ADP Workforce Now™

Employee Maintenance Learning Guide

Participant Guide

Need support after training?

To exchange tips and best practices with fellow users, get on The Bridge—an online community built exclusively for ADP clients.

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Always Designing for People™

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Welcome!

Together, we will ensure that you:

- Become comfortable with navigating in ADP Workforce Now.
- Learn how to verify and maintain your employee data in preparation of your first payroll.

How to Use This Guide

You'll use this guide as a reference while you are getting familiar with ADP Workforce Now. You may not need to complete all of the activities in this guide. Your ADP associate will help you focus on the tasks that apply to your company. All of the activities in this guide will help you to prepare the employee data that will be the foundation of your first payroll.

Note: Because we are continually improving our solutions, the screens in this document may differ from those that you see in the product.

Before You Begin

1. Access ADP Workforce Now at https://workforcenow.adp.com.
2. Log on using your username and password.

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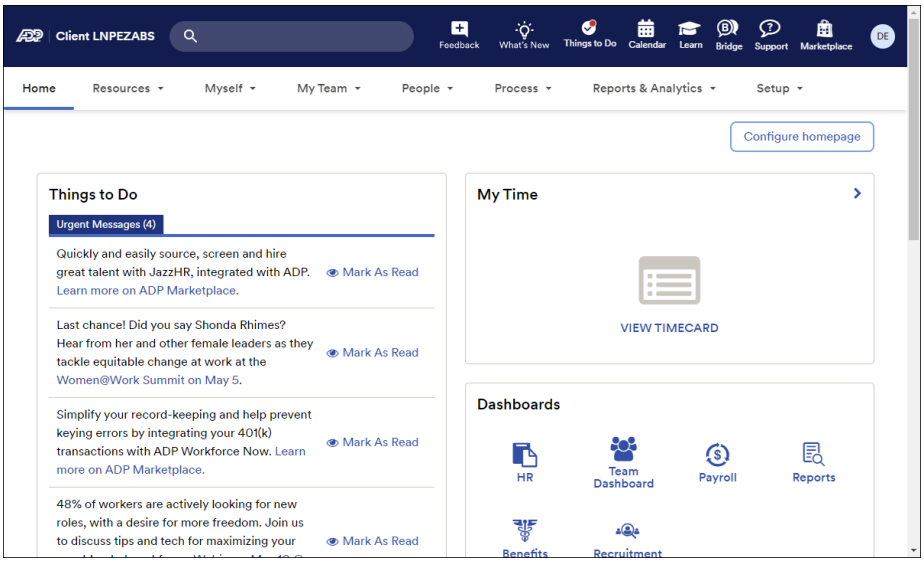
Welcome to ADP Workforce Now

Overview

ADP Workforce Now is your company's solution for managing your payroll and human resources data. Your **Home** page will vary from what you see here because it will be customized to your company's needs. However, the menus, icons, and search that you'll use to access your data are the same.



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Elements and Descriptions

The following table describes the elements in ADP Workforce Now.

Element	Description
Menus	Use the menus to navigate to your tasks. The menus and menu items that you see are specific to your role and your security rights. Employees see the **Myself** menu, where they perform self-service tasks. Managers see the **My Team** menu, where they access information on their direct reports.
	Opens a central location for all of your system-wide messages, tasks to complete, and approvals and notifications.
	Employees use the calendar to view their pay dates, check their time off balances, and request time off.
	Access ADP training.
	Opens an online community to connect with other ADP solution users, ask questions, and access helpful resources.
	Displays online Help and training topics related to the page that you are viewing.
	Explore an online store where you can purchase HR apps that integrate with ADP Workforce Now.
	Search for employees in your company directory, activities, pages, and reports by entering key words.

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Maintaining Your Employee Data

Overview

Now that your employee data has been loaded in ADP Workforce Now, your first steps are to:

- Learn how to review your data and get familiar with performing typical employee maintenance tasks.
- Make additions and corrections to your data and address any data that was not successfully loaded during the conversion.

Best Practice

You should complete employee maintenance tasks before every payroll to ensure that your permanent employee data is current.

How Do I Maintain My Employee Data?

Check the following information:

- ☐ Is the employees' personal information (address, contact information, email address, and so on) correct?
- ☐ Is the employees' employment information (position, status, hire date, reporting structure, and so on) correct?
- ☐ Do you have any pay rate changes to enter?
- ☐ Are there any ongoing deductions that need to be set up (including pre-tax, post-tax, direct deposits, and liens)?
- ☐ Are the employees' tax withholdings set up correctly? Be sure to check employee setup for situations such as worked in/lived in, multi-jurisdiction, state, local, city, extra tax, and tax blocks.
- ☐ Do you have any new hires or terminations to enter?
- ☐ Do any employees require additional positions to be set up?
- ☐ Do you need to set up additional values in the validation tables?
- ☐ Other: _____
- ☐ Other: _____
- ☐ Other: _____
- ☐ Other: _____

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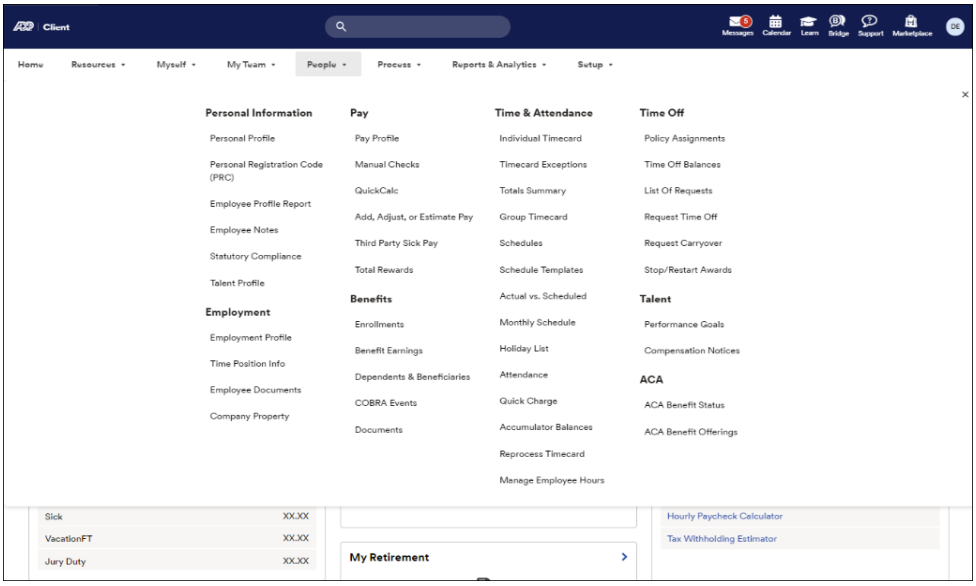
Accessing Employee Information Using the People Menu

Overview

You use the **People** menu to view or change information for an individual employee. It is divided into submenus so you can efficiently locate information.



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Submenus and Descriptions

The following table describes the submenus on the **People** menu.

Submenu	Description
Personal Information	Includes information such as addresses, emergency contacts, demographic data, compliance-related details, and professional development information
Employment	Includes employment-related information such as positions, status, hire date, and pay rates
Pay	Includes payroll-related information such as pay rates, deductions, direct deposit, tax withholdings, and to-date accumulations
Benefits	Includes benefit-related information such as benefit plan enrollments, benefit earnings, dependents and beneficiaries, and COBRA events
Time & Attendance	Includes employee timecards, schedules, a holiday list, and other information related to tracking time
Time Off	Includes information such as a list of requests, carryover requests, and time off balances
Talent	Includes information such as performance reviews, goals, and notices for compensation adjustments
ACA	Includes details about the ACA Benefit Status for individual employees

Note: Your ADP Workforce Now solution may have additional submenus, depending on the features that your company has purchased.

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Viewing Employees' Personal Information

Overview

The **Personal Profile** page is where you can view an employee's name, contact info, addresses, emergency contacts, demographic data, compliance-related details, and professional development information.

Changing an Employee's Address

Starting Point: People > Personal Information > Personal Profile

Step	Action
1	Click the **Employee Search** field.
2	In the **Search** field, enter the first four letters of the employee's last name. **Result:** Employee Search slider opens.
3	Select the employee's name.
4	Under the **Personal** tab, navigate to the **Addresses** tile and click **Edit**.
5	In the **Primary Address**, **Secondary Address**, and **Work Address** fields, make the appropriate entries.
6	In the **This address will be used for the employee's tax documents** field, select either **Primary Address** or **Secondary Address** to be the employee's legal/preferred address.
7	Select **Work From Home**, if applicable.
8	Select the appropriate option in the **Use Primary Address as the Work Address**, if needed.
9	Click **Save**.

Tip

Some data such as birthdate and Social Security number are masked. If available, click **Reveal** to view the data. The data will be masked again when you click **Hide** or navigate away from this page

Action Items

- ☐ Check your employee data to ensure that employees have the correct legal name, birthdate, and legal address. This step is critical to ensuring that your employees' W-2 forms will be correct.
- ☐ If you are using self-service, you will want to ensure that employees have a work email address entered in Contact Information.

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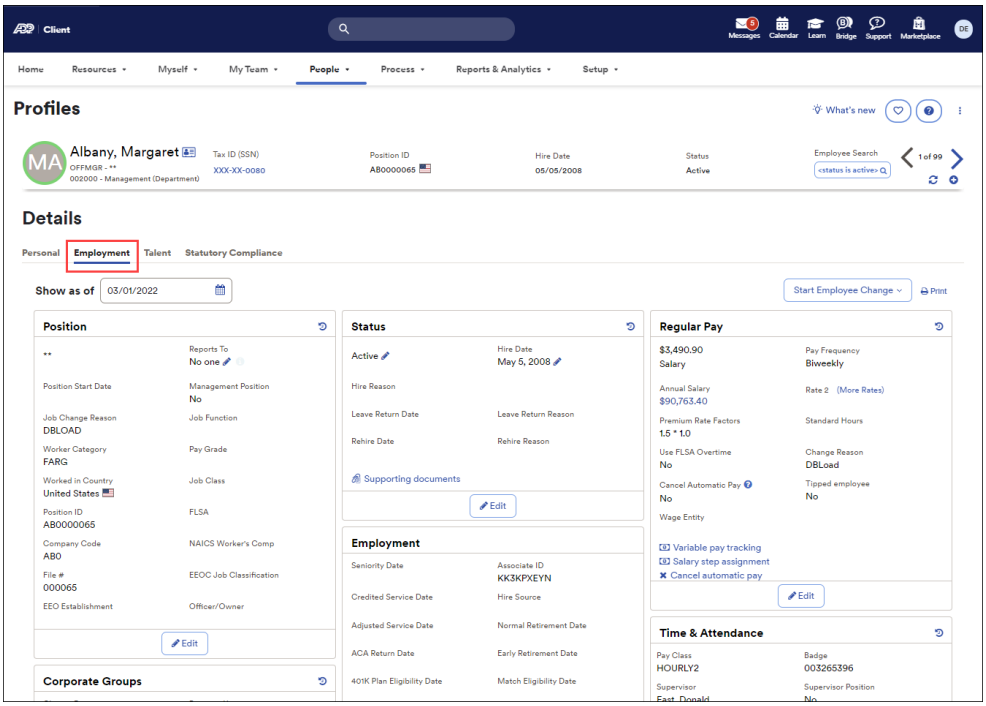
Viewing Employment Information

Overview

The **Employment** tab is where you can view an employee's employment-related information such as positions, status, hire date, reporting structure, and pay rates.

To access the Employment details, select **People > Employment > Employment Profile.** Alternatively, you can navigate to **Employment** tab from **People > Personal Information > Personal Profile.**



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What Is Effective Dating?

Many of the employment and pay-related fields in ADP Workforce Now require you to enter an effective "as of" date when making a change.

An effective date, or "as of" date, is the date upon which a change to an employee's record will take effect. Use the Effective Dating feature to enter changes for a future date.

ADP Workforce Now maintains a list of current, historical, and future-dated records so you can view all of the changes made to an employee's information.

Example

An employee's job title is scheduled to change, effective next month. Today, you access the **Employment** tab, and in the **Position** tile, enter the future change date, including the new field value and the effective date.

In this case, the future-dated change is different from the date on which the change was entered (that is, today).

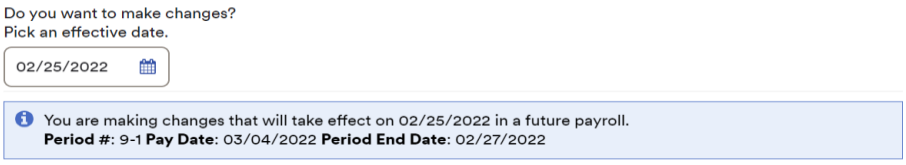
Guidelines for Selecting an Effective Date

When selecting an effective date, you should compare it to the payroll period end (PE) date.

- When the effective date is on or prior to the period end date of a payroll processing schedule, the change is current for the cycle. Changes that are current for the cycle will be included in your payroll.
- Changes that are not current for this payroll cycle are future dated. The changes will not apply to your payroll until the effective date of the change or prior to the period end date of the corresponding payroll.
- When an effective dated change becomes current, it is considered effective for the entire payroll cycle. If you enter an effective date that should take effect in the middle of the pay period, you will be prompted to make the necessary prorated pay adjustment in a paydata batch.

Example

An employee's pay rate change is entered with an effective date of 2/25. This change is considered current for the bi-weekly pay period ending on 2/27. When you enter your payroll for this pay period, you will be alerted to the rate change and prompted to make a prorated pay adjustment in the pay data batch. The employee will see the rate change reflected in the check paid on 3/04.



Tip

When you select an effective date for a change to an employee's information, the payroll dates are displayed.

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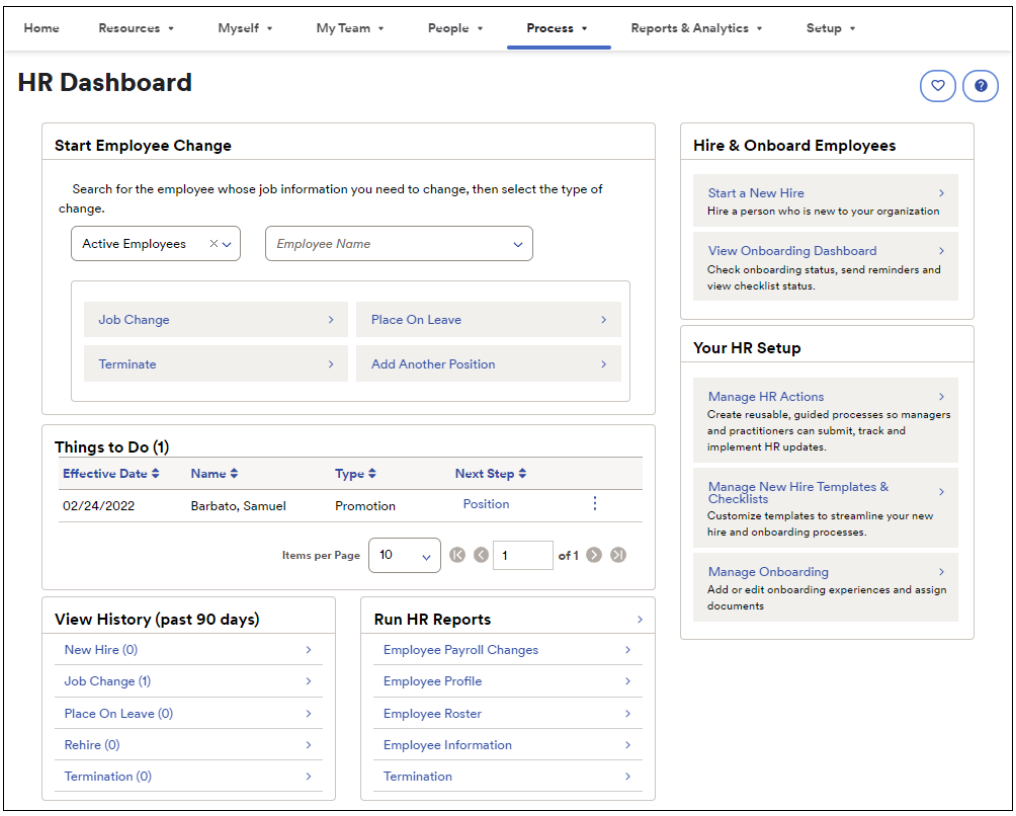
Exploring the HR Dashboard

Overview

The **HR Dashboard** provides a central location for HR administrators to view the things to do list of HR tasks, access commonly used HR functions, and start an employee change.



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Elements and Descriptions

Review the descriptions of each tile on the dashboard to learn about the types of information you can find and the actions you can take.

Tile	Description
Start Employee Change	Search for an employee based on their status. View in-progress actions to take or start a job change, leave of absence, termination, rehire, or add another position.
Things To Do	Displays in-progress changes that are currently assigned to the HR Administrator, and changes that the HR Administrator has initiated. Use it to track progress by date, name, type and action.
View History	Provides a single view of the last 90 days of change history with option to see details and a full list.
Run HR Reports	Provides quick access to common reports.
Hire & Onboard Employees	Take actions on new hires such as starting the entry of a new hire and viewing the Onboarding Dashboard.
Your HR Setup	Customize onboarding experiences, new hire checklists and templates, and set up and manage HR Actions.

Changing an Employee's Job

Scenario

An employee was promoted and will report to a different manager starting next week.

Instructions, Selecting an Employee

Starting Point: Process > HR > HR Dashboard

Step	Action
1	In the **Start Employee Change** tile, click in the down arrow to select an employee or enter the employee's name to search for the employee.
2	Click **Job Change** and choose the appropriate action for the job change. Note: If the appropriate action is not listed, choose ⊕ **Create HR Action**. **Result:** The related wizard opens.

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Instructions, Part 1: When & Why

Step	Action
1	In **Change Date** enter effective date.
2	In **Change Reason** enter reason.
3	Add notes and upload documents, if needed.
4	Click **Next>** **Result:** The Position step is displayed.

Instructions, Part 2: Position

Step	Action
1	In the **Job Title** field, select the employee's new job title.
2	In the **Management Position** field, choose **Yes** if the employee will have employees reporting to him or her.
3	In the **Reports To** field, select the new manager.
4	Change any Additional Fields as needed.
5	Click **Next>** **Result:** The Pay Information step is displayed.

Instructions, Part 3: Pay Information

Step	Action
1	Change the **Pay Type** field if needed (hourly, salary, or daily).
2	In the **Rate Amount** field enter the regular amount of pay to be earned in a pay period based on the rate type.
3	In the **Pay Frequency** field, change to the correct frequency if needed.
4	Change any Additional Fields as needed.
5	Click **Next>** **Result**: The Review & Submit step is displayed.

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Instructions, Part 4: Review & Submit

Step	Action
1	Confirm the information that you entered. If you need to make corrections, click (edit), make the necessary update, and return to the **Review & Submit** page.
2	Click **Submit**. **Result:** A message is displayed, confirming that the job change was successful, the changes that were made, and what's next, if necessary.

Tip

When you update an employee's job, consider that there may be impacts to other fields such as Job Function, Pay Grade, Job Class, FLSA, NAICS Workers' Comp, Management Position, and others.

Action Item

- ☐ Review your employee's employment data to ensure that the hire date, status, and reporting structure are accurate.

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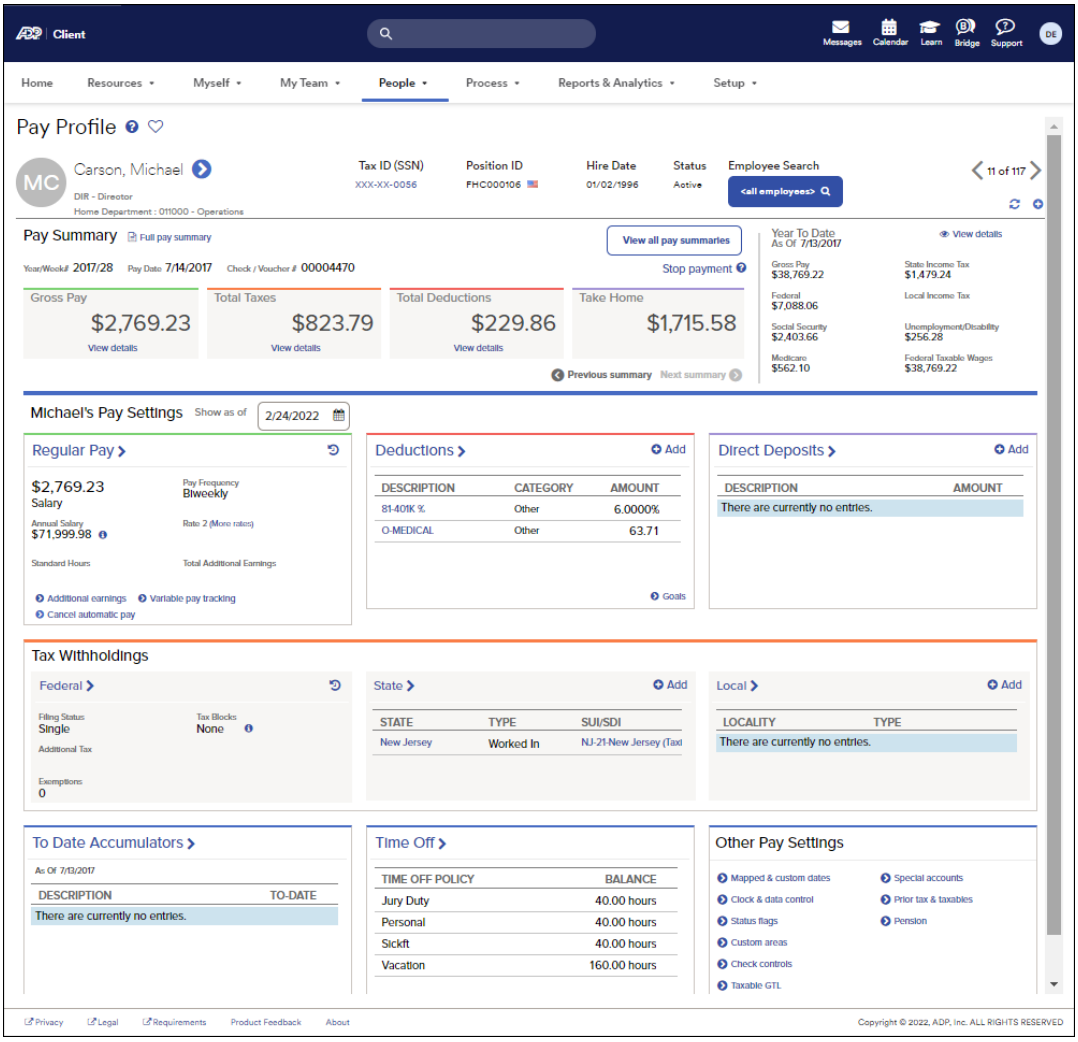
Viewing Pay Information

Overview

On the **Pay Profile** page, you can view and change an employee's pay-related information such as pay rate, deductions, direct deposits, and tax withholdings. After you process a payroll, you can see a pay summary and view year to date totals for your employees.

To access the **Pay Profile** page, select **People > Pay > Pay Profile**.



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Entering a Pay Rate Change on the Pay Profile Page

Scenario

You need to change the hourly or salary pay rate for an employee.

Instructions

Starting Point: People > Pay > Pay Profile

Step	Action
1	Click the **Employee Search** field.
2	Search for and select **the employee.**
3	In the **Regular Pay** tile, click the **Regular Pay** link. **Result:** The Regular Pay page is displayed.
4	In the **Change will be effective** field, enter a date prior to the payroll period end (PE) date when you want the change to take effect.
5	In the **Change Reason** field, select **a reason for the employee's rate change.**
6	In the **Regular Pay Rate** field, enter the new amount. **If the Employee Is Paid** → **Then** An hourly rate → Enter the new hourly amount. A fixed salary each pay period → Enter the new salary amount per pay period. **Tip:** If you know that the rate will increase by a percentage, click the Rate Change Calculator link to have the new amount calculated automatically.
7	Click **Save**. **Result:** The employee will be paid the updated amount for the entire pay period in which the effective date falls. If the rate change should be effective in the middle of the pay period, you will be prompted to make a prorated pay adjustment in the paydata batch. Your ADP associate will show you how to do this when you are preparing to process your payroll.

Viewing Historical Pay Records

When you enter a new value in an effective dated field, the value that is being replaced is saved as part of a historical record. You can view historical pay records for employees by clicking (history) in the Regular Pay tile.

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Setting Up Ongoing Deductions

Overview

You can set up regular, ongoing, automatic deductions from an employee's pay. Deductions include statutory withholdings that are required by law and voluntary deductions that the employee authorizes.

Examples

The table below lists the types and examples of deductions. Your ADP Implementation team sets up statutory deductions for your company as company-level options.

You and your ADP Implementation team set up voluntary deductions for individual employees as scheduled deductions before you begin your payroll.

Type of Deduction	Examples
Statutory deductions	• Federal, state, and local income tax • Social Security taxes • Medicare taxes • Unemployment insurance (in some states) • Disability insurance (in some states) • Liens
Voluntary deductions	• Health insurance contributions • Union dues • 401(k) retirement plan contributions • 529 plan contributions • Direct deposits

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Setting Up a Deduction for a Lien

Overview

You can use **ADP's Wage Garnishment Processing Service** to process, pay, and track employee liens. If you use Funds Disbursement, ADP remits payments to the appropriate payees based on the payment schedule that you enter.

Scenario

You need to enter a child support order as a payroll deduction for an employee.

Tip

Before you begin, be sure to have a copy of the court order.

Instructions, Part 1: Details

Starting Point: People > Pay > Pay Profile

Step	Action
1	Using the employee search, locate the employee's **Pay Profile**.
2	In the **Deductions** tile, click ⊕ **Add** link.
3	Select the type of deduction you are adding. **Note:** The steps listed here use the **Support Order** category. The steps for other deduction types will vary.
4	In the **Lien Number** field, select the number that will be used to identify the lien.
5	In the **Deduction Code** field, select the deduction code for the lien you are entering. **Note:** The available deduction codes are based on the deduction codes and descriptions defined in the Deductions validation table. If you need additional values, review Adding a New Deduction Code.
6	Click **Next**.
7	In the **Lien Subtype** field, select the type of lien. **Note:** Your selection impacts the lien priority and calculation.
8	In the **Court Order State** field, select the state in which the lien was ordered.
9	In the **Case # / Lien ID** field, enter the docket number from the order.
10	In the **Lien Start Date** field, enter the date on which the lien deduction will begin being withheld from the employee's pay, as specified in the order.
11	The **Deduction Effective On** field is populated automatically with the end date of the current pay period. Do not make any changes.
12	In the **Deduction Amount** field, enter the amount that will be deducted from the employee's pay each pay period.
13	In the **Marital Status** field, select the appropriate status for the employee.
14	In the **FIPS Code** field, enter the code for the county that issued the court order, if applicable. Not all court orders specify a FIPS code.

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Instructions, Part 2: Funds Disbursement

Step	Action
1	In the **Payee** field, enter the person or agency receiving the garnished wages. **Note:** The values in this field come from the Payee validation table. If the value you need is not available, click ⊕ (add) to add a new value.
2	In the **Payee Contact Name**, **Phone Number**, and **Extension** fields, enter the contact information for the person or agency holding the lien.
3	In the **Obligee Name** field, enter the name of the person to whom the lien payment is owed.
4	In the **Obligee SSN** field, enter the Social Security number of the person to whom the lien payment is owed.
5	In the **Check Payable To** field, select **Obligee** or **Payee**.
6	In the **Funds Disbursement Schedule** section, select the frequency of when the funds will be disbursed for this lien.
7	In the **Funds Disbursement Check Stub Messages** section, if the lien order requests the inclusion of additional information on disbursement statements, enter that information.

Instructions, Part 3: Exclusions

Step	Action
1	In the **Excluded Deductions** field, select all deductions that should be excluded when calculating an employee's disposable earnings (also known as garnishable wage base). **Note:** Other liens are automatically excluded from the calculation. If you exclude a lien deduction on this page, that lien will be excluded from the calculation twice.
2	In the **Excluded Earnings** field, select all earnings that should be excluded when calculating an employee's disposable earnings.
3	Click **Save**. **Result:** The child support lien is added to the employee's record. If you use the Funds Disbursement feature, ADP will remit payments to the payee based on the information and payment schedule that you entered.

Additional Resource

A support order is just one example of a lien. If you want to see examples of how to enter other types of liens such as bankruptcy, garnishment, support order, and tax levy, complete the *Wage Garnishment Processing Service for ADP Workforce Now* course.

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Setting Up an Ongoing Deduction with a Goal Amount

Scenario

An employee needs to make payments toward a loan. The payments should stop automatically after the goal amount is paid.

Instructions

Starting Point: People > Pay > Pay Profile

Step	Action
1	Click the **Employee Search** field.
2	Search for and select **the employee.**
3	In the **Deductions** tile, click ⊕ **Add**.
4	Click **Other**.
5	In the **Effective On** field, enter the date on which the deduction will begin.
6	In the **Deduction Code** field, select **the type of deduction**.
7	In the **Deduction Amount** field, enter the dollar amount of the deduction. **Note:** When entering a goal amount, you must enter a specific dollar amount, not a percentage.
8	Click the **Add Deduction Goal** link.
9	In the **Deduction Goal Limit** field, enter the total amount of the deduction goal. **Example:** If an employee is repaying a loan, you would enter the total amount of the loan.
10	In the **Additional Amount Already Taken** field, enter the amount that has already been paid toward the goal, if applicable.
11	Click **Save**.

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Setting Up a Direct Deposit

Scenario

You need to set up a direct deposit for an employee who wants the full amount of each pay deposited in a checking account.

Instructions

Starting Point: People > Pay > Pay Profile

Step	Action
1	Under **Employee List**, click the link. **Result:** The Employee Search window opens.
2	Search for and select **the employee**.
3	In the **Direct Deposits** tile, click ⊕ **Add**.
4	In the **Effective On** field, enter the date on which the direct deposit should begin. **Note:** This change will become effective for the pay period in which this date falls.
5	In the **Deduction Code** field, select **the type of account in which the employee's pay should be deposited**.
6	In the **Routing Number** field, enter the 9-digit code that identifies the U.S. bank location for the employee's account.
7	In the **Account Number** field, enter the information for the employee's account.
8	Select the amount that will be included in the direct deposit. **If the Direct Deposit Is** / **Then** The full amount of the employee's net pay — Select **Full Net**. A partial dollar amount of the employee's net pay — Select **Partial Net** and enter the dollar amount that will go in the account specified. A percentage of the employee's net pay — Select **Percent Net** and enter the percentage of the net pay that will go in the account specified. The bonus — Select **For Bonus Pay Only** checkbox. **Note:** If you select Partial Net or Percent Net, the remainder of the employee's pay will be deposited in another account that you specify or will be payable in a live check. You can enter a priority number to indicate the priority order in which direct deposits need to be made into the employee's bank accounts in case the employee's paycheck doesn't have enough money for deposits into all of the bank accounts.
9	Click **Save**. **Result:** The direct deposit is saved. The amount of the employee's pay that you specified will be deposited in the account for pay issued on or after the effective date.

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Tip

Discuss the bank deposit prenotification (prenote) process with your ADP associate to be sure of what to expect for your first payroll. This process can take up to 10 business days.

Verifying Tax Withholdings

Overview

ADP Workforce Now uses an employee's tax information to calculate the statutory deduction amounts for each pay period including federal, state, SUI/SDI, and local taxes. Before you process your payroll, you will want to verify that the taxes for each employee are set up accurately.

Instructions

Starting Point: People > Pay > Pay Profile

Step	Action
1	In the **Tax Withholdings** section, click **Federal** and verify the entries for the employee. **Important:** Pay close attention to verifying the filing status.
2	At the top of the page, click **State** and verify the employee's state taxes, if applicable.
3	At the top of the page, click **SUI/SDI** and verify the employee's State Unemployment Insurance/State Disability Insurance (SUI/SDI) tax information.
4	At the top of the page, click **Local** and verify any local taxes that apply to the employee, if applicable.

Tips

- If you need to make a change, you are required to enter an effective date.
- If you have employees who live in one state or locality and work in another, you'll want to carefully check the information for those employees.
- Notify your ADP associate if changes are needed on any of the tabs.
- If your employees are using self-service, they can change their federal tax information. They cannot make any changes to state or local withholdings.

Action Items

- ☐ Confirm that your employees' pay rates are correct.
- ☐ Check your employees' deductions to ensure that all deductions, statutory and voluntary, are set up.
- ☐ Enter any additional ongoing deductions and goals.
- ☐ Verify your employees' tax withholdings.

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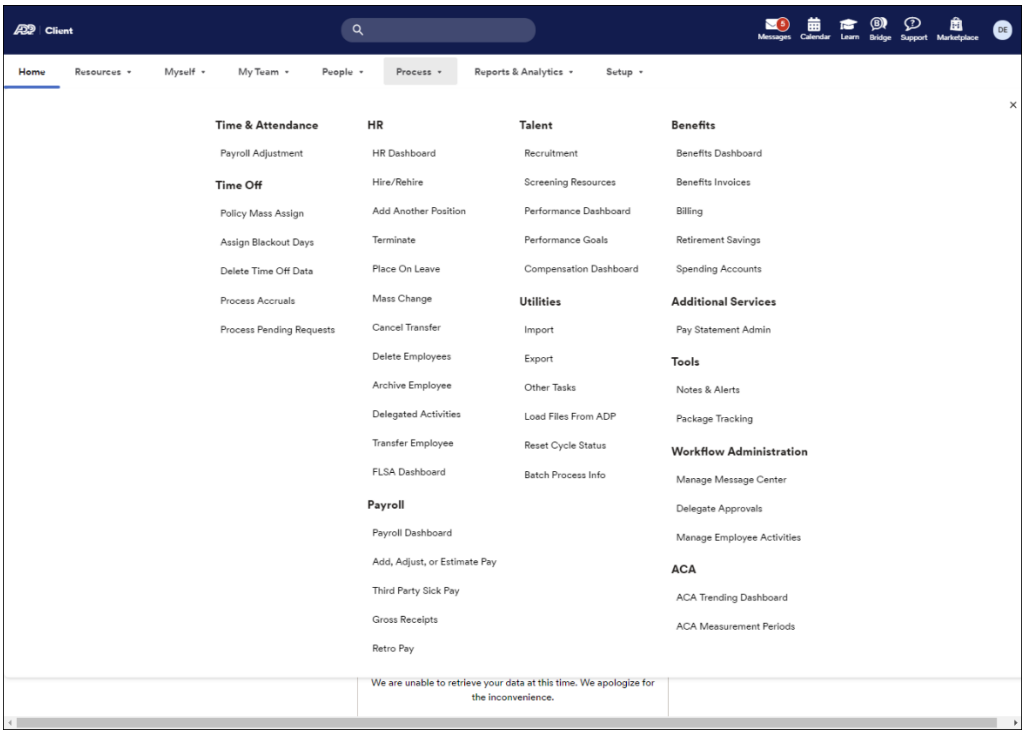
Completing Tasks Using the Process Menu

Overview

You use the **Process** menu to generate your payroll, view and create manual checks, hire and terminate employees, and import or export files. Most of the activities on the **Process** menu involve processing information for multiple employees.



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Hiring an Employee

Overview

To hire or rehire an employee in ADP Workforce Now, you use the **New Hire wizard** to take you through the process of entering a new employee's personal, employment, payroll, and tax information.

Explore: The Hire Page

Starting Point: Process > HR > HR Dashboard

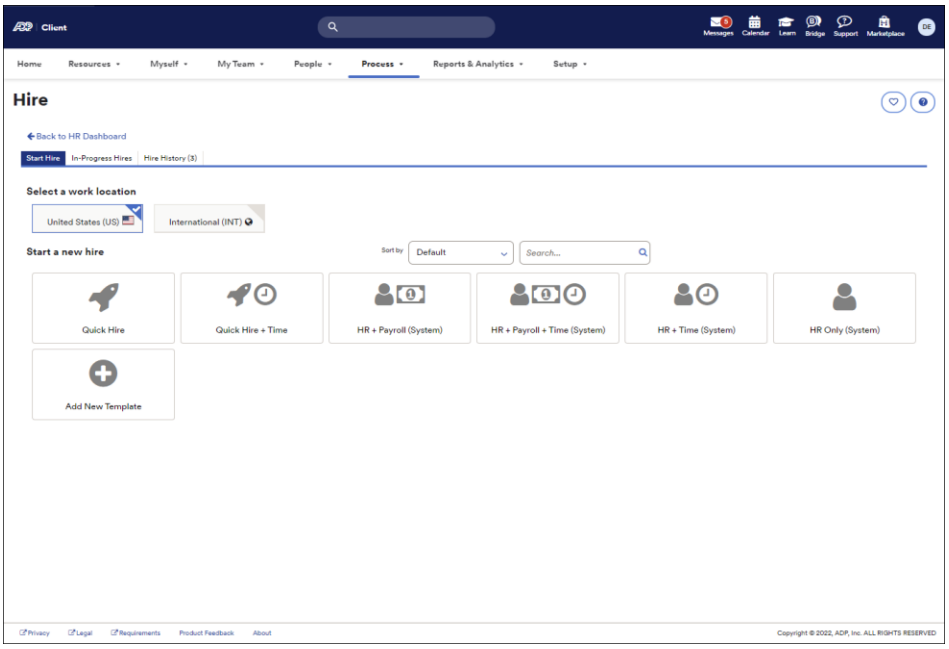
In the **Hire & Onboard Employees** tile, click **Start a New Hire.**

Overview

You use the **Hire** page to start a new hire, view and access your in-progress hires, and view a history of your hiring activity.

Elements and Descriptions

The following table describes the elements of the **Hire** page



Element	Description
Start Hire tab	Select the template needed to start a new hire.
In-Progress Hires tab	View in-progress new hires and continue the hire process, if desired.
Hire History tab	View a summary of all new hire activity, including approved, completed, canceled, deleted, or rejected new hires.
Select a work location section	If your company uses the International feature, you can select either the United States or an international location for the new hire.
Start a new hire section	Select the appropriate new hire template based on the features that the employee will use.

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What Are New Hire Templates?

To begin the new hire process, you select a template. The template consists of information such as the following:

- The required and optional fields
- A list of users who will participate in entering new hires
- The approval process

When you hire an employee, select a template that includes the fields or settings that you need to set up for that new employee. For example, if an employee is being paid through ADP Workforce Now, you must use a template that includes payroll fields.

Types of Templates

Select a template that includes the fields or settings that you need to set up a new employee.

Type of Template	Description
System	These multi-step templates contain all of the required and optional fields based on the type of employee you are hiring. You must completely fill in each step in order to proceed to the next step.
Quick Hire	These one-page templates include only the fields necessary to enter personal, employment, payroll, and tax information for the new hire. **Important:** After hiring the employee using a Quick Hire template, you need to enter any additional information, such as direct deposit, deductions, and tax withholdings on the applicable pages of the People menu. **Note:** Quick Hire templates will not work with the Onboarding module.
Custom	This multi-step template contains all of the required fields for ADP Workforce Now plus any fields that you have designated as required or optional for your company. **Note:** During implementation, your ADP associate will help you to set up any custom templates that you need to get started.

Action Items

- ☐ Familiarize yourself with the available templates before entering a new hire.
- ☐ From this point on, enter all new employees in ADP Workforce Now.

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Completing the New Hire Wizard

Instructions, Part 1: Personal

Starting Point: Process > HR > HR Dashboard

Step	Action
1	In the **Hire & Onboard Employees** tile, select **Start a New Hire**.
2	Select the **template** that corresponds to the ADP Workforce Now features that the employee will use. **Note:** For practice, use the HR + Payroll System template.
3	In the **Name** field, enter the employee's first, middle, and last names. **Note:** ADP recommends that you refer to the employee's Social Security card when entering the employee's full name. **Result:** The Payroll Name field is automatically populated. You can change it, if needed.
4	In the **Associate ID** field, the employee's unique identifier is prepopulated. You do not need to make any changes.
5	In the **Contact Information** section, enter a phone number or email address. **Note:** This information is needed to send the employee a Personal Registration Code for ADP Workforce Now.
6	In the **Hire Date** field, enter the employee's date of hire.
7	In the **Reason for Hire** field, select a reason code. **Note:** This field is generally used for reporting purposes.
8	In the **Company Code** field, select the employee's company code. **Note:** If the employee will work in multiple company codes, you may need to set up additional positions. Discuss this with your ADP associate.
9	In the **Tax ID Type** field, make the appropriate selection for the employee.
10	In the **Tax ID** field, enter the number for the type of tax ID that you selected in the previous field (SSN or EIN).
11	In the **Gender For Insurance Coverage** field, make the appropriate selection.
12	In the **Birth Date** field, enter the employee's date of birth.
13	In the **Address** section, enter the employee's legal address. **Note:** The legal address will be used for the employee's tax documents.
14	In the **Demographic** section, make the appropriate selection.
15	Click **Next**. **Result:** The Employment step is displayed.

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Tips

- All of the required fields are marked with a red asterisk.
- If you wish to enter more information, in the More Fields section, click (edit). These fields are less commonly used and are not required.
- If an error message is displayed on any of the steps, you must resolve the error before you can complete the hiring process or save your entries and exit.
- If you are unsure of what to enter in a field, next to the field, click (help) for an explanation.

Instructions, Part 2: Employment

Step	Action
1	In the **File #** field, enter a unique six-digit number, if applicable. In some cases, this field will be automatically populated for you. **Note:** Once you enter a file number, it becomes part of the employee's position ID.
2	In the **Job Title** field, select **the employee's job title.**
3	In the **Worker Category** field, select **the appropriate category for the employee.**
4	In the **Business Unit** field, select the operational unit in which the employee will work.
5	In the **Home Department** field, select **the employee's home department.**
6	In the **ACA Benefit Status** field, select the appropriate option.
7	Click **Next**. **Result:** The Payroll step is displayed.

Instructions, Part 3: Payroll

Step	Action
1	In the **Pay Frequency** field, select **the frequency by which the employee will be paid.**
2	In the **Regular Pay Rate** fields, select the rate type (hourly, salary, or daily) and enter the regular amount of pay to be earned in a pay period based on the rate type**.**
3	In the **Pay Group** field, select **the pay group that the employee is part of.**
4	Click **Next.** **Result:** The Tax step is displayed.

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Instructions, Part 4: Tax

Step	Action
1	In the **Federal Filing Status** field, select the employees' status.
2	In the **Worked In State** field, select **the state in which the employee works.**
3	In the **SUI/SDI Tax Code** field, **make the appropriate selection.**
4	Click **Next**. **Result:** All the entries are displayed for review.

Tip

Verify compliance information for each state and local tax so you know which additional tax fields are required for your company. For example, depending on your state, marital status and exemptions may revert to the employee's federal tax selections if they are not entered separately.

Instructions, Part 5: Review

Step	Action
1	Confirm the information that you entered. If you need to make corrections, click **Edit**, make the necessary update, and return to the **Review** page.
2	Click **Done.** **Result:** An Alert Message indicating the Time Off Policies that will be assigned automatically to the new hire based on the company policies is displayed.
3	Click **Close**. **Result:** The Hire History page is displayed with a confirmation message.

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Terminating an Employee

The Termination Process

Overview

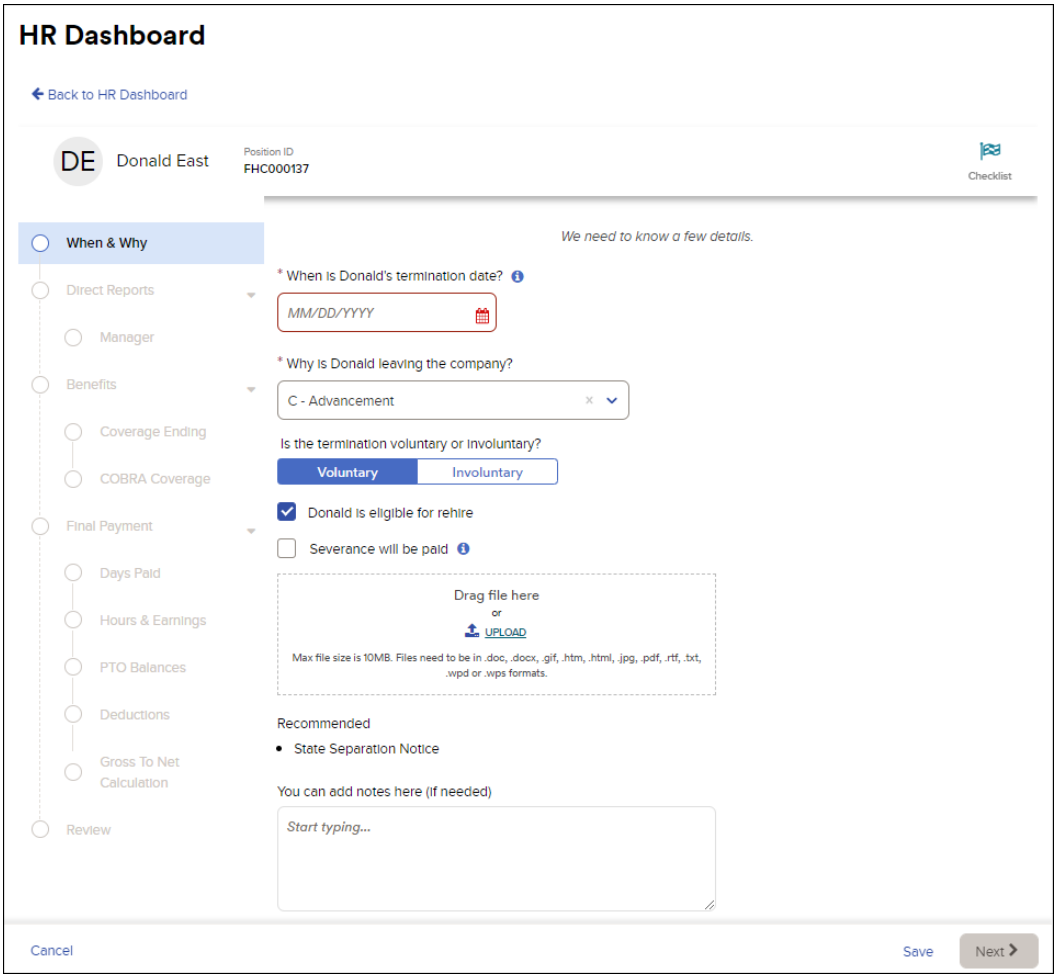
To terminate an employee, you follow a simple process to manage all aspects of the termination that are applicable to the employee you are terminating.

Stages and Descriptions

The termination process consists of several stages that will vary based on the employee that you are terminating and your company's setup. For example, if the employee you are terminating is not enrolled in benefit plans, the Benefits stage does not display.

Starting Point: Process > HR > HR Dashboard

In the **Start Employee Change** tile, search for the employee and select **Terminate** to launch the termination process.



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Stages and Descriptions (cont.)

Stage	Description
When and Why	Search for the appropriate employee and start the termination. Enter the termination date, last day of work, reason for leaving, and other general information. You can also assign a checklist, such as to record the return of company property, and attach supporting files, if needed.
Direct Reports	If the employee is a manager or Time & Attendance supervisor with employees who report to him/her, you will be prompted to reassign the employees to one or more managers and supervisors.
Benefits	Review active enrollments, dependents, and coverage rules for the employee and make adjustments, if needed. Review COBRA eligibility dates, Qualifying Events and select a COBRA contact. If relevant, you can also elect to not record the COBRA event.
Final Payment	Calculate the employee's final payment by reviewing and making changes as needed for: • The days for which the employee will be paid • Hours and earnings • Payout of PTO balances • Deductions Review the final calculations. Choose to pay the employee in a paydata batch or manual check, or opt to skip the payment. You can also delegate the final payment option to another payroll practitioner, if desired. If the termination date is in a future pay period, you will not see the final payment stage in the process. You will be prompted to complete the final payment when the payroll cycle in which the termination date falls becomes current.
Review	Confirm all of the information about the termination, make changes if necessary, and finish the termination.

Action Item

☐ If any employees who should be terminated have an active status, complete the termination process.

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Adding Another Position for an Employee

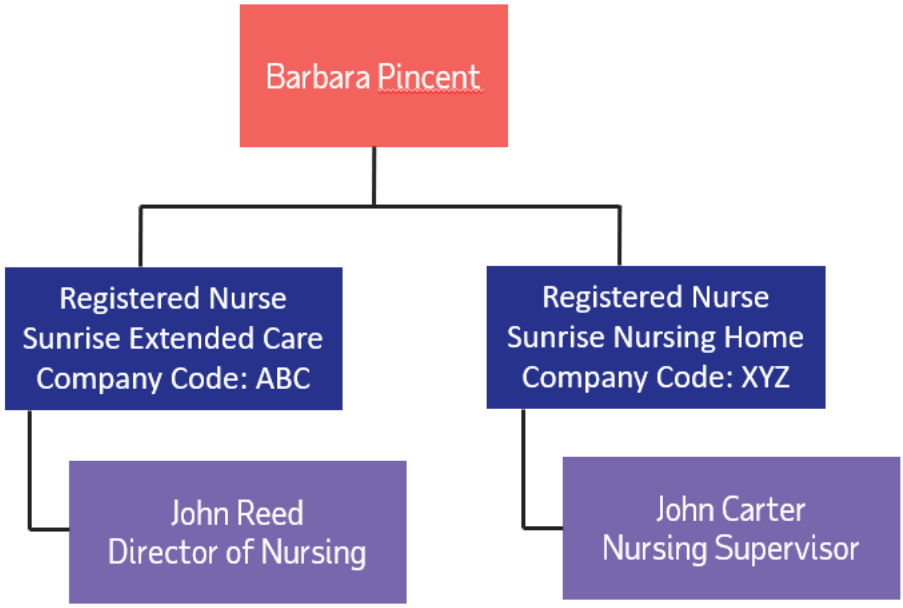
What Is the Multiple Positions Feature?

Description

Multiple Positions is a feature in ADP Workforce Now that enables you to add a position for an existing employee so that you can track the employee in two or more active positions, paid or nonpaid, at the same time.

Example

Barbara Pincent is a registered nurse (RN) at Sunrise Extended Care. She also serves as an RN at Sunrise Nursing Home. She reports to the director of nursing at the extended care facility and to the nursing supervisor at the nursing home. Barbara is paid differently for each position.



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When Should You Use Multiple Positions?

The following table indicates when you should use Multiple Positions or another feature.

If the Employee Serves In	Then Use
More than one position (paid or nonpaid)	Multiple Positions
More than one position and multiple Forms W-2 are required because payments are issued under separate federal tax identification numbers	Multiple Positions
Multiple positions and reports to two or more different managers	Multiple Positions
One position and changes state or local jurisdiction as a result of a transfer to a different location	Transfer Employee
One position and requires that a percentage or number of hours worked and be allocated to different departments	Automatic Labor Allocation

Adding Another Position

Instructions

Starting Point: Process > HR > HR Dashboard

Step	Action
1	In the **Start Employee Change** tile, search for the employee.
2	**Select Add Another Position.**
3	Follow the prompts on the screen to provide details about the new position.
4	Click **Done**.

Guidelines

- When you set up an employee with a new paid position, an additional file number is created through Payroll. A separate Form W-2 will generate at the end of the calendar year for each paid position that the employee holds.
- When an employee holds multiple positions, you must designate one as the primary position. The primary position is the designated source of information for items such as Equal Employment Opportunity (EEO) and Veterans reports.
- If the employee with the additional position is a manager, for the employee to see the **My Team** tab and have access to his or her direct reports, the primary position must be the managerial position.

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Tips

- When an employee has multiple positions, the pages that you access from the **People** menu include an **Other Positions** link. Click the **link** to view all of the employee's positions.
- If you added a position for an employee and realized that you made a mistake, you can delete the position in the same way that you delete a new hire.

Action Item

☐ Determine whether any of your employees need multiple positions set up.
If so, add the positions.

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Viewing Reports

Overview

From the **Reports & Analytics** menu, you can run standard reports, such as your Payroll Audit report, and also generate custom reports. You can access your payroll, general ledger, and quarterly tax reports from the **Reports Dashboard**.

Accessing the Master Control Report

Instructions

Starting Point: Reports & Analytics > Reports Dashboard > Reports Dashboard > Additional Reporting > PR & Qrtly Tax Reports (iReports)

Step	Action
1	Select the report display period and the view by option as **Report Type**.
2	Click the **Filters** link to select the Company and Report Type. **Note:** You can use the Filters link to add the report date and advanced filtering details.
3	Click **Apply** and then click **Close**.
4	In the **Report Type** column, click **Payroll Processing**. **Note:** If there is more than one row for Payroll Processing, click the link in the row with the highest number in the # of Reports column.
5	Select the **ADP Master Control** row.
6	Click **Download Selected**. **Result**: You will be prompted to save the file to your computer.

Validating Your Data Using the Master Control Report

Your payroll is based on the permanent employee information that you enter into ADP Workforce Now fields. The Master Control pulls the information from all of these fields into one handy report that you can use to verify your employee data. You should always check the Date of birth, Pay rates, Tax withholdings, Deductions, including direct deposits on the Master Control to identify any changes that you need to make in ADP Workforce Now.

Tip

The Master Control report will not reflect any changes that you make to your data until you process a payroll. If you have multiple company codes, you'll need to review multiple Master Control reports.

Additional Resource

For a preview of the types of standard reports that are available, access the Standard Reports Guide on the Bridge.

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Reviewing Company Level Settings

Overview

Use the activities on the **Setup** menu to create custom fields, populate validation tables, set system and company options, and assign security access permissions for other users.

Reviewing Validation Tables

Description

The validation tables determine the values that you can select in certain fields in ADP Workforce Now. During the Analysis call, you answered questions about your company's data. When you view the validation tables, you can see all of the values that were set up for you.

Instructions

Starting Point: Setup > Tools > Validation Tables

Step	Action
1	Review the validation tables to confirm that all of the values that you need are listed.
2	Make note of any changes you wish to make, such as updating descriptions or adding additional codes.

Updating Codes

Instructions

Starting Point: Setup > Tools > Validation Tables

Step	Action
1	Select the **validation table** you wish to update.
2	Click the **code** that you wish to change.
3	Change the description or make any other needed changes. The fields you can change vary based on the validation table you are updating.

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Adding a New Deduction Code

Adding new deduction codes is a common reason why you would need to update a validation table. You can easily add a new deduction code that you can start using right away.

Instructions

Starting Point: Setup > **Tools** > **Validation Tables**

Step	Action
1	On the Payroll tile, select **Deductions, Deposits and Fringe Benefits.**
2	Click **Add.**
3	Search for the Deduction Type. **Tip:** If you're not sure which deduction type to search for, click **View the entire list** for all types.
4	Select the type of deduction and Click **Continue.**
5	Follow the on-screen messages and prompts to complete the process.

Tips

- The exact steps will vary based on the type of deduction code you are adding. You might have to fill out a form (to set up a pre-tax Deduction code for a Cafeteria 125 medical plan, for example) or select options describing your new Deduction code (for post-tax and other kinds of Deduction codes).
- Setting up some post-tax and other kinds of Deduction codes (for example, for union dues, special compensation, or a 401(k) plan) will take two steps. Step 1 is to add the Deduction code to the Deductions validation table yourself. Step 2 is to call ADP to review the deduction information that you entered and finish your setup. Your call with ADP will be much faster and easier if you add the Deduction code yourself before you call. After ADP finishes your setup, you can then assign the Deduction code to your employees.

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Learning Activity: Let's Review

1. One of your employees moved to a different address in the same town. Where do you make that update? What do you need to do?

2. You're viewing an employee's Personal Profile tab on the Profiles page, and you want to validate her date of birth, but the field is masked. How can you view the data?

3. You need to make a change to an employee's hourly rate that will be effective at the beginning of the next pay period.

    a. Where do you find that information?

    b. Can you enter this change today? Why or why not?

    c. What date should you enter in the Pick an Effective Date field?

4. You have a new hire to enter in ADP Workforce Now.

    a. Where do you start the hiring process?

    b. Which template or templates can you use for an employee who will be paid using ADP Workforce Now Payroll?

5. Where can you view an employee's ongoing deductions, both statutory and voluntary?

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Learning Activity: Answers

The answers to the Learning Activity on the previous page are listed below.

1. There are two options:
    a. Access People > Personal Information > Personal Profile. In the Addresses tile, click Edit.
    b. Access Process > HR > HR Dashboard. In Start Employee Change, find the employee. Choose Job Change, choose the option for an address change and complete the wizard.

2. Click Reveal.

3.

    a. People > Pay > Pay Profile

    b. Yes, you can use effective dating.

    c. The first day of the next pay period.

4.

    a. Process > HR > HR Dashboard. Click Start a New Hire.

    b. Any of the templates that include the Payroll fields.

5. People > Pay > Pay Profile

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Next Steps

This is *your* ADP Workforce Now solution. From this point on, you are responsible for completing the tasks that we walked through today and maintaining your employee data in ADP Workforce Now.

Here's how you can prepare for the next step in your implementation:

- Explore the pages in ADP Workforce Now to get familiar with navigating. Remember that you can click **Cancel** to back out of any changes.
- Use the "Action Items" list below to review your employee data and make corrections, as needed.
- Your Payroll Learning call is scheduled for: _____

Action Items

- ☐ Use the Master Control report to check your employee data. Ensure that employees have the correct legal name, birthdate, and legal address. This step is critical to ensuring that your employees' W-2 forms will be correct.
- ☐ If you are using self-service, you will want to ensure that employees have a work email address entered in Contact Information.
- ☐ Review your employees' employment data to ensure that their hire date, status, and reporting structure are accurate.
- ☐ Confirm that your employees' pay rates are correct.
- ☐ Check your employees' deductions to ensure that all deductions, statutory and voluntary, are set up.
- ☐ Enter any additional ongoing deductions and goals.
- ☐ Verify your employees' tax withholdings.
- ☐ Familiarize yourself with the available templates before entering a new hire.
- ☐ From this point on, enter all new employees in ADP Workforce Now.
- ☐ If any employees who should be terminated have an active status, complete the termination process.
- ☐ Determine whether any of your employees need multiple positions set up. If so, add the positions.
- ☐ If you are missing any codes in the validation tables, add the missing codes.

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Accessing Additional Learning Resources

The Bridge

Join TheBridge.adp.com, an online community for payroll and HR professionals where you can ask questions, share knowledge, make connections, and learn from industry experts and peers about a broad range of human capital management topics. Special topics are dedicated to new users of ADP Workforce Now like you.

Instructions

Step	Action
1	<table><tr><th>If You Are</th><th>Then</th></tr><tr><td>Logged on to ADP Workforce Now</td><td>At the top of any page, click (The Bridge).</td></tr><tr><td>Not logged on to ADP Workforce Now</td><td>Access https://thebridge.adp.com/welcome Log in using your ADP Workforce Now user name and password.</td></tr></table>
2	To access learning resources that are designed to support you on the topics that you learned about today, first ensure you are logged in to Workforce Now as an administrator, then access the Employee Maintenance Learning Guide link on The Bridge.

Online Help

In your ADP solution, at the top of many pages, you'll see the help. Click (help) to open online Help, where you can view help content specific to the page that you are on or search for information on any topic.