

Employee Maintenance

The table below and the two tables on the following page include instructions to add an employee, change information for an existing employee, and delete a former employee. The *QuickBooks* windows for these maintenance activities are shown on pages 76 through 80.



Add an Employee Record Quick Reference Table

| Box or Other Location | Procedure |
|-----------------------|---|
| Home Page | Click the Employees icon to display the Employee Center. |
| Employees Tab | Click the Employees tab if it is not already open. |
| New Employee button | Click the New Employee button to open the New Employee window. |
| Personal tab | Complete the boxes to the extent that the information is available. Some boxes may not be applicable for the employee. |
| Address & Contact tab | Select the Address & Contact tab. Complete the boxes to the extent that the information is available. Some boxes may not be applicable for the employee. |
| Additional Info tab | Select the Additional Info tab. Enter the employee account number, if applicable. |
| Employment Info tab | Select the Employment Info tab. Enter the hire date. |
| Payroll Info tab | Select the Payroll Info tab. Enter the pay frequency, then enter the salary, hourly, and/or overtime amounts/rates into the Earnings section of the window. Click the Taxes button. |
| Federal tab | Complete the boxes to the extent that information is available, including dependents. |
| State tab | Select the State Worked and the State Subject to Withholding from the drop-down menu. Enter the number of allowances. |
| Other tab | Use this tab to Add new payroll item such as surcharges, contributions, or other User-Defined taxes. |
| OK button | Click the OK button to save the entered employee information and close the window. |

Change Information in An Existing Employee’s Record Quick Reference Table

| Box or Other Location | Procedure |
|-----------------------|---|
| Home Page | Click the Employees icon to display the Employee Center. |
| Employee Center | Click the Employees tab to display the employee list. |
| Employee List | Right-click on the employee name that is to be changed and select Edit Employee to open the Edit Employee window. |
| Edit Employee window | Choose the relevant tab(s). Change appropriate information in the windows. |
| OK button | Click the OK button to save the edited employee information and close the window. |

Delete a Former Employee’s Record Quick Reference Table

| Box or Other Location | Procedure |
|-----------------------|---|
| Home Page | Click the Employees icon to display the Employee Center. |
| Employee Center | Click the Employees tab to display the employee list. |
| Name column | Right-click on the employee name that is to be deleted and select Delete Employee. <i>(Note: Be sure you want to delete the employee record before you do so. If you want that employee included later, you will need to find and reenter the information as you would for a new employee following the guidance in Add an Employee Record – Quick Reference Table.)</i> |
| QuickBooks message | If the employee is associated with at least one transaction in the current year or has a prior balance, a warning message will appear. For this project, click cancel and do not delete the employee. |

Employee Maintenance QuickBooks windows

Employee Center → Employees Tab → New Employee

Employee Center: Jennifer M Brownell

New Employee... Manage Employee Information Print Enter Time Excel Word

Employee Information

Full Name: **Jennifer M Brownell** Main Phone: 614-556-5110
Account No: **10001**
Address: **Jennifer M Brownell**
2455 Field Circle Court
Sienna Heights, OH 43225
Map | Directions

NOTE: Note available

REPORTS FOR THIS EMPLOYEE:
QuickReport
Payroll Summary
Paid Time Off Report
Employee Pay Adjustments
History

Transactions

| TRANSACTION TYPE | DATE | ACCOUNT | AMOUNT |
|------------------|------------|------------------------------|----------|
| Paycheck | 02/28/2021 | 10100 - Cash-General Account | 2,521.27 |
| Paycheck | 02/15/2021 | 10100 - Cash-General Account | 2,521.27 |
| Paycheck | 01/29/2021 | 10100 - Cash-General Account | 2,521.27 |
| Paycheck | 01/15/2021 | 10100 - Cash-General Account | 2,521.27 |

New Employee Window – Personal Tab

INFORMATION FOR: **Personal**

LEGAL NAME: [] First [] M.I. [] Last []

Address & Contact: PRINT ON CHECKS AS []

Additional Info: SOCIAL SECURITY NO. []

Payroll Info: GENDER []

Employment Info: DATE OF BIRTH []

Workers' Comp: MARITAL STATUS []

U.S. CITIZEN []

ETHNICITY []

DISABILITY: DISABLED []
DISABILITY DESCRIPTION []

I-9 FORM: ON FILE []
WORK AUTHORIZATION EXPIRES []

MILITARY: U.S. VETERAN []
STATUS []

Employee is inactive

OK Cancel Help

(windows continued on the following page)

Employee Maintenance

QuickBooks windows (continued)

New Employee Window—Address & Contact Tab

INFORMATION FOR

Personal

Address & Contact

Additional Info

Payroll Info

Employment Info

Workers' Comp

HOME ADDRESS

ADDRESS

CITY

STATE (none) ZIP

MAIN PHONE MAIN EMAIL

Work Phone CC Email

Mobile Website

Fax Other 1

EMERGENCY CONTACT INFO

| CONTACT NAME | CONTACT PHONE | RELATION |
|-------------------|---------------|----------|
| Primary Contact | | |
| Secondary Contact | | |

Employee is inactive

OK Cancel Help

New Employee Window—Additional Info Tab

INFORMATION FOR

Personal

Address & Contact

Additional Info

Payroll Info

Employment Info

Workers' Comp

ACCOUNT NO. (EMPLOYEE ID)

BILLING RATE LEVEL

CUSTOM FIELDS

B-DAY

DATE OF LAST RAISE

SPOUSE'S NAME

Define Fields

Employee is inactive

OK Cancel Help

(windows continued on the following page)

Employee Maintenance

QuickBooks windows (continued)

New Employee Window – Employment Info Tab

INFORMATION FOR

Personal
Address & Contact
Additional Info
Payroll Info
Employment Info
Workers' Comp

Employment Leave of Absence Termination

EMPLOYMENT DATES

HIRE DATE: 12/15/2021
ORIGINAL HIRE DATE
ADJUSTED SERVICE DATE
RELEASE DATE (LAST DATE ON PAYROLL)

JOB DETAILS

TITLE
SUPERVISOR
DEPARTMENT
DESCRIPTION
TARGET BONUS

EMPLOYMENT DETAILS

EMPLOYMENT TYPE: Regular
FULL/PART TIME
SEASONAL
EXEMPT
KEY EMPLOYEE

Employee is inactive

OK Cancel Help

New Employee Window – Payroll Info Tab

INFORMATION FOR

Personal
Address & Contact
Additional Info
Payroll Info
Employment Info
Workers' Comp

PAYROLL SCHEDULE
PAY FREQUENCY: Biweekly
CLASS

Direct Deposit Taxes...
Sick/Vacation...

EARNINGS

| ITEM NAME | HOURLY/ANNUAL RATE |
|-------------|--------------------|
| Regular Pay | |
| | |
| | |
| | |

ADDITIONS, DEDUCTIONS AND COMPANY CONTRIBUTIONS

| ITEM NAME | AMOUNT | LIMIT |
|-----------|--------|-------|
| | | |
| | | |
| | | |

Use time data to create paychecks
 Employee is covered by a qualified pension plan

Employee is inactive

OK Cancel Help

(windows continued on the following page)

Employee Maintenance

QuickBooks windows (continued)

Taxes Window – Federal Tab

The screenshot shows the 'Taxes' window with the 'Federal' tab selected. The 'Form W-4' is set to '2019 and Prior'. The 'Filing Status' is 'Single'. 'Allowances' is set to '0' and 'Extra Withholding' is '0.00'. Under 'SUBJECT TO', the following options are checked: Medicare, Social Security, and Federal Unemployment Tax (Company Paid). The 'Advance Earned Income Credit' option is unchecked. A question mark icon is visible next to the 'Form W-4' dropdown. On the right side, there are 'OK', 'Cancel', and 'Help' buttons.

Taxes Window – State Tab

The screenshot shows the 'Taxes' window with the 'State' tab selected. The 'STATE WORKED' section has a 'State' dropdown menu set to '(none)'. The 'STATE SUBJECT TO WITHHOLDING' section also has a 'State' dropdown menu set to '(none)'. Below these are sections for 'MISCELLANEOUS DATA (DEPENDS ON STATE SELECTED)' and 'PREVIOUS STATE DATA (FOR REFERENCE ONLY)'. On the right side, there are 'OK', 'Cancel', and 'Help' buttons.

(windows continued on the following page)

Employee Maintenance

QuickBooks windows (continued)

Taxes Window – Other Tab

The screenshot shows the 'Taxes' window in QuickBooks, with the 'Other' tab selected. The window has a title bar with 'Taxes' and a close button. Below the title bar are three tabs: 'Federal', 'State', and 'Other', with 'Other' highlighted. The main area contains a table with two columns: 'ITEM NAME' and 'TYPE'. The 'TYPE' column has a dropdown menu currently showing '<--- select Other Tax'. To the right of the table is a 'Delete' button. Below the table is a 'Print on W-2 as:' label followed by an empty text box. At the bottom of the window is a section labeled 'PREVIOUS LOCAL DATA (FOR REFERENCE ONLY)' with an empty text area. On the right side of the window are three buttons: 'OK', 'Cancel', and 'Help'.