Core - Payroll Wizard

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What is the Payroll Wizard?

The payroll wizard finalizes paycheck amounts for you by adding up total amounts and factoring in taxes and any adjustments. These final amounts are printing onto check stubs and saved on the employee's record. Core is not currently able to print live checks so amounts will need to be written on checks and sent with the paycheck stub through your normal company processes.

In order to take transactions into the Payroll Wizard, you will need to have entered time and completed proofing first.

At the top you will see the number of Unpaid W2 Transactions. This is the number of transactions that have had time entered and proofed but not yet completed payroll. This means that for those employees have not yet been paid.

To Complete a Payroll Run:

1. Select Start or continue a payroll run
    - This will open the payroll wizard
2. Select 'Create a new payroll run'
3. Enter Payroll Information:
    - Select the check date
    - Select the bank account
    - Select run type:
        - CheckRun – for standard W2 employees
        - AuthCheck – to create authority checks
    - Optionally, enter a stub memo to appear on checks (ex. Happy holidays)
4. Select Next
5. Select the transactions you want to pay
    - Choose from filter options such as E-pay only or non E-pay only (checks)

    - Choose from Group options such as pay by customer or select sessions to choose all the time you entered and proofed
6. Once you have selected which transactions you want to run through payroll, select next
7. Verify transactions
    - Final review of number of hours, units, salary, etc.
    - If one record does not look correct, you can select it and click the X to remove it from this payroll and continue with the rest
8. Calculate payroll errors
    - Review errors
    - Use the icons at the top to navigate quickly to different records to make adjustments or select the approve box to override the error message
    - For a full list of current payroll error and how to fix them click here .
    - Select Next
9. View Checks
    - Optionally, Select the pie chart icon in the upper right to see the staged check report
    - Review information one last time before completing payroll and printing checks
    - Select next
10. Payroll Summary Options:
    - Select Starting check number or EPay check number if you are not printing checks
    - Choose from the drop down to print all checks, Do not print epay checks, print all live and opt out checks
        - If you select a print check option, the system will print out pay check stubs only. Currently, printing live checks is not available in Core.
    - If emailing pay stubs:
        - Select the email pay stub box and select email account and email template to send from

    - Select Check sort option from the drop down
    - Review summary at the bottom
11. Select Next
12. Select Print to print out pay stubs
    - Select your printer and wait for printing to complete
    - If the payroll run was printed correctly then select "Yes, post this payroll run as complete and email paystubs"
    - If a problem occurred while printing
        - Select "No, reprint this check run"
        - Choose to reprint all or a portion of the checks
        - Select Next and attempt reprint

Note If a payroll run is not completed before the week closes, then the time entered will be removed. Make sure to work with your team to set up processes ensuring all time entered is paid and proofed before the week close date. For more information check out Core - Payroll Overview

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