Evosus Payroll Services

Implementation Guide

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Introduction

Welcome to Evosus Payroll Services! This Implementation Guide includes everything you need to know about implementing Evosus Payroll Services in your business.

Navigating the Implementation Guide

- Please review each section carefully to ensure you're fully prepared for the transition.
- You will find required forms and documentation downloads included in most sections.
- All forms are required and should be submitted to the Payroll Specialist assigned to your Implementation as soon as possible.

Implementation

The payroll implementation process is quite simple since Evosus does all the setup for you! The process moves most quickly when all necessary information, forms and documentation is completed correctly and provided as quickly as possible. Please review each section carefully for information about each implementation phase and the information we'll need from you to complete each phase.

Payroll Relief Setup

Payroll Relief by Accountant's World is the online payroll software used to integrate payroll with Evosus. Whether you're Full Service or Do-It-Yourself, this is the software we'll setup to for payroll processing. Evosus will do all the setup for you – but we'll need you to provide the information so we can set it up correctly.

- Employer Setup Form

  Download this form and fill out completely. Once completed, email a copy to your Payroll Specialist. If you have any questions about the information in this form, please contact us immediately so we can help you.

- Reports from Your Existing Payroll Service and/or Software

  The following reports or documents should be emailed to your Payroll Specialist as soon as possible. Please contact your Payroll Specialist immediately if you have any questions or concerns about providing this information or if you need help locating these reports in your existing payroll system.

    - Employee master list
    - Most recent payroll period reports
    - All quarterly reports from current year
    - Copy of Federal and State ID numbers
    - Copy of SUI rate

Direct Deposit

Evosus recommends setting up Direct Deposit for as many employees as possible. In order to setup direct deposit, we will need to get banking information for you and your employees; forms for both are included below. To secure a 2-day quick turn-around time for direct deposit, you will need to provide a guarantee from your financial institution indicating good standing and a line of credit; otherwise, direct deposit turn around will be 3 business days.

- Bank Letter Template
  Here is an example of the type of letter your financial institution should provide Evosus. Evosus will then submit this to Accountant's World on your behalf to secure a 2 day Direct Deposit turnaround.

- Employee Direct Deposit Authorization Form
  Each employee will need to complete this form and include a voided check for Direct Deposit. Most banks will provide customers with a direct deposit form if they do not have checks; these days, most banks make this form available in their online banking services.

- PayCard Enrollment Form
  If your Employee does not have a bank account we can set them up with a free PayCard. PayCards function just like a traditional bank account with direct deposit, online banking and bill pay capabilities.

E-Services

In order to provide electronic services, such as quarterly and annual filing, Evosus Payroll will need a copy of your signature on file to complete forms on your behalf. Please download the Digital Signature form, sign in the indicated area, and send back as soon as possible. Evosus will submit this form to Accountant's World on your behalf.

- Digital Signature Form

Evosus Integration Setup

Evosus will install an Evosus Payroll Services license on your Evosus database. The license will activate the Evosus Payroll integration feature allowing Evosus, or a Do-It-Yourself client, to import journal entries directly from Payroll Relief. You don't need to do anything to setup the integration –we will complete all necessary tasks for the integration prior to your first payroll.

Additional Services

- Pay-as-you Go Worker's Compensation
- EZ IRA Retirement – Click here to learn more.

Go Live

Your Payroll Go Live occurs the day your first live payroll is entered into Evosus. If you're a full service client – you will simply need to provide your payroll information to Evosus and we will take care of everything!

If you're a "Do-It-Yourselfer," Evosus will help you process your first payroll using a remote login software. We will help you login into Payroll Relief, enter your hours either manually or through the spreadsheet import, and we will demonstrate the journal entry integration for you.

It's really that simple!

Post Go Live

Submitting Payroll for Full Service Clients

Based upon your payperiod frequency, you will need to provide Evosus Payroll Services with your payroll information 3 business days prior to your pay date for direct deposit. You can submit your payroll using the following documents:

- Evosus Timecard Report
  If you're already using Evosus Timecards, this is the simplest way to report your payroll.
    1. Go to Administration>Timecards>Timecard Report.
    2. Select the appropriate payperiod.
    3. Select appropriate store and timekeeper filters.
    4. Do not filter on pay type or pay status.
    5. Choose Output "Directly to Excel."
- Payroll Relief Timesheets
  If you're not using Evosus Timecards, we'd prefer Full Service clients use this template to report your payroll each payperiod. We will provide the template prior to the first payroll. Simply fill in the spreadsheet and email to payroll@evosus.com when you're ready. You can include any pertinent changes in your email to us such as changes in deductions, inactive employees, etc. Do-It-Yourself clients can access the timesheet in Payroll Relief under Payroll Processing>Excel Timesheet or PDF Timesheet.

Billing

Prior to your first live payroll, Evosus will need your preferred payment method for payroll invoices. Evosus invoices at the beginning of each month for the prior month's processed payroll, quarterly filings, additional services and any incurred bank fees such as Direct Deposit errors and insufficient funds.

- Evosus Payment Authorization Form

  Download the Payment Authorization Form, fill out and email to your Payroll Specialist prior to Go Live.

Support Information

- Payroll Support Hours
  Monday-Friday 8:00 AM – 5:00 PM PST
- Payroll Email
  payroll@evosus.com
- Payroll Direct Phone Support
  360-735-9510 Option 4

If you've elected to process your own payroll, please keep in mind that our support services will be limited to answering software functionality questions related to Payroll Relief. We will do our best to answer questions regarding Evosus Business Management software, but may need to involve Evosus Software Support for complex software questions or questions not related to Payroll.

Payroll Communication

Evosus Payroll Services will provide on-going communication, notices and important information through our newsletter and emails. Please be sure to add payroll@evosus.com to your safe sender's list and be sure to read all emails from Evosus Payroll including our newsletter since we will provide time-sensitive information regarding your payroll. If you'd like multiple people to receive the payroll newsletter, please email a list of names and email addresses to payroll@evosus.com