

## 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:

The screenshot shows the 'Maintain Employees' interface. On the left is a navigation tree with 'Configuration' expanded, showing options like 'Employee Setup', 'Employment Information', 'Personal Information', 'Verifications', 'Staffing Job Codes', 'Emerg/Dependent Contacts', 'Salary/Pay History', 'Departmentalization', 'History', 'Attachments', 'Notes', and 'Custom'. Below this are 'Earnings' and 'Taxes'. The main area contains the following fields:

- Employee ID: CAMDF
- Last Name: Full Time
- First: CA Married Zero
- SSN: - -
- SSN Verified:
- Login ID: [Search]
- Position: [Search]
- Status: Template / Incomplete (Reason: [Search])
- Needs a Final Check:
- Pay Attributes:
  - Hourly Rate: \$0.0000
  - Annual Income: \$0.00
  - Default Work State: California
  - Reporting Class: W2
  - Pay Frequency: Semi-Monthly
  - PT/FT Status: Full Time
- W2 Information:
  - Statutor:
  - Pension:
  - 3rd Part:
  - Electron:
- Job Costing and I:
  - Job: &&&
  - Cost Code: [ ]
  - Skill: [ ]

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.

Maintain Employees

PR

Employee ID: CAM0F

Last Name: Full Time R First: CA Married Zero R

SSN: - - SSN Verified:  Login ID: [input]

Position: [input]

Employment Dates: Hire Date: [input] Rehire Date: [input] Start Date: [input] Termination Date: [input]

Raise Information: Last Date: [input] Next Date: [input]

Medical Coverage Information: Start Date: [input]

Review Information: Last Date: [input]

Employment: Supervisor: [input] Assign

Department: ADMIN Career Status: [input]

Location: PHX Client: [input]

EEOC Job Category: Professionals

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

Maintain Employees

PR

Employee ID: CAM0F

Last Name: Full Time R First: F

SSN: - - SSN Verified: [checkbox]

Position: [input]

Calc Method: System Calculated R

Filing Status: Married R

Federal Withholding Information: Exemptions: 0 Additional Withholding: \$0.00 Supplemental Wage Percentage: 0.0000

Configuration: Employee Setup, Employment Information, Personal Information, Verifications, Staffing Job Codes, Emerg/Dependent Contacts, Salary/Pay History, Departmentalization, History, Attachments, Notes, Custom, Earnings, Taxes: Social Security, Medicare, Federal Withholding Tax, State Income Tax, Federal Unemployment Tax, State Unemployment Tax

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.).

The screenshot shows a software interface with a left-hand navigation menu and a main settings area. The menu includes categories like Personal Information, Verifications, Staffing Job Codes, Emerg/Dependent Contacts, Salary/Pay History, Departmentalization, History, Attachments, Notes, Custom, Earnings, Salary, Taxes, and Social Security. The 'Social Security' item is highlighted. The main area contains the following fields:

- Calc Method: System Calculated (with a search icon and a red 'R' icon)
- Effective Dates:
  - Use Beginning Date: [ ]
  - Use Ending Date: [ ]
- Employee Portion paid by Company
- Debit Account: 710000-100-001 (with a search icon and a red 'R' icon)
- Credit Account: 213000-000-000 (with a search icon and a red 'R' icon)

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:

The screenshot shows a software interface with a left-hand navigation menu and a main settings area. The menu includes categories like State Income Tax, Federal Unemployment Tax, State Unemployment Tax, Other Deductions, Child Support Payments, Garnishments, EFT Direct Deposit Checking 1, and EFT Direct Deposit Checking 2. The 'EFT Direct Deposit Checking 1' item is highlighted. The main area contains the following fields:

- \$0.00
- Do not let earnings fall below minimum
- Account Information:
  - Type: Checking (dropdown menu)
  - Routing: [ ]
  - Account: [ ]

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.

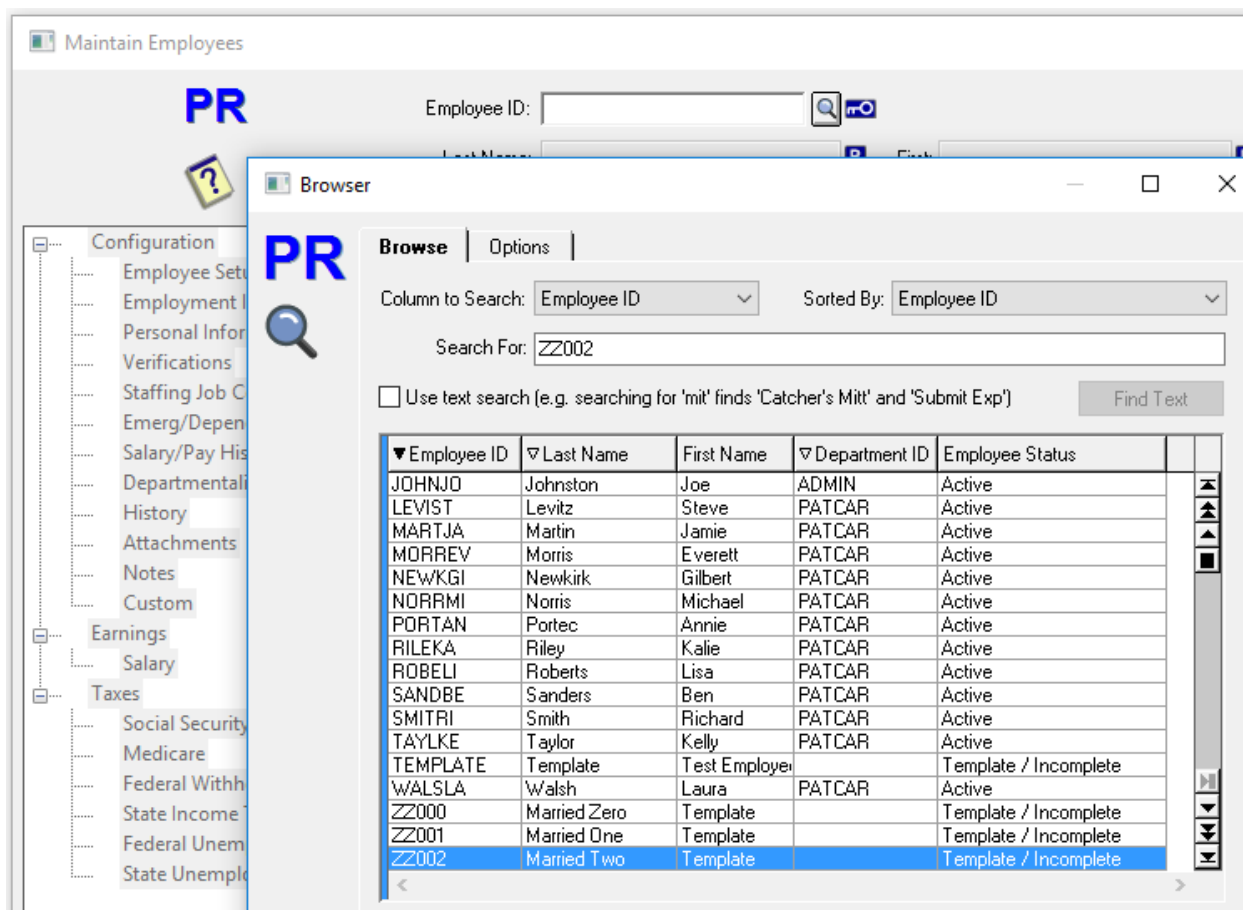
The image shows a software interface for payroll management. On the left is a vertical navigation menu with the following categories and items:

- Personal Information
- Verifications
- Staffing Job Codes
- Emerg/Dependent Contacts
- Salary/Pay History
- Departmentalization
- History
- Attachments
- Notes
- Custom
- Earnings**
  - Salary
- Taxes**
  - Social Security
  - Medicare
  - Federal Withholding Tax
  - State Income Tax
  - Federal Unemployment Tax
  - State Unemployment Tax
- Other Deductions**
  - Child Support Payments
  - Garnishments**
  - EFT Direct Deposit Checking 1
  - EFT Direct Deposit Checking 2

The right side of the image shows a configuration panel for a deduction feature. Key settings include:

- Calc Method:** Inactive (with a red 'R' icon)
- Effect:**
- Amount per Period:** \$0.00
- Deduction Amount:** (field partially visible)
- Maximums:**
  - Annual: \$0.00
  - Lifetime: \$0.00
- System Calculation:**
  - Radio buttons for **Gross Earnings** (selected) and **Net Earnings**
  - Percent:** 0.0000
  - Flag:**
  - Minimum Earnings before Calculation Occurs:** \$0.00
  - Do not let earnings fall below minimum
- Account Information:**
  - Type:** Checking
  - Routing:** (field partially visible)
  - Account:** (field partially visible)

**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

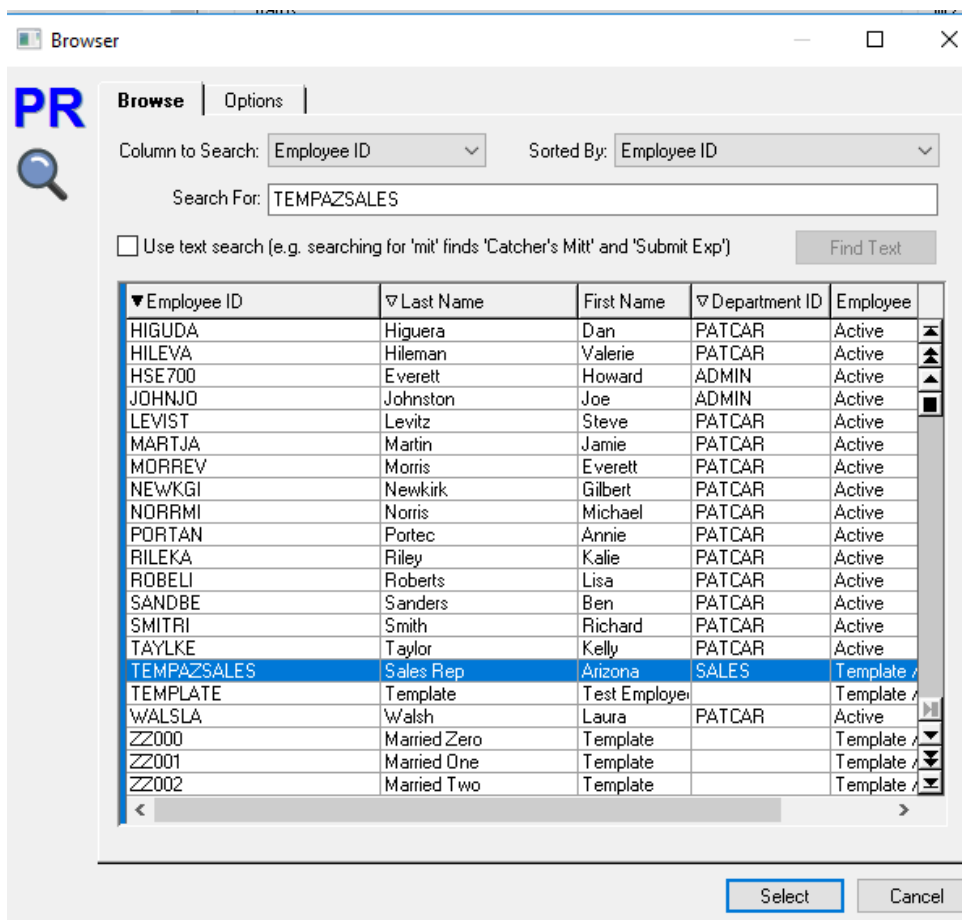
Southwestern Industries has employees in three locations spread across two states – Arizona and California. Their employees are a mix of sales personnel, customer service and administrative staff. Payroll Expenses, including company paid tax and benefit expense, are allocated to each location. Within 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.

The screenshot shows the 'Maintain Employees' window with the following details:

- Employee ID:** TEMPAZSALES
- Last Name:** Sales Rep
- First:** Arizona
- Position:** SALES
- Status:** Template / Incomplete
- Pay Attributes:** Hourly Rate: \$0.0000, Annual Income: \$0.00
- Default Work State:** Arizona
- Reporting Class:** W/2
- Pay Frequency:** Semi-Monthly
- PT/FT Status:** Full Time
- Transaction Classification Defaults:** Trans Class 1, Trans Class 2
- Employee Self-Service Time Entry:** Use Time Entry (checked)
- W2 Information:** Statutory Employee, Pension Plan, 3rd Party Sick Pay, Electronic W2
- Job Costing and Inventory Defaults:** Job, Cost Code, Skill, BOM Group Type
- Project Tracking Defaults:** Project, Expense Type, Category, Costing Code
- Workers Compensation Code Default:** Workers Comp Code: 8742

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

The screenshot shows the 'Copy Current Employee' dialog box with the following details:

- Employee to Copy:** Employee ID: TEMPAZSALES, Name: Arizona Sales Rep
- New Employee:** New Employee ID: 5008483
- Copy All Employee 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

The screenshot displays the 'Maintain Employees' application window. The main content area is titled 'Employee ID: 5008483'. On the left, a navigation tree is expanded to 'Configuration' > 'Employee Setup'. The main form contains the following fields and settings:

- Employee Information:** Employee ID: 5008483, Last Name: [ ], First: [ ], M.I.: [ ], Suffix: [ ], SSN: [ ], SSN Verified: , Login ID: [ ], Position: SALES, Sales Rep: [ ].
- Status:** Active (selected), Reason: [ ], Needs a Final Check: .
- Pay Attributes:** Hourly Rate: \$0.0000, Annual Income: \$0.00.
- Default Work State:** Arizona (selected), Reporting Class: W2 (selected), Pay Frequency: Semi-Monthly (selected), PT/FT Status: Full Time (selected).
- Options:** Time Entry, Distribute Salary Based Upon Hours, Household Worker, HIRE Act Eligible, Employee Self-Service, ESS Last Updated Date: [ ], Non-Exempt, Exempt (selected).
- Transaction Classification Defaults:** Trans Class 1: [ ], Trans Class 2: [ ].
- Employee Self-Service Time Entry:** Use Time Entry (checked), Daily Entry - Basic, Daily Entry - Advanced, Enter by Period (selected).
- W2 Information:** Statutory Employee, Pension Plan, 3rd Party Sick Pay, Electronic W2 (all unchecked).
- Job Costing and Inventory Defaults:** Job: [ ], Cost Code: [ ], Skill: [ ], BOM Group Type: [ ].
- Project Tracking Defaults:** Project: [ ], Expense Type: [ ], Category: [ ], Costing Code: [ ].
- Workers Compensation Code Default:** Workers Comp Code: 8742.

At the bottom of the window, there are navigation buttons: Add Feature, Delete Feature, Copy Feature, Copy, Save (highlighted), New, Delete, and Close.

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"

The screenshot shows the 'Maintain Employees' application window. The 'Employment Information' tab is selected in the left-hand navigation tree. The main form area contains the following fields and sections:

- Employee ID:** 5008483
- Last Name:** [Empty] **First:** [Empty] **M.I.:** [Empty] **Suffix:** [Empty]
- SSN:** [Empty] **SSN Verified:**  **Login ID:** [Empty]
- Position:** SALES (Sales Rep)
- Employment Dates:** Hire Date, Rehire Date, Start Date, Termination Date
- Raise Information:** Last Date, Last Amount (\$0.00), Next Date, Next Amount (\$0.00)
- Medical Coverage Information:** Start Date
- Review Information:** Last Date, Next Date
- Employment:** Supervisor, Department (SALES), Career Status (PROB), Location (PHX), Client, EEOC Job Category (Not Defined)
- ACA:** Offer of Coverage Code (None), Exclude from 1095: , 1095-B Origin of the Policy (None), Self-Insured:
- Time Away:** A table with columns: Away ID, Description, Begin Date, End Date, No. of Work Hours, No. of Work Days, Notes.

At the bottom of the window, there are navigation buttons: Add Feature, Delete Feature, Copy Feature, Copy, Save, New, Delete, and Close.



- 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.

The screenshot displays the 'Maintain Employees' window with the following configuration details:

- Employee ID:** 5008483
- Last Name:** [Empty] **First:** [Empty] **M.I.:** [Empty] **Suffix:** [Empty]
- SSN:** [Empty] **SSN Verified:**  **Login ID:** [Empty]
- Position:** SALES **Sales Rep:** [Empty]
- Calc Method:** Amount per Pay Period **Effective Dates:**  Use Beginning Date: [Empty]  Use Ending Date: [Empty]
- Amount per Period:** \$2,500.00 **Default Hours:** 88.0000 **Debit Account:** 710000-100-002
- Job Number:** [Empty] **Cost Code:** [Empty] **Default Workers Comp Code:** [Empty]
- Project Tracking:**
  - Project:** [Empty] **Expense Type:** [Empty]
  - Category:** 00 **Costing Code:** 00

The left sidebar shows a navigation tree with categories like Configuration, Earnings, and Non-Taxable Earnings. The 'Salary' option under Earnings is currently selected.

- 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.

**Maintain Employees**

Employee ID: 5008483

Last Name: [ ] R First: [ ] R M.I.: [ ] Suffix: [ ]

SSN: [ ] SSN Verified:  Login ID: [ ]

Position: SALES Sales Rep

Calc Method: Inactive R

Effective Dates  
 Use Beginning Date: [ ]  Use Ending Date: [ ]

Amount per Period

Employee Amt:	\$0.00
Company Amt. Taxable To Employee:	\$0.00
Company Amt. Non-Taxable To Employee:	\$0.00

Debit Account: 730000-100-000

Credit Account: 213000-500-500

Employee W2 Information  
 W2 Box: None  
 Code / Label: [ ]

Employer W2 Information  
 W2 Box: None  
 Code / Label: [ ]

Navigation: k < > > >

Buttons: Add Feature Delete Feature Copy Feature Copy Save New Delete Close

- 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.

The screenshot shows the 'Maintain Employees' window with the 'Federal Tax' tab selected in the left-hand navigation pane. The main area displays the following configuration details:

- Employee ID:** 5008483
- Position:** SALES (Sales Rep)
- Calc Method:** System Calculated
- Filing Status:** Married
- Credit Account:** 211000-000-000
- Federal Withholding Information:**
  - Exemptions: 1
  - Additional Withholding: \$0.00
  - Supplemental Wage Percentage: 0.0000

The bottom of the window features a toolbar with buttons for 'Add Feature', 'Delete Feature', 'Copy Feature', 'Copy', 'Save', 'New', 'Delete', and 'Close'. The 'Save' button is highlighted in blue.



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

The screenshot shows the 'Maintain Employees' window with the following fields and values:

- Employee ID: 5008483
- Last Name: Dominquez
- First: George
- SSN: 123-45-5677
- Position: SALES (Sales Rep)
- Calc Method: System Calculated
- Effective Dates: (Use Beginning Date and Use Ending Date checkboxes are unchecked)
- Amount per Period: \$0.00
- Deduction Amount: (empty)
- Credit Account: 110000-PAY-000

A sidebar on the left lists various earning and deduction categories such as Custom, Earnings, Salary, Commissions, Bonus, Other Earnings, Car Allowance, PTO Pay, and PTO Accrual.

### 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](mailto:info@cyma.com).