# User Manual

**Checkmark Canada**
**Cloud Payroll**

# Table of Contents

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# Chapter I

# Introduction

## Get Started:

Checkmark Canada Cloud Payroll has been designed to be intuitive, fast, and simple to use. The user interface is simple and contains fewer secondary menus, which results in fewer clicks to find the desired information or functions.

**NOTE:** Checkmark Canada Cloud Payroll works best in a Chrome browser, but it also works with Internet Explorer 10, Safari 6, and Firefox. It's useful to bookmark your login page and memorize your login username so it's easy to login anytime on your same computer, tablet, or laptop device.

# Chapter II

# Dashboard

SUMMARY

## Company Overview
This shows a snapshot of the Payroll Summary graph of the company level up to the latest pay cheques creation.

## Employee Overview
This shows each employee wise Payroll Summary graph based on the selection up to the latest pay cheques creation.

## Tax Resources
This contains helpful legislative and regulatory URLs and information.
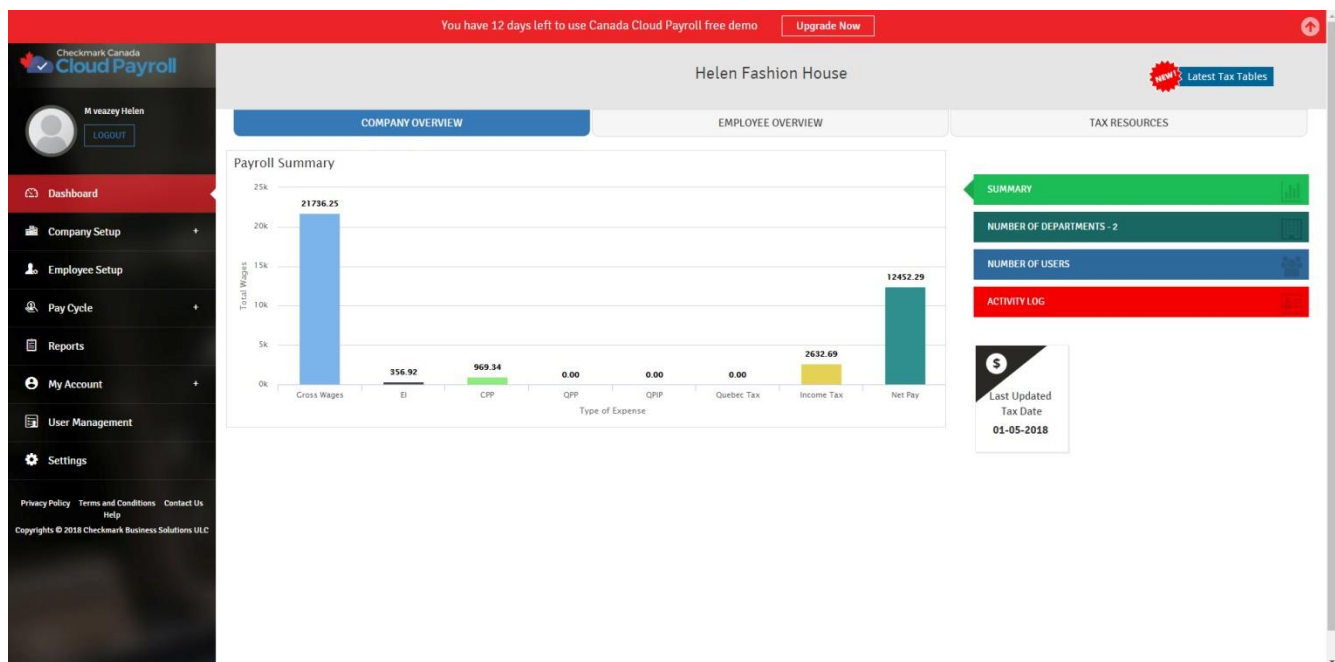


## Number of Departments:
This shows the department wise of employees.

## Number of Users:
This shows the number of users that have already been created in **User Management** for the payroll process with permissions.

**Activity Log:**

This contains information about message flows and how you played with the application and functions.


**Last Updated Tax Date:**

This shows the latest updated tax date for your company.

# Chapter III

# Company Setup

This chapter will walk you through how to setup your Checkmark Canada Cloud Payroll company.

## Company Setup

Under Company Setup, you will find these sections:

- Company Information
- Departments
- Contributions
- Provincial Data
- Hour Categories
- Additional Income
- Other Deductions
- Ledger Accounts

## Company Information

This section has two Tabs: Company Info and Direct Deposit. This section will take you through both tabs.

## Company Info

The first step in setting up your company is to input basic company Information on the Company Info Tab. The fields are explained below.

## Company Information Field Descriptions:

Company Name:        Enter your Company Name.

Trade Name:        Enter your Company Trade name, which will be used on cheques and reports.

Use this trade Name on Cheques & Reports:
        Check this box if you want the Trade name to appear on your cheques and reports, instead of the Company Name.

Contact First Name:    Enter the Contact Person's first name.

Contact Last Name:    Enter the Contact Person's last name.

Email Address:       Enter the Contact Person's email address.

Phone:        Enter the Company's phone number.

Address Line 1:      Enter the Company's registered address.

Address Line 2 (Optional):  Enter additional address details for the Company, if applicable.

City:        Enter the City in which your Company is located.

Province:        Select the Province for your Company.

Postal Code:      Enter the postal code for your Company in the format of "A2A 2A2" (Alpha Numeric, Alpha Numeric, Alpha Numeric format.

Federal Account #:    Enter your Company's Business Account Number as shown on Form PD7A (Source Deduction Remittance Form).

Pension Plan Reg. #:   Enter the registration number for your Company's Registered Pension Plan or Deferred Profit Sharing Plan.

Payroll Year:      The Payroll Year will default to the current year.

After filling out all the mandatory fields, which are marked with a red asterisk, click "SAVE." If you want to clear information that you have entered incorrectly, click "CLEAR" (before it is saved). If you click on "CANCEL," it will redirect you to the Dashboard without saving.

## Direct Deposit

If you use the Checkmark Canada Cloud Payroll Direct Deposit option, you can directly deposit pay cheques to your employees' bank accounts.

You will still be able to process Printed Cheques for your employees who do not want to have Direct Deposit.

[Note - To opt in, all of the Mandatory Fields on the Company Info Tab must be filled in, and you must be on the Paid Version of Checkmark Canada Cloud Payroll. For details see "Converting to Paid from My Account under the Registered Products Tab.]

## Setting Up Direct Deposit in Company Information:

Go to Company Setup and click on Company Information. There you will see the Direct Deposit option. Click on the checkbox for Direct Deposit. Then click on "Save." This will activate the Direct Deposit Tab, where you will need to fill in your information.

In the Direct Deposit Tab, almost all of the fields are mandatory. The fields are explained below.

## Direct Deposit Field Descriptions:

Additional Information:
Owner First Name:       Enter the first name of the Account Holder.
Owner Last Name:        Enter the last name of the Account Holder.
Street Address 1:       Enter the street address of the Account Holder.
Street Address 2 (Optional):   Enter additional address details for the Account Holder, if applicable.
City:                   Enter the City for the Account Holder's address.
Province:               Select the Province for the Account Holder's address, from the drop down list.
Postal Code:            Enter the postal code for the Account Holder's address.
Contact Number:         Enter the phone number for the Account Holder.
Last 4 digits of SIN:   Enter last four digits of the Account Holder's SIN (Social Insurance Number).
Date of Birth:          Enter the date of birth for the Account Holder.

## Organization Information:
Legal Structure:        Select the legal structure of the Company, from the drop down list.
                        If you select other, a text field will appear where you can enter in your Legal
                        Structure.
Website:                Enter the Company's website address.
Business Type:          Select the Business Type of the Company, from the drop down list.
Annual Volume:          Enter the annual volume of the Company.
Average Transaction Amount: Enter the average transaction amount for the Company.

## Account Information:
Account Number:         Enter the Company's Bank Account Number.
Routing Number:         Enter the Company's Bank Routing Number.

After filling in the mandatory fields, you should read the Privacy Policy and the Terms and Conditions, then click "Submit."   Once submitted, a confirmation popup will appear to confirm that you want to send your Direct Deposit Information for verification.



Clicking "YES" will send the request for verification and the Status will show as "Pending" until approved.

[Note - Please note that it can take seven to eight business days to receive verification. Until then, you cannot edit the Direct Deposit fields.]

If any errors are found in the data you entered, you will be directed back to the Company Information screen and an error message, with details, will appear at the top of the screen.

Once your information has been successfully verified, the Status will be changed to "Approved."



If your verification is rejected, "Pending" will change to "Rejected," along with the reason why. Then the fields on the *Direct Deposit Tab* will activate, and you will be able to make the necessary changes and resubmit for verification.

## Departments

You can create up to 99 Departments for your Company by clicking on Company Setup and selecting Departments; there you will see two Tabs: Departments and Job Title. This section will take you through both Tabs.

Departments

Once a Department has been created on the Departments screen, you can assign it as the default Department to an employee, distribute hours to specific Departments before you create Cheques, and/or allocate amounts after Cheques have been created.
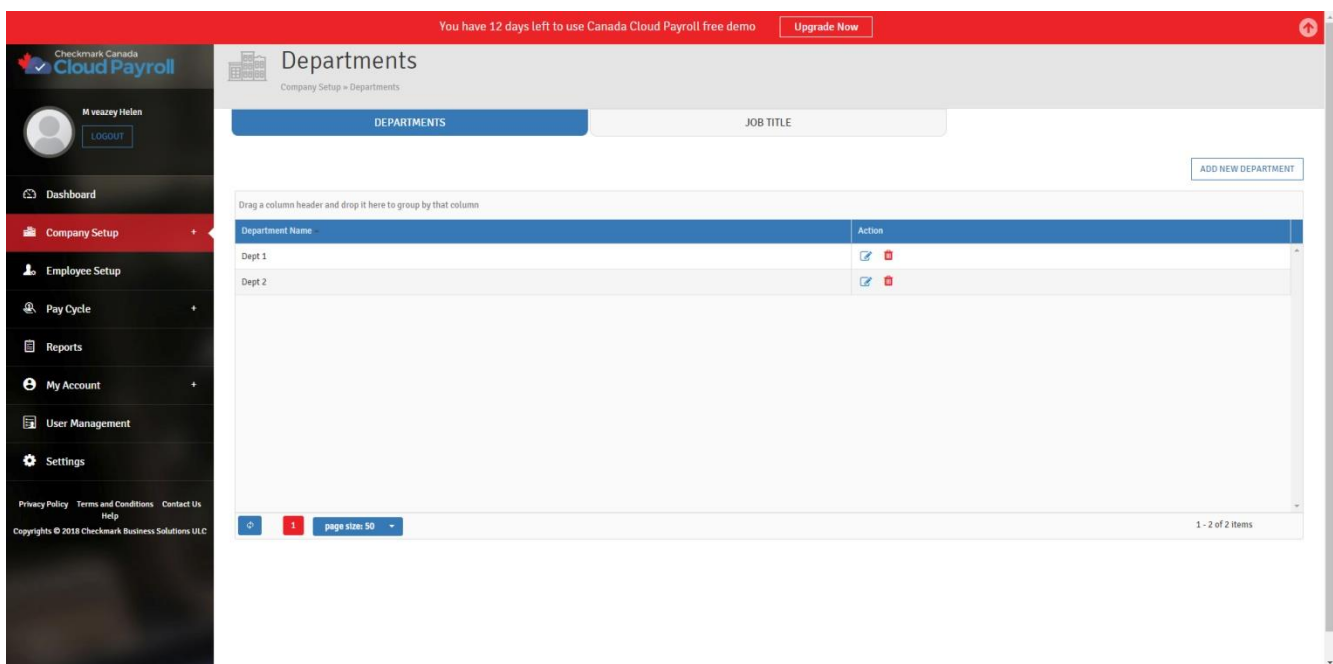


Create a new Department by following these steps:
- Click "Add New Department" from the Departments Screen.
- Enter a name for the Department and "save."

### Editing/Modifying Departments:

You can edit/modify a Department at any time, as long as it has not been assigned to any employees, has not been used on any cheques, and no Job Titles have been assigned to it.

To edit/modify an existing Department, follow these steps:

- Select the Department from the List of Departments.
- Click the Edit button under Action.
- Make the necessary changes.

- Click the blue check icon to save.
- Clicking on the red "X" icon will cancel the changes.

### Deleting Departments:

You can delete a Department at any time, as long as it has not been assigned to any employees, has not been used on any cheques, and no Job Titles have been assigned to it.

- To delete an existing Department, follow these steps:
- Select the Department from the List of Departments.
- Click the Delete icon under Action.
- Click "Yes, Delete It!" to confirm.

## Job Title

You can set up unlimited Job Titles for each Department for your Company.

Once a Job Title has been created on the Job Title screen, you can assign it as the default Job Title for an employee.

### Create a new Job Title by following these steps:

- Click the Job Title Tab in the Department screen.
- Click "Add New Job Title."
- Select the Department you want to assign this Job Title to, from the list.
- Enter a name for the Job Title and save.



Checkmark Canada Cloud Payroll
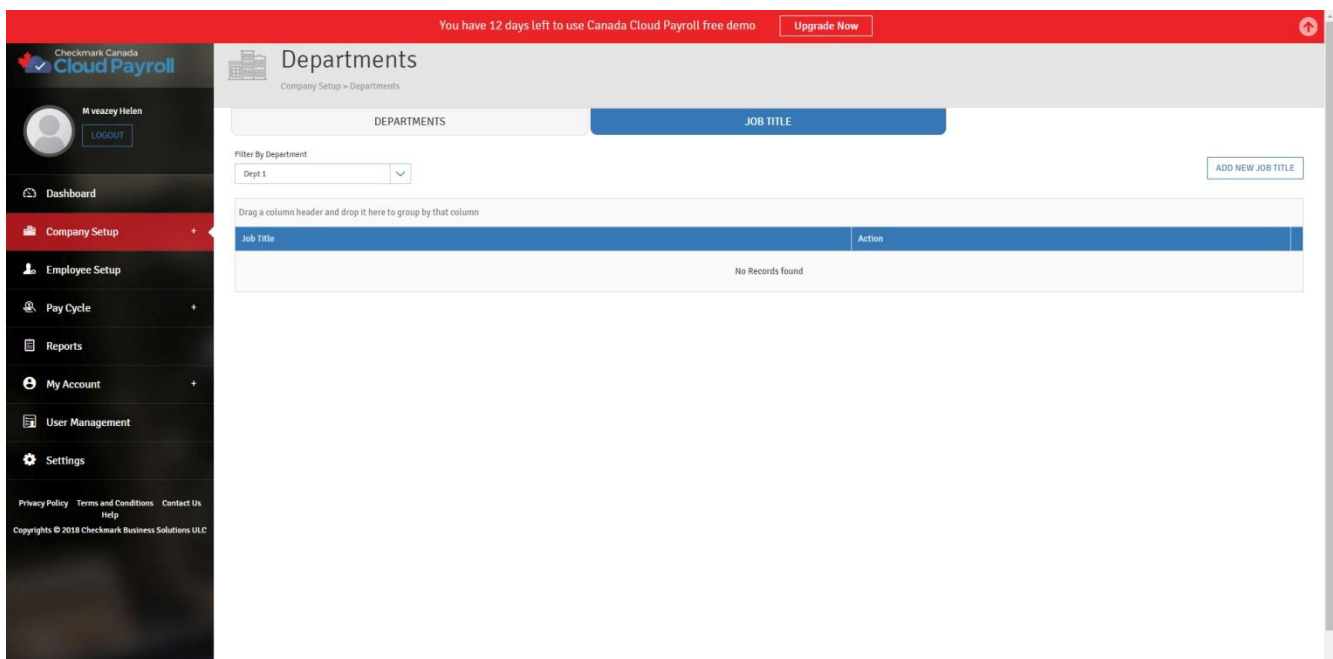
### Editing/Modifying an Existing Job Title:

You can edit/modify a Job Title at any time, as long as it has not been assigned to any employees and has not been used on any cheques.

- To edit/modify an existing Job Title, follow these steps:
- Select the Job Title from the List of Job Titles.
- Click the Edit button under Action.
- Make the necessary changes.
- Click the blue check icon to save.
- Clicking on the red "X" icon will cancel the changes.

### Deleting an Existing Job Title:

You can delete a Job Title as long as it has not been assigned to any employees and has not been used on any cheques.

- To delete an existing Job Title, follow these steps:
- Select the Job Title from the List of Job Titles.
- Click the Delete icon under Action.
- Click "Yes, Delete It!" to confirm.

## Contributions

The Contribution screen, under Company Setup, contains values used to calculate Employment Insurance Premiums, Canada Pension Plan Contributions, Québec Pension Plan Contributions, and Québec Parental Insurance Plan Premiums.

**Contributions Field Descriptions**:

Maximum EI Earnings:  The maximum amount of annual earnings subject to the Employment Insurance (EI) Premiums.

Maximum CPP Wages:  The maximum amount of annual wages subject to Canada Pension Plan (CPP).

CPP Exemption:  The annual basic exemptions for CPP.

CPP Rate (%):  The employee contribution rate for CPP.

EI Rate (%):  The Employment Insurance Premium rate for employees (other than Québec).

Employer EI Rate (%):  The Employment Insurance Premium rate for employers (other than Québec).

Employer CPP Rate (%):  The employer contribution rate for CPP.

Maximum QPIP Earnings – Québec:  The maximum amount of annual earnings subject to the Québec Parental Insurance Premiums (QPIP).

EI Rate- Québec (%):  The Employment Insurance Premium rate for employees in Québec.

QPIP Rate – Québec (%):  The Québec Parental Insurance Plan Premium rate for employees working in Québec.

Employer EI Rate – Québec (%): The Employment Insurance Premium rate for Employers in Québec.


Employer QPIP Rate –Québec (%): The Québec Parental Insurance Plan Premium rate for employers in Québec.

Maximum QPP Earnings – Québec:  The maximum amount of annual wages subject to Québec Pension Plan (QPP).

QPP Exemption – Québec:  The annual basic exemptions for QPP.

QPP Rate – Québec (%):  The employee contribution rate for QPP.

Employer QPP Rate – Québec (%):  The employer contribution rate for QPP.

Load 20XX Values:  Click this button to load the default values for the tax parameters. Each time you start a New Year, or see the message that there has been an update or there are new tax tables available, you should click the "Load 20xx Values" button to make sure you are using the latest tax parameters available.

[* Important - while we attempt to maintain up-to-date and accurate tax information, we cannot be responsible for changes or discrepancies in tax values. Please check the appropriate tax guide or publication if you are in doubt as to the accuracy of any tax value.]

Making Manual Changes to Contributions:

To manually edit/modify the **Contributions**, follow these steps:
Make the necessary changes and save.


If, as an employer, you have a reduced EI Employer rate, make sure to manually adjust the EI Employer Rate (%) to reflect your rate. Each time you click on "Load 20XX Values," you will need to manually change the EI Employer Rate (%), because this will cause all of the fields to revert to the default values.

# Provincial Data

The Provincial Data screen, under Company Setup, is used to edit Provincial WSIB Maximums and EHT/QHIP Rates.



Provincial Data Field Descriptions:

| | |
|---|---|
| Province: | Select the Province you need to view or edit, from the drop down list. |
| WSIB Maximum: | The maximum wages subject to WSIB (Workplace Safety and Insurance Board). |
| EHT/HSF Rate (%): | This rate pertains specifically to Ontario employers with annual payrolls over the $400,000.00 exemption ceiling, who must remit Employer's Health Tax (EHT) or to Québec employers who are subject to the Québec Health Services Fund Contributions (HSF). If this applies to your Company, enter your Company's rate. |
| Load Current: | Click this button to load the current WSIB values. This is based on the Payroll Year you are in. |

[* Important - While we attempt to maintain up-to-date and accurate tax information, we cannot be responsible for changes or discrepancies in tax values. Please check the appropriate tax guide or publication if you are in doubt as to the accuracy of any tax value.]

Making Manual Changes to Provincial Data:

To manually edit/modify the Provincial Data, follow these steps:
Select the Province from the list, Make the necessary changes and save.


Hour Categories

You can have up to seven Hour Categories for your Company; all of which can be used for any employee.

Once defined on the Hour Categories screen, under Company Setup, an Hour Category appears on the Enter Hours and Calculate Pay screens. Accrued Hour Categories, such as "Sick," are assigned to employees in the Employee Setup screen.

[* Note - The order of your Hour Categories is determined by the order in which they are put into the system. Once the Hour Categories have been entered, the only way to change the order would be to delete them and re-enter them in the order you want. Due to this, you should be very careful as you enter your Hour Categories; you might want to set them up according to their frequency of use, with the most frequently used Category appearing first in the list.

* Note - Hour Categories should not be modified once they have been used; either by entering them in the Employees YTD Tab or by cheque. This could adversely affect balances.]

Checkmark Canada Cloud Payroll comes with several pre-defined Hour Categories, including:

Regular
Overtime
Double
PayRate2
PayRate3
Sick
Vacation
Comp
Holiday

Click "Add From List" to see a complete list.

You can add a pre-defined Hour Category to your Company and use it as is or change it to fit your needs.
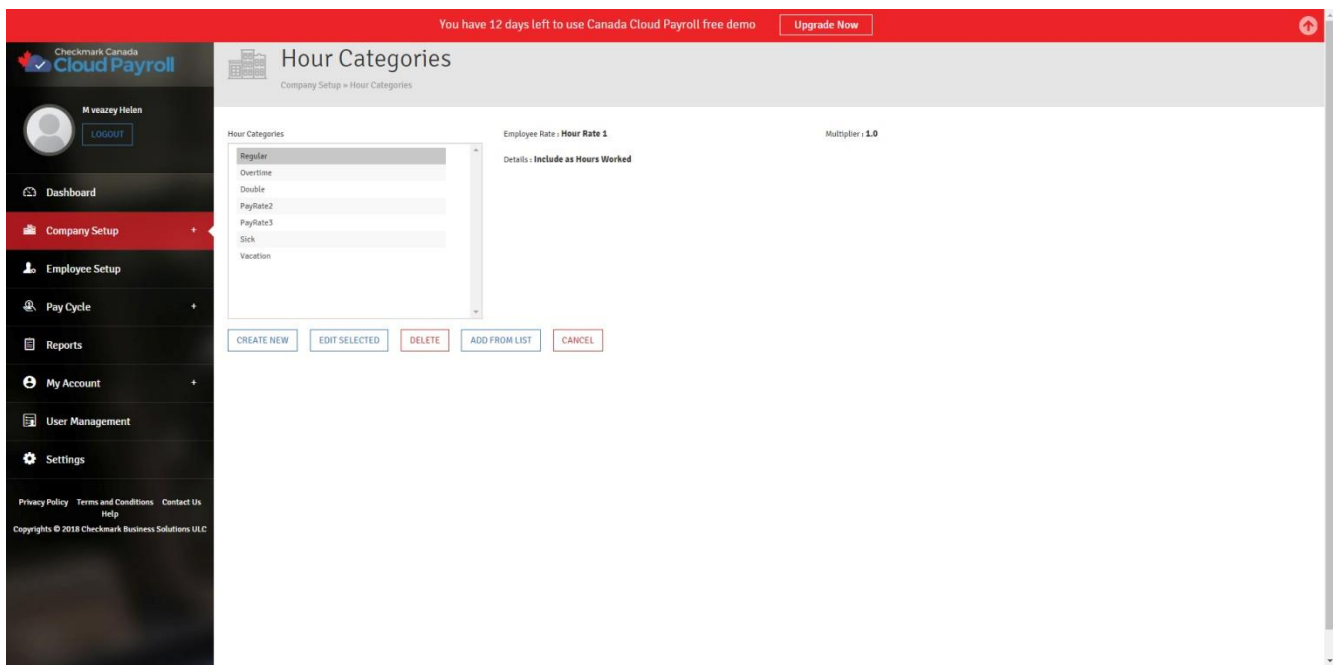
Adding a Pre-Defined Hour Category to your Company:

- To add a pre-defined Hour Category/Categories, follow these steps:
- Click "Add From List."
- Select the Hour Category/Categories you want.
- Click "Add" to add the Hour Category/Categories to your list of Hour Categories.

Creating a New Hour Category:

- If you need an Hour Category that is not included in the pre-defined list, you can use the "Create New" button.
- Once you are in the Create New Hour Category screen, you will see several fields:
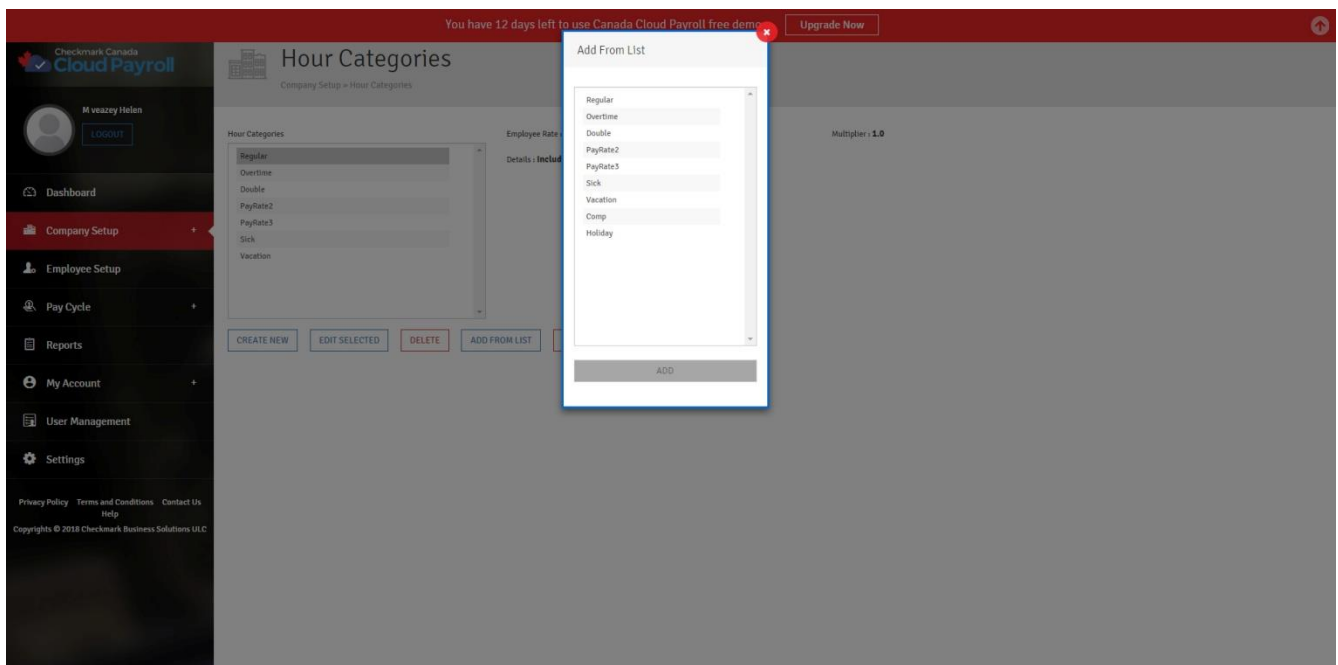
## Hour Category Field Descriptions:

| | |
|---|---|
| Hour Category: | Enter the name of the Hour Category. |
| Employee Rate: | Use this radio button to select which Hour Rate should be associated with the Hour Category. The actual Hour Rate amount depends on the Hour Rates set up for each employee on the Employee Setup screen. |
| Multiplier: | Use this radio button to select the Multiplier, which will be used to multiply the employee's hourly rates. |
| For Example: | If you set it up for "Overtime", with 1.5 Times Rate as the Multiplier for the Hour Category, then when one of your employees works overtime, you can put in the number of overtime hours into the "Overtime" Hour Category and it will automatically calculate the overtime dollar amount to be 1.5 times the employee's Hour Rate. So if the employee makes $8.00 an hour, it would calculate at $12.00 an hour for "Overtime" (1.5*8=12). |
| Include as Hours Worked: | Check this option if the hours in this Category should be included for Additional Income, Other Deduction, and/or Accrued Hour Category calculations based on Hours Worked. |
| Vacationable: | Check this option if the Hour Category should be included as income for calculating Vacation Pay. |
| Not Subject to EI: | Check this option for hours that are not eligible for Employment Insurance. Typically, you would not use this option unless you have employees who have Native Indian Status. |

To add a new Hour Category, follow these steps:

Click "Create New."
- Type in the name of the new category.
- Assign the appropriate Employee Rate and Multiplier.
- Check if you want it included as Hours Worked, Vacations, and/or Not Subject to EI, then save.

Editing/Modifying an Existing Hour Category:

You should not edit/modify an existing Hour Category if it has already been used on a cheque or any employees have amounts for it in their YTD Tab. To make a change to the Hour Category mid-year, stop assigning hours to the Category when you input hours. Then, create a New Category with the correct set up and use it moving forward.

To edit/modify an existing Hour Category, follow these steps:

- Select the Hour Category from the List of Hour Categories.
- Click the "Edit Selected" button.
- Make the necessary changes.
- Click "Update" to Save.

Deleting an Existing Hour Category:

As long as the Hour Category has not been used for any cheques, nor has any information been entered for it in the YTD Tab in the Employee Setup, you can delete it at any time.

To delete an Hour Category, follow these steps:
- Select the Hour Category from the List of Hour Categories.
- Click "Delete."
- Click "Yes, Delete It!" to confirm.

## Additional Income

This section shows you how to use the Additional Income screen, under Company Setup, to set up the types of income, such as mileage or tips, that your Company uses (in addition to salary or hourly wages) to calculate an employee's pay.

[* Note – you can assign Ledger Accounts to each Additional Income Category for transferring or posting Additional Income amounts to an accounting system.]

You can define up to 20 Additional Income Categories for your Company and assign up to four per employee.

Once defined on the Additional Income screen, the Additional Income Category appears on Income/Deductions, the Income Tab in Employee Setup, and the Calculate Pay screen.
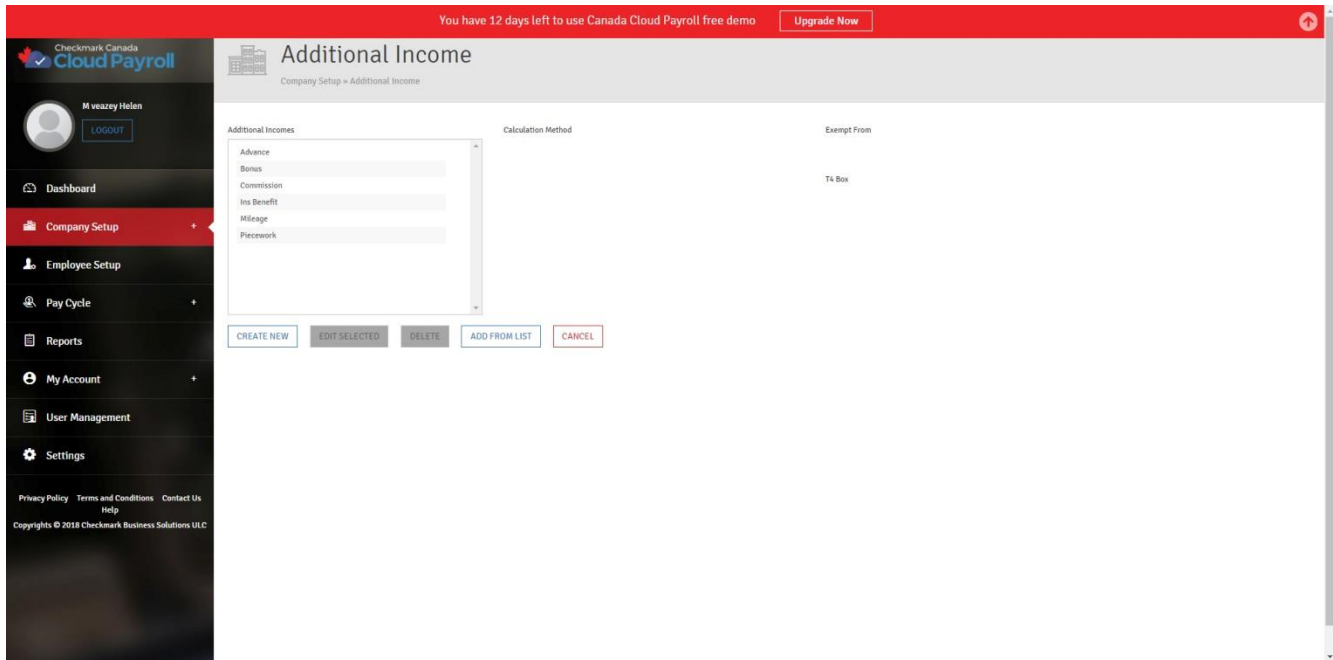


Checkmark Canada Cloud Payroll comes with several pre-defined Additional Income Categories, including:

> Advance
> Bonus
> Commission
> Ins Benefit
> Mileage
> Piecework

Click "Add From List" to see a complete list.

You can add a pre-defined Additional Income Category to your Company and use it as is or change it to fit your needs.

Adding a Pre-Defined Additional Income Category to your Company:

- To add a pre-defined Additional Income Category, follow these steps:
- Click "Add From List."
- Select the Additional Income/s you want.
- Click "Add" to add the Additional Income Category/Categories to your list of Additional Incomes.

Creating a New Additional Income Category:

If you need an Additional Income Category that is not included in the pre-defined list, click the "Create New" button.

You will see several fields once you are in the Create New Additional Income Category screen.
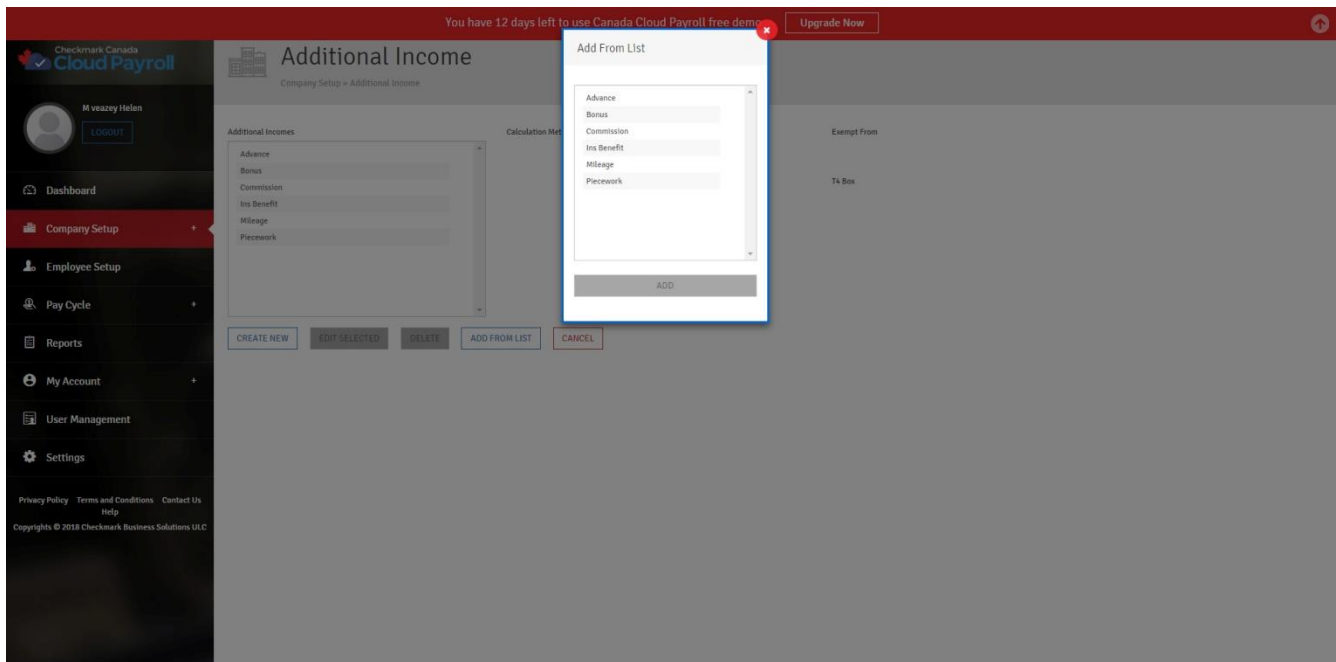


## Additional Income Field Descriptions:

Additional Income: Enter the name of the Additional Income Category.

Calculation Method: When entering the values for a Calculation Method, enter the values that your Company typically uses. You can always change the values when you assign the Additional Income Category to an employee.

Variable Amount: Use this Method when you want to enter a different amount each pay period on the Calculate Pay screen.

Fixed Amount: Use this Method to add a fixed amount to an employee's earnings each pay period or hour worked, depending upon what is selected from the drop down list.

Fixed % of Sales: Use this Method to calculate the income, such as commission, based on a fixed percentage of sales. Enter the percentage that an employee typically earns.

For Example: If an employee typically earns a 5% commission on sales, enter "5" in the edit box. Once you have assigned the Category to an employee, you can enter the amount of sales on the Calculate Pay screen.

Mileage Amount PerMile:    Enter the typical amount an employee receives for each mile driven.
For Example:              If an employee typically receives twenty-nine cents ($0.29) for each mile, enter "0.29" in the edit box. Once you have assigned the Category to an employee, you can enter the number of miles on the Calculate Pay screen.

Piecework:                Enter the typical rate that an employee receives for piecework. You can enter an amount as low as $0.001 and as high as $999.99. Once you have assigned the Category to an employee, you can enter the number of pieces on the Calculate Pay screen.

Exempt From:              By checking the appropriate options, you can classify an Additional Income Category as exempt from any combination of the following taxes:

                               Fed Tax
                               Prov Tax
                               EI
                               CPP
                               QPP
                               WSIB
                               EHT/HSF
                               QPIP

See the appropriate tax guide to determine the correct handling of individual income items.

Omit From Net:            Check this option if an Additional Income Category should not be included in the net pay.

## For Example:

An example of this type of income is the Life Insurance portion of a Benefits package that is a taxable benefit to the employee. Income defined with the Omit from Net option checked will not post to a Ledger Account.

Non-Vacationable:         Check this option if the amount for the Additional Income Category should be omitted from the Vacation Pay calculation.

Include in Wages ForDept/Job Posting: Check this option if you want the amount for the Additional Income Category included in the department or job distribution for your employee cheques.

T4 Box:                   Enter the appropriate T4 Box number the Additional Income's data should print in, if applicable.

To add a new Additional Income Category, follow these steps:

- Click "Create New."
- Type in the name of the new Additional Income Category.
- Assign the appropriate Calculation Method.
- Check the appropriate Exempt From options, if applicable.
- Check if you want it to be Omit From Net, Non-Vacationable, and/or Included in Wages for Dept/Job posting, if applicable.
- Enter the appropriate T4 Box, if applicable, and save.

Editing/Modifying an Existing Additional Income Category:

* Important - You should not change the way the Additional Income Category is taxed once the first cheque of the Year has been created, as that could adversely affect your reports and cause corruption. To make a change to the tax set up mid-year, stop the Category from being applied by simply modifying the amount/rate to zero. Then, create a New Category with the correct tax set up to use going forward.

To edit/modify an existing Additional Income Category, follow these steps:
- Select the Additional Income Category from the List of Additional Incomes.
- Click "Edit Selected."
- Make the necessary changes.
- Click "Update" to save.

Deleting an Existing Additional Income Category:

As long as the Additional Income Category has not been used for any cheques, and has not had any information entered for it in the YTD Tab in the Employee Setup, you can delete it at any time.

- To delete an existing Additional Income Category, follow these steps:
- Select the Additional Income Category from the List of Additional Incomes.
- Click "Delete."
- Click "Yes, Delete It!" to confirm.

## Other Deductions

This section shows you how to use the Other Deductions screen, under Company Setup, to setup deductions from employee's pay, other than taxes. Checkmark Canada Cloud Payroll allows you to add pre-defined Deductions, create new Deductions, modify existing Deductions, and/or delete Deductions not being used in the Deduction list. Pre-defined Deductions can be modified once they are in the Deduction list.

Once defined on the Other Deductions screen, the Other Deduction Category appears on the Income/Deductions, the Deduction Tab in Employee Setup, and the Calculate Pay screen.

You can define up to 30 Other Deduction Categories for your Company and assign up to eight per employee.

Checkmark Canada Cloud Payroll comes with the following pre-defined Other Deduction Categories:

Credit Union
Loan
Medical Ins

You can add a pre-defined Other Deduction Category to your Company and then use it as is or change it to fit your needs.



Adding a Pre-Defined Other Deduction Category to your Company:

- To add a pre-defined Other Deduction Category, follow these steps:
- Click "Add From List."
- Select the Other Deduction Category/Categories you want.
- Click "Add."

Creating a New Other Deduction Category:
If you need a new Other Deduction Category that is not included in the pre-defined list, click the "Create New" button.
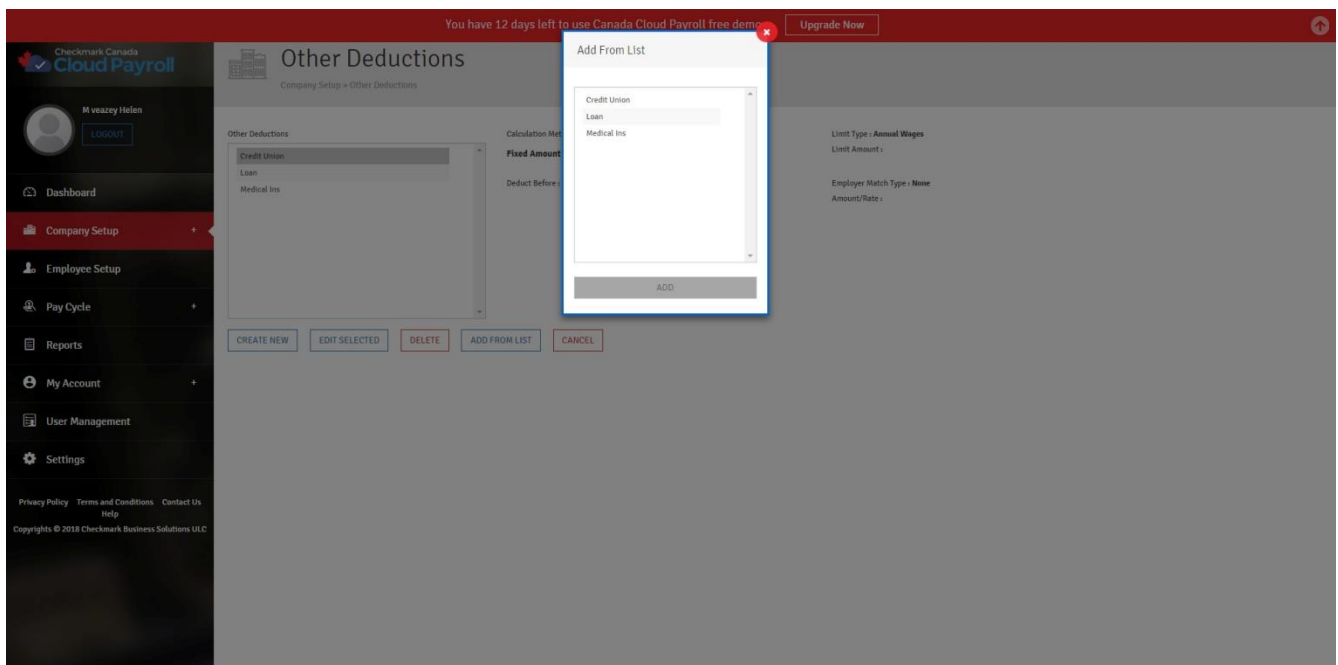
Once you are in the Create New Other Deduction Category screen, you will see several fields.

## Other Deductions Field Descriptions:

| | |
|---|---|
| Other Deduction: | Enter the name of the Other Deduction Category. |
| Calculation Method: | When entering the values for a Calculation Method, enter the values that your Company typically uses. You can always change the value when you assign the Other Deduction Category to an employee. |
| Variable Amount: | Use this Method when you want to enter a different amount each pay period on the Calculate Pay screen. |
| Fixed Amount: | Use this Method to deduct a fixed amount from an employee's earnings each pay period, hour worked, or first cheque of the month, depending upon what is selected from the drop down list. |
| Fixed %: | Use this Method to deduct a fixed percentage of the employee's Total Wages, Federal Wages, or Provincial Wages, depending upon what is selected from the drop down list. Enter the percentage that is typically deducted, you can modify it per employee in Employee Setup. |
| Limit Type: | This will tell the Other Deduction Category when to stop deducting from the employee's pay. You can set the Limit Type for deductions defined as Fixed Amount or Fixed %. You can choose a deduction Limit Type of Annual Wages, Loan Amount, Annual Deduction Amount, or Pay Period. |
| Annual Wages: | If "Annual Wages" is selected, the deduction will be calculated until the annual wages exceed the entered Limit. |

| Loan Amount: | "Loan Amount" is selected, the deduction will be calculated until the amount of the loan is reached. |
|---|---|
| Annual Deduction Amount: | If "Annual Deduction Amount" is selected, the deduction will be calculated until the amount is deducted. |
| Pay Period: | If "Pay Period" is selected, the deduction will be calculated until the pay periods deduction amount exceeds the entered amount. |
| Amount: | Enter the amount of the Limit |
| Employer Match Type: | You can set the Employer Match Type for a deduction by selecting either "Fixed Amount" or "Fixed %", from the drop down list. |
| Amount/Rate: | Enter the amount or rate for the Employer Match. If you have "Fixed Amount" selected as the Employer Match Type, the amount you enter in the Amount/Rate edit box is treated as a dollar amount. If you have "Fixed %" selected as the Employer Match Type, the amount you enter in the Amount/Rate edit box is treated as a percentage. |
| Deduct Before: | By checking the appropriate options, a deduction will be deducted before the following taxes: |

Tax (Federal and Provincial withholding)

EI
CPP
QPP
QPIP

See the appropriate tax guide to determine the correct handling of individual deduction items.

To add a new Other Deduction Category, follow these steps:
- Click "Create New."
- Type in the name of the new Other Deduction Category.
- Assign the appropriate calculation method.
- Check the appropriate deduct before options, if applicable.
- Assign the appropriate Employer Match Type and Amount/Rate, if applicable, and save.

Editing/Modifying an Existing Other Deduction Category:

[* Important - You should not change the way an Other Deduction Category is taxed once the first cheque of the Year has been created, as that could adversely affect your reports and cause corruption. To make a change to the tax set up mid-year, stop the category from being applied by simply modifying the amount/rate to zero. Then create a New Category with the correct tax setup to use moving forward.]

To edit/modify an existing Other Deduction Category, follow these steps:

- Select the Other Deduction from the list of Other Deductions.
- Click on "Edit Selected."
- Make the necessary changes.
- Click on "Update" to save.

Deleting an Existing Other Deduction Category:

As long as the Other Deduction Category has not been used for any cheques and has not had any information entered for it in the YTD Tab in the Employee Setup, you can delete it at any time.

To delete an existing Other Deduction Category, follow these steps:

- Select the Other Deduction Category from the List of Other Deductions.
- Click "Delete."
- Click "Yes, Delete it!" to confirm.

## Ledger Accounts

This section shows you how to use the Ledger Accounts screen, under Company Setup, to setup Ledger Accounts that allow you to post your payroll to an accounting program.

If you will not be posting payroll to an accounting program, you do not need to set up Ledger Accounts.

However, you might find Ledger Accounts useful for Posting Summary reports, which can be used to manually enter your payroll data into an accounting system.

Assigning Posting Accounts in Ledger Accounts:

You can assign accounts to the following Payroll Categories:
Additional Income
Deduction Match Expense
Departments
Employee Cheques
Employer Taxes
Jobs
Other Deductions
WSIB/EHT

From the Ledger Account screen, click on the different categories in the drop-down menu to see the different account options.

Ledger Accounts Field Descriptions:

| | |
|---|---|
| Additional Income: | The Additional Income Categories that appear in the list are those that were set up on the Additional Income screen. You can assign an account to each Category. |
| Deductions Match Expense: | An expense account for the employer deduction expense for deductions set up with an Employer Match amount or percentage. |
| Departments: | Use this option if you distribute employee wages/hours to Departments. |
| Wage: | An expense account for department wages. |
| Tax: | An expense account for department taxes for the employer portions of EI, CPP/QPP, QPIP, etc. |
| Employee Cheques: | |
| Payroll Cash Account: | The cash account from which cheques are paid. |
| Wages Withheld: | An expense account (in the 5000-8999 range) for gross wages. This is the default account. Accounts set up for Departments will override this account. |
| EI Withheld: | A liability account (in the 2000 range) for Employment Insurance Premiums deducted. |
| CPP Withheld: | A liability account (in the 2000 range) for Canada Pension Plan Contributions withheld. |

QPP Withheld:               A liability account (in the 2000 range) for Québec Pension Plan Contributions withheld.

Income Tax Withheld:        A liability account (in the 2000 range) for employee Income Tax deducted.

Québec Tax Withheld:        A liability account (in the 2000 range) for Québec Income Tax deducted.

QPIP Withheld:              A liability account (in the 2000 range) for employee Québec Parental Insurance Plan Premiums deducted.

Employer Taxes:
Employer Taxes Expenses:    An expense account (in the 5000-8999 range) for the total of the employer's portion of EI, CPP, and/or QPP.

EI Payable:                 A liability account for Employment Insurance Premiums. Usually this is the same account that is set up in the Employee Cheques section.

CPP Payable:                A liability account for Canada Pension Plan. Usually this is the same account that is set up in the Employee Cheques section.

QPP Payable:                A liability account for Québec Pension Plan. Usually this is the same account that is set up in the Employee Cheques section.

QPIP Payable:               A liability account for Québec Parental Insurance Plan. Usually this is the same account that is set up in the Employee Cheques section.

Jobs:                       Use this option if you distribute employee wages to Jobs in Checkmark MultiLedger or any other accounting software.

Job Wage:                   An expense account for Job wages.

Job Tax:                    An expense account for Job taxes for the employer portions of EI, CPP, and/or QPP.

Other Deductions:   The Other Deductions Categories that appear in the list are those that were set up on the Other Deductions screen. You can assign an account to each Category.

WSIB/EHT:       Enter an expense account (in the 5000-8999 range) and liability account (in the 2000 range) for each appropriate Province for WSIB (Workplace Safety and Insurance Board) and EHT/QHIP (Employer Health Tax/Québec Health Insurance Premium).

To assign a Posting Account Number for any item, follow these steps:

- Select the Payroll Category.
- Click the Edit button under Action for the item you want to add an Account Number to.
- Type in the Account Number.
- Click the blue check icon to save.
- Clicking on the red "X" icon will cancel the changes.

Editing/Modifying a Posting Account:

You can edit/modify an Existing Posting Account Number at any time.

To edit/modify a Posting Account Number, follow these steps:
- Select the Payroll Category.
- Click the Edit button under Action for the item you want to modify.
- Make the necessary changes.
- Click the blue check icon to save.
- Clicking on the red "X" icon will cancel the changes.

Deleting a Posting Account Number:

You can delete an existing Posting Account Number at any time.

To delete an existing Posting Account Number, follow these steps:
- Select the Payroll Category.
- Click the Edit button under Action for the item you want to delete.
- Remove the Account Number.
- Click the blue check icon to save.
- Clicking on the red "X" icon will cancel the changes and the account number will not be removed.

# Chapter IV

# Setting up Employees

This chapter will walk you through how to set up your Employees in Checkmark Canada Cloud Payroll. It will also cover how to Import and Export employees' information.

Under Employee Setup, you will find these sections:

- Creating Employees
- Viewing and Editing/ Modifying Employees
- Deleting Employees
- Importing Employees
- Exporting Employees

## Creating a New Employee

Checkmark Canada Cloud Payroll allows you to have an unlimited number of employees and will only accept valid Social Insurance Numbers and Canadian Addresses.

The Items you assign to individual employees need to have been setup previously in the prior sections. You will need to setup, for example, Additional Incomes, Deductions, etc., prior to setting up the employees.

To create a New Employee, click "Create Employee" and a screen will appear to enter all of your employee's information. The Employee Setup screen has different Tabs for different types of information. You will need to enter the Personal Info before you can move on to the other Tabs. This section will take you through how to setup each Tab.

## Personal Info Tab:

Use this Tab to enter information such as the employee's name, address, SIN, employee #, and default Department



## Personal Information Field Descriptions:

First Name:            Enter the first name of your employee.

Last Name:             Enter the last name of your employee.

Street:                Enter the employee's mailing address (the number and the street name and Suffix). This will appear on the employee's cheque stubs and T4s/RL1s.

City:                  Enter the name of the City for your employee's mailing address.

Province:              Select your employee's Province, from the dropdown list.

SIN:                   Enter your employee's SIN (Social Insurance Number).

Birth Date:            Enter your employee's birth date.

Postal Code:           Enter your employees postal Code

[Note*: Enter the employee's information (the mandatory fields are marked with a red asterisk) and save. Once the above information saved other information can be given in "Update Employee"]

Phone Number:          Enter your employee's phone number.

Email Address:         Enter your employee's email address

Department:            Assign a default Department to the employee, from the drop down list, if
                       applicable. The Department assigned here will determine which Department
                       Heading the employee will appear under in lists and reports.

Job Title:             Assign a default Job Title to the employee, from the drop down list, if applicable.
Employee #:            Here you can assign Employee Numbers which can be alphanumeric. The
                       number will print on the cheque stub.

Marital Status:        Select the marital status of the employee, from the drop down list.
Employment Type:       Select the employee's Employment Type, from the drop down list.
In-active
(Delete at Close Year): If you check this box, it will inactivate the employee, then the employee will be
                       Deleted when you start the next Payroll Year.  This is typically used for
                       Terminated employees. Once an employee has been marked as in-   active, they
                       will show in red on the Employee List.

Direct Deposit:        If the employee has opted for direct deposit payment then click on the radio button
                       for Direct Deposit and provide the following information:

Account Holder:        Enter the employee's Bank Account Holder's name.

Account Number:    Enter the employee's Bank Account Number.

Routing Number:    Enter the employee's Bank Routing Number.

Account Type:           Select the type of account, from the drop down list.


* **Note** - You will still be able to print reports for inactive employees before the year is closed, but you
will be unable to calculate or create cheques for them. When the year is closed, all of the inactive
employees will automatically be deleted from the Company data.

## Wages Tab:

Use this Tab to set up wage information, such as salary or hourly rates, pay frequency/how many pay periods per year, last raise date, and Vacation Pay information.



## Wages Tab Field Descriptions:

Salary per Pay Period:           If the employee is salaried, enter the amount to be paid per pay period.

Hour Rate 1, 2, 3, 4, and 5:    If the employee is hourly (paid per hour), you can enter up to four different hourly pay rates. Hour Categories such as "Overtime" or "Double-time" are set up on the Hour Categories screen.

Pay Periods Per Year:           Select the pay frequency, or how often the employee will be paid.

Duration:                       This field will populate the number of pay periods per year based off of the pay frequency selected for Pay Periods per Year.

Normal Hours per Pay Period:  Enter the number of hours a salaried employee is expected to work in each pay period. The hours are used for EI reports when issuing Record of Employment.

Hire Date:                      Enter the date the employee was hired.

Last Raise Date:                Enter the date that the employee last received a raise.

Termination Date: Enter the date that the employee's employment ended.

Retain Vacation Pay: Check this box if the Vacation Pay should be accrued for a later pay out. If you do not check this box, the Vacation Pay will be paid on each pay cheque.

Vacation Pay Vacationable: Check this box if the Vacation Pay should be vacationable.

Vacation %: Enter the percentage of Vacation Pay the employee earns. For Example: If the employee earns 5% Pay, enter "5".

Vacation Pay: This will show the current amount of Vacation Pay accrued by the employee to date based on the Vacation % entered above. If you start using Canada Cloud Payroll mid-year, enter the accumulated amount owed to the employee so far this year.

WSIB %: Enter the percentage for Workplace Safety & Insurance Board for the employee.

Comments: This is a place for any notes about the employee, such as emergency contacts, when they received raises, etc.

## Taxes Tab:

Use this Tab to set up an employee's withholdings and tax deductions. The information entered on this Tab will determine how the employee's taxes are calculated.

## Taxes Tab Field Descriptions:

1. Province:                Select the Province for the employee from drop-down list.

2. Tax Exempt:              Check this box if the employee is exempt from Income Tax
                           (Provincial and Federal).

3. EI Exempt:              Check this box if the employee is exempt from EI.

4. C/QPP Exempt:           Check this box if the employee is exempt from CPP/QPP.

5. QPIP Exempt:            Check this box if the employee is exempt from QPIP, for
                           Québec Employees only.

6. Province Claim Code:    Select the Province Claim Code for the employee from
                           Drop down list, except the Québec employee.

7. Province Claim Amount:  Once you select the Province Claim Code above, these fields will
                           automatically update.

8. Federal Claim Code:     Select the Federal Claim Code, from the drop down list for the employee.
In                         this list you can find Claim Codes 1 through 10.

9. Federal Claim Amount:   Once you select the Federal Claim Code above, this field will
                           automatically update.

10. Additional W/H:        Enter the dollar amount of additional Income Tax Withholding per pay
                           period for the employee, if applicable.

11. Additional Deductions: Enter the annual Additional Deduction Amount for the employee, if
                           applicable.

12. Tax Credit:            Enter the annual Tax Credit amount for the employee, if applicable.

13. Area Deductions:       Enter the deduction amount for living in a prescribed area, if applicable.

14. Pension Adjustments:   Enter the "deemed" value of the employee's Pension Benefits that have
                           accrued in the year within a Registered Pension Plan and/or Deferred
                           Profit Sharing Plan, if applicable.

15. TD1X Remuneration:     Enter the remuneration amount on the TD1X form for commission
                           remunerated employees.

16. TD1X Expense:          Enter the expense amount on the TD1X form commission remunerated
                           employees.

17. Additional P/Q W/H:    Enter the dollar amount of additional Québec Withholding per pay

period for the employee, if applicable.

18. PQ-TP-1015.03-V Deductions: Enter the amount from line 19 on the PQ-TP-1015.03-V Form, if applicable and only for Québec Employees.

19. PQ-TP-1015.03-V Claims: This amount will auto fill based on the amount for Claim Code 1 for Québec, for the current payroll year.

20. T4 Box 29:                    Enter the appropriate employment code for the employee, if applicable.

21. T4 Box 73:                    Enter the number of days the employee worked outside of Canada during the year, if applicable.

22. Labour Sponsored Venture Federal Credit: Enter the tax credit, if the takes the Labour Sponsored Venture Federal Deduction.

23. Labour Sponsored Venture Province Credit: Enter the tax credit, if the employee takes the Labour Sponsored Venture Provincial Credit Deduction.

## Income/Deductions Tab:

Use this Tab to assign Additional Incomes and Other Deductions to the employee. Before an Additional Income Category or Other Deduction Category can be assigned to an employee, it must have been set up on the Additional Income or Other Deductions screens. See "Setting up Additional Income Categories" for more details.

Once you click on the Income and Deductions Tab, you will see two options: "Income" and "Deductions."

### Income:

Use this Tab to assign up to four Additional Income Categories to the employee.

Assigning an Additional Income Category:

To set up the Employee's Income Tab, follow these steps:
- Click the Income Tab in the Income/Deductions Tab.
- Select the appropriate Additional Income Category from the drop-down list.
- Press "Assign" to assign it to the employee.

Editing/Modifying an Additional Income Category for the employee:

Once you have assigned an Additional Income Category to an employee, you can edit/modify the Rate/Amount, as long as it is not setup as "Variable." This amount is entered when you calculate the employee's pay on the Calculate Pay screen.

To edit/modify an Additional Income Category that has been assigned to the employee, follow these steps:
- Click the Edit icon under Action for the Additional Income Category.
- Change the Rate/Amount.
- Click the blue check icon to save.

Deleting an Additional Income Category from an employee:

You can remove an Additional Income Category from an employee as long as the employee does not have any income associated with it. The only time to actually delete/remove an Additional Income Category is after you have started a new year, but before you have created a payroll in the new year. To stop the Category from being applied mid-year, simply modify the Amount/Rate to zero in the

Employee Setup.

To delete an Additional Income Category that has been assigned to the employee, follow these steps:
- Click the Delete icon under Action for the Additional Income.
- Click "Yes, Delete it!" to confirm.

## Deductions:

Use this Tab to assign up to eight Other Deduction Categories to the employee.



Assigning an Other Deduction Category:

## To set up the Employee Deductions Tab, follow these steps:
- Click the Deduction Tab in the Income/Deductions Tab.
- Select the appropriate Other Deduction Category from the drop-down list.
- Press "Assign" to assign it to the employee.

Editing/Modifying an Other Deduction Category for the employee:

Once you have assigned the Other Deduction Category to an employee, you can edit/modify the Rate/Amount, Limit, and Match as long as it is not setup as "Variable." This amount is entered when you calculate the employee's pay on the calculate Pay Screen.

To edit/modify an Other Deduction Category that has been assigned to the employee, follow these

steps:

- Click the Edit icon under Action for the Other Deduction.
- Make the necessary changes.
- Click the blue check icon to save.

Deleting an Other Deduction Category from an employee:

You can remove the Other Deduction Category from an employee as long as the employee does not have any cheques or YTD totals associated with it. The only time to actually delete/remove an Other Deduction Category is after you have started a new year, but before you have created a payroll in the new year. To stop the Category from being applied mid-year, simply modify the Amount/Rate and the Match (if applicable) to zero in the Employee Setup.

To delete an Other Deduction Category that has been assigned to the employee, follow these steps:

- Click the Delete icon under Action for the Other Deduction Category.
- Click "Yes, Delete it!" to confirm.

## Accrued Hours Tab:

Use this Tab to setup Accrued Hour Categories for the employee. Accrued Hours are Hour Categories where you track the hours earned and used for each employee, such as "Sick" or "Comp." This is in addition to the required Vacation Pay. Before an Accrued Hour Category can be added to the employee, it must have been set up on the Hour Categories screen under Company Setup. For details, see "Setting up Hour Categories" on page.

## Accrued Hours Tab Field Descriptions:

Accrual Hours:        Select the Hour Category, from the drop down list, for the employee.  The drop-down list will show the Hour Categories you have setup under Hour Categories Setup.

Earn Hours:        Enter the number of hours the employee should accrue/receive based on the frequency selected in the "Per" drop down list.

Per:        Select the accrual frequency for the employee from following options:

Month:        If you choose "Month", the employee will receive the number of accrued hours in the edit box on the first cheque of month. The employee will start receiving the accrued hours on the first cheque after the date entered in the "Start Receiving on" box. If nothing is entered, the employee will start the accrued hours on the next cheque.

Year:        If you choose "Year", the employee will receive the number of accrued hours entered in the edit box at one time; employee will start receiving the accrued hours on the pay cheque after the date entered in the "Start Receiving on" box. A Start Receiving on date is required for the "Year" option.

Hour:        If you choose "Hour", the employee will receive the number of hours entered in the edit box per hour worked. You can also limit the maximum hours that are used to determine the earned hours for each pay period. The employee will start receiving the accrued hours on the first cheque dated after the date in "Start Receiving on" box. If nothing is entered, the employee start receiving the accrued hours on the next cheque.

* Note - If you choose "Hour" as the accrual Method, you should select the "Use in Calculation Based on Hours Worked" option in the Hour Categories screen for each Hour Category that should be included in the accrual. For example, let's say that you have two Hour Categories defined as "Regular" and "Sick," and you would like "Sick" to accrue at a rate of 0.25 hours for every "Regular" hour worked. You should check the "Use in Calculations Based on Hours Worked" option for the Hour Category "Regular" in order for the "Regular" hours to be included in the "Sick" accrual calculation.

Pay Period:        If you choose "Pay Period", the employee will receive the number of accrued hours entered in the edit box each cheque. The employee will start receiving the accrued hours on the first cheque after the date entered in "Start Receiving on". If no date is entered, the employee will start receiving the accrued hours on the next cheque.

Up to Hours Worked Per Pay Period:  Enter the maximum hours per pay period an employee can accrue hours on. This option is only available if you choose "Hour" from the "Per" drop down.

For Example:          If you only want the employee to accrue hours on the first 40 hours they work within a pay period, you would enter "40" into this box.

Hours Accumulated:   Enter the number of hours the employee has already accumulated. This field will change based on the hours accrued with each pay cheque.

Start Receiving on:   Enter the date the employee should start accruing hours.

Earn a Maximum of Hours:  Check this option and enter the limit for the number of accrued hours that an employee can accumulate.

## How to Setup Accrued Hour Categories for Employees:

You can assign a maximum of three Accrued Hour Categories to each employee.



## To assign Accrued Hour Categories to the employee, follow these steps:

- Click "ADD NEW."
- Select the appropriate Hour Category from the drop-down list.
- Fill out the necessary information.
- Click "Assign."

## Editing/Modifying an Accrued Hour Category for the employee:

Once you have assigned an Accrued Hour Category to an employee, you can edit/modify the set up at any time.

To edit/modify an Accrued Hour Category that has been assigned to the employee, follow these steps:
Click the Edit icon under Action for the Accrued Hour Category.
Make the necessary changes.
Press "Update" to save.

## Deleting an Accrued Hour Category from an employee:

You can remove an Accrued Hour Category from an employee at any time. If you remove/delete an Accrued Hour Category that has Hours Accumulated, it will remove them as well.

To delete an Accrued Hour Category that has been assigned to the employee, follow these steps:
- Click the Delete icon under Action for the Accrued Hour Category.
- Click "Yes, Delete it!" to confirm.

## YTD Tab:

Use this Tab to enter or view an employee's Year-To-Date (YTD) Balances for wages, Additional Income, Other Deductions, and taxes. YTD Balances affect the annual reports and are needed for accurate calculations of taxes with an annual wage limit, such as CPP/QPP, EI, and QPIP.

Depending on when you process your first payroll with Checkmark Canada Cloud Payroll, you might need to set up YTD Balances for your employees.

## You do not need to enter YTD Balances if:

The first payroll you processed with Checkmark Canada Cloud Payroll is the first payroll of the year.
You are using Checkmark Canada Cloud Payroll to process the first payroll for a new business.
You are not using Checkmark Canada Cloud Payroll for keeping employee records.

By carefully setting up your employees' YTD Balances and entering after-the-fact paycheques from the current month, you can help ensure accurate records for reports, such as T4s/RL1s. Here is a brief overview of what to do:

1. Enter the starting balances as of the last completed month in the current year.
   - For example: If you are going to process your first payroll with Checkmark Canada Cloud Payroll on August 16th, enter the starting balances as of July 31st

2. Record calculations for the after-the-fact paycheques that were issued in the current month.
   - After-the-fact-cheques are cheques that were issued prior to using Checkmark Canadian Payroll Cloud.
   - Again, if you are going to process your first payroll with Checkmark Canada Cloud Payroll on August 16th, enter the after-the-fact paycheques issued between August 1st and August 15th.
   - For details, see "Calculating After-the-Fact Paycheques" on page 73.
   - If you are going to process your first payroll with Checkmark Canada Cloud Payroll at the beginning of a month, you do not have any after-the-fact paycheques in the current month.
3. Create the after-the-fact paycheques in Checkmark Canada Cloud Payroll.
   - Cheque calculations do not affect an employee's record until you create the cheque in Checkmark Canadian Payroll Cloud.
   - For details, see "Creating Cheques" on page 75.



YTD Tab Field Descriptions:

Wages:            This section contains the information for the wages, either salary or hourly, the employee has earned YTD.

Salary:           The employee's year-to-date salary amount.

Hours:            This will show the total number of hours the employee has worked year-to-date.

Amount:           This will show the total dollar amount an hourly has earned year-to-date.

Hours Detail:     This button will provide a breakdown of an hourly year-to-date hours and amounts.

| | |
|---|---|
| Hours: | The year-to-date hours for this employee for each Category. The Hour Categories listed here are the ones setup in the Hour Categories Setup screen. |
| Amount: | The year-to-date dollar amount the employee has earned each Hour Category. |
| EI Wages: | Enter the amount of EI Wages year-to-date for the employee. |
| WSIB Wages: | Enter the amount of WSIB Wages year-to-date for the employee. |
| Additional Income: | The Categories listed here, besides Vacation, will be the ones that you have setup in Additional Income Setup and have assigned to the employee. |
| Vacation: | The dollar amount of Vacation Pay the employee has been paid year-to-date. |
| Taxes: | This section contains the amounts for the taxes that have been withheld from the employee year-to-date. |
| EI: | The amount of EI that has been withheld from the employee's pay so far this year. |
| QPIP: | The amount of QPIP that has been withheld from the employee's pay so far this year. |
| CPP: | The amount of CPP that has been withheld from the employee's pay so far this year. |
| QPP: | The amount of QPP that has been withheld from the employee's pay so far this year. |
| Income Tax: | The amount of Federal and Provincial (for all except Québec) Income Tax that has been withheld from the employee's pay so far this year. |
| Québec Tax: | The amount of Québec Income Tax that has been withheld from the employee's pay so far this year. |
| Other Deductions: | The Categories listed here will be the ones that you have setup in Other Deductions Setup and have assigned to the employee. |
| Net Pay: | The Net Pay that the employee has received so far this year. |

Entering YTD Balances:

**To enter YTD Balances for the employee, follow these steps:**
1. Enter the employee's year-to-date salary as of the last completed month into the Salary box (for salaried employees).
2. Click "Hours Detail" and enter the year-to-date hours and amounts for each Hour Category as of the last completed month (for hourly employees).
- Note - If you do not want to enter the year-to-date amounts for each Hour Category, you can enter the total dollar amount in the Amount edit box.
3. Click "Save" to close the Hours Detail screen and update the Hours and Amount fields.
- Note - If you press "Cancel," it will close out of the Hour Detail screen without saving your changes.
4. Enter the year-to-date amounts for the Additional Income Categories and Other Deduction Categories.
5. Enter the year-to-date amounts for each Tax Category.
6. The Net amount will calculate for you.
7. Click "Save" to update the employee's YTD Balances.

**Editing/Modifying YTD Balances for the employee:**

You can edit/modify the YTD Balances for an employee at any time. Keep in mind, if you modify the YTD Balances, you will not have a paper trail if you get audited.

**To edit/modify the YTD Balance for the employee, follow these steps**:
Make the necessary changes and save.

**Deleting/Removing YTD Balances from the employee:**

You can remove YTD Balances from an employee at any time. Keep in mind, YTD Balances are needed to generate a T4/RL1 at the end of the year, and if you get audited, you will need to be able to show why you removed the YTD Balances.

To remove the YTD Balances from the employee, follow these steps:
1. Remove the amounts from the necessary fields and save.

## Viewing and Editing/Modifying an Employee

You can view and/or edit/modify the information and details for an employee at any time. If an employee is showing in the List of Employees as "red," it means that the employee has been marked as Inactive. If an employee is showing in the List of Employees as "blue," it means there are missing details or information, and the employee must be modified.

**To view and/or edit/modify an Employee follow these steps:**

1. Check the boxes for the Tabs you want.
2. Click on the employee name.
3. Make the necessary changes and save.
   - **Note** – While viewing or editing an employee, you can move to another employee by clicking on their name.

## Deleting an Employee

You can delete an employee at any time, as long as they do not have any YTD totals and no cheques have been made for them. If you have already entered YTD totals or processed payrolls for the employee, you will need to mark them as "Inactive," and then they will be deleted when you start the next Payroll Year.
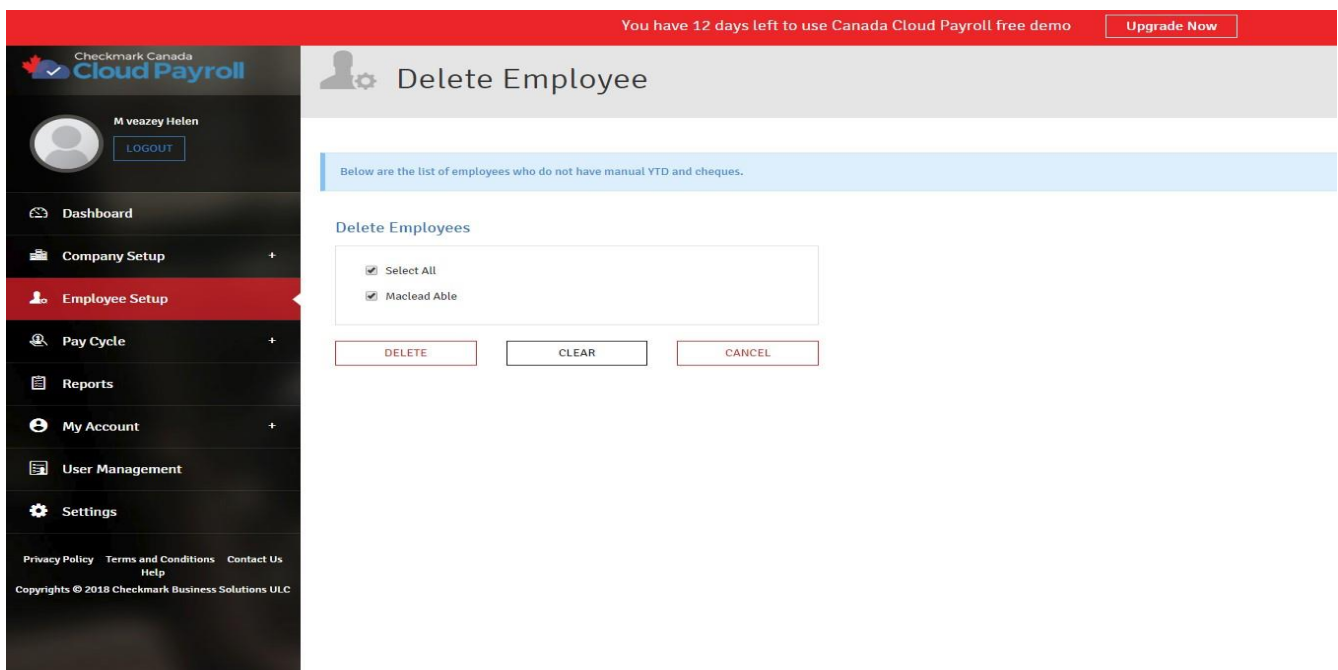


### To delete an Employee, follow these steps:
1. Click "Delete Employees."
2. Check the box next to the employees you want to delete.
3. Click "Delete."
4. Click "OK" on the screen that comes up to tell you the deletion was successful.

Importing and Exporting Employees

This section shows you how to Import and Export Employee information. For information on importing hours, see "Import Hours Tab" on page 60.

## Importing Employee Information:

You can Import Employee information into your Checkmark Canada Cloud Payroll Company.



Please note that not all of the Employee Setup Fields are available for import. You can only import the following fields:

| | | |
|---|---|---|
| First Name | Salary per Pay Period | CPP YTD |
| Last Name | Hour Rate 1-4 | QPP YTD |
| Street | Pay Periods Per Year Choice | Income Tax YTD |
| City | Hire Date | Quebec Tax YTD |
| Province | Last Raise Date | Job Title |
| Postal Code | Termination Date | Marital Status |
| Phone Number | Province Choice | Employment Type |
| Email Address | Salary YTD | In- Active Selection |
| SIN | EI Wages YTD | Normal Hours per Pay |
| Birth Date | WSIB Wages YTD | Vacation YTD |
| Department Choice | EI YTD | |
| Employee Number | QPIP YTD | |

After you import your employee, you will need to go back through and verify that all of the information is correct, as well as the Fields that are not available for importing.

Instructions for Importing Employees:

The employee information that you import must be in a .CSV (Comma Separated Value) or a Tab Delimited Text File (.TXT).
If it is a Tab Delimited Text File, you need to make sure there is a tab between each Field and a return after each employee.
The Import File needs to have Field Headers, which need to match the Field Names in Checkmark Canada Cloud Payroll.
The Import File Fields need to be in the same order as the Fields on Checkmark Canada Cloud Payroll.
The mandatory Import Fields have been selected by default.
Phone Numbers should be in the format of "XXX-XXX-XXXX" or "XXXXXXXXXX."
The SIN should be in the format of 'XXX-XXX-XXX" or "XXXXXXXXX."
The Birth Date should be in the format of MM-DD-YYYY.
Pay Period per Year choices need to be input as follows:
D = Daily (240 Pay Periods Per Year).
W = Weekly (52 Pay Periods Per Year).
B = Bi-Weekly (26 Pay Periods Per Year).
S = Semi-Monthly (24 Pay Periods Per Year).
M = Monthly (12 Pay Periods Per Year).
Q= Quarterly (04 Pay Periods Per Year).
H= Semi-Annually (02 Pay Periods Per Year).
A= Annually ( 01 Pay Periods Per Year).
The Email Address cannot be more than 30 characters in length.

How to Import Employee Information:


## To Import Employees, follow these steps:
1. Click "Import Employees" on the Employee Setup screen.
2. Click on the checkbox next to each Field you want to import.
3. Click "Choose File" on the bottom of the screen.
4. Select the Import File (either a Comma Separated Value (.CSV) or a Tab Delimited Text File (.TXT)).
5. Click "Open" after you have selected the File.
6. Click "Import."

You will then be redirected back to the main Employee Setup screen, and you will be able to view the imported employees on your Employee List.

If the import fails, you will see a message about what caused the failure at the top of the import screen.
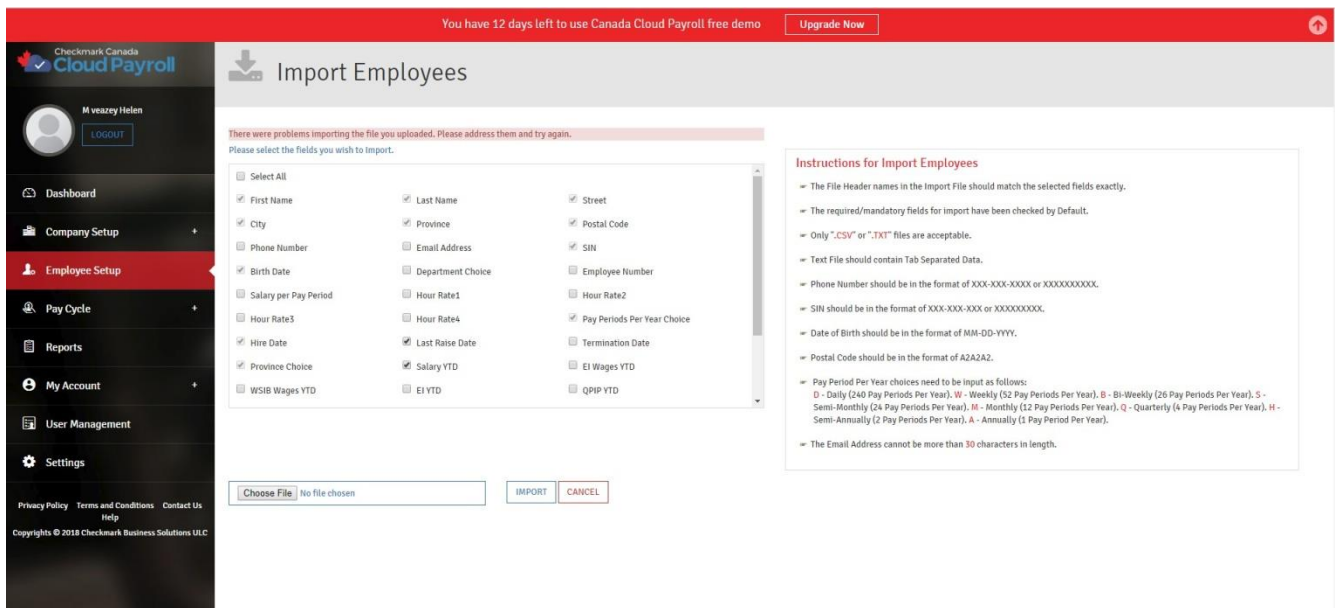
There are multiple reasons why an import file is as an incorrect File Format.

- The Import File is in an incorrect File Format.

To resolve this, make sure the Import File is in the proper File Format; either a Comma Separated Value (.CSV) or a Tab Delimited Text File (.TXT).

- You have duplicate information, such as an Email Address or an SIN.

To resolve this, you will need to correct the duplicated information in the Import File.

- You have an empty row in the .CSV File.

To resolve this, you will need to delete the entire empty row from the .CSV File.

- Required/Mandatory Fields were not included in the .CSV/Text File.

To resolve this, you will need to make sure that all of the required/mandatory Fields are in your Import File.

- A field is in the wrong format, such as the SIN or Birth Date not being in the proper format.

To resolve this, you will need to make sure all of the Fields are in the proper formats in the Import File.

## Exporting Employee Information

You can export Information to an SCV or TXT File, allowing you to import the information into other programs, into another Checkmark Canada Cloud Payroll Company, or save it as safe location as a back-up.

Please note that you can only export information from the following Fields.

| | | |
|---|---|---|
| First Name | Employee Number | EI YTD |
| Last Name | Salary per Pay Period | QPIP YTD |
| Street | Hour Rate 1-4 | CPP YTD |
| City | Pay Periods Per Year Choice | QPP YTD |
| Province | Hire Date | Income Tax YTD |
| Postal Code | Last Raise Date | Quebec Tax YTD |
| Phone Number | Termination Date | Job Title |
| Email Address | Province Choice | Marital Status |
| SIN | Salary YTD | Employment Type |
| Birth Date | EI Wages YTD | In- Active Selection |
| Department Choice | WSIB Wages YTD | Normal Hours per Pay |
| Vacation YTD | Net YTD | |

Note*: If you want the other fields that are not able to be exported as part of your Export File, you will need to manually enter them once you have created the Export File from Checkmark Canada Cloud Payroll.

How to Export Employee Information:

**To Export Employees, follow these steps**:
1. Click "Export Employees" on the Employee Setup screen.
2. Click on the checkbox next to each Field you want to Export.
3. Click "Export CSV" or "Export TXT" on the bottom of the screen.

This will download the EmployeeExport.CSV or EmployeeExport.TXT File with your employee's information.

# Chapter V

# Processing Pay Cycle

This chapter will walk you through how to enter your employee hours, calculate the payroll, and create and print the cheques in Checkmark Canada Cloud Payroll.

## Process Pay

It will also cover how to modify already created cheques and distribute hours/amounts to Canada Cloud Payroll Departments or Jobs. All of these options are available in the Pay Cycle section of Canada Cloud Payroll.

Your first option under Pay Cycle will be Process Pay, which is where you can input the hours your employees have worked and calculate the cheques for both hourly and salary employees.



## Process Pay Field Descriptions:

Pay Frequency:    Select which of your *pay frequencies* you want to process payroll for, such as Daily, Weekly, Bi-Weekly, Semi Monthly, Monthly, Quarterly, Semi Annually, and Annually.

[* Note - You can select multiple pay frequencies at this step, just keep in mind that it will put the same Cheque Date, Period Start, and Period End for all cheques created, regardless of the pay frequency of

the employee.]



Cheque Date: Input the date you want for the official Cheque Date for this payroll; this is the date the cheques will be cashable.

Period Start: Input the first day of the pay period.

Period End: Input the last day of the pay period.

The grid on this screen will list all of the payrolls you have done so far this year. It will list the Pay Periods per Year, Duration, Cheque Dates, Period Start, Period End, Status, and Number of Cheques Created. The Status will tell you if you have completed the payroll or if it is still In Process.

The first step in processing your payroll with Canada Cloud Payroll is to select your *Pay Frequency/Frequencies* and your dates.

Once you have selected your *Pay Frequency/Frequencies* and input your dates, click the "Next" button to move to the Time Sheet screen to input hours.

## Time Sheet – Distribute Hours

The next step in processing your payroll is to input any hours that were worked by your employees. You have four options when it comes to inputting your hours:



You can distribute them to Departments/Jobs, manually enter them without Department/Job distributions, import your hours from a tab-delimited text file or a .CSV file, or input the hours in Hours Detail on the **Calculate Pay screen**. This section will cover the first three options.

This option is available only for an earning whose employee calculation method is Amount per Hour or Percentage of base. You can set it on the employee's Hour Categories, and change it on the detailed Hours if necessary.

Each pay period, you can input hours for hourly and salaried employees with the **Time Sheets screen**. The hours you enter for salaried employees, however, are used for tracking purposes only and do not affect the employee's wage calculations (unless the employee also has hourly rates assigned).

[* Note - You can check the "Retain Hours for Next Pay Period" checkbox on the **Distribute Hours Tab** to keep the hours you input in the system to be used for the next pay period, regardless of whether you Distribute, Enter, or Import the hours.

* Note - If you have changed any hours for an employee whose calculated pay has already been saved, Canada Cloud Payroll will automatically undo the save calculation. Then, you must recalculate the employee's pay, with the new hours, on the Calculate Pay screen.

If you are using Cloud Canada Payroll Departments or Checkmark Multi-Ledger Canada Jobs, you can

assign different numbers of hours to different Departments/Jobs Titles for the same employee, or assign all of their hours to one Department or Job.

**To Distribute Hours to Departments/Jobs, follow these steps:**
Click on the employee you want to distribute hours for.
Enter the number of hours into the text box.
Select the Hour Category from the drop-down list.

Choose if you are distributing this to a Department or a Job

For an earning whose employee calculation method is Amount Per Hour or Percentage of Base, you can also choose the Jobs allocated based on calculation base option, described in the next section.

**If you are choosing Multi-Ledger Jobs, follow these steps:**

Choose the fields (Job Code and Job Name) you are distributing to Jobs, and save it in either .Text/.CSV file.
Click "Choose File."
Navigate to where your Jobs Text File is located.
Select the File and click "OK" or "Open."
Select the Department/Job, from the drop-down list, for these hours.
Click "Add" and it will be added to the hour's grid for the employee.
Repeat steps two through five for all of the Hour Categories/Departments/Jobs you need to distribute hours to.
Click "Save" to add all of these hours to the employee.

After the hours are saved, they can be used for pay calculations on the Calculate Pay screen.

Once you have distributed all of the Hours for all of your employees, click "Next" to move to the Calculate Pay screen.

## Time Sheet – Enter Hours

If you are not using Canadian Cloud Payroll Departments or Jobs, you can go to the Enter Hours Tab and manually enter how many hours each employee worked in each Hour Category.

The Enter Hours Tab shows all the assigned Hour Categories you setup in Hour Categories under Company Setup as the columns.

You can move your mouse to highlight any Hour Field by clicking the field. You can then move to the next field by pressing the tab key on your keyboard.

[* Note – Numbers to the right of the decimal point are treated as hundredths of an hour. For example, enter "30.75" for an employee who worked 30 hours and forty-five minutes. For detailed information on the decimal equivalent to how many minutes an employee worked, see "Conversion Chart: Number of Minutes and Decimal Equivalent" on the next page.]

## To Enter Hours, follow these steps:

Click on the Hour Field you want to input hours for.
Enter the number of hours for this employee and this Hour Category.
Press the tab key on your keyboard to move to the next Hour Field or use your mouse to click on another Hour Field.
Press "Save and Proceed" once you are done Entering Hours for all needed employees.

* Tip – You can click "Fill Down Column" to quickly enter the same number of hours for one Category for all employees, such as eight hours of holiday pay for each employee. For example, enter "8" and click "Fill Down Column." Starting with the currently selected employee, each value in the column will be replaced with "8."

Once you click "Save and Proceed," it will take you to the Calculate Pay screen.

## Import Hours Tab:

You can import employee hours from a tab-delimited text file or a .CSV File by going to the Import Hours Tab. The hours should be the total hours for each applicable Hour Category for each employee.

Each record of the Import File must contain the employee's Last name and First name followed by the values for the applicable Hour Categories. Hours can have up to three places to the left of the decimal and two places to the right of the decimal (000.00).

The order of the Hour Categories in the Import File must be the same as the order in which they appear on the Enter Hours Tab. The Import File must have a tab between each field and a return at the end of each record. If an employee does not have any hours for a particular Hour Category, you should still separate the Categories by a tab.

**For example, an Import File for two employees' hours might look like this:**

Browne[Tab]Jennifer[Tab]32[Tab]2[Tab]3.25[Tab]8[Tab]40[RETURN]
Wilcox[Tab]James[Tab]40[Tab]6.5[Tab] [Tab] [Tab]25[RETURN]

You cannot import hours directly into Departments or Jobs, but you can allocate the hours/amounts to the appropriate Jobs or Departments after you have created the paycheque. For more information, see "Allocating/Re-Allocating Hours for Hourly Employees" on page 82 and/or "Allocating/Re-Allocating Wages and Employer Taxes for Salaried Employees" on page 82.

## Time Sheet – Import Hours

Click on the Import Hours Tab in the Time Sheet screen of Process Pay.
Click "Choose File."
Select the Import File and click "OK"/"Open."

\* Note - If an employee's name appears in the Import File but is not found in Checkmark Canada Cloud Payroll, a message will appear telling you that the employee could not be found. Click "OK" to continue importing or click "Cancel" to stop the import process.
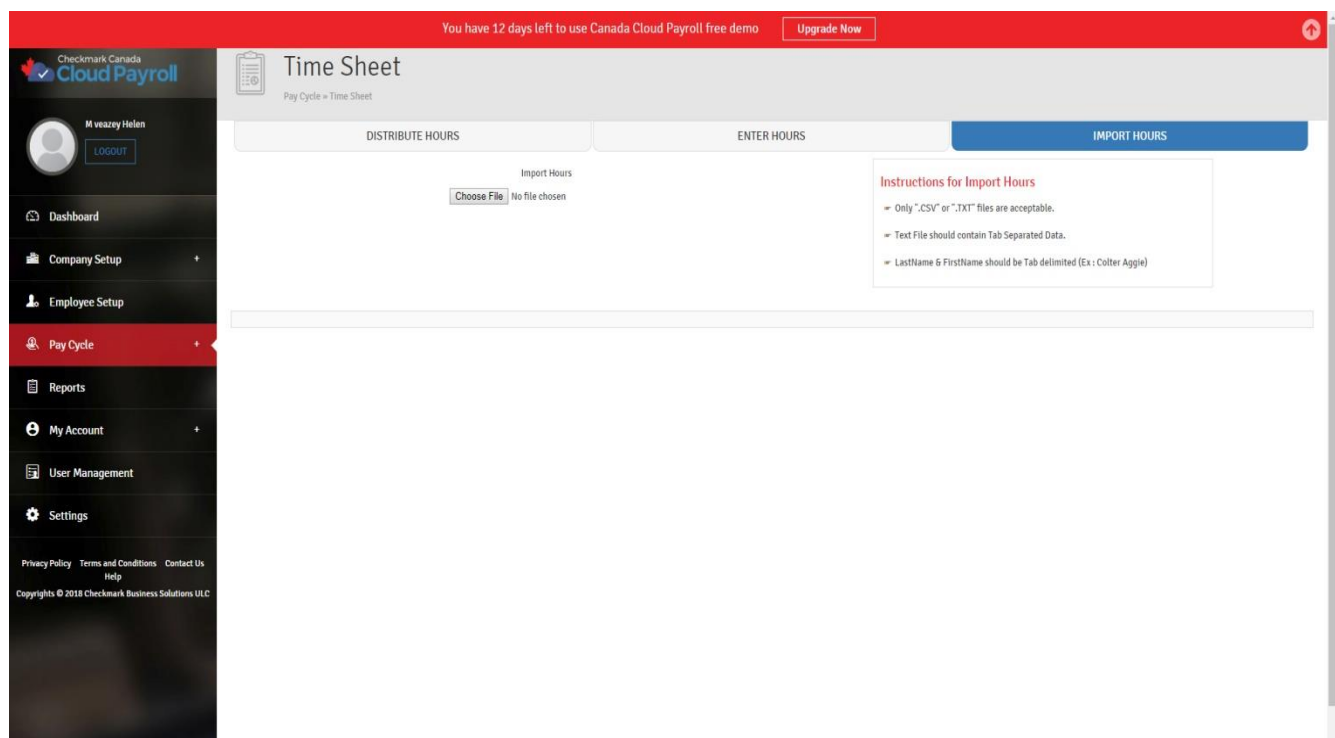
After the import completes, a grid will show listing your employees and how many hours went into which Hour Category for each employee.

Clicking "Save and Proceed" will save the imported hours. Once the save is completed, it will give you a confirmation screen. Once you click "OK" in the import confirmation screen, you will be taken to the Calculate Pay screen.

## Conversation Chart: Number of Minutes and Decimal Equivalent:

# of Minutes   Decimal Equivalent

| # of Minutes | Decimal Equivalent | # of Minutes | Decimal Equivalent |
|---|---|---|---|
| 1 | 0.02 | 31 | 0.52 |
| 2 | 0.03 | 32 | 0.53 |
| 3 | 0.05 | 33 | 0.55 |
| 4 | 0.07 | 34 | 0.57 |
| 5 | 0.08 | 35 | 0.58 |
| 6 | 0.10 | 36 | 0.60 |
| 7 | 0.12 | 37 | 0.62 |
| 8 | 0.13 | 38 | 0.63 |
| 9 | 0.15 | 39 | 0.65 |
| 10 | 0.17 | 40 | 0.67 |
| 11 | 0.10 | 41 | 0.68 |
| 12 | 0.20 | 42 | 0.70 |
| 13 | 0.22 | 43 | 0.72 |

| | | | |
|---|---|---|---|
| 14 | 0.23 | 44 | 0.73 |
| 15 | 0.25 | 45 | 0.75 |
| 16 | 0.27 | 46 | 0.77 |
| 17 | 0.28 | 47 | 0.78 |
| 18 | 0.30 | 48 | 0.80 |
| 19 | 0.32 | 49 | 0.82 |
| 20 | 0.33 | 50 | 0.83 |
| 21 | 0.35 | 51 | 0.85 |
| 22 | 0.37 | 52 | 0.87 |
| 23 | 0.38 | 53 | 0.88 |
| 24 | 0.40 | 54 | 0.90 |
| 25 | 0.42 | 55 | 0.92 |
| 26 | 0.43 | 56 | 0.93 |
| 27 | 0.45 | 57 | 0.95 |
| 28 | 0.47 | 58 | 0.97 |
| 29 | 0.48 | 59 | 0.98 |
| 30 | 0.50 | 60 | 1.00 |

## Calculate Pay:

This section shows you how to calculate the pay for employee cheques and special cheques, such as bonuses and after-the-fact cheques, using the **Calculate Pay screen**.

Checkmark Canada Cloud Payroll can calculate the pay for one employee at a time or all employees, for any combination of pay periods, at one time.

After you have input employee hours with the **Time Sheet screen** (you can also enter hours in the Calculate Pay screen), the next step is to have Checkmark Canada Cloud Payroll calculate employee *wages, Additional Income, Other Deductions*, taxes, and the net pay for the current pay period.

Calculate Pay Field Descriptions:

Wages:                         Where the wage information will display

Salary:                        Amount wills auto fill, based off of what salary amount you assigned to this employee in Employee Setup. You can edit this field if you need to change the salary amount for this payroll.

Hours:                         Total number of hours that have been assigned to this employee for this payroll. This will auto fill off of the hours input on the Time Sheet screen.

Amount:                       Total amount the employee has earned based on the input hours and the Hourly Rates that were assigned in Employee Setup.

**Hours Detail:**  Click this button to enter hours on the **Calculate Pay screen**.

**Hours:**  Enter the number of hours that the employee has worked for each category, for this pay period.

**Category:**  Will display the Hour Categories which were setup on the **Hour Category screen** in **Company Setup**.

**Rate:**  Auto fills based off of what was setup in Employee Setup, but is editable.

**Amount:**  Auto fills based off of the number of hours input and the Hourly Rates assigned in Employee Setup.

**Multiplier:**  Will display the multiplier assigned to this Hour Category in the **Hour Category Setup screen**.

**Accrued:**  Number of hours that have been accrued for this pay period.

**EI Hours:**  Total Number of hours subject to EI for the pay period. This will auto fill based on The hours you have input, but you can manually change it, if need be.

**Taxes:**  Automatically populates based off of the information entered on the calculate Pay screen, hours input, from the employee set up, but are editable.

**EI:**  Total amount of EI withheld from the employee for the pay period.

**QPIP:**  Total amount of QPIP withheld from a Québec employee for this pay period.

CPP:            Total amount of CPP withheld from the employee for this pay period, except for Québec employees.

QPP:            Total amount of QPP withheld from a Québec employee for this pay period.

Income Tax:     Total Federal and Provincial tax withheld from the employee for this pay period. For Québec employees, this will only show the Federal withholding.

Quebec Tax:     Total Québec Provincial withholding that has been withheld from a Québec employee for this pay period.



Additional Income:   View or edit Additional Income amounts for this employee for this pay period. The Categories listed here are the ones that were assigned to the employee in Employee Setup.

**Income Details:** Click this button to enter details for your Additional Incomes, such as Commissions based on Percentage of Sales, or Mileage.

**Income Category:** The Categories listed here are the ones that were assigned to the employee in Employee Setup.

**Quantity:** Enter the quantity the Additional Income should be calculated with.

**Rate:** Automatically populates based on what was entered in either Employee or Additional Income Setup.

**$:** Automatically calculates the amount that should be paid to the employee for this Additional Income.

**Vacation:** Total amount of Vacation Pay that has been paid out to the employee on this cheque.

**Accrued:** Total amount of Vacation Pay that has been accrued by the employee this pay period.

Other Deductions:     View or edit Other Deduction amounts for the employee for this pay period. The Categories listed here are the ones that were assigned to the employee in Employee Setup.

Net Pay:              Automatically calculates based on all of the other information on this screen.



Calculate Multiple Cheques:   Enables you to calculate all of the employees within each of your pay Frequencies, as long as hours and hourly rates or salary amounts have

been established.

Calculate Cheque: Will recalculate the taxes and net pay based on any based manual changed made on the Calculate Pay screen.



Save: Save the calculations for the cheque you are currently on.

Undo: Will undo the save calculations for the cheque.

Proceed to Pay: Takes you to the cheques section of Pay Cycle.

Disable Calculations: Select this option if you wish a deduction to be turned off for this payroll, for hour accrual to not accrue on this cheque or to disable all the calculations when entering cheques, such as after-the-fact payroll cheques. Items selected in this window will affect all calculations made while you are in the Calculate Pay window. To deselect any or all of the options in this window, close Calculate Pay and re-enter the window.

\* **Note** - If this option is unavailable, you probably have an employee selected in the list. Deselect the employee and try again.

Disable Hour Accruals: Select this option if you are doing a special cheque and do not wish employee accruals to calculate on this cheque. An example is an employee that has accrual based on a per pay period basis and you are calculating a bonus cheque in addition to a regular paycheque on the same cheque date.

Disable All Calculations:    Select this option if you wish to manually enter all of the employee income, tax and deduction fields such is the case when entering after-the-fact cheques.

## Calculating Pay for Multiple Employees:

The "Calculate Multiple" button gives you a quick way to calculate pay for any combination of pay frequencies.

Employees whose calculated pay has already been saved will not be affected by this.
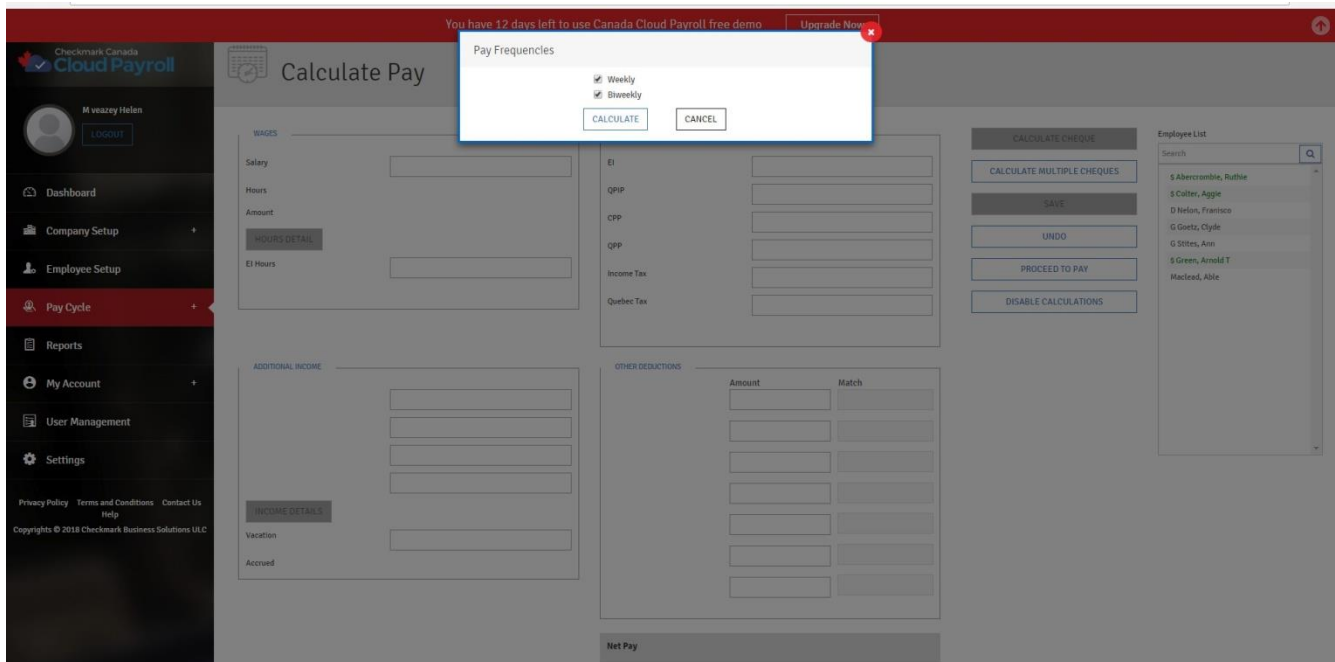


**To Calculate Pay for Multiple Employees, follow these steps**:
1. Click "Calculate Multiple" once you enter the Calculate Pay screen.
2. Uncheck the pay frequencies for which you do not want to calculate pay.
3. Click "Calculate" to calculate the pay for all of the employees with the selected pay frequencies.

**\* Note** – Any employees who do not have a Salary Amount assigned, or have not had hours input for this pay period, will not be calculated.

## Calculating Pay for an Employee:

**To Calculate Pay for an Employee, follow these steps:**
1. Select the employee from the list.
2. Make any necessary changes to the wages shown for the employee.

3. To enter hours for the employee, click the "Hours Detail" button.
   - Hours entered for a salaried employee do not affect the wages calculations unless the employee has been set up with hourly pay rates and a salary amount.
4. Make any necessary changes to the Additional Income amounts.
   - To enter the quantities for Additional Income Categories, such as Commission or Mileage, click the "Income Details" button.
   - Enter the amounts for any Variable Amount of Additional Income for this pay period.
5. Make any necessary changes to the Other Deductions amounts.
   - Enter the amounts for an Variable Amount of Other Deductions for this pay period.
6. Click "Calculate Cheque" to recalculate the taxes and net pay.
7. Press "Save" to save the calculations.

Once a calculation has been saved for an employee, their name will turn from "black" to "green," and they will have a dollar sign ($) in front of their names. If that calculation is not correct, or needs to be modified, you must first Undo the save calculation. For details, see "Undoing a Save Calculation" on page 72.

You will be able to verify these calculations on the Review/Create Cheques Tab in the Cheques section of Pay Cycle before creating the paycheques. For details, see "Reviewing Calculations before you Create a Cheque" on 74.

After saving the calculations for all appropriate employees, click "Proceed To Pay" to move to the Cheques section of Pay Cycle where you can create the paycheques.

\* Note – Checkmark Canada Cloud Payroll does not add the calculated pay to employee records until you have created the cheques.

### Entering Hours on the Calculate Pay Screen:

The most efficient way to input hours for employees is with the Time Sheet screen. However, you can use the "Hours Detail" button to enter or edit hours, or edit the hourly rate, on the Calculate Pay screen.

\* **Note** – Changing the hourly rate in the Hours Detail screen is a temporary change and does not change the employee's hourly rate for future pay calculations.

### To enter Hours on the Calculate Pay Screen, follow these steps:
1. Select the employee from the list.
2. Click the "Hours Detail" button.
3. Enter the hours for each Hour Category.
   - You can enter the hours and change the hourly rate, but not the values shown for Amount or Accrued.
4. Click "Save" to close the Hours Detail Screen and update the Hours and Amount fields on the

Calculate Pay screen.
5. Click "Calculate Cheque" to recalculate the taxes and net pay.

\* Note – If the Retained Hours for Next Pay Period option is checked on the Time Sheet screen, the hours you save on the Hours Detail screen will automatically appear for the next payroll.

### Entering Additional Income Details on the Calculate Pay Screen:

You can use the Calculate Pay screen to enter the income details for the following types of Additional Income Category Calculation Methods:
- Fixed % of Sales
- Mileage Amount Per Mile
- Piecework

### To enter Additional Income Details on the Calculate Pay screen, follow these steps:
1. Select the employee from the list.
2. Click the "Income Details" button.
3. Enter the quantities for the Additional Income Categories:
    - If the Calculation Method is Fixed % of Sales, such as for a commission, enter the total sales.
    - If the Calculation Method is Piecework, enter the number of pieces or items.
    - If the Calculation Method is Mileage Amount Per Mile, enter the number of miles.
4. Click "Save" to close the Income Details Screen and update the Additional Income Categories on the Calculate Pay Screen.
5. Click "Calculate Cheque" to recalculate the taxes and net pay.

### Undoing a Save Calculation:

You can undo a save calculation for any employee at any time.

To undo an employee's save calculation, follow these steps:
Select the employee from the list of who has a save calculation.
If you do not select an employee, it will undo the calculations for all employees who have any calculations saved.
Click "Undo."
Click "OK" on the screen that comes up to confirm.

All employees who have had a calculation undone will change from being "green" with the dollar sign ($) in front of their names to being "black" with no dollar sign.

### Editing/Modifying a Save Calculation:

You can edit/modify a save calculation for any employee at any time.

### To edit/modify a save calculation, follow these steps:

1. Select the employee from the list whose calculation you want to change.
2. Click "Undo."
3. Reselect the employee from the list.
4. Modify one or more of the calculations.
5. Click "Calculate Cheque" to recalculate the taxes and net pay.
6. Click "Save."

### Calculating Pay for Special Cheques:

You can use the Calculate Pay screen to calculate pay for special cheques, such as after-the-fact and bonus cheques.

* Note – Do not forget to use the Review/Create Cheques screen to create the special cheques, since Checkmark Canada Cloud Payroll updates employee records after the cheque is created. For details, see "Creating Cheques" on page 75.

### Calculating After-the-Fact Paycheques:

After-the-fact cheques are cheques that were issued in the current month prior to using Checkmark Canada Cloud Payroll. If you want Checkmark Canada Cloud Payroll to keep accurate records for reports, you should record these cheques.

## Cheques

This section shows you how to review payroll calculations, create, print, modify, void, and delete paycheques.

After you have save all of the calculations needed for this payroll, and have clicked "Proceed to Pay" on the Calculate Pay screen, it will bring you to the Cheques section of Pay Cycle, which is broken up into two Tabs: Review/Create Cheques and Print/Modify Cheques.

### Review/Create Cheques Tab:

This Tab will enable you to review your calculations and create the payroll cheques.

Only the employees whose calculated pay has been saved on the Calculate Pay screen will appear on the list. If you do not see the employee you want, go to the Calculate Pay screen and make sure that the employee's pay has been saved. Employees whose pay has been saved are indicated by a dollar sign ($) in front of their names, which will be in "green" text, on the Calculate Pay screen.
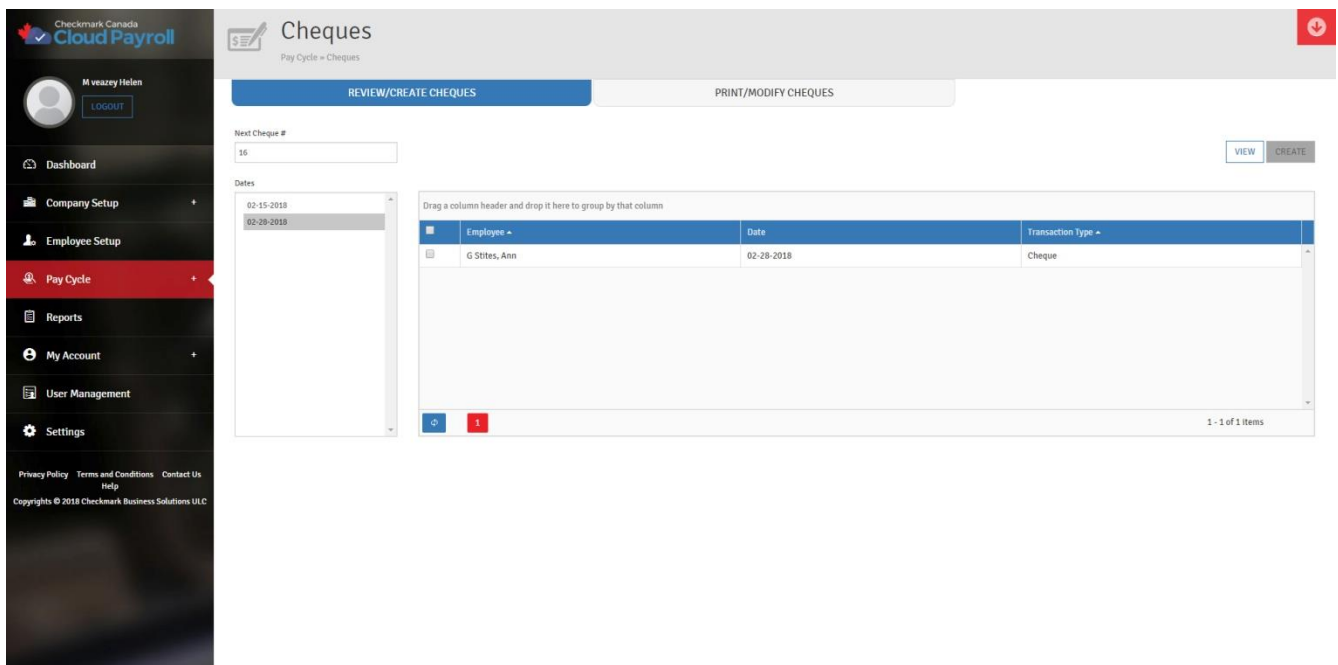
## Reviewing Calculations before you Create a Cheque:

You can review the calculations you have saved in one convenient report.
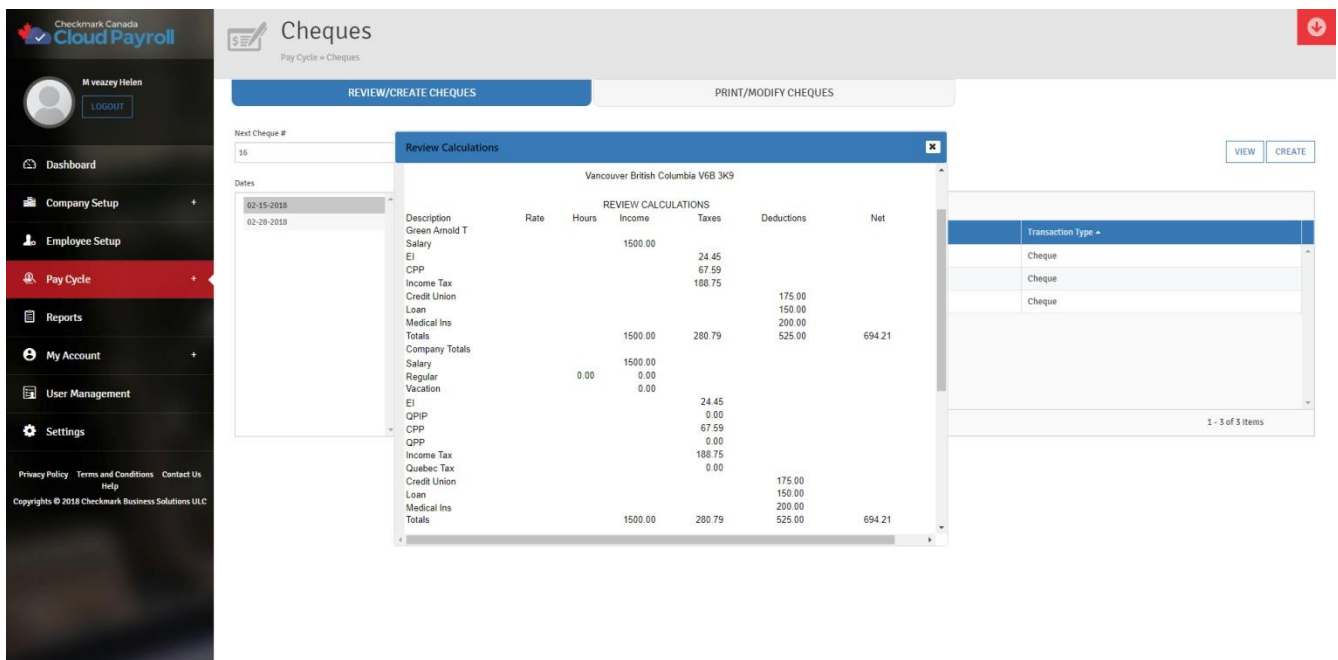


**To Review the saved calculations before you Create a Cheque, follow these steps:**
1. Click on the Tab for Review/Create Cheques under the Cheques section of Pay Cycle.
2. Select the cheque Date you want to review.
3. Check the box next to each employee you want to review the calculations for.

- You can select a consecutive or a non-consecutive series of employees.
- If you want to review all of the employees in this pay period, you can click on the top checkbox to check all of the listed employees.
- If you do not have any employees selected, it will generate the report for all employees.
4. Click "View."

From here, you can print or save this report for future reference.

If any information is incorrect, you must return to the Calculate Pay screen, undo the calculation, and make the changes. For more information on calculating pay or undoing calculations, see "Calculate Pay" on page 64.

## Creating Cheques:

After you have calculated the pay for the pay period with the Calculate Pay screen, you can use the Review/Create Cheques Tab in the Cheques section of Pay Cycle to create the payroll cheques. Once cheques are created, Checkmark Canada Cloud Payroll updates employee records with the new cheque information.

You can create one cheque at a time or all of them at once.
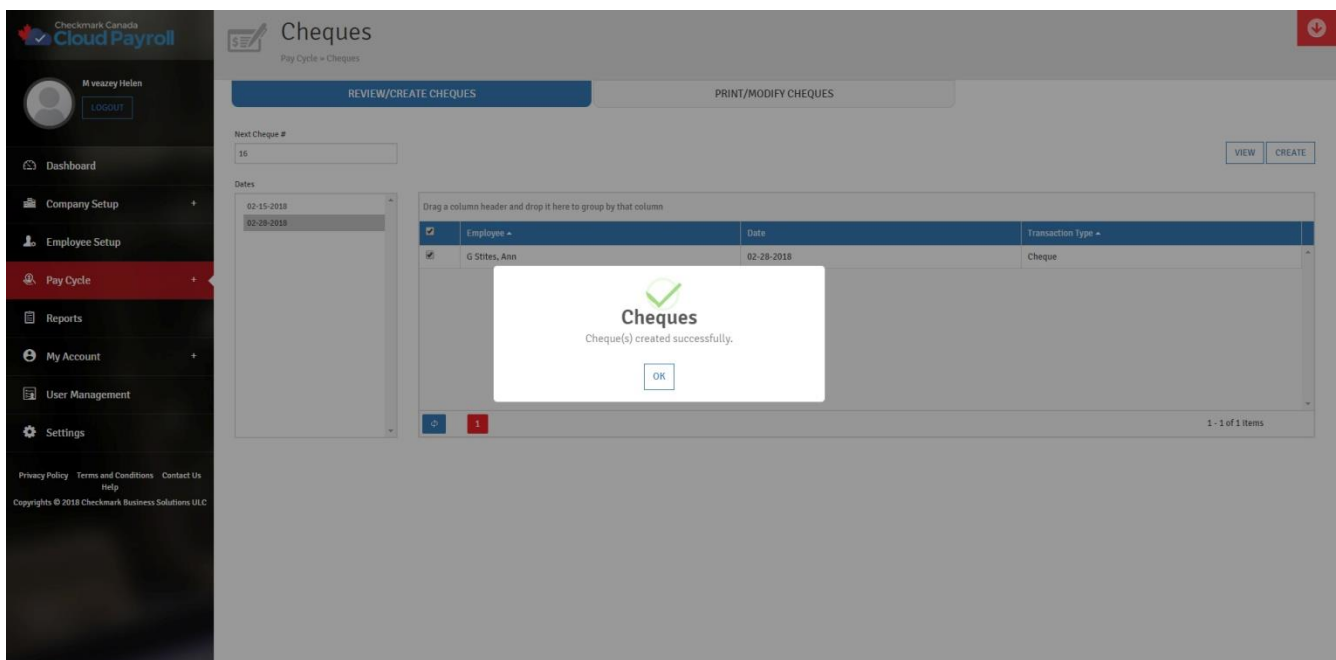


### To Create Cheques, follow these steps:
1. Click on the Tab for Review/Create Cheques under the Cheques section of Pay Cycle.
2. Check the checkbox next to the employee's name who you want to create the cheque for.

- You can select a consecutive or a non-consecutive series of employees.
- If you want to create all of the listed employees cheques at once, you can click the top check box to select all of the employees in the list.

3. Change the Next Cheque # and/or the Direct Deposit Cheque #, if necessary.
    - When creating multiple cheques, Checkmark Canadian Payroll Cloud consecutively assigns cheque numbers starting with the cheque number that has been entered first.
4. Click "Create."
5. Approve the payroll on the Payment Confirmation screen.
6. Confirm the pricing at the top of the page.
7. Choose to pay with the credit card on file or add a new card.
    - To add a new card, follow these steps:
    - Choose the radio button for Use a different credit card.
    - Select the Card Type.
    - Enter the Credit Card Number.
    - Enter the Expiration Date and the Security Code.
    - Enter the Name on the Card.
    - Check the checkbox for "Save Credit Card" if you want to save this credit card for future use.

8. Edit the Billing and/or Shipping Addresses, if applicable.
    - Click on "Edit."
    - Enter the new information.
    - Check if the Shipping Address is the same as the Billing address.
    - Click "Update."
9. Check the box for "I have reviewed the payroll summary and want to approve payroll."
10. Click "Approve Payroll."

After you have approved the payroll, you will be directed back to the Review/Create Cheques Tab, the employees' names for which cheques have been created will no longer appear in the list, and the Next Cheque #/Direct Deposit # will show your next available cheque number. You will also receive an email confirmation of your payment.

Once created, a cheque's calculations cannot be changed. However, you can use the Print/Modify Cheques Tab to edit/modify the cheque number, convert a direct deposit to a cheque, and delete or void the cheque.

## Print/Modify Cheques Tab:

On this Tab, you can select any combination of employees, cheques, and/or cheque dates.

Once you have selected a cheque, the buttons at the bottom of the screen will activate.

If you have only selected one cheque, the Cheque Details will populate on the right-hand side of the screen. You can view but not edit the calculations.

## Printing Cheques:

After you have created the cheques, you can print them from the Print/Modify Tab. Printing cheques is not necessary for posting cheque information to the employee's records, therefore this step is optional.

Cheques can be printed or reprinted until the Payroll Year is closed. Reprinting a cheque does not affect the employee records.

The cheques that have already been printed will have an asterisk after the cheque number.

### To Print Paycheques, follow these steps:
1. Click on the Tab for Print/Modify Cheques under the Cheques section of Pay Cycle.
2. Select the Date or Dates.
3. Check the checkbox next to each cheque you want to print.
    - If you want to print all of the cheques listed, check the top checkbox, and it will check all of the listed cheques.
4. Check the checkbox to Print 2nd Stub on Laser Cheque, if applicable.
    - If this option is checked, a second stub will be printed on the bottom third of an 8 ½" by 11" laser cheque.
5. Check the checkbox for CPA Standard, if applicable.
6. Click "Print" at the bottom of the screen.
7. Confirm that the cheques look correct on the print preview.
8. Click the save icon to save the cheques in different formats.
                OR
9. Click the print icon to download a PDF of the cheques that you can save. or print.

You can verify the print alignment for your specific printer by printing a cheque onto a blank piece of printer paper. Then, hold a blank cheque underneath the printed cheque values to test the alignment. You may need to hold the two pieces up to some light to see it well.

If one or more cheques jam in your printer, you can reprint from the same PDF that you downloaded, or you can print from Checkmark Canada Cloud Payroll again to generate a new PDF with the same cheque numbers. If you use pre-printed cheque stock and need to assign a new cheque number to reprint, please see "Editing/Modifying Cheques" on page 78.

## Editing the Cheque Format:

You can edit the cheque format and reposition the fields that print on cheques to align the printing for your particular printer.

## To Edit the Cheque Format, follow these steps:

1. Click on the Tab for Print/Modify Cheques under the Cheques section of Pay Cycle.
2. Click the button for "Edit Format" at the bottom of the screen.
3. Make the necessary changes.
   - To move a field, click on the field and drag it to the new location.
   - To prevent a field from printing, double-click the field. The field's name will change from "black" to "red."
   - To enable a disabled field, double-click on the disabled field. The field's name will change from "red" to "black."
4. Click on the red "X" in the top left-hand corner of the screen.
5. Click "Yes" on the screen that comes up to ask if you want to save your changes.

You can also click the "Default" button at the top of the Format screen to revert to the default format.

## Editing/Modifying Cheques:

Once cheques have been created, you can use the Print/Modify Cheques Tab to edit/modify the cheque numbers.

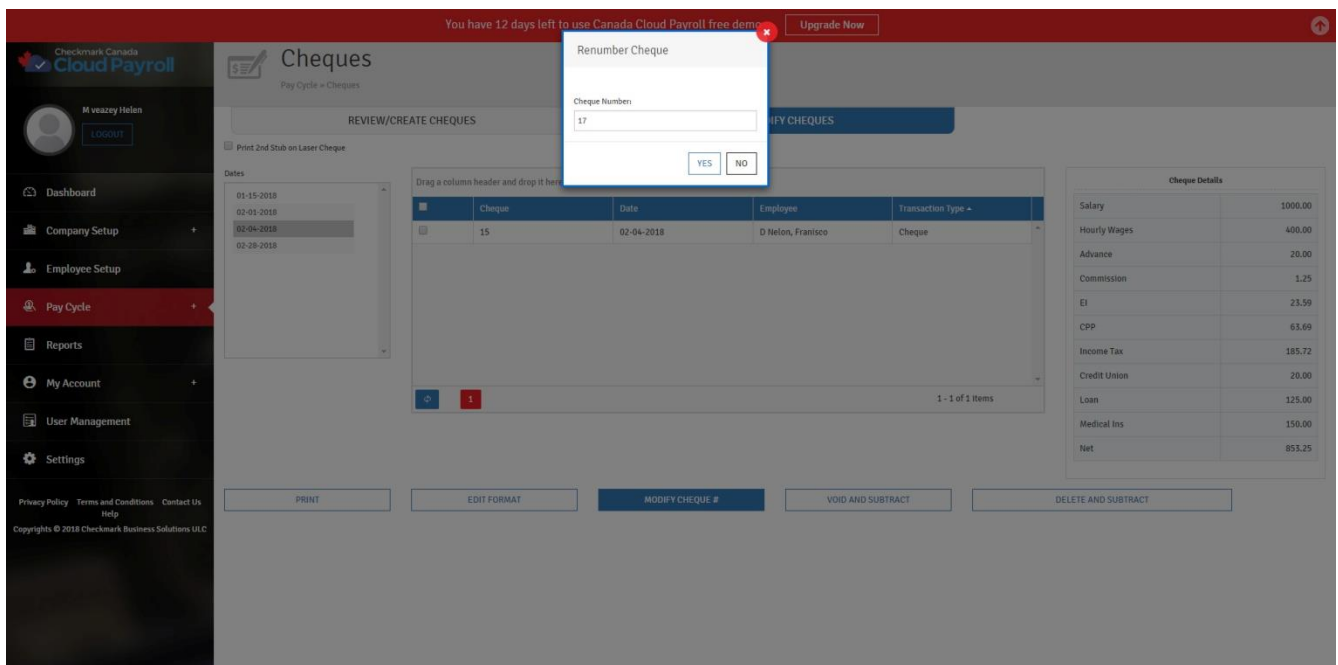## To edit/modify the cheque numbers, follow these steps:

1. Click on the Tab for Print/Modify Cheques under the Cheques section of Pay Cycle.
2. Select the proper date or dates.
3. Check the checkboxes next to the cheque or cheques you need to change the cheque number on.
4. Click "Modify Cheque #" at the bottom of the page.
5. Type in the new cheque number in the Renumber Cheque screen that comes up.
   - When editing the cheque number for multiple cheques at a time, Checkmark Canada

Cloud Payroll consecutively assigns cheque numbers starting with the cheque number that has been entered first.
6. Click "Yes."

After you have edited/modified the cheque numbers, the cheques will be moved to their new positions in the list, based off of the new cheque numbers.

## Converting to Cheque:

You can change a direct deposit employee paycheque to be a printed cheque from the Print/Modify Cheques Tab.

**To convert a direct deposit paycheque to a printed cheque, follow these steps:**
1. Click on the Tab for Print/Modify Cheques under the Cheques section of Pay Cycle.
2. Select the proper date or dates.
3. Check the checkboxes next to the cheque or cheques you need to convert.
4. Click "Convert to Cheque" at the bottom of the page.
5. Click "Yes" on the screens that comes up to confirm.

* Note – It will automatically assign the "Next Cheque" # that is on the Review/Create Cheques Tab.

Now this cheque will be treated by the system as a printed cheque, and you can print it for the employee.
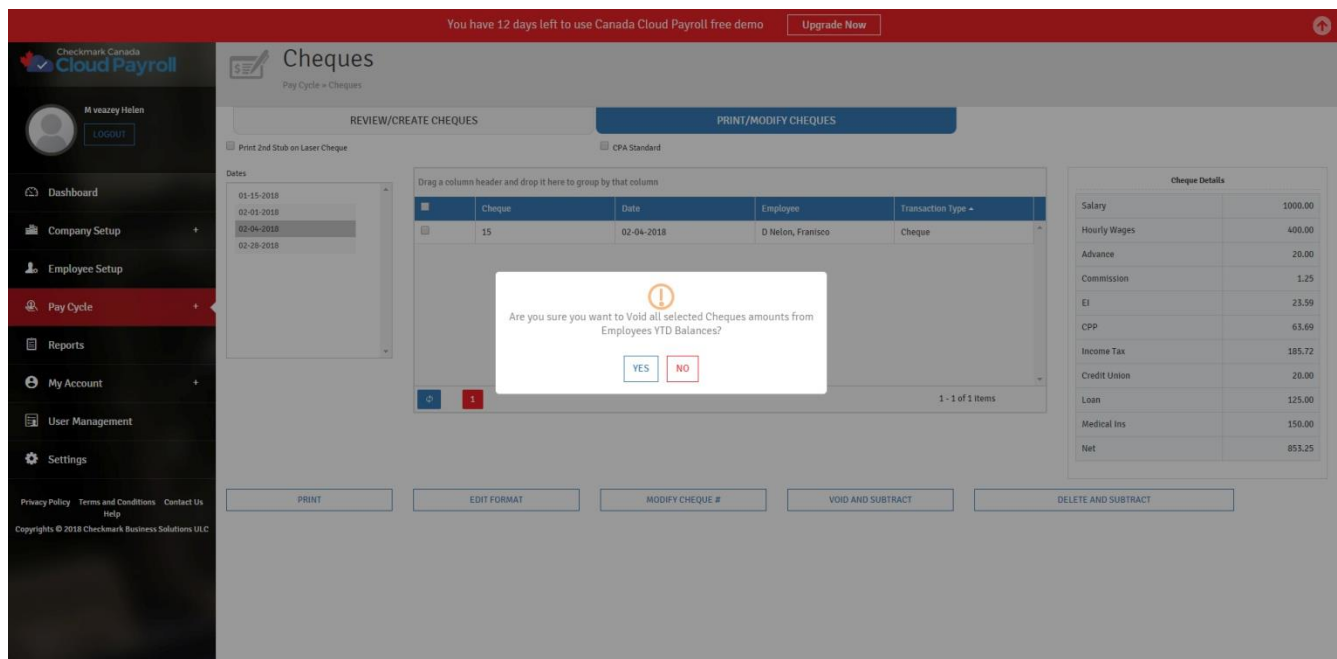


## Void and Subtract:

Voiding cheques retains the cheque number, replaces the employee's name with "Void", and subtracts the values from the employee's year-to-date balances.

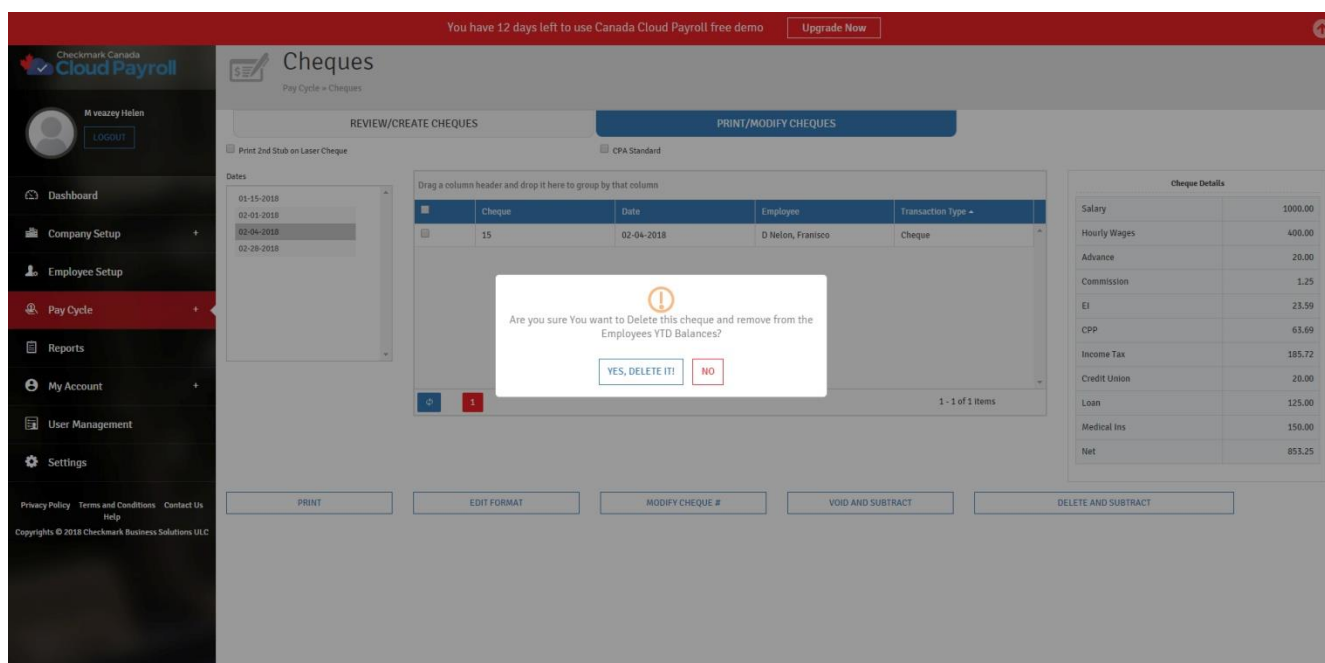**To void a cheque and subtract the amounts from the employee's year-to-date balances, follow these steps:**

1. Click on the Tab for Print/Modify Cheques under the Cheques section of Pay Cycle.
2. Select the proper date or dates.
3. Check the checkboxes next to the cheque or cheques you need to void.
4. Click "Void and Subtract" at the bottom of the screen.
5. Click "Yes" on the screen that comes up to confirm.



## Delete and Subtract:

Deleting cheques removes all the information associated with the cheques and subtracts the values from the employee's year-to-date balances. You will be able to use the cheque number again in the future.

**To delete a cheque and subtract the amounts from the employee's year-to-date balances, follow these steps:**

1. Click on the Tab for Print/Modify Cheques under the Cheques section of Pay Cycle.
2. Select the proper date or dates.
3. Check the checkboxes next to the cheque or cheques you need to delete.
4. Click "Delete and Subtract" at the bottom of the screen.
5. Click "Yes, Delete it!" on the screen that comes up to confirm.

Now the cheque or cheques have been permanently deleted, and the amounts have been removed from the employee's year-to-date totals. You can reenter the cheques, if need be, using the same cheque number.

* Important – You should not Delete or Void a cheque for an employee after another cheque has been created for that same employee. This will cause the maximums and taxes to not calculate correctly. If you realize you need to Delete or Void a cheque after another has been created for that employee, you will need to Delete or Void all of the cheques for this employee back to the one you need to be rid of. Then, you will need to reenter the valid cheques back into the system, starting with the oldest pay date and moving forward. For more details on how to reenter these cheques, please see "Calculating After-the-Fact Paycheques" on 73.

## Distribute to Jobs/Departments

You can use the Distribute to Jobs/Departments screen under Pay Cycle to allocate an employee's wages and employer taxes to one or more departments or jobs after a cheque has been created.

You can also use the Distribute to Jobs/Departments screen to re-allocate an employee's hours that were allocated using the Distribute Hours screen. If you re-allocate hours for hourly employees on this screen, the employee's wages are re-allocated automatically as well.

Please note that allocating/re-allocating hours for salaried employees does not automatically allocate their wages by Department or Job.



Allocating/Re-allocating Hours for Hourly Employees:

If you have created a cheque for an hourly employee and did not Distribute the hours to Departments or Jobs, or if you created a cheque for an employee after inputting hours by Department or Job on the

Distribute Hours screen, you can allocate/re-allocate those hours to Departments or Jobs on the Distribute to Jobs/Departments screen without having to delete the cheque and recalculate pay for that employee.

### To allocate/re-allocate Hours for an Hourly Employee, follow these steps:
1. Go to Distribute to Jobs/Departments under Pay Cycle.
2. Select the proper date or dates.
3. Click on the cheque you need to allocate/re-allocate.
4. Choose if you are allocating to Checkmark Canada Cloud Payroll Departments or MultiLedger Jobs.
     - If you are choosing MultiLedger Jobs, follow these steps:
       1. Choose that you are allocating to Jobs.
       2. Click "Choose File."
       3. Navigate to where your MultiLedger Jobs Text File is located.
       4. Select the File and click "OK" or "Open."

* Note – If you have already selected a Job File, it will automatically default to the last Job File uploaded.
5. Type in the number of hours that should go to a particular Department/Job.
6. Select the Department/Job from the drop-down list for these hours.
7. Click "Distribute."
     - If you are allocating to multiple Departments or Jobs, the remainder of the hours will be shown in another edit box.
8. Once you have distributed all of the hours, click "Save."
9. Click "OK" on the screen that comes up to tell you the hours were Distributed Successfully.

The wages will be allocated/re-allocated automatically for hourly employees.

### Allocating/Re-allocating Wages and Taxes for Salaried Employees:

You can allocate/re-allocate a salaried employee's wages and employer taxes to Departments or Jobs after a cheque has been created.

### To allocate/re-allocate salaried employee's wages and employer taxes, follow these steps:
1. Go to Distribute to Jobs under Pay Cycle.
2. Select the proper date or dates.
3. Click on the cheque you need to allocate/re-allocate.
4. Choose if you are allocating to Checkmark Canada Cloud Payroll Departments or Jobs
     - If you are choosing MultiLedger Jobs, follow these steps:
       1. Choose that you are allocating to Jobs.
       2. Click "Choose File."
       3. Navigate to where your MultiLedger Jobs Text File is located.
       4. Select the File and click "OK" or "Open."
5. Type in the dollar amount that should go to a particular Department/Job.
6. Select the Department/Job from the drop-down list for these wages.
7. Click "Distribute."

8.  If you are allocating to multiple Departments or Jobs, the remainder of the wages will be shown in another edit box.
9.  Once you have distributed all of the wages, click "Save."
10. Click "OK" on the screen that comes up to tell you the wages were Distributed Successfully.

The Wages amount that appears consists of salary wages only and does not include any Additional Income amounts, unless the Additional Income Category is set up with the Include with Wages for Dept/Job Posting option checked.

To remove a line of allocation, click the edit box for it, delete the amount, and press tab on your keyboard.

# Chapter VI

# Reports

This chapter will walk you through the different reports that are available within Checkmark Canada Cloud Payroll. It will also give you instruction on how to view, print, and save reports.
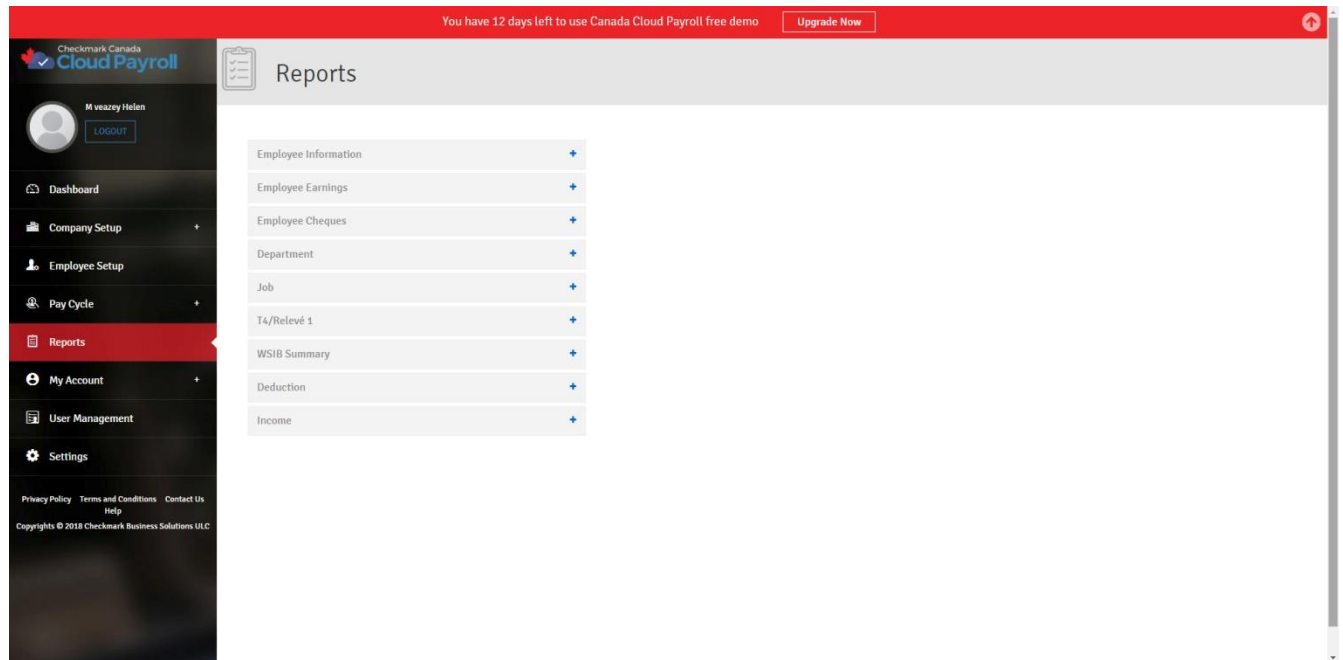


**Checkmark Canada Cloud Payroll offers a variety of report categories with different report options:**

1. Employee Information
   - Personal Information
   - Wage Information
   - Tax Information
   - Income/Deduction Information
2. Employee Earnings
   - Earnings Register
   - Hours Register
   - Cheque Summary
   - EI/QPIP
   - Vacation
3. Employee Cheques
   - Cheque Register
   - Posting Summary & Format
4. Department
   - Wages & Hours
   - Cheque Summary

5. Job
    - Wages & Hours
    - Cheque Summary
6. T4/Relevé 1
    - Summary
    - T4
    - Relevé 1
7. WSIB Summary
    - WSIB Information
8. Deduction
    - Other Deduction Register

9. Income
    - Additional Income Register

**All of the reports can be viewed on screen, downloaded as a PDF for printing, or saved as:**
- Adobe Acrobat File
- Excel 2007 File
- PowerPoint 2007 File
- Text File/Matrix Printer
- Rich Text File
- Microsoft XPS File
- MHT File

## Using the Report Windows

This brief section will show you how to view, print, and save the reports.

## Viewing Reports:

## To View a Report on screen, follow these steps:
1. Select the needed employee/employees from the list.
2. Select the needed cheque date/dates from the list.
3. Click on the plus icon next to the report category you need.
4. Click on the name of the report you need.

After you have pulled up the report, you can view it on screen, download it as a PDF for printing, or save it in the above-mentioned formats.

## Printing a Report:

To print a report from Checkmark Canada Cloud Payroll, you must download the report as a PDF, then open the PDF in a PDF Reader and print the report.

## To print a report, please follow these steps:

1. Select the needed employee/employees from the list.
2. Select the needed cheque date/dates from the list.
3. Click on the plus icon next to the report category you need.
4. Click on the name of the report you need.
5. Click the printer icon.

This will download the reportname.pdf to your computer. From there, you can save it for future reference or open it in a PDF Reader and print it.

## Saving a Report in different formats:

Checkmark Canada Cloud Payroll can save the reports in several formats, besides the PDF for printing.  The list of the formats are mentioned on page 85.

### To save a Report, please follow these steps:
- Select the needed employee/employees from the list.
- Select the needed cheque date/dates from the list.
- Click on the plus icon next to the report category you need.
- Click on the name of the report you need.
- Click the save icon.
- Select the format you want from the drop-down list.

This will download the report name file type (for instance, Personal_Information.xlsx) to your computer.

## Employee Information

The reports under this Report Category will provide you with different kinds of information about your employees.
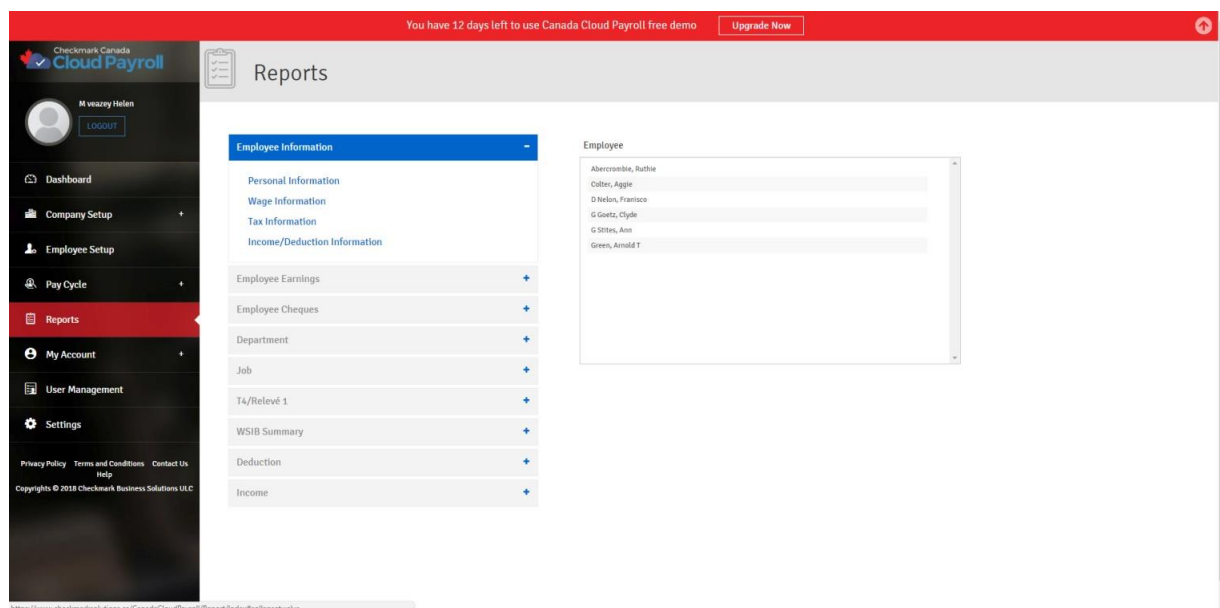
**Type of Employee Information Reports:**

Personal Information:      The Personal Information report shows the employee personal data, including name, address, phone number, SIN number, birth date, employee number, and default department.

Wage Information:      The Wage Information report shows information, such as the employee's salary or hourly rates, pay frequency, hire date, last raise date, termination date, and accrued hours available.

Tax Information:      The Tax Information report shows the tax set up for the employee including, net claim, provincial claim, federal credit, provincial credit, tax table, and any additional withholding amounts.

Income/Deduction Information: The Income/Deduction Information report the Additional Income and Other Deduction categories and their associated definitions that have been set up for the selected employees.

## Employee Earnings:

The reports under this Report Category will provide you with different kinds of employee earning information, sorted by the employees' names or employee numbers.
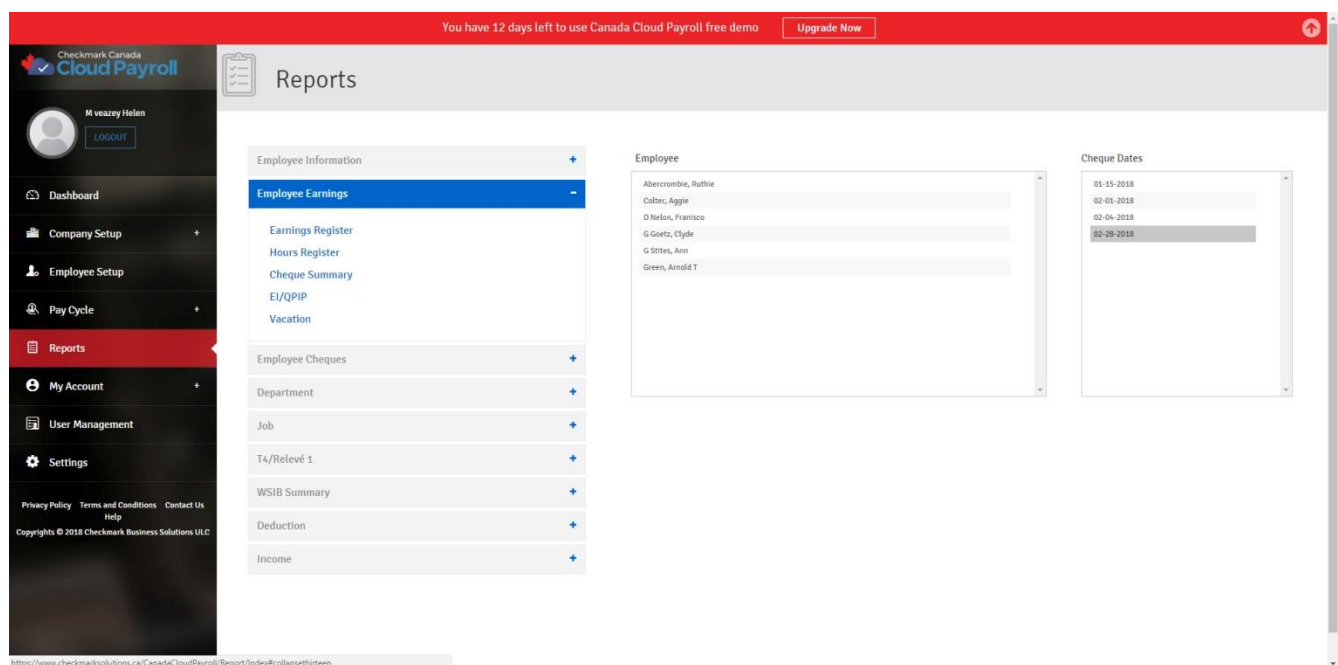


**Types of Employee Earnings Reports:**

Earnings Register:      For the cheque dates selected, the Earnings Register report shows the employee's year-to-date income, deductions, taxes, and net pay, as well as any employer matching amounts. Totals for the company are listed at the end of the report.

| Hours Register: | For the range of cheque dates selected, the Hours Register report shows the employee's year-to-date hours for hour categories, such as Regular, Overtime, Double Time, Sick, Vacation. Totals for the company are listed at the end of report. |

Hours Register:     For the range of cheque dates selected, the Hours Register report shows the employee's year-to-date hours for hour categories, such as Regular, Overtime, Double Time, Sick, Vacation. Totals for the company are listed at the end of report.

Cheque Summary:     The Cheque Summary report shows an employee's income-taxes, deductions, and net pay for each cheque in the selected cheque dates. Totals for all categories are also shown by employee.

EI/QPIP:     The EI/QPIP report shows an employee's name, cheque Number EI Wages and EI Hours in the first two columns and QPIP Wages and QPIP Hours in the second two columns if the employee works in Quebec.

Vacation:     For the cheque dates selected, the vacations report shows an Employee's name, cheque number, Prior, Gross Pay, Used, Accrued and YTD.

**Employee Cheques:**

The reports under this Report Category will provide you with different kinds of employee cheque information, sorted by cheque date, as well as exports for several accounting programs.
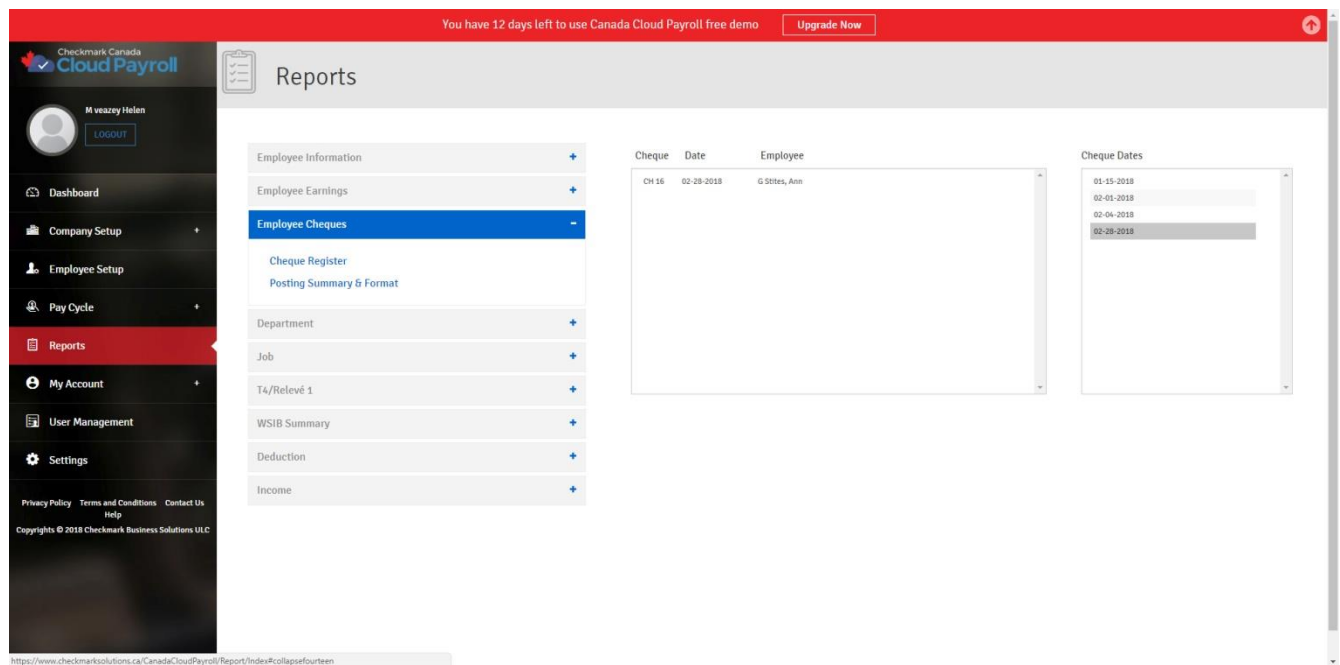


**Employee Cheque Reports Field Descriptions and Types of Employee Cheque Reports:**

Cheque Register:     The Cheque Register report shows check data for the selected month, including hourly rates, number of hours, income, deductions, net pay. At

the bottom of the report, the Remittance amounts for Canada Customs and Revenue
Agency and Government of Quebec are shown. The reports also shows Employer and Employee EI and CPP/QPP, as well as tax deductions for your remittance forms.

Cheques Ref. #: Enter the reference number you want to show up for the posting in the accounting software.

Taxes Ref. #: Enter the reference number you want to show up for posting in the accounting software.

Cheques Post Date: Enter the Date you want the posting to appear in accounting software.

Taxes Post Date: Enter the Date you want the posting to appear in the Accounting software.

Posting Summary & Format: Click this link to open the Posting Summary & Format screen, which will provide you with a Posting Summary and export files to be imported into different account softwares.

Posting Summary: The Posting Summary report shows cheque information in a summarized format and can be used to create manual journal entries in your accounting system. You can also save the posting summary information as a text file that can be imported into an accounting program. The net for each cheque is shown, along with totals for wages, income, taxes, and deductions.

*Note: Ledger accounts are also shown with their associated amounts. If you have ledger accounts set up for department or job wages and taxes, then the ledger accounts and amounts for each department are shown.
The total debits and credits are shown on the last two lines.

Checkmark: You can post information to Checkmark MulitLedger Canada program. For more details about exporting to Checkmark's MultiLedger, see "Posting Employee Cheques to Checkmark MultiLedger Canada" or to any Accounting Software.

DBA: You can export posting information to DBA. Enter the Cheques Ref #, Taxes Ref. #, Cheques Post Date, and Taxes Post Date. Then click on DBA. Click on the Save. icon in the window that appears. Select Text File. This will download the Posting_Summary_DBA.txt file. You will need to go to your Downloads folder, find the file, rename it for importing, then move it to the appropriate folder for importing.

| MYOB: | You can export posting information to MYOB. Enter the Cheques Ref. #, Taxes Ref. #, Cheques Post Date, and Taxes Post Date. Then Click on MYOB. Click on the Save icon in the window that appears. Select Text File. This will download the Posting_Summary_MYOB.txt file.  You will need to go to your Downloads folder, find the file, rename it for importing, then move it to the appropriate folder for importing. |
|---|---|
| Connected: | You can export posting information to Connected. Enter the Cheques Ref. #, Taxes Ref. #, Cheques Post Date, and Taxes Post Date. Then click on Connected. Click on the Save icon in the window that appears. Select Text File. This will download the Posting_Summary_Connected.txt file. You will need to go to your Downloads folder, find the file, rename it for importing, then move it to the appropriate folder for importing. |
| Money Works: | You can export posting information to Money Works. Enter the Cheques Ref. #, Taxes Ref. #, Cheques Post Date, and Taxes Post Date. Then click on Money Works. Click on the Save icon in the window that appears. Select Text File. This will download the MoneyWorks.txt file. You will need to go to your downloads folder, find the file, rename it for importing, then move it to the appropriate folder for importing. |

## Department

The reports under this Report Category will provide you with information on Checkmark Canada Cloud Payroll Departments.
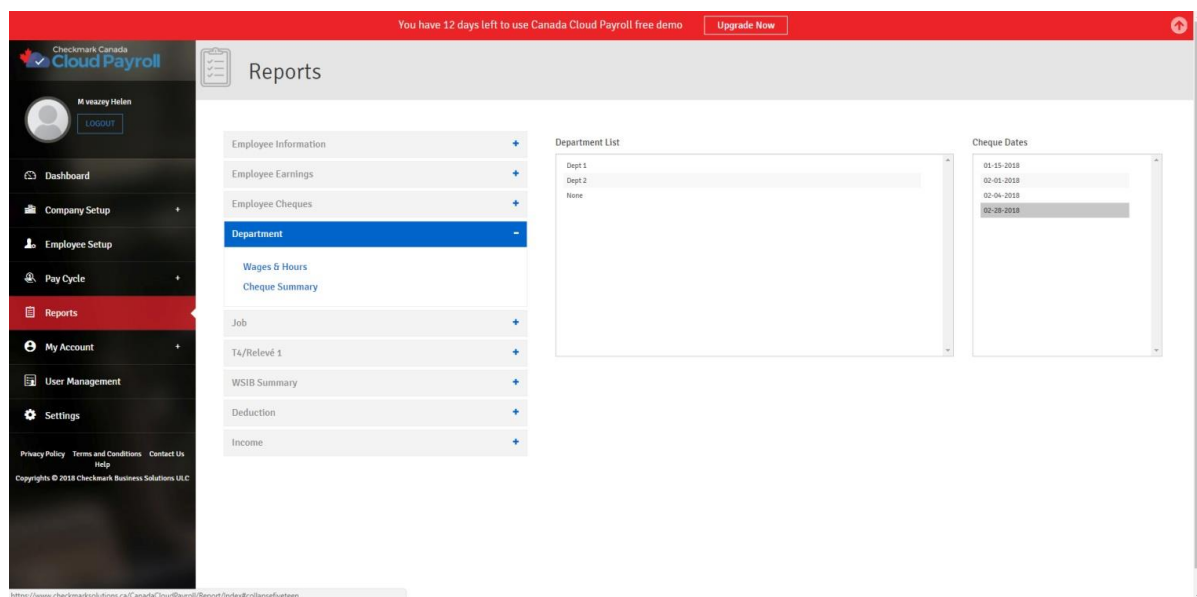
## Type of Department Reports:

Wages & Hours:    This report shows wages and number of hours for each Department for each Income Category, including salary, all hour categories, and other income amounts. Totals for wages and hours for the selected report range appear after each Department, and company totals appear at the end of the report.

Cheque Summary:    This report shows the Department's expense for wages and employer taxes by cheque. Totals for wage expense and employer tax expense for the selected report range appear after each Department, and company totals appear at the end of the report.

## Job

The reports under this Report Category will provide you with information on Jobs.
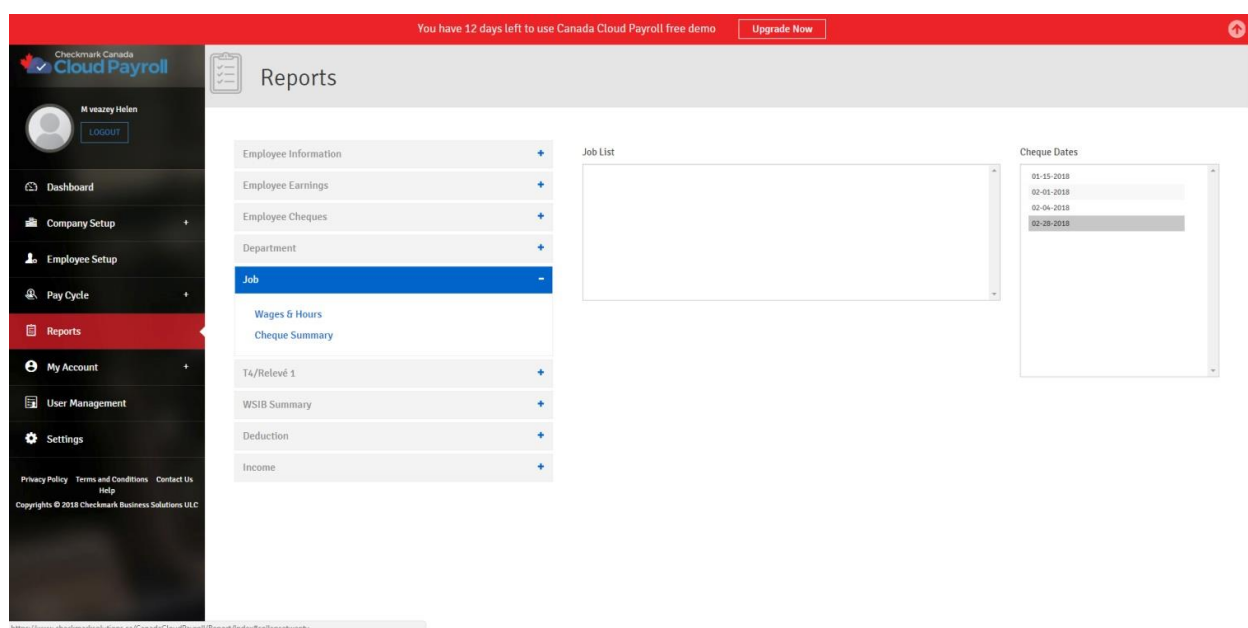


## Types of Job Reports:

Wages & Hours:    This report shows wages and number of hours for each Job for each Income Category, including salary, all hour categories, and other income amounts. Totals for wages and hours for the selected report range appear after each Job, and company totals appear at the end of the report.

Cheque Summary:    This report shows the Job's expense for wages and employer taxes by cheque. Totals for wage expense and employer tax expense for the selected report range appear after each Job, and company totals appear at the end of the report.

# T4/Relevé 1

This section will give you a Summary for the T4 and Relevé 1 and generate the printable forms for both the T4 and Relevé 1, as well as the .XML file to upload the T4s to the Government's website.
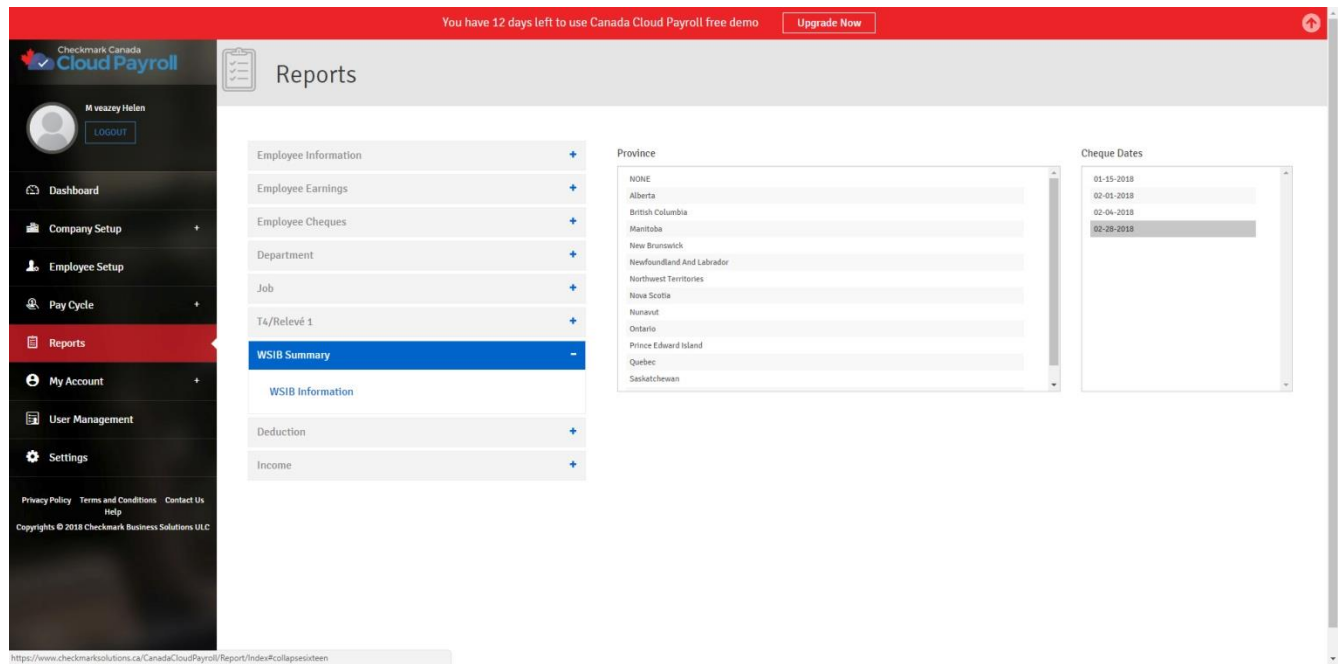


## Type of Job Reports:

Summary:            This report summarized the T4 and Relevé 1 information including number of employees, federal income, Provincial income, Registered Pension Plan amounts, CPP, Employer CPP, EI Earnings, Employer EI, Income tax, Quebec tax, QPP, and Employer QPP.

T4 Boxes – 20 (Registered Pension Plan):            Select the Deduction that should be included in the T4 Box 20 for the Register Pension Plan.

Relevé 1 Boxes – D (Registered Pension Plan): Select the Deduction that should be included in the RL1 Box D for the Registered Pension Plan.

T4:            Select this option to print T4 forms for your employees.
            The T4 slips required by the CCRA have just three Other Deductions associated with a box number. If you deduct for Union Dues, Registered Pension Plan, or Charitable donations, you must associate the deductions with the correct T4 box, 20, 44, or 46. Other Income items that should appear on the T4 should be set up in the T4 box on the Other Income window. Other Income box numbers and amounts will print

Contact Name:            Enter the contact person's Name.

| | |
|---|---|
| Area Code: | Enter the Area Code of the contact person. |
| Phone [123-4567}: | Enter the seven digit phone number of the contact person. |
| Pro.Sin: | Enter the Pro.SIN. |
| Submitter Ref: | Enter the Submitter Reference Number. |
| Transmitter #: | Enter the Transmitter Number. |
| Email Address: | Enter the email address of the contact person. |
| Format T4: | Click this button to move the T4 fields to print exactly in the pre-printed form. |
| T4-XML: | Click this button to generate the T4 XML File for uploading to the Governments website. |
| View: | Click this button to view the T4 information. |
| Relevé 1: | Select this option to print Relevé 1 forms for your employees. Use the pop-up lists in the Relevé 1 Boxes section to assign the appropriate Other Income and Other Deduction items to the correct letter on the Relevé 1. Relevé 1 slips will be printed only for employees with Quebec assigned as the Province on the Taxes tab of the Employee Setup window. |

## Deduction:

This section will give you a Summary report on Deduction from the employee site.
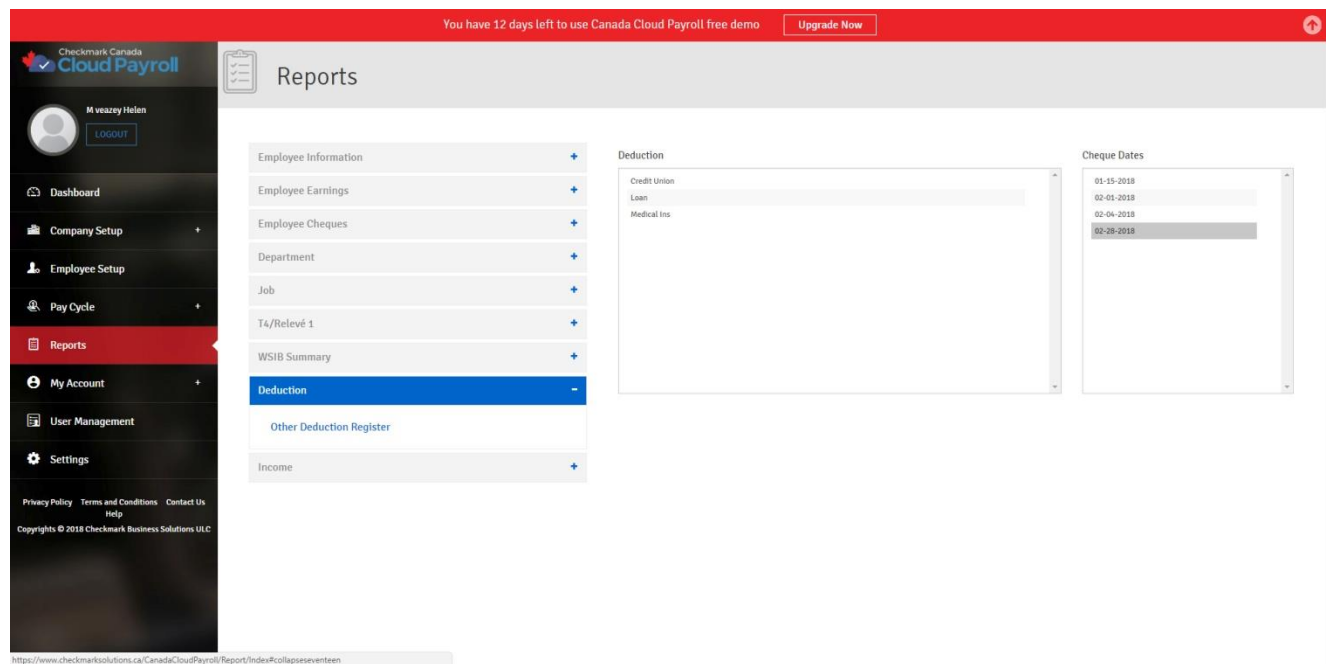
# Income

This section will give you a Summary report on Income from the employee site.
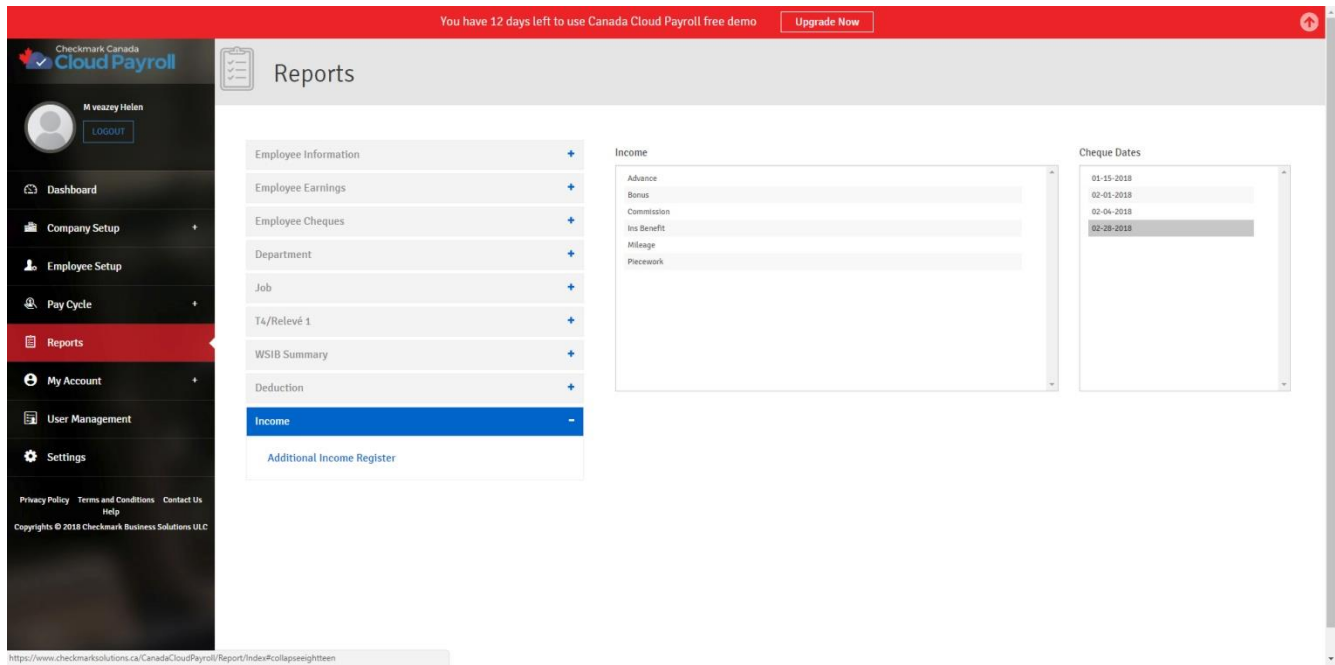
# Chapter VII

# My Account

This chapter will walk you through how to convert from Trial/Demo to a Paid and regular customer of Checkmark Canada Cloud Payroll, as well as related products of Checkmark Canada Cloud Payroll.
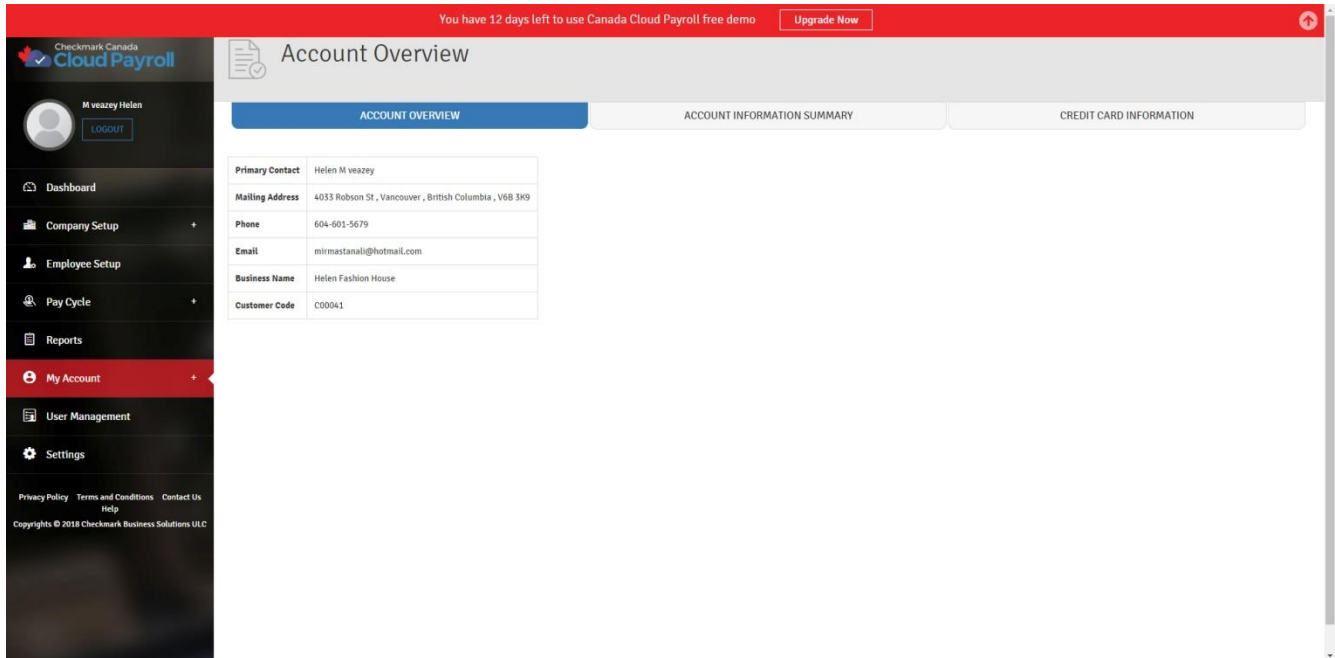


**Account Overview:**        This shows registration details like Primary Contact name, Mailing address, Phone, Email ID, Business Name, and Customer Code.

Account Information Summary: Here you can change or the Edit Primary Contact name, Billing Address, and Shipping Address.

## Account Overview

| ACCOUNT OVERVIEW | ACCOUNT INFORMATION SUMMARY | CREDIT CARD INFORMATION |
| --- | --- | --- |

**Primary Contact**

First Name *
Helen

Last Name *
M veazey

**Billing Address**

Address Line1 *
4033 Robson St

Address Line2
Address Line2

City *
Vancouver

Province *
British Columbia

Postal Code *
V6B 3K9

Country *
Canada

Phone *
604-601-5679

Email *
mirmastanali@hotmail.com

Shipping Address is same as Billing : ☑

**Shipping Address**

Address Line1 *
4033 Robson St

Address Line2
Address Line2

City *
Vancouver

Province *
British Columbia

Postal Code *
V6B 3K9

Country *
Canada

Phone *
604-601-5679

SUBMIT     CLEAR     CANCEL

---

**Credit Card Summary:** Here you can Add New Credit Details. Once you fill in all the mandatory fields, click on checkbox of "I Agree to the Checkmark Refund Policy, Privacy Policy and Terms and Conditions," and Click on the checkbox of "Save Credit Card for Later," and click on the "Save" button to get it to save.

## Account Overview

| ACCOUNT OVERVIEW | ACCOUNT INFORMATION SUMMARY | CREDIT CARD INFORMATION |
| --- | --- | --- |

**Add New Card**

Card Number
1245 1245 1245 1245

Expiry Date
Jan        2018

Security Code
Security Code

Name on Card
John Doe

☐ I agree to the Checkmark Refund Policy, Privacy Policy and Terms & Conditions.

☐ Save Credit Card for later

SAVE     CLEAR     CANCEL

{ forte }
VISA  MasterCard  American Express  DISCOVER  Diners  JCB

**Registered Products:**   On this page you can convert your Checkmark Canada Cloud Payroll from Trial to Paid Version by clicking on the "Upgrade to Paid " button.
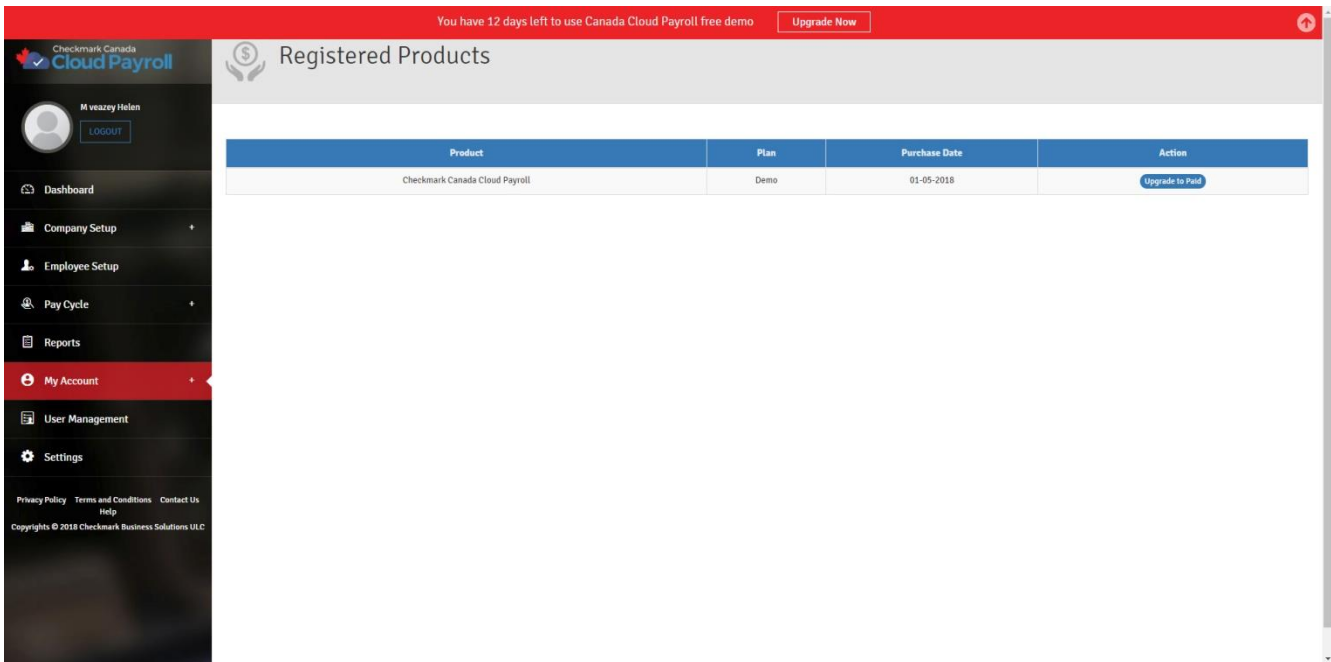


**Payment Information:**  In this page you can view all the transactions that are made in Checkmark Canada Cloud Payroll.
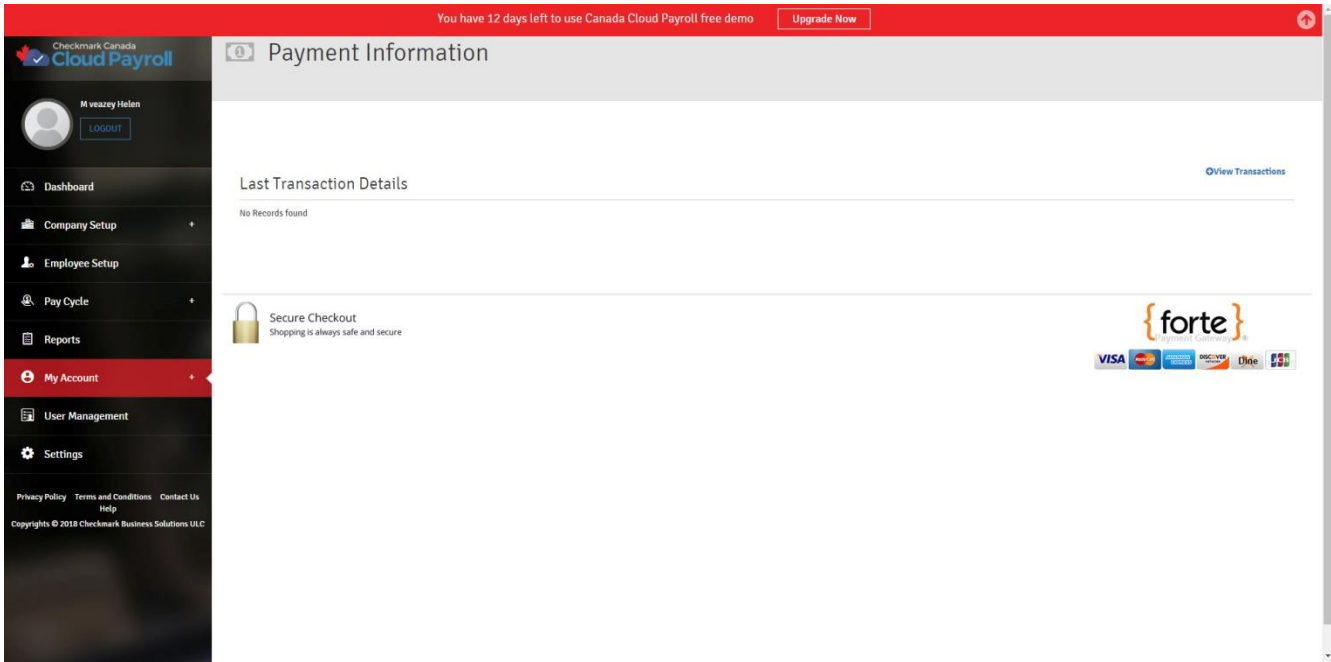
**Support:**

Here there two tabs where you can raise the ticket for any issue that is related to the application for Checkmark Canada Cloud Payroll and filling the Application form. You can even suggest a feature that would benefit you in the future while using Checkmark Canada Cloud Payroll.

# Chapter VIII

# User Management

## Active

## Inactive

This chapter walks you through you how to create Sub-User Active and Inactive with the below flow.



Active:  Here you can create a sub-user by filling out the form, and you can set a permission for a user to use the application.

Create User:

First Name:              Enter the first name of Sub-User

Last Name:              Enter the last name of Sub-User

Email Address: Enter the Email Address of Sub-User.

Password:              Enter the Password of the Sub-User

Confirm Password: Enter the Confirm Password of the Sub-User

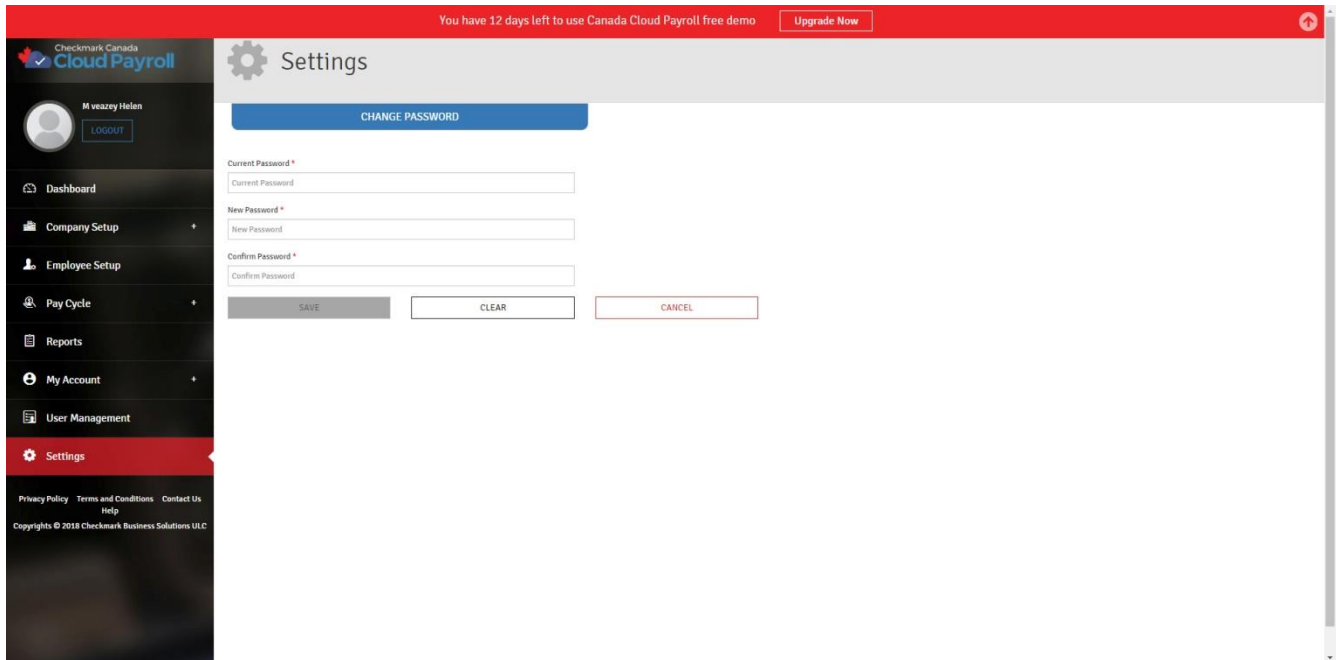Set Permissions:      Select the checkbox and Set Permissions for the Sub-User to use in the application

Once the form is completed click on "Save" button to save the details of Sub-Users.

# Chapter IX

# Settings

## Change Password

This chapter walks through you how to change your password and use it.



Current Password:           Enter the Current Password that you gave at the time
                            of registration with Checkmark Canada Cloud Payroll.

New Password:           Enter the New Password for Checkmark Canada Cloud Payroll.

Confirm Password:           Enter the Confirm Password for Checkmark Canada Cloud
                            Payroll.

Once you complete "New Password and Confirm Password," click on Save to use for the future for
Checkmark Canada Cloud Payroll.

# Support Contact Information

| | |
|---|---|
| **Corporate Address:** | 997 Seymour St.Suite<br>250 Vancouver BC<br>V6B3M1, Canada. |
| **Business Hours:** | 8am - 5pm PDT Monday - Thursday<br>8am - 4pm PDT Fridays |
| **Phone:** | 970-225-0522 |
| **Email:** | info.ca@checkmarksolutions.ca |
| **Website**: | www.checkmarksolutions.ca |