

Beyond - Employee Pay Setup

Last Modified on 04/18/2024 3:48 pm CDT

Setting up Pay for Employees

In order for employees to receive pay for their work, their Pay Setup needs to be completed. To complete this in Beyond™, see the steps below accessible from the Pay Setup tab in Beyond. The Payment Options and Basic Tax Setup cards allow payment delivery option designations, electronic pay setup and basic tax setup.

This Article Covers:

1. [Payment Options](#)
2. [Electronic Pay Setup](#)
3. [Basic Tax Setup](#)

Payment Options

Begin by navigating to the employee's record and selecting the Pay Setup tab.

The Payment Options can be edited by selecting the pencil icon in the top right of the card.

Payment Options

Default Pay Rate	Paycheck Delivery Code
<hr/>	<hr/>
Note to Payroll	<input type="checkbox"/> Pay Setup Complete
<input checked="" type="checkbox"/> Mail Check and/or Stub	<input checked="" type="checkbox"/> Email Pay Stub

- An employee record can have a designated default pay rate entered for all assignments.
- Paycheck Delivery Codes can be entered to establish the employee will be picking up their paychecks at a specific branch.
- Internal notes can be entered for Payroll communication.
- Mail Check or Email Pay Stub check boxes can be selected for employee payment preferences also.
- The Pay Setup Complete check box will be automatically checked once payment process is complete.

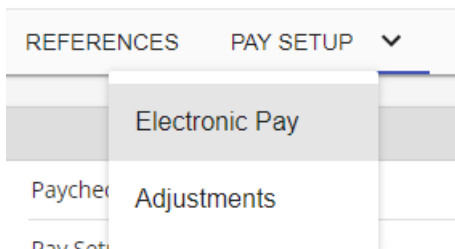
Note Ensure the employee has a valid email address to set up the Electronic Pay Stub option successfully.

Electronic Pay Setup

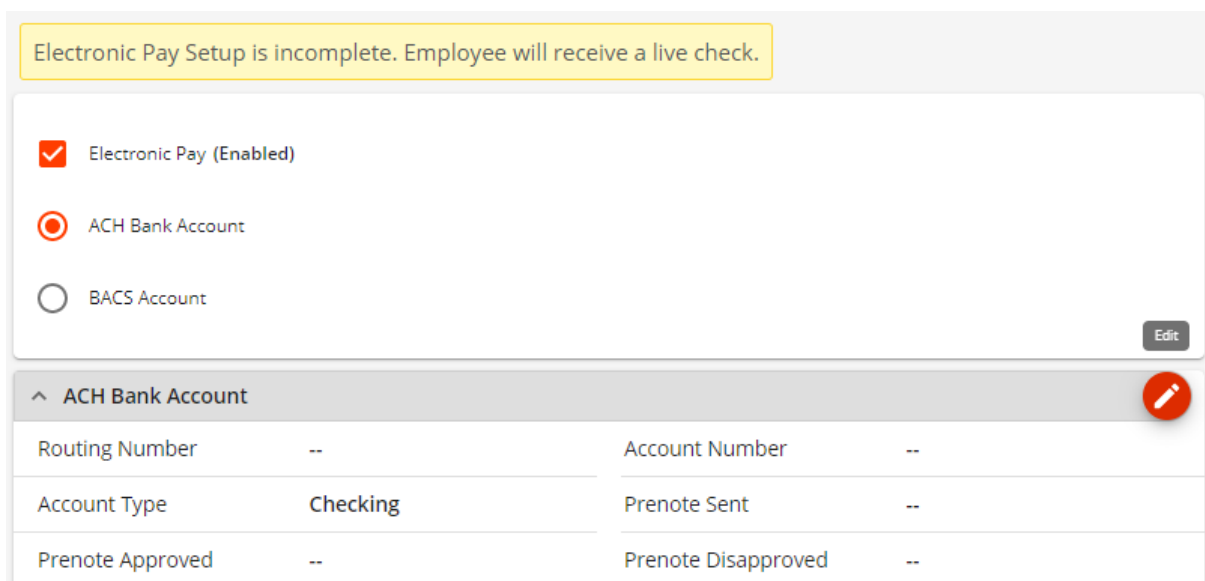
If an employee would like their pay automatically deposited into their bank accounts every pay period, or they are allowed to sign up for paycards, their bank/paycard information needs to be entered and saved into their employee

record. To setup, follow the steps below:

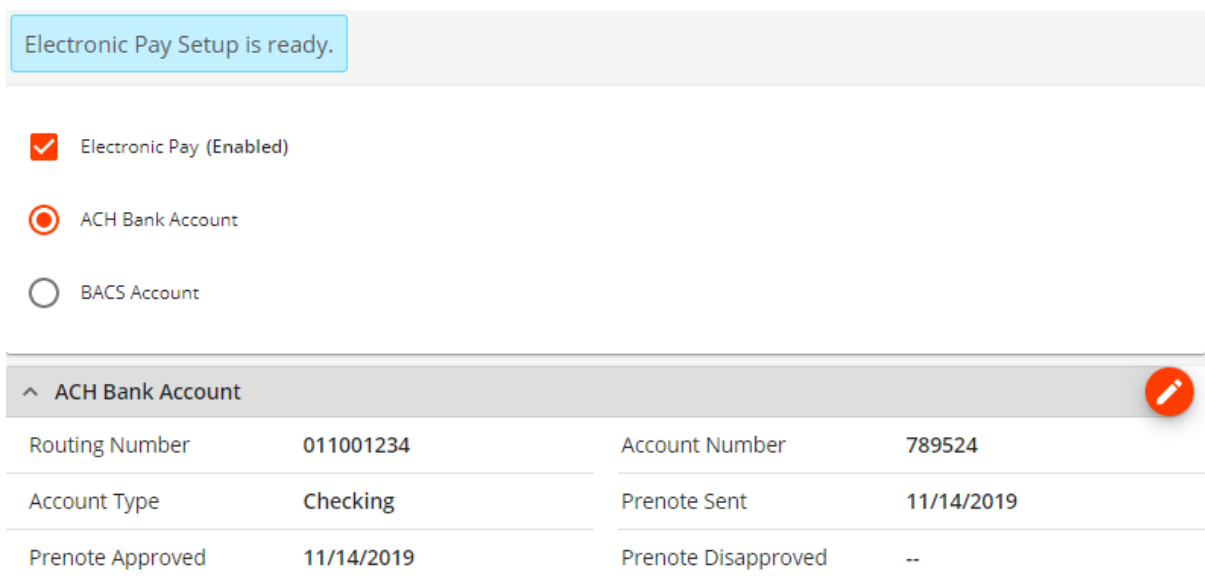
1. Select the Electronic Pay option from the Pay Setup drop down menu tab .



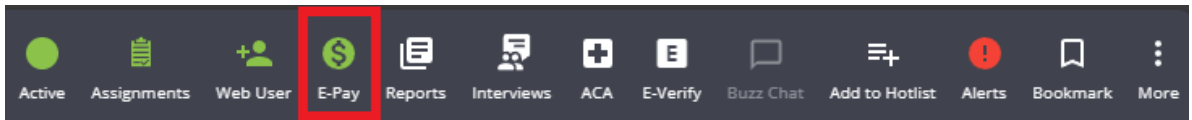
2. In the Electronic Pay card, check the Electronic Pay (Enabled) box. Choose either ACH Bank Account or BACS Account.
3. From the Edit pencil icon, enter the Routing Number, Account Number and Account Type.



4. Once the information is entered and the Pre-note process approved (if applicable), an alert box indicates the Electronic Pay Setup is ready.



5. The dollar sign charm also indicates the Direct Deposit status.



Basic Tax Setup

To indicate Federal or State exemptions and other tax related information, edit the Basic Tax Setup card from the pencil icon to make appropriate selections.

Note For employees with a Tax State of PA, a PSD Code will need to be selected within Employee > Pay Setup > Basic Tax Setup:

^ Basic Tax Setup	
Federal Exemptions 0	State Exemptions 0
Marital Tax Status Married	Extra Withholding 0.00
Dependent Allowance 0.00	Other Income 0.00
Extra Deductions 0.00	Tax at Higher Rate No
Tax State PA	State Juris --
County Tax --	Exempt from County Tax No
City Tax XPAP62228	Exempt from City Tax No
School Tax --	Exempt from School Tax No
PSD Code 510101	

The PSD Code will need to be selected within the "PSD Code" field found via Employee > Pay Setup > Basic Tax Setup > PSD Code:

Basic Tax Setup

* Marital Tax Status
 Single Tax at Higher Rate

Dependent Allowance 0.00 Other Income 0.00

Extra Deductions 0.00 * Extra Withholding 0.00

* Federal Exemptions 0 * State Exemptions 0

* Tax State Pennsylvania State Juris

County Tax Exempt

* PSD Code
510101 PHILADELPHIA CITY

City Tax XPAP62228 PHILADELPHIA Exempt

School Tax Exempt

SAVE AS DRAFT CANCEL **SUBMIT**

Once a PSD Code is selected, the County Tax, City Tax, and School District Tax fields will not be able to be edited:

Basic Tax Setup	
Federal Exemptions 0	State Exemptions 0
Marital Tax Status Married	Extra Withholding 0.00
Dependent Allowance 0.00	Other Income 0.00
Extra Deductions 0.00	Tax at Higher Rate No
Tax State PA	State Juris --
County Tax --	Exempt from County Tax No
City Tax XPAP62228	Exempt from City Tax No
School Tax --	Exempt from School Tax No
PSD Code 510101	

If your employee worked for you before the 2020 W-4 changes, you will be able to toggle the W-4 year option.

Here is a break down the basic tax setup based on the [2020 W-4](#):

The screenshot shows a 'Basic Tax Setup' form. At the top left, the 'W4 Year' is set to 2020, which is highlighted with a red box. Below this, the 'Marital Tax Status' is 'Single'. There is a checkbox for 'Tax at Higher Rate' which is unchecked. The 'Dependent Allowance' is 0, with a link to 'Step 3 Claim Dependents'. The 'Other Income' is 0, with a link to 'Step 4(a) Other Income'. The 'Extra Deductions' is 0, with a link to 'Step 4(b) Deductions'. The 'Extra Withholding' is 0, with a link to 'Step 4(c) Extra Withholding'. The 'Federal Exemptions' is 0, with a note 'Only 0 or 99 if marked Exempt'. The 'State Exemptions' is 0. The 'Tax State' is 'Minnesota' and the 'State Juris' is blank. There are three 'Exempt' checkboxes for 'County Tax', 'City Tax', and 'School Tax', all of which are unchecked. At the bottom, there are buttons for 'SAVE AS DRAFT', 'CANCEL', and 'SUBMIT'.

If your employee's are filling out their W-4s (federal and state - if applicable) via [HRCenter](#), this information will automatically be populated.

Note The Dependents field is only applicable to those in Louisiana due to their state tax exemptions.

Related Articles