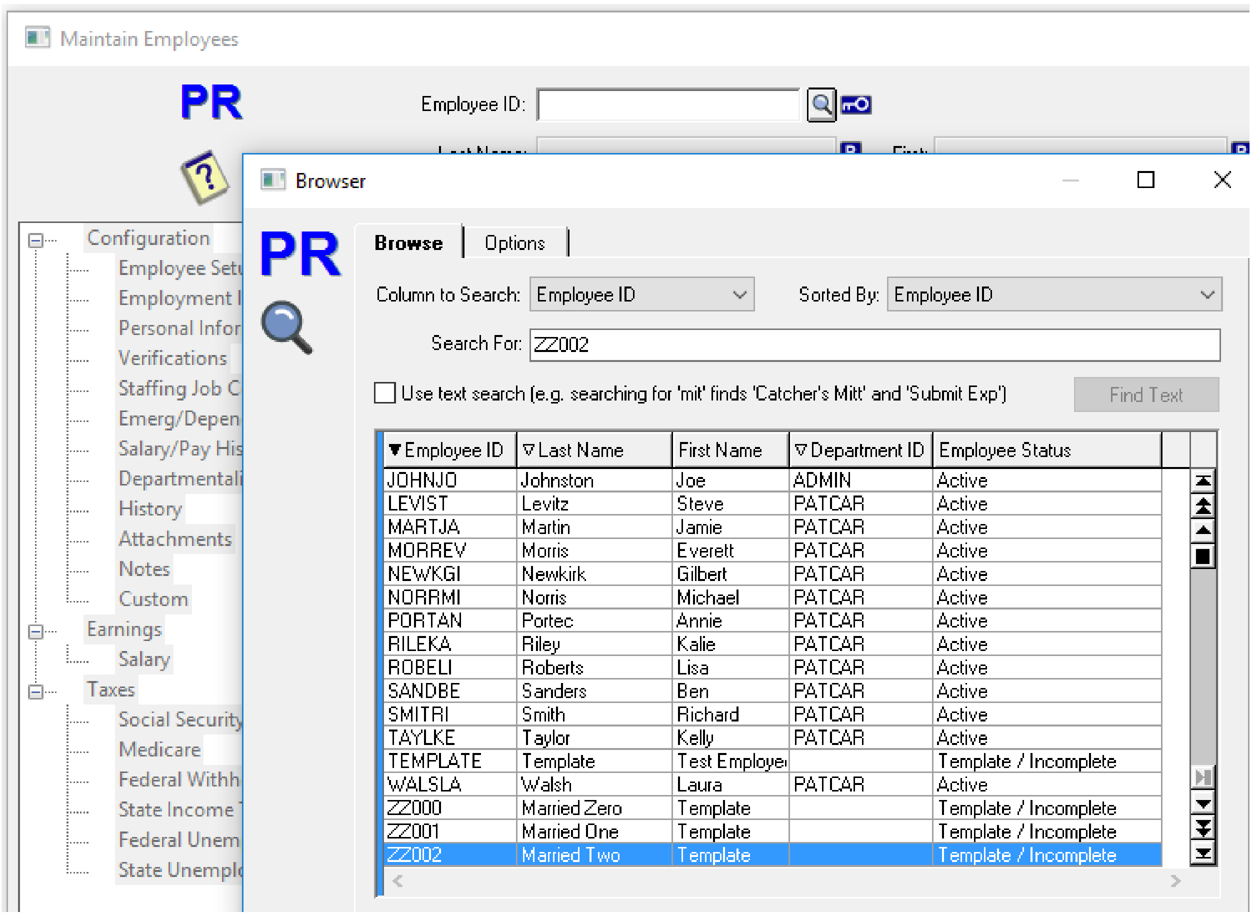
Template Employees do not require all required fields – meaning you can setup “incomplete features” to be completed after copying to the new employee. For example, add a Direct Deposit feature to the Template Employee without an Account or Routing Number:



Another good practice with Template Employees is to add commonly used "Other Deductions" and set their status to "Inactive". If the "real employee" will have one of these features, then you simply need to (after copying the Template Employee) activate the feature for the real employee. In the example below, each Template Employee is assigned an Inactive "Child Support" and "Garnishment" feature. Each Active employee who is set up by copying the Template Employee will then have these inactive features.



Hint: When creating Template Employees, you will find it helpful to set Employee IDs in a way that keeps all the Template Employees "together" in the employee list. This will make it much easier to find the proper Template Employee in the file browser. If your Employee IDs are numeric, make template IDs alphabetic and vice versa. In the example below, Template Employee all start with "ZZ" putting them altogether at the bottom of the list:



Bringing It All Together – An Example

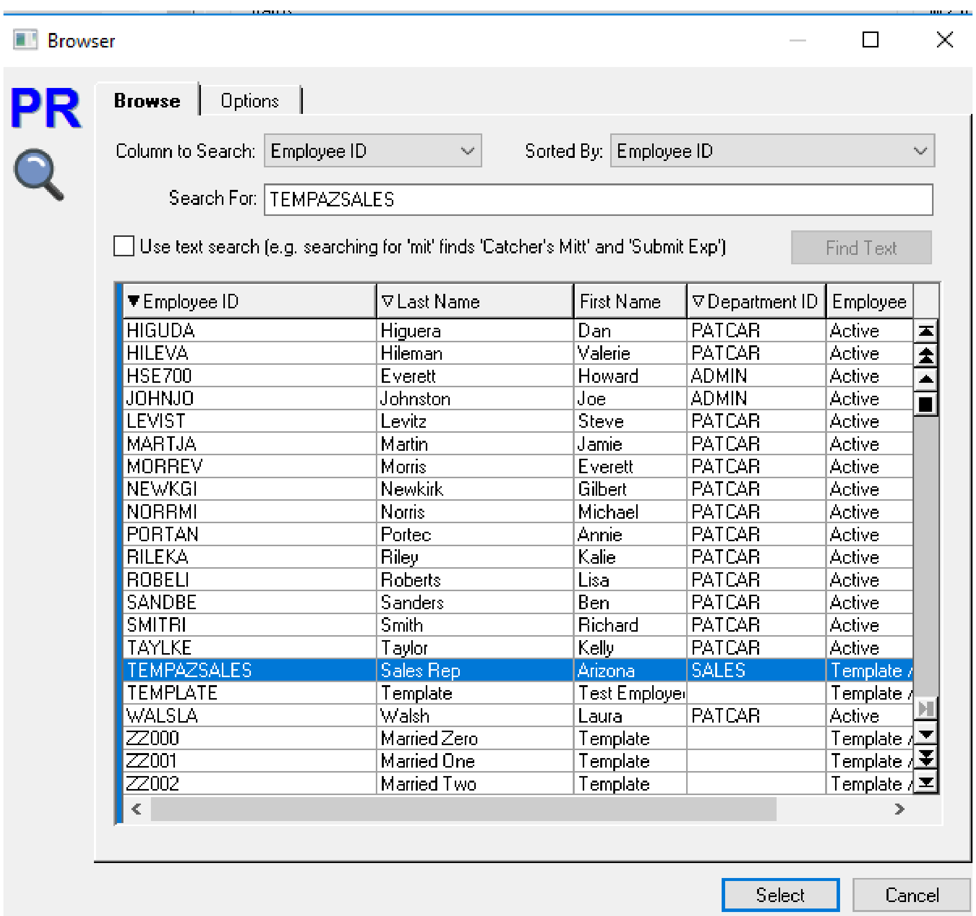
Southwestern Industries has employees in three locations spread across two states – Arizona and California. Their employees are a mix of sales personnel, customer service and administrative staff. Payroll Expenses, including company paid tax and benefit expense, are allocated to each location. Within each location, payroll expenses are allocated to departments. All employees are paid via Direct Deposit and all full-time personnel are eligible for the company health care plan. Approximately one-third of the work force is enrolled in the company 401k plan.

The Payroll Administrator for Southwestern Industries has set up 12 Template Employees:

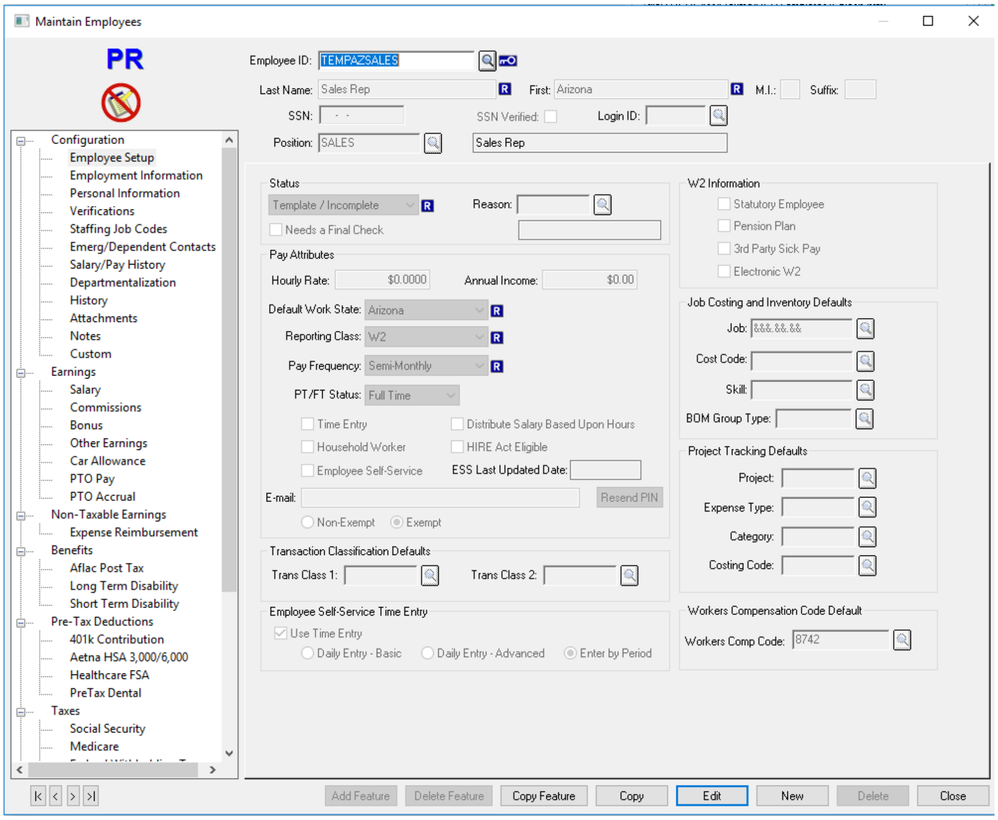
1. Sales – Phoenix
2. Sales – Southern California
3. Sales – Northern California
4. Customer Service – Phoenix
5. Customer Service – Southern California
6. Customer Service – Northern California
7. Admin – Phoenix
8. Admin – Southern California
9. Admin – Northern California
10. Executive – Phoenix
11. Executive – Southern California
12. Executive – Northern California

Let's look at how easy it is to add a new sales representative in Phoenix.

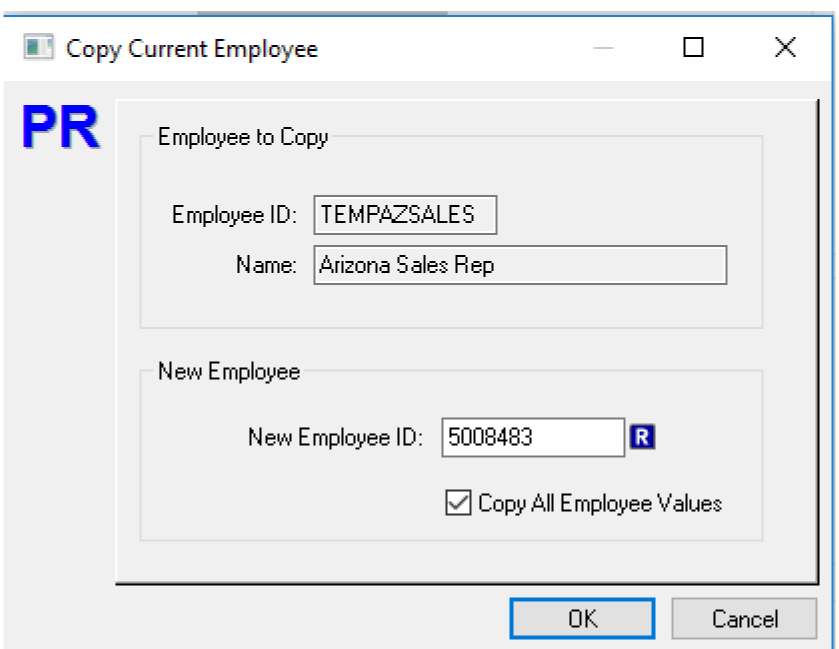
1. Select Template Employee "TEMPAZSALES" in Maintain Employees.



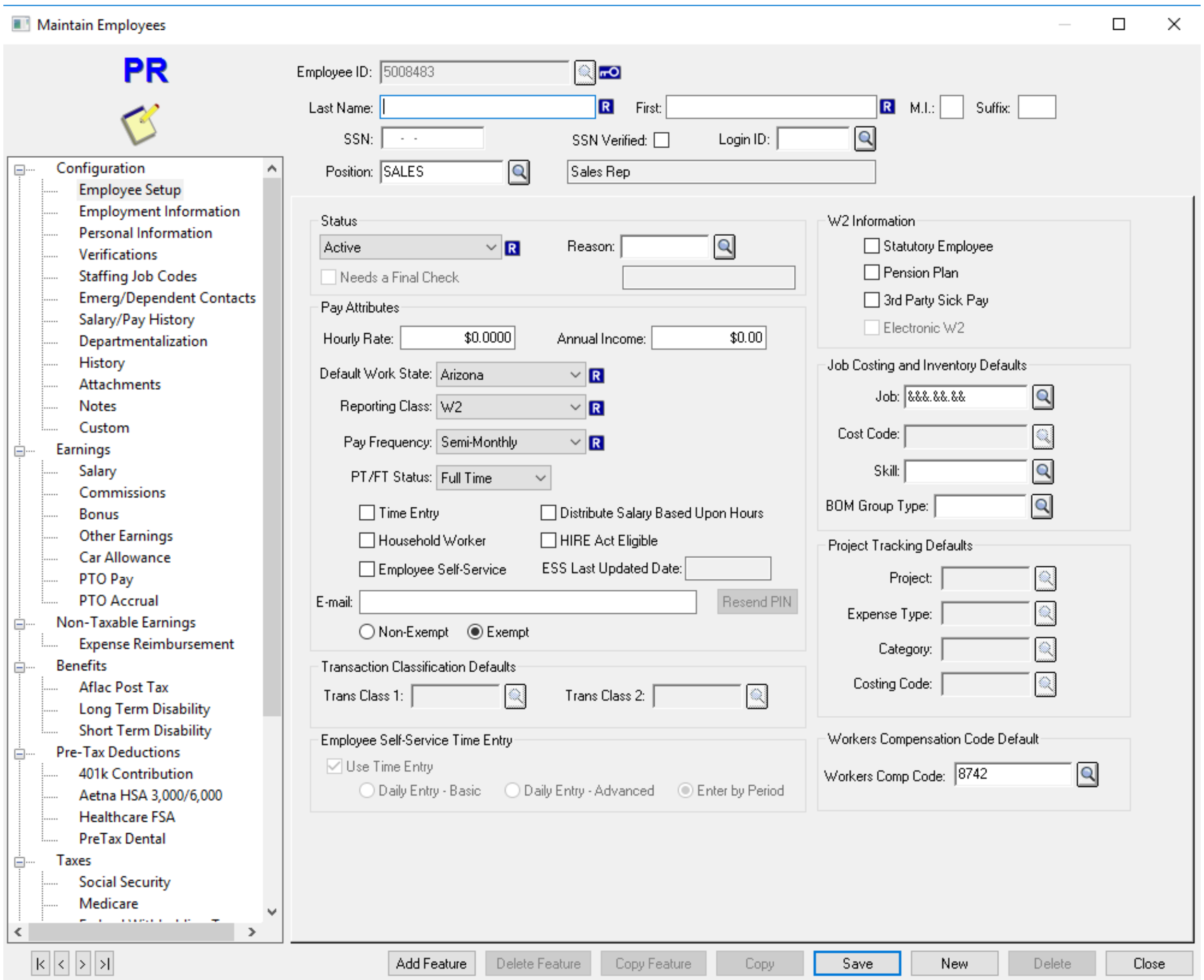
2. The Template Employee appears, ready to be copied to the new employee.



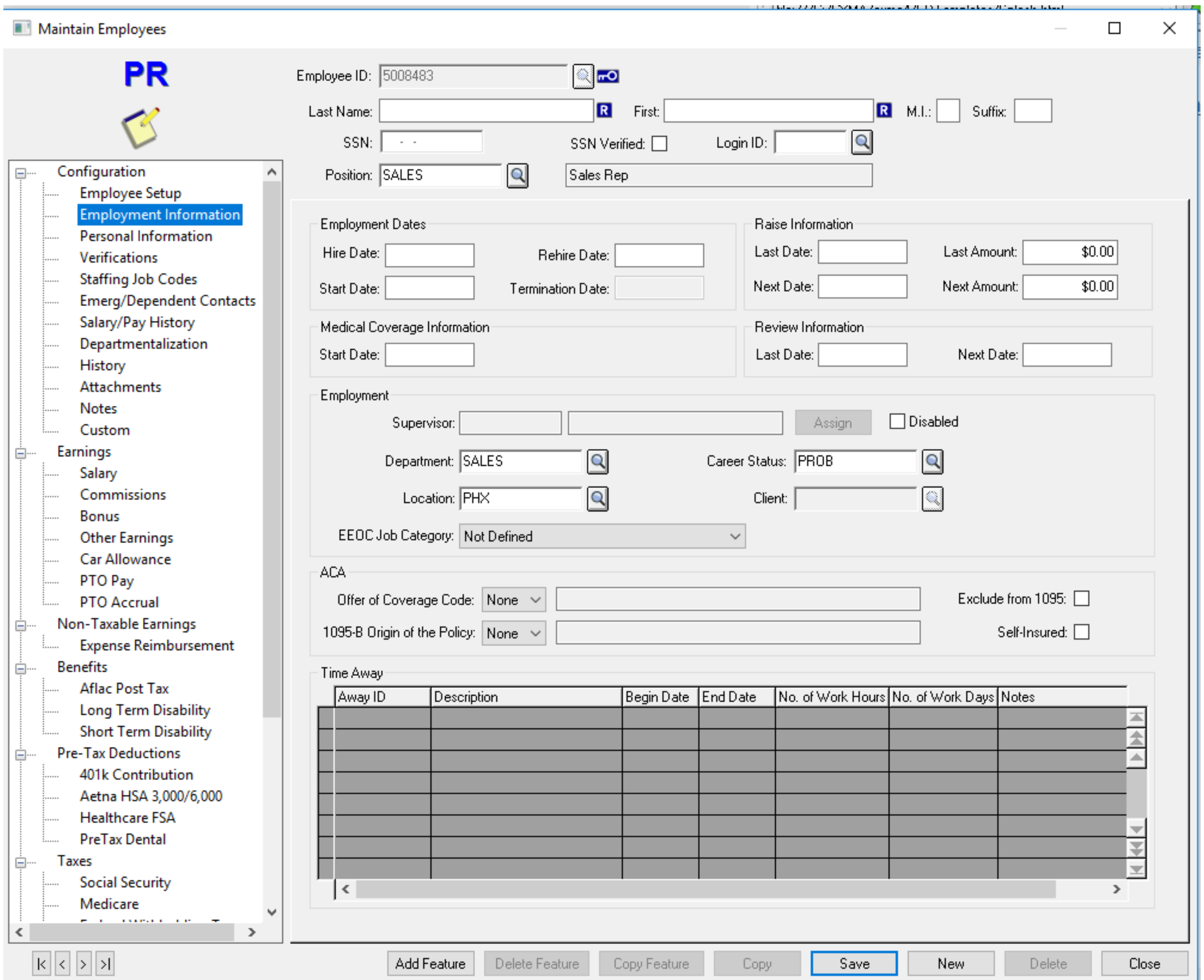
3. The user enters the new employee id and selects "Copy All Values".



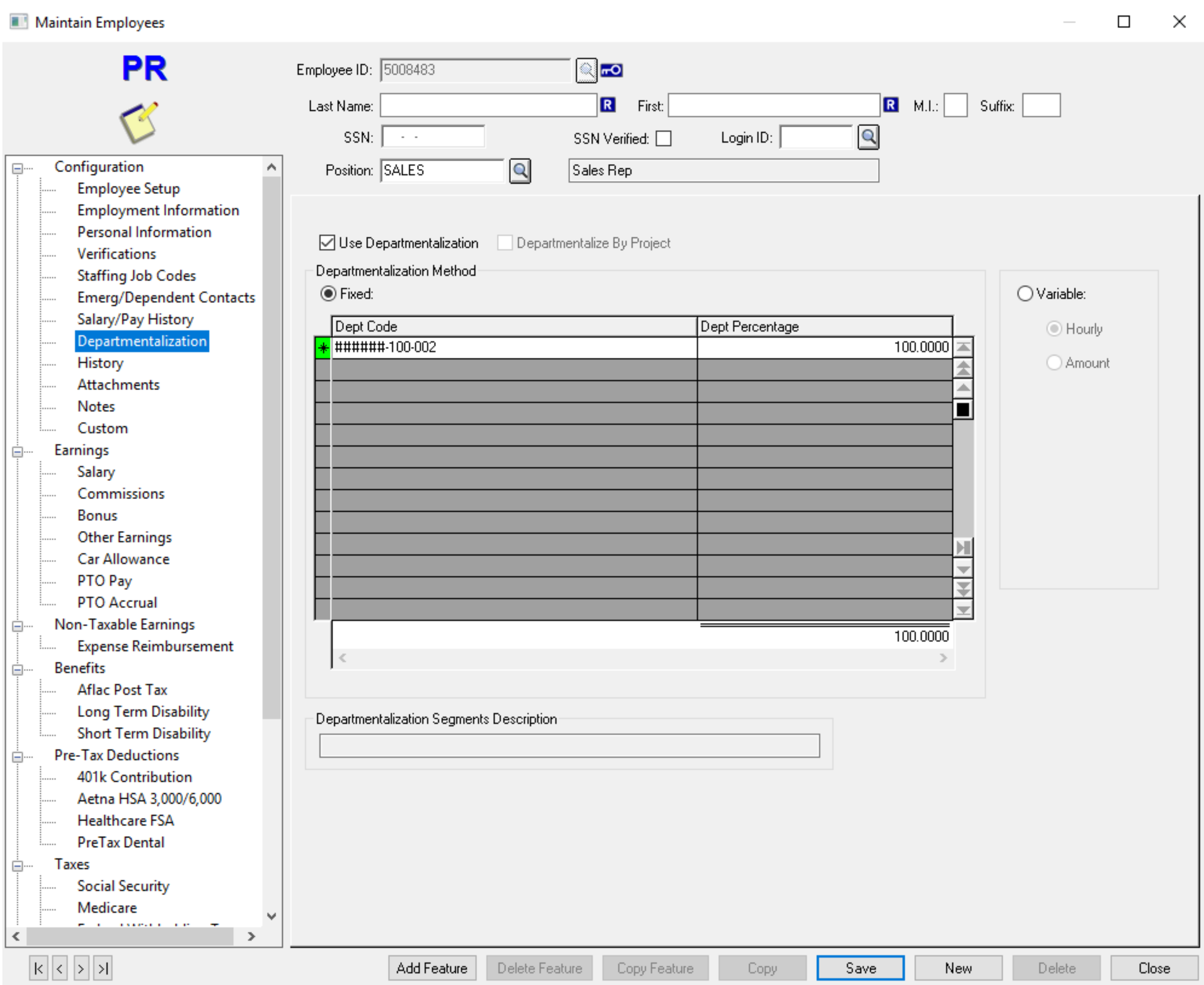
4. The new employee screen appears. Let's review it to see how it is almost completely (and properly) configured for an Arizona Sales Representative.
   a. The Position Field is preselected "SALES"
   b. Status is "Active"
   c. Work State is "Arizona"
   d. PT/FT Status is set to "Full Time"
   e. The correct Workers Comp Code is set automatically



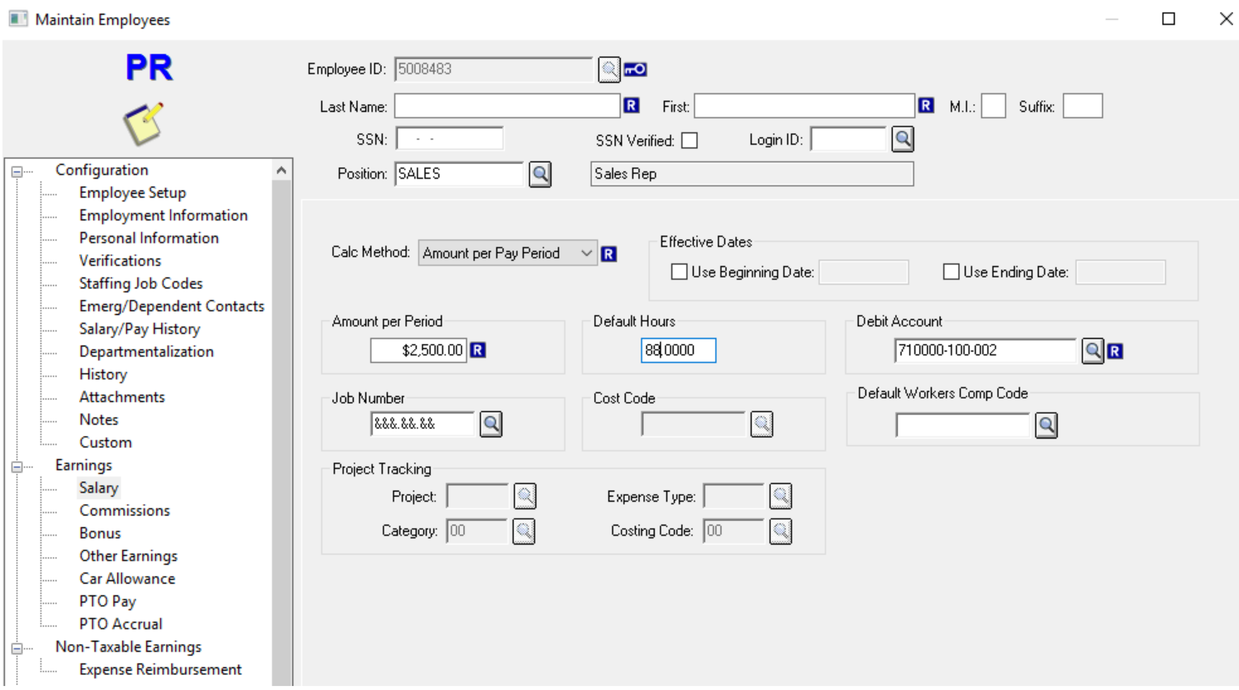
5. On the Employment Information Tab:
    a. Department is pre-set to “Sales”
    b. Location is preset to “Phoenix”
    c. Career Status is preset to “Probationary”



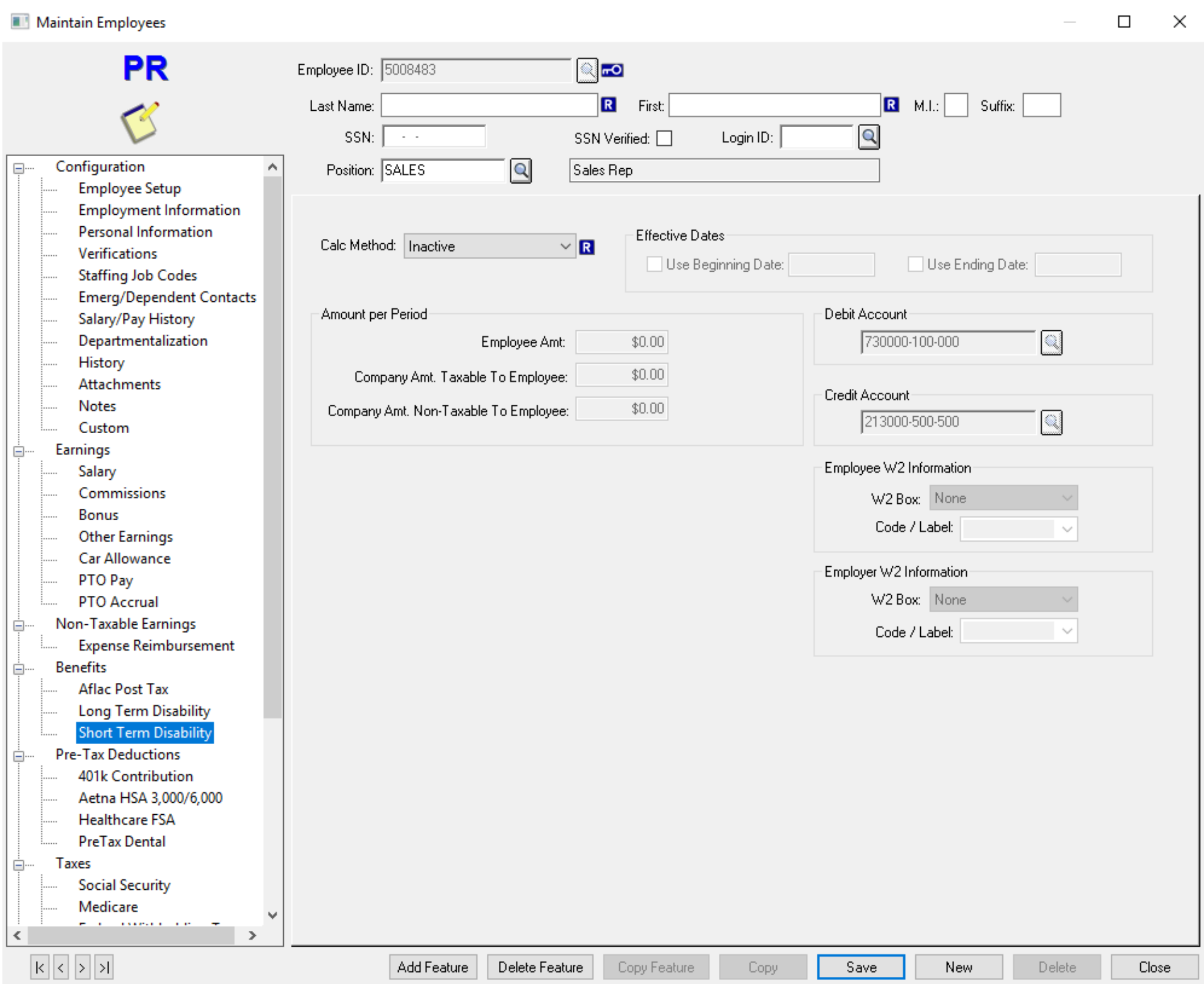
6. On the Departmentalization Tab the employee is pre-configured to allocate all labor, company paid taxes and company paid benefits to a variety of GL accounts all ending in "100-002" – which are the subaccounts for Location = Arizona and Department = Sales



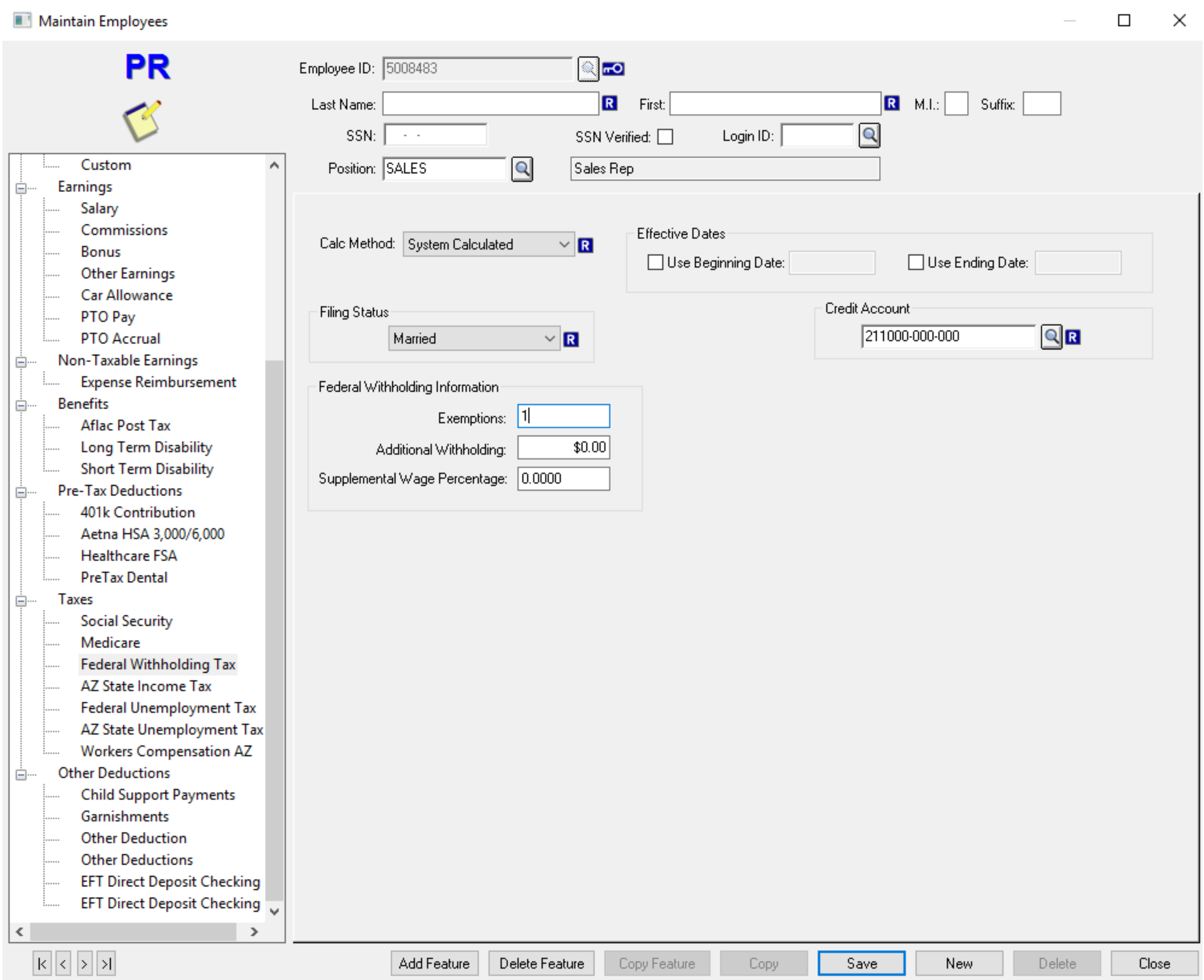
7. The operator fills in the new employee salary amount. The Commission, Bonus and Other Earnings features need no changes. The Car Allowance feature is set to “Inactive” and does not need to be changed until the employee has passed the “Probation” period. PTO Accrual defaults to the normal new employee amount and needs no changes.



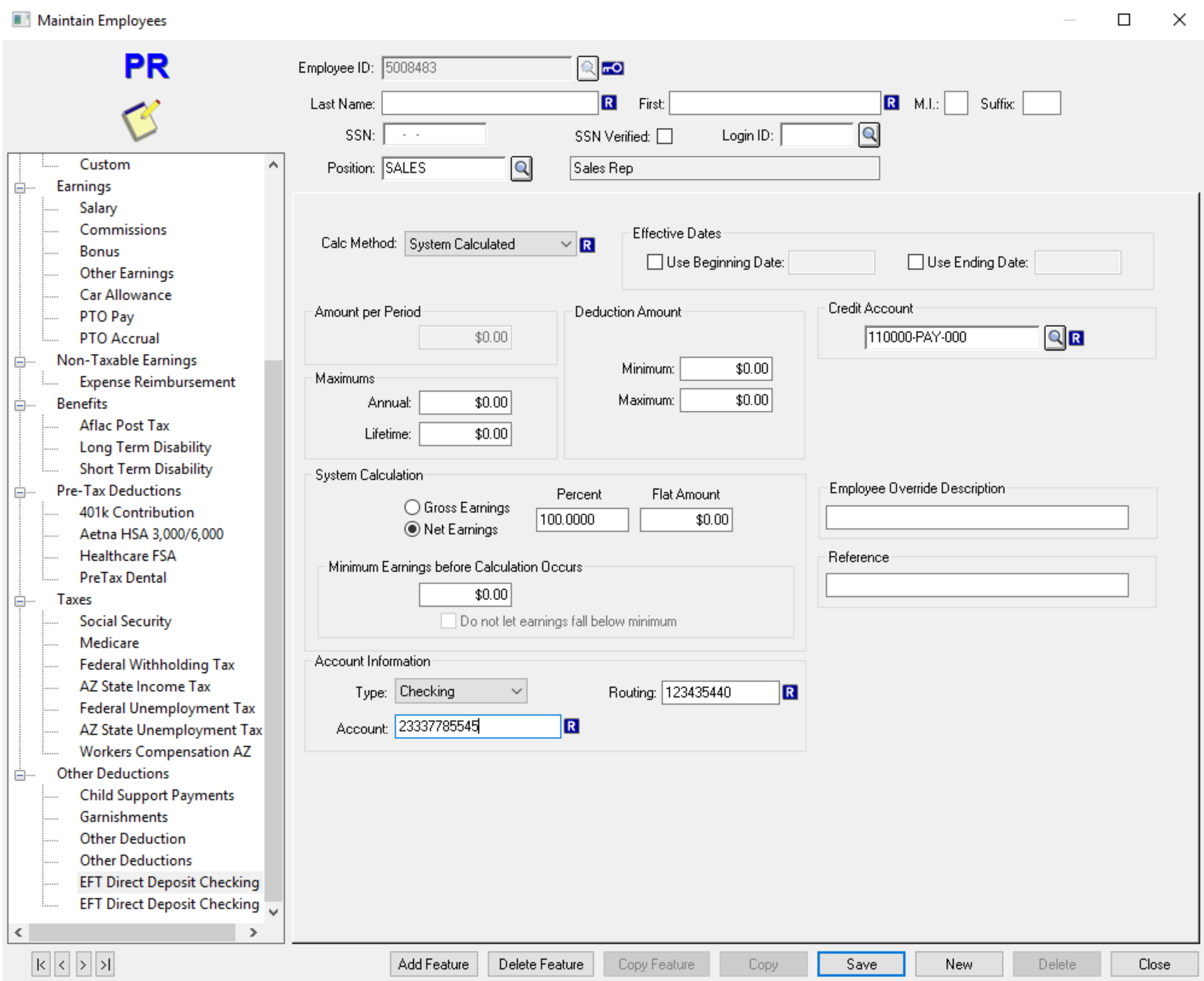
8. Benefits and Pre-Tax Deductions: The new hire has declined Aflac and Short Term Disability so no changes are needed to those features, as they populate from the Template Employee as "Inactive". The user enters the employee amounts for 401K and Pre-Tax Health.



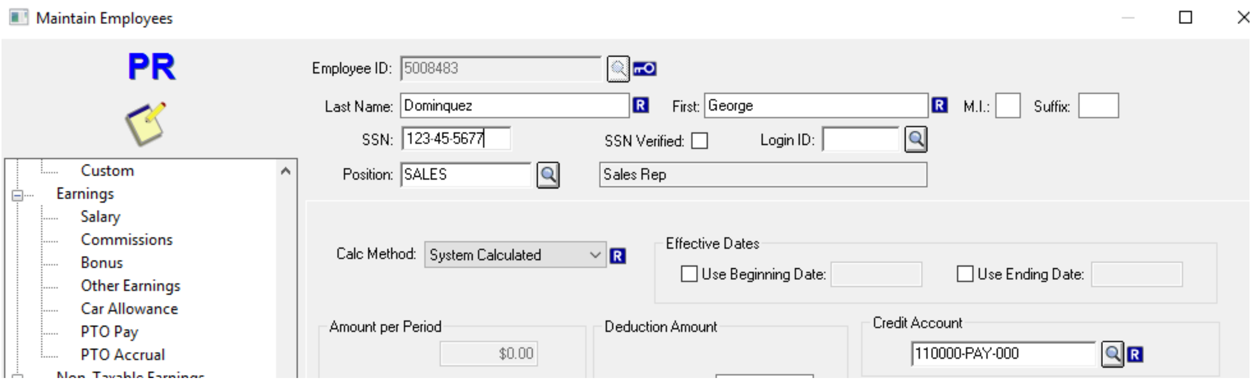
9. The user enters “Married 1” on the Federal Tax tab but no changes are needed to Social Security, Medicare, AZ State Tax, FUTA, SUTA or Workers Compensation settings.



10. The user sets the new employee direct deposit account and routing number. No changes are need to the remaining “Other Deductions” as they do not apply at this time to the employee and are preset to “Inactive”.



11. The last step – the user enters the new employee name and Social Security Number and selects "Save". Total elapsed time – less than two minutes!



Summary

With a little thought and planning, you'll find using Template Employees invaluable - saving you time when setting up new employees – and ensuring that employees are configured correctly. If you have any questions on how best to implement this in your payroll department, give us a call at 800-292-2962 or reach out to us at info@cyma.com.