

Creating a Bonus Check Run

Creating a Template

1. Go to the [Company - Payroll Defaults - Payroll Check Templates](#) screen.
2. Select and open the company from the list on the left-hand side of the screen.
3. Click the plus



sign in the toolbar to create a new record.

4. Click the **Blocks** tab.
5. Click the **Create** button to add an E/D Code to the list above.
6. Select the E/D Code to be added from the **E/D Code** dropdown list.
7. Click the **check**



mark and the **commit**



button in the toolbar to post and commit changes.

8. Click the **Block Taxes** tab.
9. Select Yes for any taxes that should be blocked for the bonus check run.
10. Post and commit any changes to this screen.
11. Click the **States** tab.
 1. Click the **Create** button to add a state to the list above.
 2. Enter a **State Override Type** and **State Override Value** if applicable.
 3. Select other state level taxes to be blocked.
 4. Post and commit any changes to this screen.
 5. Finally, click the **Locals** tab.

Defining the Payroll as a Bonus Check Run

Continue processing the payroll as usual.

Note: For more information about payroll processing, refer to [Creating a Payroll](#).

Additional Considerations

Time off Accrual

If the accrual is Frequency Based (ex: every payroll, first payroll of the month, etc), these accruals cannot be blocked using a template. When using a template, the rules are applied to the employees' checks, at the Batch level; however, frequency-based accruals are looking at the payroll as a whole not, at the individual checks.

- These accruals must be blocked at the Payroll level - via the **Block TO Accrual** field on the [Payroll - Payroll screen](#).

If the accrual is based on Hours Worked, use the template block on the [Company - Payroll Defaults - Payroll Check Templates - Blocks tab](#).

Note: The safest and recommended way to make sure all accruals are blocked, is to set the block at the **Block TO Accrual** field on the [Payroll - Payroll - Blocks tab](#).

Blocking Scheduled E/Ds

There are a couple of options for blocking scheduled E/Ds in a bonus check run:

- Block all scheduled E/Ds
 - Block all scheduled E/Ds except pension, etc., or
 - Select one of the blocks on the [Company - Payroll Defaults - Payroll Check Templates - Blocks tab](#).
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Note: Use caution when selecting to block all E/Ds, as some garnishments should be applied to all wages, including bonuses.

If the scheduled E/Ds are set for "Every Scheduled Pay", and the bonus run is not a scheduled pay, these E/Ds will be blocked automatically.

Tax Frequencies

The tax frequency for the payroll can be overridden using the **Override Frequency** field on the [Company - Payroll Defaults - Payroll Check Templates - Details tab](#). For example, the system can be set up to tax all employees in the payroll at a quarterly frequency.

- Go to the [Company - Payroll Defaults - Payroll Check Templates - Details tab](#).
 - The taxes can also be manipulated on the [Company - Payroll Defaults - Payroll Check Templates - Taxes, States, or Locals tabs](#).
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Note: If OASDI and Medicare are blocked, and the employees should have been taxed, those shortfalls will be made up in the next check the employee receives.
