

Enterprise - How to Configure PEO Setup

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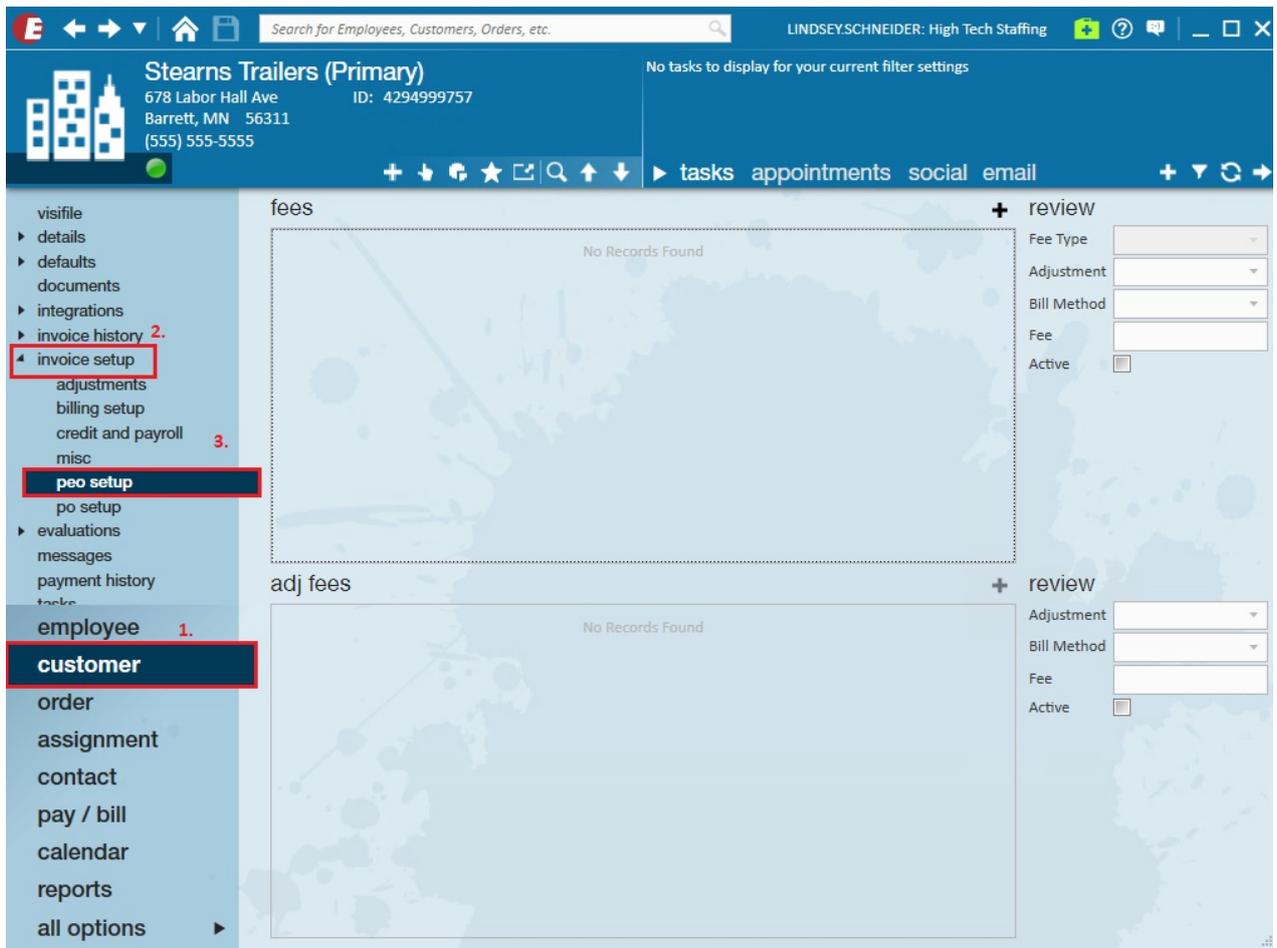
Users may utilize Enterprise to bill back employee benefit costs, payroll and worker compensation costs, recruiting costs, etc. through the PEO module for specific customers.

Note Users will need to be setup with the correct [security role](#) labeled "PEO setup" for the PEO section to be visible within a customer record. Please contact Tempworks support if you need assistance.

PEO Setup

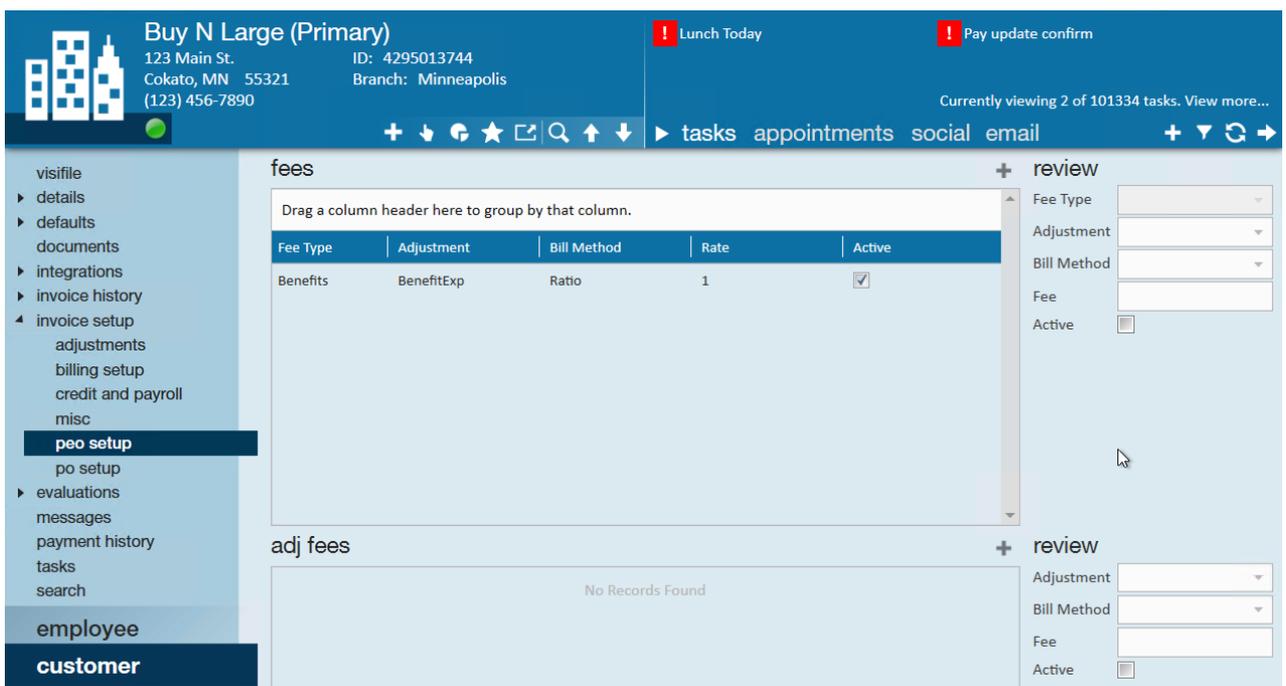
Within Enterprise, users may automatically bill back the costs by customer or department, whether they are flat fees or percentages.

Navigate to the customer or department of choice, select invoice setup, PEO:



The PEO section is broken out into two sections, fees and adjustment fees.

Fees are the **employer** costs that users wish to include to bill back. The rate will be separated by WC code, Tax and Admin fees per customer specifications.



To add a new fee select the + icon, this will open the new peo item setup screen:

The screenshot shows a window titled "new peo item" with a blue header. Below the header are four input fields: "Fee Type", "Adjustment", "Bill Method", and "Fee". Each field has a red exclamation mark icon to its left. The "Fee Type" field is currently empty. At the bottom of the window, there are two buttons: "Cancel" and "Add Fee".

From the Fee Type drop down select the adjustment you wish to add to the customer record.

Note The adjustments within the fee type drop down will need to be setup by TempWorks to ensure they are flagged as PEO adjustments. Please work with TempWorks support to review these specific adjustment types.

Once the fee type is selected, users may also enter bill method information and select whether they wish to bill a flat fee or ratio (percentage).

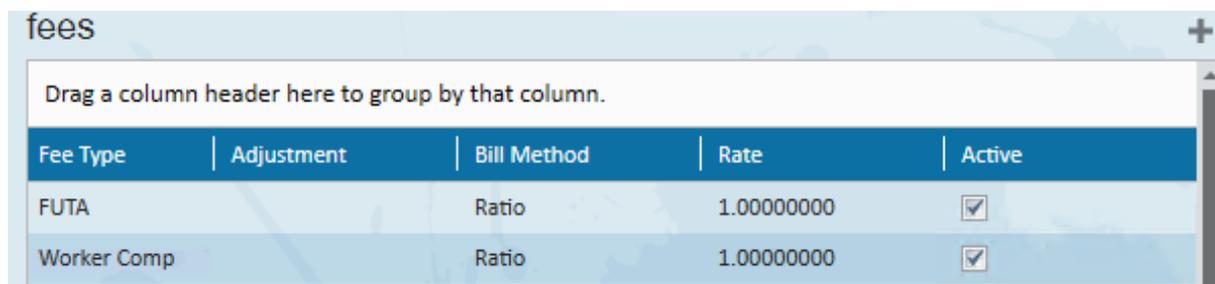
In the following example the adjustment type of per check fee has been setup to charge .50 per check.

The screenshot shows the same "new peo item" window. The "Fee Type" field is now filled with "Per Check Fee". The "Adjustment" field is filled with "PerCheck". The "Bill Method" field is filled with "Flat Fee". The "Fee" field is filled with ".50". The "Cancel" and "Add Fee" buttons are still visible at the bottom.

Note The fee type of per check fee will only allow a flat fee to be selected for the bill method.

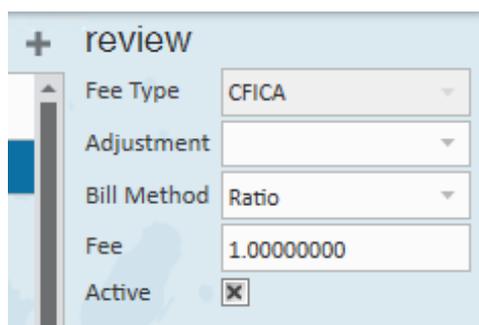
Note When entering a ratio: it should be entered as a percentage of the amount of the expense. In the example below, Worker Comp is setup at 1.0, which will calculate to 100%. If you wish for a fee type to calculate at 50%, enter .50 in order for the system to calculate the ratio correctly.

In the example, for FUTA, if \$50.00 was paid out and you want to bill back all of that \$50.00, you enter 1.0 into the "Fee" field after selecting the bill method of Ratio to obtain 100% of what was paid out.



Fee Type	Adjustment	Bill Method	Rate	Active
FUTA		Ratio	1.00000000	<input checked="" type="checkbox"/>
Worker Comp		Ratio	1.00000000	<input checked="" type="checkbox"/>

PEO fees can be edited by highlighting the specific fee and utilizing the review section to edit, update, or deactivate/reactivate fees.



+ review

Fee Type: CFICA

Adjustment: [dropdown]

Bill Method: Ratio

Fee: 1.00000000

Active:

Adj Fees

Adjustment fees can be identified as the **employee** adjustments to be included as part of the bill back costs to customers. Navigate to the adj fees section and select the + icon. This will open the new peo item window:

The screenshot shows a software window titled "new peo item" with a blue header. Below the header are three input fields: "Adjustment" with a red exclamation mark icon to its right, "Bill Method" set to "Ratio", and "Fee" set to "0". At the bottom of the window are three buttons: a warning icon, "Cancel", and "Add Fee".

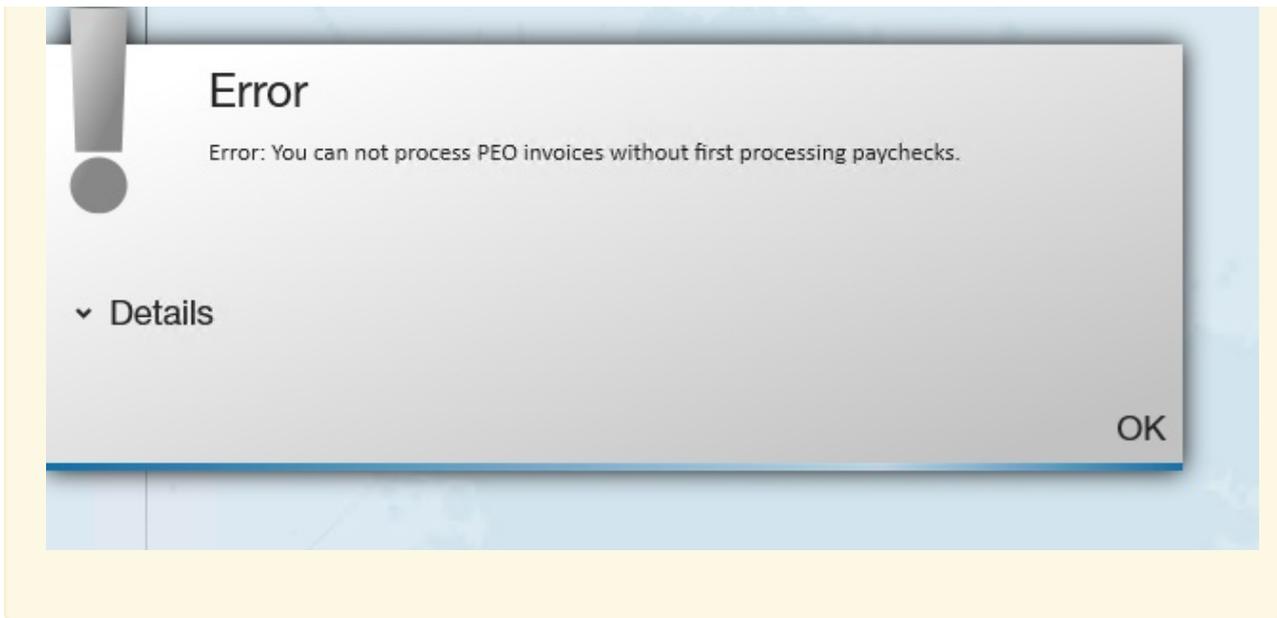
Select from the adjustment type drop down to choose the adjustment of choice, verify the bill method, and enter the fee. The logic for data entry is the same as the [fees section](#).

In the following example, the parking reimbursement adjustments will be billed back at a ratio of 100% from the employees tied to this customer.

The screenshot shows the same "new peo item" window. The "Adjustment" dropdown is now set to "Parking", the "Bill Method" remains "Ratio", and the "Fee" field now contains "1.00". The "Add Fee" button is highlighted, indicating it is the active action.

Once the PEO section is completed within the customer section, users **must** process payroll **before** PEO's can be calculated, which occurs during the invoice process.

Note If an attempt to run Invoices occurs prior to running payroll, users will receive the following error:



In the following example, once payroll has been calculated and invoices processed, users may view the PEO costs associated with the invoice:

A-Z Excavating		Invoice Number	47320	Weekend Bill	12/11/2016	
123 Eagan Way St Paul, MN, 55121		Invoice Date	12/13/2016	Pay Date		
		Owed Balance	\$4,569.09	Amount Paid	\$0.00	
Invoice Items		item	quantity	rate	weekend date	total
<input checked="" type="checkbox"/>	Aasen, Alexander Unknown	Reg Hours	40.00	\$30.00	12/11/2016	\$1,200.00
<input checked="" type="checkbox"/>	Aasen, Robert Unknown	Reg Hours	40.00	\$30.00	12/11/2016	\$1,200.00
						\$2,400.00
Adjustment Items						
<input checked="" type="checkbox"/>	Aasen, Alexander Futa			\$5.76	12/11/2016	\$5.76
<input checked="" type="checkbox"/>	Aasen, Alexander WCExpense			\$6.53	12/11/2016	\$6.53
<input checked="" type="checkbox"/>	Aasen, Alexander Suta			\$10.56	12/11/2016	\$10.56
<input checked="" type="checkbox"/>	Aasen, Alexander Cfica			\$59.52	12/11/2016	\$59.52
<input checked="" type="checkbox"/>	Aasen, Alexander Cmed			\$13.92	12/11/2016	\$13.92
<input checked="" type="checkbox"/>	Aasen, Alexander GrossPay			\$960.00	12/11/2016	\$960.00
<input checked="" type="checkbox"/>	Aasen, Alexander PerCheck			\$0.50	12/11/2016	\$0.50
<input checked="" type="checkbox"/>	Aasen, Alexander FEE\$			\$2.00	12/11/2016	\$2.00
<input checked="" type="checkbox"/>	Aasen, Robert Futa			\$5.76	12/11/2016	\$5.76
<input checked="" type="checkbox"/>	Aasen, Robert WCExpense			\$6.53	12/11/2016	\$6.53
<input checked="" type="checkbox"/>	Aasen, Robert Suta			\$10.56	12/11/2016	\$10.56
<input checked="" type="checkbox"/>	Aasen, Robert Cfica			\$59.52	12/11/2016	\$59.52
<input checked="" type="checkbox"/>	Aasen, Robert Cmed			\$13.92	12/11/2016	\$13.92
<input checked="" type="checkbox"/>	Aasen, Robert ACA ER			\$50.51	12/11/2016	\$50.51
<input checked="" type="checkbox"/>	Aasen, Robert GrossPay			\$960.00	12/11/2016	\$960.00
<input checked="" type="checkbox"/>	Aasen, Robert PerCheck			\$0.50	12/11/2016	\$0.50
<input checked="" type="checkbox"/>	ACA Surcharge			\$3.00	12/11/2016	\$3.00
						\$2,169.09
Tax Items						
Extended Invoice Details						

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