

## Creating an Employee - Step 7: Creating Scheduled E/Ds

To set up employee-level Scheduled E/Ds,

1. Go to [Employee - Scheduled E/Ds](#).
2. Select and open the company from the list on the left-hand side of the screen.
3. Select the employee from the list on the right-hand side of the screen.
4. Click the **plus**



sign in the toolbar to create a new record.

**Result:** the **Details** tab opens.

**Note:** Fields with names with a red \* asterisk are required.

Field / Button	Description
<b>Calculation Method</b>	method used to calculate deductions from payrolls.
<b>Amount</b>	amount of the deduction to be withheld each pay
<b>Always Pay / Deduct</b>	<p>offers flexibility to override E/D similar to Blocking Week 1 - 5</p> <ul style="list-style-type: none"> <li>• <b>No</b> - if the employee has no wages in a payroll cycle, the system does not pay / deduct the E/D, nor is it tracked to be made up later.</li> <li>• <b>All payrolls</b> - earnings are paid whether or not there are earned wages for the employee; deductions are tracked to take from the next payroll. <ul style="list-style-type: none"> <li>◦ If there are insufficient earnings and the <b>Make Up Deducts Shortfall</b> field on the <a href="#">Client - E/Ds - Details tab</a> is set to Yes, the deduction is made up in a subsequent pay cycle.</li> </ul> </li> <li>• <b>Current Payrolls</b> - the E/D is applied to the current the payroll whether or not there are earned wages for the employee. If deduction exceeds amount in check the amount is not tracked to be made up later.</li> </ul>

	<ul style="list-style-type: none"> <li>◦ If there are insufficient earnings for the deduction, the Scheduled E/D is processed based on the selection in the <b>Deductions to Zero</b> field.</li> </ul>
<b>Priority</b>	priority to include E/D in check
<b>E/D Group</b>	<p>select an E/D Group if the Scheduled E/D is included in an E/D Group.</p> <ul style="list-style-type: none"> <li>• Earnings must be set up as a member of an E/D Group, which simplifies the calculation of such earnings as 401(k)s</li> </ul>
<b>%</b>	Scheduled E/D percentage to be withheld
<b>Deductions to Zero</b>	<p>defaults to the <b>Deductions to Zero Default</b> field on the <a href="#">Client - E/Ds - Scheduled Defaults</a> tab. It can be overridden here by E/D, by employee.</p> <p>Instructs how much of a deduction should be taken if there is not enough to take the entire amount. This does not turn shortfall / deduction not taken makeup on or off. It only tells the system whether or not to take partial amounts for deductions.</p> <ul style="list-style-type: none"> <li>• Yes - the entire amount is deducted, until the check is zero. If there is shortfall it</li> <li>• may be either a portion of or the total amount of the scheduled E/D.</li> <li>• No - a deduction is taken only when there are sufficient funds to take the whole deduction. If there are insufficient wages, the created shortfall is always the total amount of the Scheduled E/D. <ul style="list-style-type: none"> <li>◦ If there is a pre-existing shortfall, it takes the shortfall amount only when there are sufficient wages to take the whole amount.</li> <li>◦ When there is a deduction and a pre-existing shortfall, and there are sufficient wages to take the shortfall but not all of the deduction, Evolution takes the shortfall, but not the deduction.</li> </ul> </li> </ul>
<b>Multiple Scheduled E/D Group</b>	<p>select the E/D Group to apply multiple E/Ds that are combined into a group. <b>Example</b>, multiple garnishments that need to be combined so they do not exceed 50% of disposable earnings.</p> <p>When a scheduled deduction is grouped with a Child Support deduction via the Multiple Scheduled E/D Group, the total of the 2 deductions take 50% of disposable earnings rather than 50% of all earnings. If there are 2 scheduled deductions grouped together and no Child Support is involved, Evolution continues to take 50% of all earnings.</p>
<b>Company Benefit</b>	<p>The benefit on which the Scheduled E/D is based and linked.</p> <p>When a Scheduled E/D is based on a client benefit, the amounts are pulled from the <a href="#">Client - Benefits</a> screen. When the benefit is changed on that screen the Scheduled E/D is updated automatically.</p>

<b>Employee Benefit</b>	<p>The benefit on which the Scheduled E/D is based and dynamically linked. When a Scheduled E/D is based on an Employee Benefit the amounts are pulled from the <a href="#">HR - Employee - Benefits screen</a>. When the benefit is changed on the <a href="#">HR Module - Employee- Benefits screen</a> Evolution updates the Scheduled E/D.</p> <p><b>Note:</b> Scheduled E/Ds reference one benefit each; therefore, if an Employee Benefit is used, the Client Benefit options are inactive, and vice versa</p>
<b>Company Benefit Rate</b>	<p>The benefit rate on which the Scheduled E/D is based and dynamically linked. <b>Example:</b> EE Only, EE + 1, Family.</p> <p>When the benefit is changed on the <a href="#">Client - Benefits screen</a>, the scheduled E/D is updated automatically. This field only can be populated when the Company Benefit field is populated.</p> <ul style="list-style-type: none"> <li>• A Benefit Rate must be selected, or the user must select None</li> </ul>
<b>Frequency section</b>	
<b>Frequency</b>	select how frequently the deduction takes place.
<b>Month Number</b>	if the frequency is quarterly, semi-annual, or annual, select the month in which the deduction takes place.
<b>Which Payrolls</b>	<ul style="list-style-type: none"> <li>• <u>All</u> - The E/D will be included in all payrolls.</li> <li>• <u>First</u> - The E/D will be included in the first scheduled payroll of the pay period.</li> <li>• <u>Last</u> - The E/D will be included in the last scheduled payroll of the pay period.</li> <li>• <u>Nearest to the 15th</u> - The E/D is included in the payroll nearest to the 15th of each month. If the 15th falls directly in the middle of the pay cycle, the E/D is taken from the second payroll.</li> </ul> <p><b>Important:</b> if "All Payrolls" is selected, and the company runs monthly, and weekly (or bi-weekly) payrolls, in the case of a Scheduled [Earnings] E/D the monthly employee will receive the scheduled earnings at <b>every</b> payroll; even payrolls for which s/he is not normally paid.</p>
<b>Effective Start Date / Effective End Date</b>	<p>the Effective End date is not required.</p> <p><b>Note:</b> The Effective End Date is used to determine the rate used. If the Effective End Date for the Scheduled E/D is Null, the current rate is used. If the Effective End Date is populated, the rate used is the rate for the corresponding period.</p>
<b>Block Week 1 - 5</b>	offers flexibility of blocking the deduction for a particular week

<b>Destination Details / Navigation sections</b>	
<b>Agency</b>	<p>agency to which the payments are sent.</p> <p>If an Agency is selected, the Direct Deposit fields are grayed. If an Employee Direct Deposit number is selected, Agency cannot be entered. This is to prevent duplication of payments</p>
<b>Child Support Case</b>	select the child support case number
<b>Garnishment / Loan ID</b>	type the garnishment ID to print the garnishment ID on agency checks (regardless of the type of Scheduled E/D). This field allows up to 30 characters.
<b>EE Direct Deposit</b>	select the direct deposit bank account number to use direct deposit for the Scheduled E/D. When an employee's direct deposit account number is changed on the <a href="#">Direct Deposit tab</a> , the employee Scheduled E/D is automatically updated.
<b>Deduct Whole Check</b>	<p>value selected defaults based on the setting applied on the <a href="#">Client - E/Ds - Scheduled Defaults tab</a></p> <p><u>Yes</u> - deducts the net check (use for direct deposits)</p> <p><u>No</u> - deducts a portion of the check</p>
<b>Take Home Pay</b>	<p>enter the take home pay amount. To set this up, Yes must be selected in the Deduct Whole Check field</p> <ul style="list-style-type: none"> <li>• If the employee wants to take home a certain amount, specify the amount.</li> <li>• If a person has a levy against them - an involuntary deduction from employee's earnings for unpaid federal or state taxes - and the levy-type E/D Code is used, enter the amount of take-home pay. The levy amount is calculated automatically.</li> </ul>
<b>Employee Button</b>	shortcut to the <a href="#">Employee - Employee screen</a> for the selected employee.
<b>HR Employee Benefits Button</b>	shortcut to the <a href="#">HR Module - Employee - Benefits screen</a> for the selected employee.