

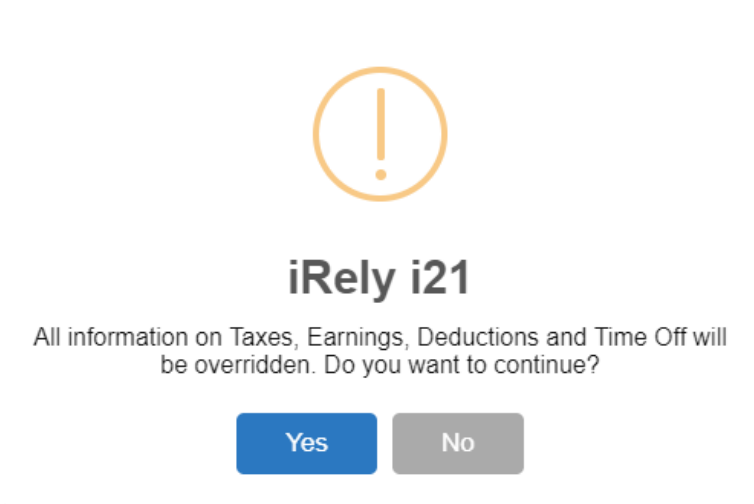
How to Use Employee Templates

1. Create a [new employee](#) record.



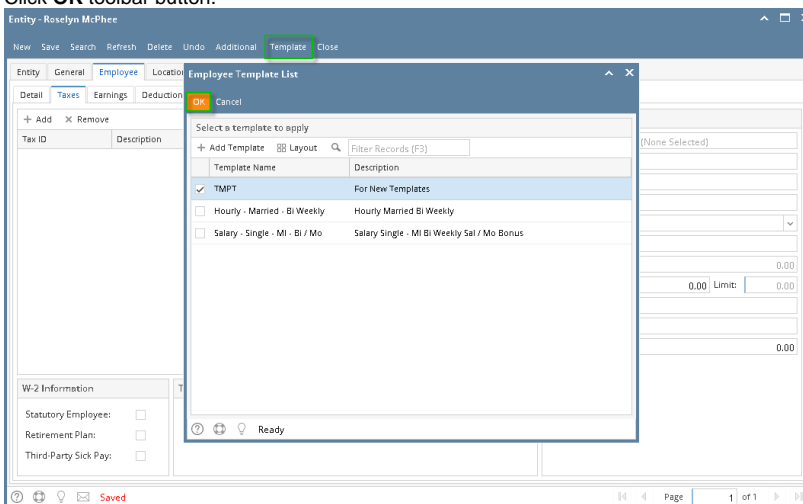
Templates can be also used if needed when updating employee record.

2. Click **Template** toolbar button.



Required field in Entity tab and Employee tab - Detail tab should be filled to be able to use templates

3. Warning is displayed, click Yes
4. Select template from **Employee Template List** screen.
5. Click **OK** toolbar button.



6. Information from the selected template will automatically populate their respective fields.

7. Click **Save** button.

The screenshot shows the 'Entity - Roselyn McPhee' application window. The 'Employee' tab is active, displaying a list of tax items with columns for Tax ID, Description, Paid By, and Default. The 'Save' button in the top toolbar is highlighted with a green box. The status bar at the bottom indicates 'Saved'.

Tax ID	Description	Paid By	Default
SDI-CA	State Disability Insurance - CA	Employee	<input checked="" type="checkbox"/>
CA State Tax	California State Tax	Employee	<input checked="" type="checkbox"/>
MI-Local	Michigan City Tax	Employee	<input checked="" type="checkbox"/>
MI-State Tax	Michigan State Tax	Employee	<input checked="" type="checkbox"/>
SUTA	State Unemployment Tax	Company	<input checked="" type="checkbox"/>
FUTA	Federal Unemployment Tax	Company	<input checked="" type="checkbox"/>
FICA MED Company	FICA Medicare Company	Company	<input checked="" type="checkbox"/>
FICA MED Employee	FICA Medicare Employee	Employee	<input checked="" type="checkbox"/>
FICA SS Company	FICA Social Security Company	Company	<input checked="" type="checkbox"/>
FICA SS Employee	FICA Social Security Employee	Employee	<input checked="" type="checkbox"/>

1. Create a **new employee** record.

Templates can be also used if needed when updating employee record.

- Click **Template** toolbar button.
- Select template from **Employee Template List** screen.
- Click **OK** toolbar button.

The screenshot shows the 'Entity - Roselyn McPhee' application window with the 'Employee Template List' dialog box open. The 'Template' button in the top toolbar is highlighted with a green box. The dialog box displays a list of templates, with 'TMPT' selected. The status bar at the bottom indicates 'Saved'.

Template Name	Description
<input checked="" type="checkbox"/> TMPT	For New Templates
<input type="checkbox"/> Hourly - Married - Bi Weekly	Hourly Married Bi Weekly
<input type="checkbox"/> Salary - Single - MI - Bi / Mo	Salary Single - MI Bi Weekly Sal / Mo Bonus

5. Information from the selected template will automatically populate their respective fields.

6. Click **Save** button.

Entity - Roselyn McPhee

New **Save** Search Refresh Delete Undo Additional Template Close

Entity General **Employee** Locations Contacts Comments (0) History Attachments (0) Messages Custom Audit Log (2)

Detail **Taxes** Earnings Deductions Time Off Time Entry Direct Deposit Timesheet Paychecks

+ Add X Remove

Tax ID	Description	Paid By	Default
SDI-CA	State Disability Insurance - CA	Employee	<input checked="" type="checkbox"/>
CA State Tax	California State Tax	Employee	<input checked="" type="checkbox"/>
Mi-Local	Michigan City Tax	Employee	<input checked="" type="checkbox"/>
Mi-State Tax	Michigan State Tax	Employee	<input checked="" type="checkbox"/>
SUTA	State Unemployment Tax	Company	<input checked="" type="checkbox"/>
FUTA	Federal Unemployment Tax	Company	<input checked="" type="checkbox"/>
FICA MED Company	FICA Medicare Company	Company	<input checked="" type="checkbox"/>
FICA MED Employee	FICA Medicare Employee	Employee	<input checked="" type="checkbox"/>
FICA SS Company	FICA Social Security Company	Company	<input checked="" type="checkbox"/>
FICA SS Employee	FICA Social Security Employee	Employee	<input checked="" type="checkbox"/>

W-2 Information

Statutory Employees: ☐

Retirement Plan: ☐

Third-Party Sick Pay: ☐

Tax Options

Tax Information

Tax ID: (None Selected)

Description:

Calculation Type:

Filing Status:

State:

County:

Amount: 0.00

Extra Withholding: 0.00 Limit: 0.00

Liability Account:

Expense Account:

Federal Allowances: 0.00

Page 1 of 1