

## Creating a Batch

Most payrolls require only one batch, however, more than one batch may be necessary for one of the following reasons:

- To pay hourly and salaried employees separately
- To pay employees with different pay frequencies in the same payroll
- To let different users key different batches
- To apply a template to a batch

Once a payroll has been created and saved on the [Payroll - Payroll screen](#), the [Payroll - Batch](#) screen opens.

1. Click the **Create Batch** button.

**Result:** The batch is created with default data.

| Field / Button                | Description   |
|-------------------------------|---|
| <b>Payroll Filter</b>         | enables filtering employees by D/B/D/T.   |
| <b>Payroll Check Template</b> | enables tax overrides. Select a template from the dropdown.   |
| <b>Frequency</b>              | payroll frequency.  |
| <b>Period Begin</b>           | the next scheduled check Begin Date is calculated. If Yes, the Begin Dates for this batch are updated to the new scheduled date. If No, the Begin Dates for this batch are not updated. |

|                                       |   |
|---------------------------------------|---|
| <b>Period End Date</b>                | Evolution calculates the next scheduled check End Date based on the new scheduled date. If Yes, the End Dates for this payroll are updated.   |
| <b>Pay Salary</b>                     | <u>Yes</u> - Salaried employees are paid in this payroll, or No   |
| <b>Pay Standard Hours</b>             | <u>Yes</u> - Pay regular hours in payroll by applying Regular Hours   |
| <b>Load Payroll Defaults</b>          | <u>Yes</u> - the Scheduled E/D defaults are used when creating a batch  |
| <b>Batch Creation Options section</b> |   |
| <b>Checks per EE</b>                  | if creating more than one check   |
| <b>Calculate Scheduled E/Ds</b>       | To have Evolution automatically calculate Scheduled E/Ds  |
| <b>Include Time Off Requests</b>      | Approved Time Off Requests only   |
| <b>Pay</b>                            | Select whether to include all, or just salaried or hourly employees   |
| <b>Select EEs from List</b>           | Select employees receiving checks in this payroll, or in a previous payroll.<br>When auto-creating checks for companies with multiple locations, only the locations selected are available. |
| <b>Create Checks</b>                  | Default is Regular - change to fit payroll.   |
| <b>Create 945 Checks</b>              | Select if paying 945 checks.  |
| <b>Create COBRA Batch button</b>      | No longer used.   |
| <b>Refresh E/Ds button</b>            | When selected, all E/Ds that were deleted from the checks are refreshed.  |
| <b>Refresh E/Ds No Manbutton</b>      | When selected, all Scheduled E/Ds that were deleted from the checks (no manual checks) are refreshed.   |
| <b>Delete Batch button</b>            | Only unprocessed payrolls can have batches deleted.   |

2. Click the **check**



**mark** and the **commit**



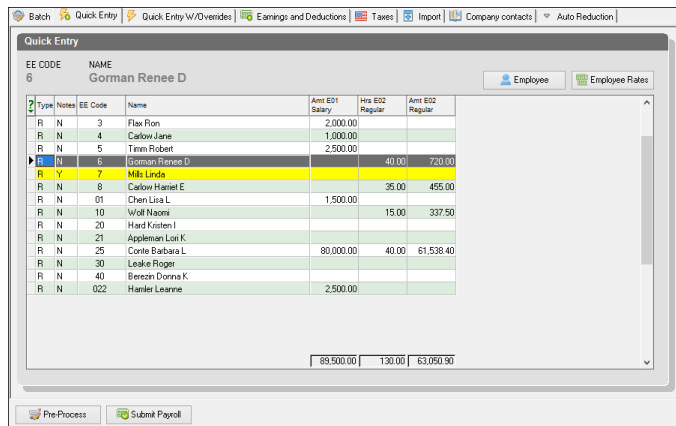
**button** in the toolbar to post and commit changes.

**Result:** A pop-up opens asking "would you like to auto-create checks for this batch?"

3. Click **Yes** in most situations.
  - If No, checks will not be created and must be created manually.

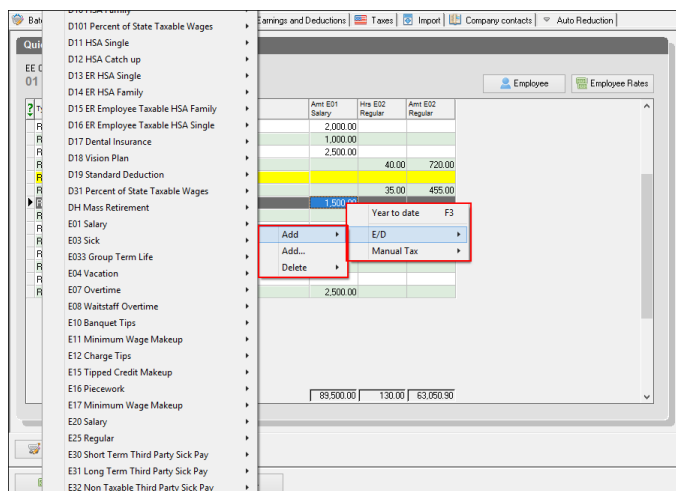
The checks in the batch are created. To create additional batches, repeat steps 1 through 3 for each batch.

4. Click the **Quick Entry** tab (Quick Entry only works on payrolls with one Pay Frequency) do the following for each check:



- a. Verify the sorting order is appropriate for entering check data. The default sort order is set up on the **Company - General - Company Info - Payroll & Employees tab**. Click the column heading to sort in ascending or descending order.
- b. Enter the check amounts.
- c. Press **Enter** to navigate to the next column, or to the first column in the next row

The Amt Salary, Hrs Regular, and Amt Regular columns are shown by default. Right-click within the grid to add or delete E/Ds.



5. Go to the **Payroll - Check screen** to enter additional details about the check, if needed.
6. Click **Save** when finished.
7. Click the **Batch** button to return to the **Payroll - Batch - Quick Entry tab**.

8. Click the **Batch Totals** button.

**Result:** The Earnings and Deductions tab opens.

9. Verify the totals for each E/D Code for the batch, and the number of checks.

**If the totals or the number of checks are incorrect**

1. Select the E/D Code with the incorrect amount from the left-hand column.
2. Select the employee in the right pane.
3. Press the **CTRL** key + **Enter** to see the **Payroll - Check - Check Lines tab**.
4. Click the **Checks** button and make the correction.
5. Click the **Batch** button to return to the **Payroll - Batch screen**.