

Setting Up Employee Defaults

Available in Sage 50 Pro Accounting and Higher

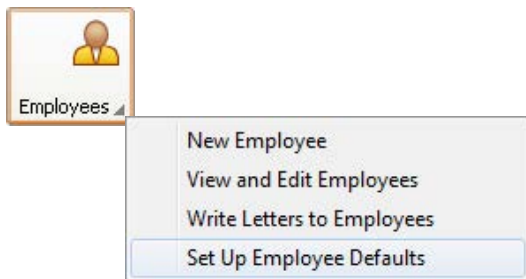
Quick Reference Guide

What are Employee Defaults?

Employee Defaults are basic information you enter that **applies to most of your employees**. Entering Employee Defaults can save you time because some of the information is automatically filled in for new employees you set up. You can change this information for each employee if necessary.

How do I access Employee Defaults?

Go to the **Employees & Payroll Navigation Center**, click Employees, and then select Set up Employee Defaults. You need to complete the Payroll Setup Wizard first before accessing Employee Defaults. That's because the wizard will create most of the default information for you.



What kind of information can I enter?

- **Custom Fields** – You can record and track any information that you need about your employees that is not already in Sage 50. First, create the labels for custom fields in Employee Defaults. Then you can enter the actual data on each employee record.

General		Employee Fields	Company Fields
Custom Fields: What is this?			
Field Labels	Enabled		
1. Spouse	<input checked="" type="checkbox"/>		
2. Birthday	<input checked="" type="checkbox"/>		
3. Special Note	<input checked="" type="checkbox"/>		

- **Employee Fields** – displays employee taxes (such as Federal Income tax, Social Security, etc) and benefits (such as Retirement plans, vacation, etc). Rows that are grayed out were set up in the Payroll Setup Wizard. You can modify these fields in Payroll Settings (Employees & Payroll Navigation Center > Payroll Setup > Payroll Settings).

General		Employee Fields	Company Fields	Review Ratings			
Field Name	G/L Account	Calc	Formula	Amount	Memo	Run	Adjust
Fed_Income	23400-00	<input checked="" type="checkbox"/>	FIT		<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="▶"/>
Soc_Sec	23400-00	<input checked="" type="checkbox"/>	FICA EE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="▶"/>
Medicare	23400-00	<input checked="" type="checkbox"/>	MEDICARE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="▶"/>
State	23600-00	<input checked="" type="checkbox"/>	***SIT		<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="▶"/>
K401	23300-00	<input checked="" type="checkbox"/>	401K EE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="▶"/>
VAC_Accrued		<input checked="" type="checkbox"/>	VAC_ADD		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="▶"/>

- **Company Fields** – displays company paid taxes (such as Federal and State Unemployment taxes) and company contributions (such as 401K).

General		Employee Fields		Company Fields		Review Ratings	
Field Name	Liability	Expense	Calc	Memo	Formula	Adjust	
Soc_Sec_ER	23400-00	72000-00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	FICA ER	▶	
Medicare_ER	23400-00	72000-00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	MEDICARE	▶	
FUTA_ER	23400-00	72000-00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	FUTA ER	▶	
SUI_ER	23400-00	72000-00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	***SUI ER	▶	
K401_ER	23300-00	73000-00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	401K ER	▶	

- **Review Ratings** (Available in Sage 50 Premium Accounting and higher) – Enter up to 10 ratings that your company uses to review employees (Outstanding, Above Average, Unsatisfactory, etc).

General		Employee Fields		Company Fields		Review Ratings	
Performance Review Ratings:							
Field	Ratings		You may add up to 10 Performance Review company uses when rating or reviewing emp				
1	Outstanding		Learn more				
2	Above Average						
3	Satisfactory						
4	Below Average						
5	Unsatisfactory						

- **Employment Status** (available in Sage 50 Premium Accounting and higher) - Enter up to 10 Employment Statuses (such as current employee, terminated, leave of absence, etc).

General		Employee Fields		Company Fields		Review Ratings		Employment Status	
Employment Status:									
Field	Status		You may add up to 10 Employment Statuses. You can create new statuses or edit the ones we have provided for you.						
1	Current Employee		Learn more						
2	Terminated								
3	Leave of Absence								
4	Dependent (COBRA)								
5	Non-employee								

Did you know?

- **Memo** fields allow you to track information without making a general ledger entry or calculation. An example of a memo field is vacation or sick hours.
- **Run** fields keep a running balance from year to year. These payroll fields do not get reset to zero after closing a payroll year. This is useful if you allow vacation balances to carry over to the next year.

General		Employee Fields		Company Fields		Review Ratings	
Field Name	G/L Account	Calc	Formula	Amount	Memo	Run	Adjust
VAC_Taken		<input type="checkbox"/>			<input checked="" type="checkbox"/>	<input type="checkbox"/>	▶
VAC_Remain		<input checked="" type="checkbox"/>	VAC_REM		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▶

For more info, visit: Sage.com or contact us at 866-996-7243