



Add Employees for the First Time

Contents

- Employees.....2
- Add Employee Information3
- Add Employee History.....4
- Assign Jobs to an Employee5
- Enter Tax Information6
- Add Form 1095-B Coverage.....7
 - Add Covered Individuals.....8
- Add Form 1095-C Coverage.....9
 - Add Covered Individuals.....10
 - Add Employees' Offer Codes.....11
- Set up an Employee's Direct Deposit Information12
- Apply Adjustments13
- Add Earned Time Off.....14
- Attach Files to an Employee15

Employees

This is where you enter the details of the people who perpetually long for payday – including yourself.

As you enter your employees' information, be sure to have their employee forms handy for personal details and tax information that you may not know off the top of your head.

For ministers, pay special attention to his or her tax information. Ministers have special tax requirements and often have allowances that you want to account for.

Finally, your employees' details will change as their lives change, so it's important to stay up-to-date to ensure everyone receives the correct paycheck.

? **TIP:** It may take a while to enter all of your employee information for the first time. [Here is a guide to help you through that process](#) without employee management getting in the way. Use the guide first, then return to this section to review steps on how to edit your employee information later.

Add Employee Information

Enter any basic information that you have on file for your employees.

Before you begin

- You must have accounting administrator permissions to perform this task.
- Have all employee forms handy as you enter information.

Procedure

- 1 In the top-left corner, click your ministry hub then [Accounting](#). Then click [Payroll→Employees](#).
- 2 Click [Add Employee](#).
- 3 Enter the employee's name. If the employee already has a Realm profile or is a vendor, a list of potential matches displays. If you click a name, that person's available information is automatically entered.
- 4 Select if he or she is a minister. See what this check box affects below.
- 5 Enter the employee's home address, so their tax details display accurate information based on their location.
- 6 While the other fields are optional, complete them with all you know about the employee.
- 7 If you want to continue with this employee, click [Next: Employment History](#). If you want to return to this later, click [Save & Close](#).

TIP: Is this person a minister?

Select this check box to swap federal and state taxes for ministerial taxes in the [Tax Information](#) tab. It's important to select the box here if you want your minister's tax information to be accurate.

Add Employees for the First Time

Example

In this video example, we begin to add a minister's employee and tax information.

Add Employee History

The longer someone is employed, the more you will need to update their history.

Before you begin

- You must have accounting administrator permissions to perform this task.

Procedure

- 1 In the top-left corner, click your ministry hub then [Accounting](#). Then click [Payroll](#)→[Employees](#).
- 2 Either click the employee's name, or click [...](#) beside an employee and select [Edit](#).
- 3 On the [Employee History](#) tab, click [Add Employee History](#).
- 4 If this is a new employee, select [Hire](#), and enter the hire date. If this is an existing employee, you may have more events to add.
- 5 Click [Add Note](#) and enter a note explaining why an event took place or what happened during the event if necessary.
- 6 If you want to continue with this employee, click [Next: Jobs](#). If you want to return to this later, click [Save & Close](#).

Assign Jobs to an Employee

Take the jobs you've set up, and select the ones that apply to each employee.

Before you begin

- You must have accounting administrator permissions to perform this task.
- You must set up your jobs before you can assign them.

Context

Only add an employee's regular job here. You will add one-time jobs on individual employees' timesheets.

Procedure

- 1 In the top-left corner, click your ministry hub then [Accounting](#). Then click [Payroll](#)→[Employees](#).
- 2 Either click the employee's name, or click **...** beside an employee and select [Edit](#).
- 3 On the [Jobs](#) tab, enter this employee's main pay schedule. If they work multiple job at different frequencies, this serves as the pay schedule for tax calculation.
- 4 Select or add a new job title.
- 5 Complete the fields so that this employee's pay accurately displays per period. If this is an hourly position, enter the [Default Hours](#) and the [Overtime Rate](#) in addition to the other fields. See more information on hourly and salaried rates below.
- 6 Click [Add](#). Repeat these steps to assign additional jobs.
- 7 If you want to continue with this employee, click [Next: Tax Information](#). If you want to return to this later, click [Save & Close](#).

TIP: If an employee is hourly, their rate is displayed per hour. This is also true for their default overtime rate. These rates will display on your employee's timesheet as soon as they're loaded into it.

For a salaried employee, the rate is what they earn per year. When payroll is run for a salaried employee, their amount earned per pay period will be calculated based on their annual rate.

Enter Tax Information

Enter your employees' tax elections, allowances, and withholding amounts.

Before you begin

- You must have accounting administrator permissions to perform this task.
- If you need more information on ministerial taxes, read [Publication 517](#).
- Make sure these fields match your employee's W-4 as you enter their information.

Context

Only state and local tax information that applies to an employee's address will display. Wages for ministers are FICA exempt and will print as taxable income on Form W-2. Only the voluntary withholding amount you enter will be deducted for income taxes.

Procedure

- 1 In the top-left corner, click your ministry hub then [Accounting](#). Then click [Payroll](#)→[Employees](#).
- 2 Either click the employee's name, or click **...** beside an employee and select [Edit](#).
- 3 On the [Tax Information](#) tab, only turn on the 2020 W-4 if this employee is new or has requested federal withholding changes.
- 4 Select any necessary elections, and enter withholding.
- 5 If this employee lives out of state, select whether to file taxes from the state in which they live or the state in which they work.
- 6 For ministers, if necessary, calculate the voluntary withholding amounts per paycheck, and enter the numbers.
- 7 Clear any local taxes that do not apply.
- 8 If you want to continue with this employee, click [Next: ACA](#). If you want to return to this later, click [Save & Close](#).

NOTE: Ministers typically file Form 4361 to exempt themselves from self-employment tax. If your ministers haven't done this, increase the voluntary amount withheld to offset the cost of self-employment tax they would otherwise have to pay.

Add Form 1095-B Coverage

If you're a small, self-insured employer, add Form 1095-B coverage for your employees.

Before you begin

- You must have accounting administrator permissions to perform this task.
- Visit the [official IRS website](#) to determine if you qualify as a small employer.

Procedure

- 1 In the top-left corner, click your ministry hub then [Accounting](#). Then click [Payroll→Employees](#).
- 2 Either click the employee's name, or click **...** beside an employee and select [Edit](#).
- 3 On the [ACA](#) tab, select the reporting year.
- 4 Select [Form 1095-B](#) as the ACA form.
- 5 If this employee has dependents, click [Add Individual](#).
- 6 Enter the individual's name.
 - a **Optional:**
If the individual already has a Realm profile, view the information of the names that display below the Name field, and select the appropriate one. If applicable, the remaining information completes automatically once you select a name.
- 7 Enter the individual's social security number or their birthday. The IRS only requires one.
- 8 Select the individual's coverage details.
 - a If the individual was only covered for part of the year, select the months in which they were.
- 9 Click [Save](#).
- 10 If you want to continue with this employee, click [Next: Direct Deposit](#). If you want to return to this later, click [Save & Close](#).


Add Covered Individuals

Add the individuals covered by an employee's health insurance.

Before you begin

- You must have accounting administrator permissions to perform this task.
- You must either select [Form 1095-B](#) or [Self-Insured Coverage](#) if you use Form 1095-C.

Procedure

- 1 In the top-left corner, click your ministry hub then [Accounting](#). Then click [Payroll](#)→[Employees](#).
- 2 Either click the employee's name, or click  beside an employee and select [Edit](#).
- 3 On the [ACA](#) tab, click [Add Individual](#).
- 4 Enter the individual's name.
 - a **Optional:**
If the individual already has a Realm profile, view the information of the names that display below the Name field, and select the appropriate one. If applicable, the remaining information completes automatically once you select a name.
- 5 Enter the individual's social security number or their birthday. The IRS only requires one.
- 6 Select the individual's coverage details.
 - a If the individual was only covered for part of the year, select the months in which they were.
- 7 Click [Save](#).
- 8 If you want to continue with this employee, click [Next: Direct Deposit](#). If you want to return to this later, click [Save & Close](#).

Add Form 1095-C Coverage

If you're a large employer, add Form 1095-C coverage for your employees.

Before you begin

- You must have accounting administrator permissions to perform this task.
- Visit the [official IRS website](#) to determine if you qualify as a large employer.

Procedure

- 1 In the top-left corner, click your ministry hub then [Accounting](#). Then click [Payroll→Employees](#).
- 2 Either click the employee's name, or click **...** beside an employee and select [Edit](#).
- 3 On the [ACA](#) tab, select the reporting year.
- 4 Select [Form 1095-C](#) as the ACA form.
- 5 Select if you provide self-insured coverage.
 - a If this employee has dependents, see [Add Covered Individuals](#) for help adding that information.
- 6 Click [Edit Data](#).
- 7 Select your plan start month. This is the month in which this plan began for all of your employees, not just this individual.
- 8 Select one of the following coverage terms:
 - [Coverage codes and amounts are the same for all 12 months of the year](#)—Enter the offer code, employee required contribution, and safe harbor code once.
 - [Coverage codes and amounts vary for part of the year](#)—Enter the offer code, employee required contribution, and safe harbor code per month.
 - a **Optional** Enter the offer codes individually per month, click **...**, and select [Copy to Following Months](#) if the offer codes are the same from that month forward.
- 9 Click [Save](#).
- 10 If you want to continue with this employee, click [Next: Direct Deposit](#). If you want to return to this later, click [Save & Close](#).


Add Covered Individuals

Add the individuals covered by an employee's health insurance.

Before you begin

- You must have accounting administrator permissions to perform this task.
- You must either select [Form 1095-B](#) or [Self-Insured Coverage](#) if you use Form 1095-C.

Procedure

- 1 In the top-left corner, click your ministry hub then [Accounting](#). Then click [Payroll→Employees](#).
- 2 Either click the employee's name, or click  beside an employee and select [Edit](#).
- 3 On the [ACA](#) tab, click [Add Individual](#).
- 4 Enter the individual's name.
 - a **Optional:**
If the individual already has a Realm profile, view the information of the names that display below the Name field, and select the appropriate one. If applicable, the remaining information completes automatically once you select a name.
- 5 Enter the individual's social security number or their birthday. The IRS only requires one.
- 6 Select the individual's coverage details.
 - a If the individual was only covered for part of the year, select the months in which they were.
- 7 Click [Save](#).
- 8 If you want to continue with this employee, click [Next: Direct Deposit](#). If you want to return to this later, click [Save & Close](#).

Add Employees' Offer Codes

Enter codes for the coverage you offer to multiple employees.

Before you begin

- You must have accounting administrator permissions to perform this task.

Context

If you have a number of newly added employees, and your coverage involves preparing and printing Form 1095-C, add the offer codes for your coverage to multiple employees at once rather than entering them one at a time.

Procedure

- 1 In the top-left corner, click your ministry hub then [Accounting](#). Then click [Payroll→Employees](#).
- 2 Select the check boxes beside the employees you want to add offer codes for.
- 3 Click the [Select an action...](#) drop-down list, and select [Add Offer Codes for Form 1095-C](#).
- 4 Select the reporting year and the plan start month.
- 5 Select one of the following coverage terms:
 - [Coverage codes and amounts are the same for all 12 months of the year](#)—Enter the offer code, employee required contribution, and safe harbor code once.
 - [Coverage codes and amounts vary for part of the year](#)—Enter the offer code, employee required contribution, and safe harbor code per month.
 - a **Optional** Enter the offer codes individually per month, click [...](#), and select [Copy to Following Months](#) if the offer codes are the same from that month forward.
- 6 Select if you provide self-insured coverage.
- 7 Before you overwrite, know this action cannot be undone. Select this only if you're sure.
- 8 Click [Save](#).

Set up an Employee's Direct Deposit Information

Use an employee's bank information to set up direct deposit for them.

Before you begin

- You must have accounting administrator permissions to perform this task.

Procedure

- 1 In the top-left corner, click your ministry hub then [Accounting](#). Then click [Payroll](#)→[Employees](#).
- 2 Either click the employee's name, or click **⋮** beside an employee and select [Edit](#).
- 3 On the [Direct Deposit](#) tab, enable direct deposit for this employee.
- 4 With the information this employee provides, select whether they want to receive their direct deposit through their [Checking](#) or [Savings](#) account.
- 5 Enter the routing number for their preferred bank.
- 6 Enter their account number.
- 7 **Optional:**
If the employee wants a dollar amount or percentage of his or her net pay to go into another account, click [Add Additional Account](#), and enter the account's information. Any remaining will deposit into his or her primary account.
- 8 If you want to continue with this employee record, click [Next: Adjustments](#). If you want to return to this later, click [Save & Close](#).

Apply Adjustments

From employees' insurance to their 401k's, apply any benefits or other adjustments they qualify for.

Before you begin

- You must have accounting administrator permissions to perform this task.
- You must set up payroll adjustments before you can apply them to your employees.

Procedure

- 1 In the top-left corner, click your ministry hub then [Accounting](#). Then click [Payroll→Employees](#).
- 2 Either click the employee's name, or click **...** beside an employee and select [Edit](#).
- 3 On the [Adjustments](#) tab, select or add a new adjustment, like health insurance or retirement, and enter the amount or percentage of the adjustment.
- 4 Click [Add](#). If this employee has more adjustments, you can repeat the previous step and this one to add more.
- 5 If you want to continue with this employee, click [Next:Time Off](#). If you want to return to this later, click [Save & Close](#).

Add Earned Time Off

Enter the total amount of carryover available for the employee at this time.

Before you begin

- You must have accounting administrator permissions to perform this task.

Context

If you track carryover and time take, this is the amount of time off earned so far this year. If not, enter the total amount available for the employee at this time.

Procedure

- 1 In the top-left corner, click your ministry hub then [Accounting](#). Then click [Payroll](#)→[Employees](#).
- 2 Either click the employee's name, or click [⋮](#) beside an employee and select [Edit](#).
- 3 On the [Time Off](#) tab, click [Amount Earned](#).
- 4 Select the date on which to add this employee's available time off. It can be today's date, or it can align with your beginning balances—typically January 1st.
- 5 Select the format of the time off amount: [Hours](#) or [Days](#).
- 6 Enter the amount of time off this employee has available to them according to the format you selected.
- 7 Optional:
Click [Add Note](#) and enter a comment about the earned time off.
- 8 Click [Save](#).

Attach Files to an Employee

Attach files that are 20 MB or less to an employee's record.

Before you begin

- You must have accounting administrator permissions to perform this task.

Context

Attach a photo, ID, or other documents that you need to reference from time to time. Uploaded files will remain attached to the employee until they're deleted.

Procedure

- 1 In the top-left corner, click your ministry hub then [Accounting](#). Then click [Payroll](#)→[Employees](#).
- 2 Either click the employee's name, or click [⋮](#) beside an employee and select [Edit](#).
- 3 On the [Attachments](#) tab, click [Add Attachment](#).

TIP: Click [View allowed file types](#) before you click [Add Attachment](#) to make sure your attachments will be accepted.

- 4 Click [Choose File](#).
- 5 Locate and select the file you want to attach.

NOTE: The file must be 20 MB or less and must be in an acceptable format.

- 6 Give the file a descriptive name.
- 7 Add notes to further define what the attachment is for.
- 8 Click [Save](#).