

Employee Maintenance

Employee maintenance includes adding an employee record, changing information for an existing employee, and deleting a former employee's record. The three maintenance tasks are covered in detail on the following pages, including *QBO* windows. Note that there are several pages of *QBO* windows for this section, and the circled letters from the Quick Reference Tables are disbursed throughout those pages.

Add an Employee Record – Quick Reference Table

Step	Box or Other Location	Procedure
A	QBO Navigation Bar	Click Payroll → Employees to open the employee listing.
B	Add an employee button	Click the Add an employee button .
C	Add Employee window	Uncheck the box next to “Ask this employee to enter their personal, tax, and banking info with QuickBooks Workforce” in the first section because there is no way to accommodate this feature using the educational platform. Note that all window illustrations were done with this check box unchecked. Then complete the first few sections of the Add Employee window up to the point of adding the pay rate/ salary amount.*
D	+ Add Additional pay types link	If the new employee will receive any additional types of pay (overtime, holiday, commission, bonus, for example), click the + Additional pay types link to open the Pay types window .
E	Pay types window	If the employee is to receive additional types of pay, select the appropriate type(s). Note: If Overtime Pay is selected, <i>QBO</i> will automatically pay 1.5 times the regularly hourly rate for overtime hours worked by hourly employees.
F	Save button (Pay types window)	When all additional pay types have been entered, click the Save button to return to the Add Employee window .
G	+ Add deductions link	If the employee has any additional deductions or garnishments, click the + Add deductions link to open the Deductions & contributions window .
H	Deductions & contributions window	If the employee has additional deductions and/or contributions (flexible spending accounts, HSA plans, other taxable deductions, health insurance contribution, and/or retirement contribution), click the + Add deduction/contribution link and enter the items.
I	Garnishments (Deductions & contributions window)	If the employee has any garnishments (spousal support, federal tax levy, other), click the + Add garnishment link and enter the items.
J	Done button (Deductions & contributions window)	Click the Done button when you are finished adding any deductions/ contributions and/or garnishments. This will return you to the Add Employee window .
K	+ Enter W-4 form	Click the + Enter W-4 form link to open the Add withholdings window .
L	Add withholdings window	Enter all information for federal, state, and local tax withholdings to the extent the information is available.

(continued)



Add an Employee Record – Quick Reference Table *(continued)*

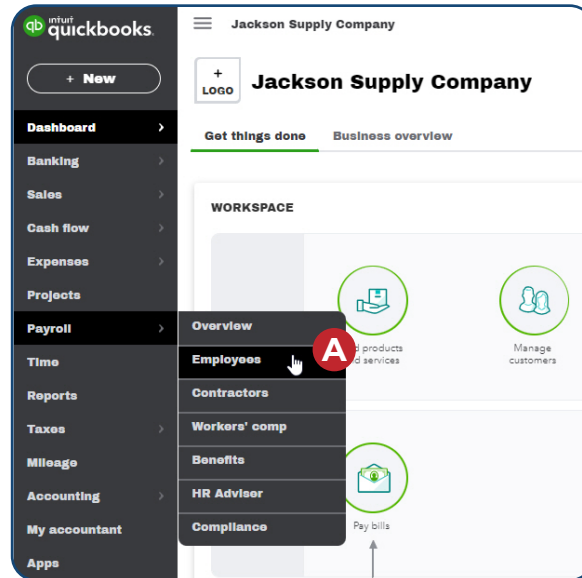
Step	Box or Other Location	Procedure
M	Save button (Add withholdings window)	When you have finished entering all federal, state, and local tax withholdings, click the Save button to return to the Add Employee window .
N	Add Employee window – remaining sections	Complete the remaining parts of the Add Employee window , such as birth date and method of payment.
O	Add Employee window	Review all information to verify that it is correct.
P	Done button	Click the Done button to save the new employee record.

* Because QBO constantly updates its payroll windows, the number of sections in the Add Employee window, as well as the location of some of the boxes, may change from what is shown in the illustrations. The same basic information is presented, however.



Add an Employee Record

QBO windows



Payroll

Overview Employees Contractors Workers' comp Benefits HR Adviser Compliance

Employees Run payroll

Next payroll due Monday, 02/28/2022
Paycheck list

i Families First Coronavirus Response Act.
If your employees or their families are affected by COVID-19, you can pay them sick leave and apply a credit to your payroll taxes. [Learn more](#) x

i CARES Act.
Defer your Social Security tax payments and apply a wage retention credit to help keep your employees on payroll. [Learn more](#) x

i Workers' comp insurance is required in Michigan.
Pay only what's needed, whenever you run payroll. [Learn more](#) x

PRIVACY

Find an employee

Active Employees

⚙️

NAME ▲	PAY RATE	PAY METHOD	STATUS
Brownell, Jennifer	\$65,000.00/year	Check	Active

B



Add an Employee Record

QBO windows (continued)

The screenshot shows the 'Add Employee' window with the following sections and fields:

- Personal info** (Section 1):
 - First name* (text field)
 - M.I. (text field)
 - Last name* (text field)
 - Hire date (calendar icon)
 - Why do we need this? (text field)
 - Email (text field)
 - Checkboxes for 'We'll email an invite...' and 'Ask this employee to enter their personal, tax (2020 W-4), and banking info...'
 - Checkboxes for 'Invite this employee to track and record their hours...' and 'Invite this employee to track and record their hours with QuickBooks Time.'
- How often do you pay this employee?** (Section 2):
 - Dropdown menu: 'Every month'
 - Text field: 'starting 02/28/2022'
- How much do you pay this employee?** (Section 3):
 - Dropdown menu: 'Hourly'
 - Text field: '\$' followed by a number field and '/ hour'
 - Text fields: 'Default hours: ' hours per day and ' days per week. (optional) What are default hours?'
 - Link: '+ Add additional pay types (like overtime and sick pay)'
- Does this employee have any deductions? (Examples: retirement, health care)** (Section 4):
 - Text: 'Deductions may include healthcare or retirement plans. Garnishments and loan repayments can be added here too. Learn more about deductions'
 - Text: 'No deductions (most common).'
 - Link: '+ Add deductions'
- What are this employee's withholdings?** (Section 5):
 - Text: 'You can find this info on this employee's W-4. What is a W-4?'
 - Link: '+ Enter W-4 form'
- What are your employee's personal details?** (Section 6):
 - Text: 'Add employee's personal details.'
 - Text field: 'Birth date'
- How do you want to pay this employee?** (Section 7):
 - Text: 'In a rush? Choose paper check for now and come back to change this later. Learn about ways to pay'
 - Dropdown menu: 'Direct deposit'

At the bottom of the window are 'Cancel' and 'Done' buttons.

Note: This illustration encompasses the entire contents of the window for illustration purposes. You will need to use the scroll bar to view and complete the lower sections of the window.



Add an Employee Record

QBO windows (continued)

Pay types

How much do you want to pay Employee?
[Supported pay types?](#)

Pay type: Rate per hour:

Default hours (optional)
Set default hours if this employee will work the same number of hours every pay period. This saves you time and may make you eligible for Auto Payroll. You can always update hours when running payroll. [Learn About Auto Payroll](#)

Hours per day: Days per week:

Pay type: Hourly 2

[+ Another hourly pay type](#)

Common pay types

- Overtime Pay
- Double Overtime Pay
- Holiday Pay
- Bonus
- Commission

[Cancel](#) [Save](#)

Deductions & contributions

Any deductions or contributions for Jennifer?

Deductions/contributions
Deductions may include health insurance, retirement plans, loan repayments, and so on. [Learn More](#)

[+ Add deduction/contribution](#)

Garnishments
A garnishment is a court order to withhold wages from an employee and send the money to an agency or creditor. [Learn More](#)

[+ Add garnishment](#)

[Cancel](#) [Done](#)



Add an Employee Record

QBO windows (continued)

Add withholdings

What are Employee's withholdings?

Personal info

First name: Employee M.I.: E Last name: New

Address: _____

City or town: _____ State: MI ZIP code: _____

Social Security number: _____
What if they only have an ITIN?

Federal withholding

You can find the information for this section on Employee's W-4 form. [Need a blank W-4 form?](#)

Filing status (Step 1a):

Select yes if Employee has marked this box on their W-4. (Step 3c)

Yes

Claimed dependents' deduction (Step 3):

Other adjustments

Other income (Step 4a)	Deductions (Step 4b)	Extra withholding (Step 4c)
<input type="text" value="\$0"/>	<input type="text" value="\$0"/>	<input type="text" value="\$0"/>

State withholding

MI state taxes

You can find the information for this section on Employee's state tax form. [Need a blank state form?](#)

Filing status: Withholding allowances: Additional amount to withhold:

Local taxes

[Learn more](#)
Looks like there aren't any local taxes for this location. If Employee lives or works in a state with local taxes, you may want to double-check the location. [Edit location](#)

Tax exemptions

These are not common. Certain government criteria must be met to take these exemptions. Not sure? Contact a tax expert or the applicable tax agency. [Learn More](#)

FUTA
 Social Security and Medicare
 MI SUI

[Cancel](#) [Save](#)

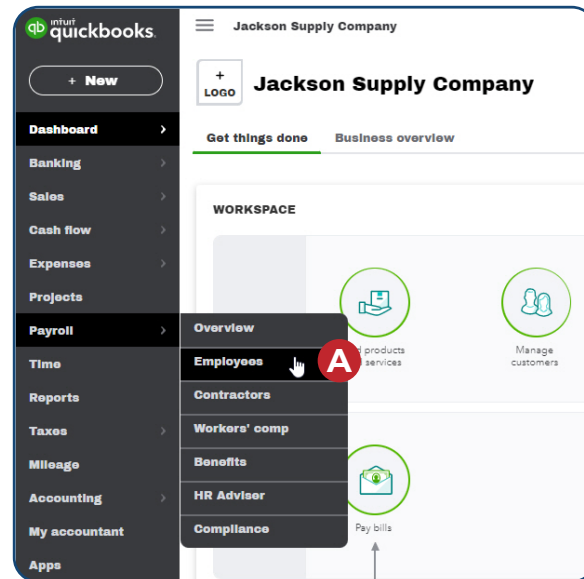
Note: The illustration below encompasses the entire contents of the window for illustration purposes. You will need to use the scroll bar to view and complete the lower sections of the window.

Change Information in an Existing Employee's Record – Quick Reference Table

Step	Box or Other Location	Procedure
A	QBO Navigation Bar	Click Payroll → Employees to open the employee listing.
B	Name column	For the employee whose record you need to edit, click on the employee's name to open the Employee details tab .
C	Edit employee button	Click the Edit employee button next to the employee's icon and name to open a details window for that employee.
D	Employee details	Locate the section(s) that need to be edited and make the appropriate changes.
E	Done button	When all changes have been properly made, click the Done button to save the changes.

Change Information in an Existing Employee's Record

QBO windows



Change Information in an Existing Employee's Record

QBO windows (continued)

Payroll

Overview **Employees** Contractors Workers' comp Benefits HR Adviser Compliance

Employees Run payroll

Next payroll due Thursday, 03/31/2022
[Paycheck list](#)

Families First Coronavirus Response Act.
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CARES Act.
Defer your Social Security tax payments and apply a wage retention credit to help keep your employees on payroll. [Learn more](#)

Workers' comp insurance is required in Michigan.
Pay only what's needed, whenever you run payroll. [Learn more](#)

PRIVACY

Active Employees

Invite to Workforce

Add an employee

NAME ▲	PAY RATE	PAY METHOD	STATUS
Brownell, Jennifer B	\$65,000.00/year	Check	Active
Phelps, Mark	\$20.00/hour	Check	Active

Jennifer M. Brownell

[Edit employee](#) C

Employee details

Paycheck list

Pay

Taxes Married Filing Jointly (or Qualifying Widow(er))

Social Security no.4567

Pay rate \$65,000.00 / year

Pay schedule Every month

Payment method Check

Deductions None

Company-paid contributions None

Garnishments None

Federal W-4 [Download](#)

Profile

Address 2455 Field Circle Court
Okemos, MI 48864

Birth date 06/08/1973

Gender --

Notes

Employment

Employee ID

Status Active

Hire date 02/01/2022

Work location 2867 Jolly Road
Okemos, MI 48864

Job title

Workers' comp class

Reference — Payroll Cycle and Other Activities:
Employee Maintenance



Change Information in an Existing Employee's Record QBO windows (continued)

Jennifer Brownell

Pay Profile Employment

1 Personal info

First name* Jennifer M.I. Last name* M Brownell

Hire date
Why do we need this?
02/01/2022

Email

We'll email an invite for this employee to view their pay stubs and W-2 with QuickBooks Workforce. [Learn about Workforce](#)

Invite this employee to track and record their hours with QuickBooks Time. [Learn more](#)

2 How often do you pay Jennifer?

Enter a few details and we'll work out your company's payroll calendar. [What is a pay schedule?](#)

Every month starting 02/28/2022

3 How much do you pay Jennifer?

If your company offers additional pay types, add them here. These pay types show up when you run payroll. [Learn more about pay types](#)

Salary \$ 65,000.00 per year

Jennifer works 8.00 hours per day and 5.00 days per week. [What's this?](#)

+ Add additional pay types (like overtime and sick pay)

4 Does Jennifer have any deductions? (Examples: retirement, health care)

Deductions may include healthcare or retirement plans. Garnishments and loan repayments can be added here too. [Learn more about deductions](#)

No deductions (most common).

+ Add deductions

5 What are Jennifer's withholdings?

You can find this info on this employee's W-4. [What is a W-4?](#)

Married Filing Jointly (or Qualifying Widow(er))

6 What are Jennifer's personal details?

Add employee's personal details.

Birth date 06/08/1973

7 How do you want to pay Jennifer?

In a rush? Choose paper check for now and come back to change this later. [Learn about ways to pay](#)

Paper check

Each time you run payroll, we'll create a paycheck that you can print and hand to Jennifer yourself.

Delete employee Demo

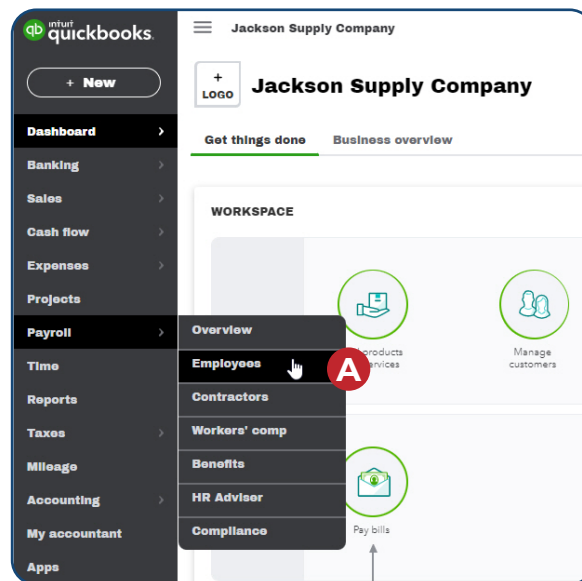
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Delete a Former Employee's Record – Quick Reference Table

Step	Box or Other Location	Procedure
A	QBO Navigation Bar	Click Payroll → Employees to open the employee listing.
B	Name column	For the employee whose record you want to delete, click on the employee's name to open the Employee details tab .
C	Edit employee button	Click the Edit employee button next to the employee's icon and name to open a details window for that employee.
D	Delete employee button	Click the Delete employee button .
E	Warning message	A message appears asking if you are sure you want to delete the employee. Click the Yes button to delete. Click the No button to preserve the employee's data. Close all windows to return to the QBO Home page .

Delete a Former Employee's Record

QBO windows



Delete a Former Employee's Record

QBO windows (continued)

Payroll

Overview **Employees** Contractors Workers' comp Benefits HR Adviser Compliance

Employees Run payroll ▼

Next payroll due Thursday, 03/31/2022
[Paycheck list](#)

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PRIVACY

Active Employees Invite to Workforce Add an employee ⚙️

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Phelps, Mark	\$20.00/hour	Check	Active

Jennifer M. Brownell

Edit employee C

Employee details

Paycheck list

Pay ✎

Taxes Married Filing Jointly (or Qualifying Widow(er))

Social Security no.4567

Pay rate \$65,000.00 / year

Pay schedule Every month

Payment method Check

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Company-paid contributions None

Garnishments None

Federal W-4 [Download](#)

Profile ✎

Address 2455 Field Circle Court
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Notes

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Delete a Former Employee's Record

QBO windows (continued)

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Pay Profile Employment

1 Personal info

First name* Jennifer M.I. M Last name* Brownell

Hire date Why do we need this? 02/01/2022

Email

We'll email an invite for this employee to view their pay stubs and W-2 with QuickBooks Workforce. Learn about Workforce

Invite this employee to track and record their hours with QuickBooks Time. Learn more

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Paper check

Each time you run payroll, we'll create a paycheck that you can print and hand to Jennifer yourself.

D Delete employee Done

Note: This illustration encompasses the entire contents of the window for illustration purposes. You will need to use the scroll bar to view and complete the lower sections of the window.

! Deleting will remove all of this employee's info. Are you sure you want to delete this employee?

No Yes

E

