



Remote Payroll Portal Instructions for: Payroll Data Entry

Payroll Data Entry

The payroll data that you record in your private, personalized, and secure web portal is automatically encrypted so your data is safe as it travels over the Internet. Each payroll period you will receive an e-mail message telling you that the payroll timesheet is available on your private portal. After you receive the e-mail message, please complete the following steps to record payroll data for the current pay period.

Accessing Payroll Data Entry

- 1) Click on Client Login, in the upper right hand corner of any page on the Jones & Roth website. (<http://www.jrcpa.com>)
- 2) Click Accounting & Payroll Portal.
- 3) Enter your unique login and password.
- 4) Click Login.
- 5) In the **Remote Payroll Data Entry** section, click on your company name under **Open Payroll for:**
 - The navigation pane that appears on the left includes links to the pages available.
 - The data-entry pane that appears on the right is where you will enter/edit payroll data, notes, etc.



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General Options

General Information

- ♦ The **Notes from Payroll Processor** pane is a read-only pane where we will post notes or important information you need to know before entering your payroll data. Please be sure to review all information in this pane before you begin entering data.
- ♦ Below the **Notes from Payroll Processor** pane are listed for your information the **Period Beginning Date**, **Period End Date**, and **Check Date** for the current payroll.
- ♦ The **Notes to Payroll Processor** pane can be used to enter any general questions or comments you would like to communicate back to us. We will check this field before processing your payroll.
- ♦ Click the **Update** button at the bottom of the page, to save any information entered.

Printable Report Options

- ♦ Mark or unmark information you would like displayed when you print the Remote Payroll Data Entry report.

Remote Payroll Data Entry

Short Form Payroll Entry (recommended for very simple payrolls only)

- ♦ Short Form Payroll Entry allows very quick and efficient one-screen timesheet entry.
- ♦ Enter time data for each employee listed. Click the Update button to save the information.
- ♦ To reset (clear) any information you've entered, click the Reset button. Important: Reset will clear all information on the form, not just the field or employee row you're on, that has been entered from the last time you clicked Update.
- ♦ To revise information entered for a particular employee, go to that field and enter the corrected information and then click the Update button again.
- ♦ To change an employee's permanent information (address, phone number, etc.), click the employee's name under Employee Navigation, enter the information and click the Update button. You may scroll through employees using the Previous and Next buttons. Click the Short Form Payroll Entry link again to return to the quick data-entry form.

Extended Short Form

- ♦ Extended Short Form entry is a second data entry option. It allows one-screen time and deduction entry by department.
- ♦ Enter appropriate information for each employee listed. Click the Update button to save the information.
- ♦ Reset and revise information as described under Short Form Payroll Entry above.
- ♦ Change an employee's permanent information as described under Short Form Payroll Entry above.



Remote Payroll Portal Instructions for: Payroll Data Entry

Remote Payroll Data Entry, continued

View Printable Report

- ♦ This report displays some general employee information and allows you to review data entered for the current payroll period.
- ♦ You may print a copy of the report before entering data to use as a worksheet. Right-click anywhere on the report and then choose Print from the menu.
- ♦ To print a copy of the report after completing data entry, again right-click anywhere on the report and then choose Print from the menu.

Employee Navigation

- ♦ Employee Navigation is a third data entry option, allowing you to scroll through each employee individually to enter time, deductions or change employee information.
- ♦ Enter appropriate information for each employee. Click the Update button to save the information.
- ♦ Use the Previous and Next buttons to easily scroll through employee screens.
- ♦ Use the Notes pane to enter any special check requirements for the employee, to describe any updated W-4 data or deduction requirements. (It's also a good idea to make a note of any information you've updated for the employee.)
- ♦ Reset and revise information as described under Short Form Payroll Entry above.

Important! Paychecks are not automatically generated for salaried employees. Hours must be entered, before a paycheck will be calculated. Full time hours are 40 weekly, 86.67 bi-weekly, and 173.33 monthly.

Add New Employee

An Employee Information Form is required before any new employee may receive a paycheck. If a new employee does not appear in the navigation pane and they are to receive a paycheck for the **current** pay period, do the following:

- ♦ A New Employee screen will display.
- ♦ Enter the employee's name, address, and personal information.
- ♦ Use the Other Information pane to record W-4 information, wage types, rates and amounts for the first check, and any other relevant information for the new employee.
- ♦ Click the Finish button to save the new employee's record. The new employee's name will now appear as a link under Employees added.
- ♦ In the Notes to Payroll Processor pane tell us when the Employee Information sheet was submitted.



Remote Payroll Portal Instructions for: Payroll Data Entry

Remote Payroll Data Entry, continued

Save & Continue Later

- ♦ You may initiate multiple sessions of payroll data entry for the current payroll period using this option.
- ♦ Data previously entered will be saved until the next session.
- ♦ You must click Payroll Complete to finish data entry and initiate processing.

Complete Payroll

- ♦ Payroll data entry will be locked-down and an automatic e-mail message will be sent to us letting us know that your payroll data is ready for processing.
- ♦ The Status under Remote Payroll Data Entry on the Home page will now read “Remote Payroll Data Entry has been completed.”
- ♦ If updates to payroll data are necessary after payroll is complete and your payroll data has been retrieved, you must contact your Payroll Specialist immediately.

Important! Click the **Complete Payroll** button **ONLY** when all payroll data entry for the current payroll period is complete.

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