

Beyond - Employee Pay Setup

Last Modified on 10/07/2021 3:43 pm CDT

Setting up Pay for Employees

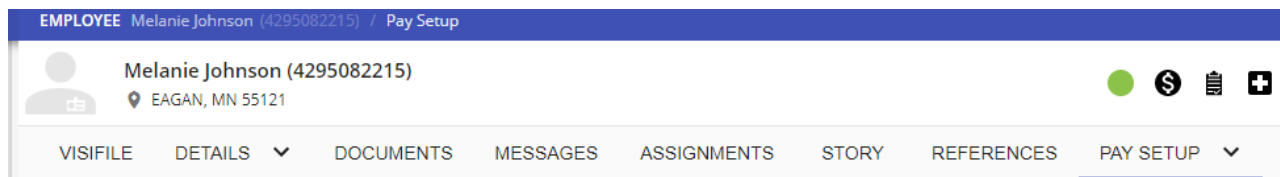
In order for employees to receive pay for their work, their Pay Setup needs to be completed. To complete this in Beyond™, see the steps below accessible from the Pay Setup tab in Beyond. The Payment Options and Basic Tax Setup cards allow payment delivery option designations, electronic pay setup and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

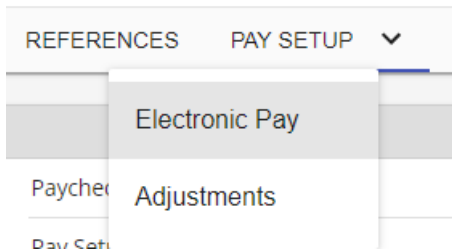
- An employee record can have a designated default pay rate entered for all assignments.
- Paycheck Delivery Codes can be entered to establish the employee will be picking up their paychecks at a specific branch.
- Internal notes can be entered for Payroll communication.
- Mail Check or Email Pay Stub 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.


Electronic Pay Setup is incomplete. Employee will receive a live check.

Electronic Pay (Enabled)

ACH Bank Account

BACS Account

Edit

^ ACH Bank Account 

Routing Number	--	Account Number	--
Account Type	Checking	Prenote Sent	--
Prenote Approved	--	Prenote Disapproved	--


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

Electronic Pay Setup is ready.

Electronic Pay (Enabled)


ACH Bank Account

BACS Account

^ ACH Bank Account 

Routing Number	011001234	Account Number	789524
Account Type	Checking	Prenote Sent	11/14/2019
Prenote Approved	11/14/2019	Prenote Disapproved	--

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



Direct Deposit
Electronic Pay Setup is incomplete. Employee will receive a live check..

***Note:** The Direct Deposit charm indicates if this employee's Electronic Pay has been setup or not.

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 auto-populate within the field once a Zip Code is selected for the Employee within Details > Addresses > Primary Address:

EMPLOYEE Landin Zuniga (4295368682) Details

Landin Zuniga (4295368682)
Philadelphia, PA 19019

VISIFILE DETAILS DOCUMENTS MESSAGES JOB MATCHING ASSIGNMENTS STORY REFERENCES PAY SETUP ONBOARDING PAY HISTORY CUSTOM DATA

Hire date needed

^ Addresses

Home
103 7th Street S
Philadelphia, PA 19019
United States of America

Temporary Address (Inactive)
--

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](#):

Basic Tax Setup

W4 Year
2019 2020

Marital Tax Status
Single Tax at Higher Rate [Step 2 Check Box](#)

Dependent Allowance
0 [Step 3 Claim Dependents](#)

Other Income
0 [Step 4\(a\) Other Income](#)

Extra Deductions
0 [Step 4\(b\) Deductions](#)

Extra Withholding
0 [Step 4\(c\) Extra Withholding](#)

Federal Exemptions
0 [Only 0 or 99 if marked Exempt](#)

State Exemptions
0

Tax State
Minnesota

State Juris

County Tax Exempt

City Tax Exempt

School Tax Exempt

SAVE AS DRAFT CANCEL 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