

Apprentice Information Systems, Inc.

Computer Solutions for the Next Generation

From: AIS Support Team

Date: December 27, 2012

To: County Clerk's Office

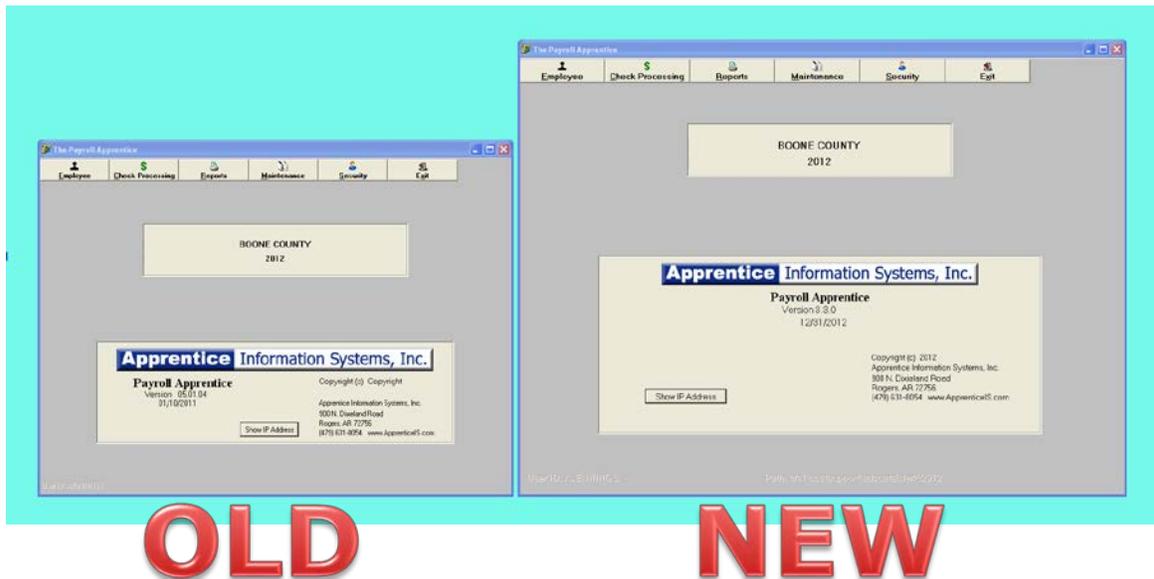
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SUBJECT: Release Notes for Payroll Apprentice 3.3.0

Apprentice Information Systems is pleased to announce the latest updates to our Payroll Apprentice program. Below you will find a list of changes that are included in this newest release. The Apprentice Customer Support team will begin scheduling updates to your system as soon as is convenient for your office. Please feel free to call us and schedule a time if you would like to expedite when your office will be receiving this update. As always, please let us know if you have any questions, concerns, or other feedback!

1. Screen Size

We have had many requests to increase the screen size. The limiting factor was that some users were on older, smaller monitors. These have now been replaced, and we will be gradually increasing each screen in the programs to a larger size. This will make working in the program easier, provide more room for features, and will better take advantage of your newer larger monitors. See below for an actual side-by-side comparison of the relative sizes of the old and new releases.

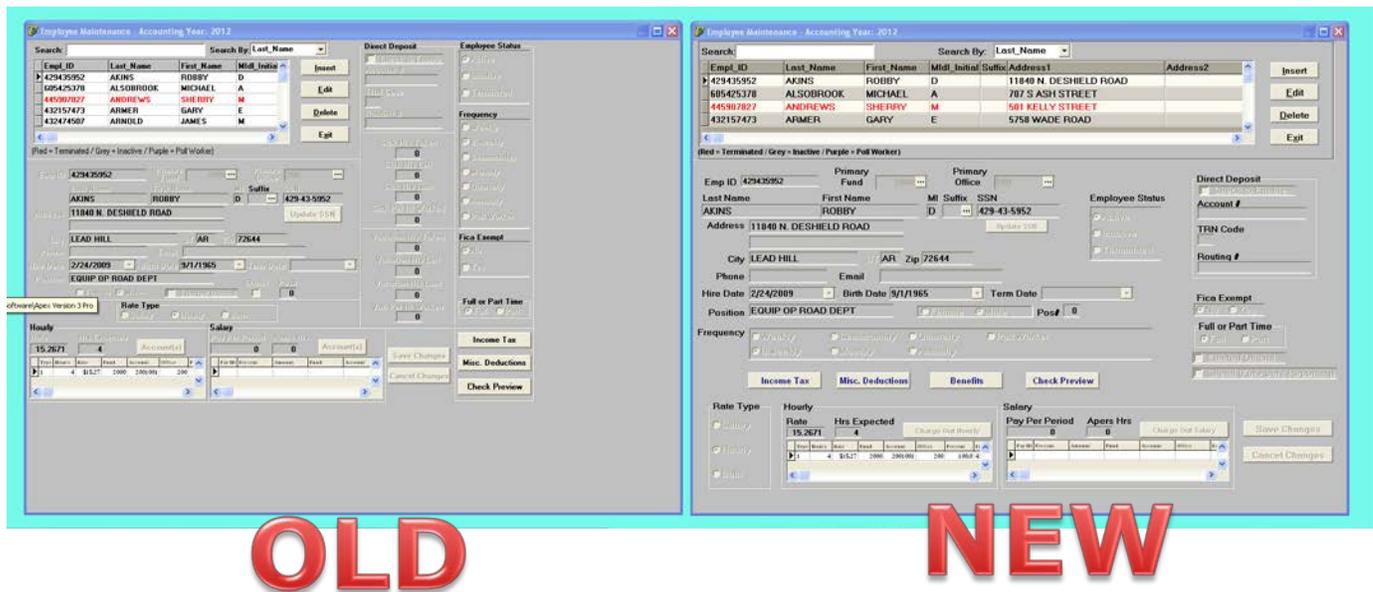


2. Employee Maintenance Screen gets a little makeover!

Given that the Employee maintenance screen is a location where users spend a large amount of time, this screen have been given a little makeover to take advantage of the new space on the larger screen, as well as to lay out sections of the screen in a more logical order.

Here are a few changes:

- The grid now spans across the entire top of the window, giving more room to view the fields.
- In short, the screen is divided into halves. The top half is information about the employee herself, while the bottom half is about the payroll she is assigned to and the compensation therein.
 - The information about the payroll, such as 'frequency', 'Fica Exempt', 'Full or Part Time', etc. is directly above the payroll information for ease of use.
- The 'Sick/Vacation Time' section is removed. In it's place is a new button [Benefits], which includes new tools for tracking time off (see #3).



3. New Benefits Module

Clicking the [Benefits] button opens the new Time Off module.

Within this screen you will add a line for each employee for each type of Time Off they receive. The power of the new module is that the program can now build and track time off as it accumulates.

- Click Insert
- Choose the type of Time Off (Vacation, Sick, Personal, Comp)
- Select How it accumulates (for those that do so)
- Set the timing for when the time begins accumulating and when it ends
- Input any annual limit

In our example below, Wally Cleaver has been set up to receive Sick time accumulating 4 hours every month, but with a cap of 40 hours per year. He receives 80 hours of vacation every year, and 8 hours of personal time every 6 months.

The screenshot shows the 'Employee Benefits - Accounting Year: 2012' window. The main window displays a list of employees with columns for Empl_ID, Last_Name, First_Name, Midl_Initial, Suffix, Address1, and Address2. The 'WALLY H CLEAVER' record is highlighted. An 'Employee Benefits' sub-window is open for Wally H Cleaver, showing a table of benefits:

Benefit	# Hours	For Every	Freq	Starting Date	Limit	Taken	Left	Active
SICK	4	1	M	1/1/2012	40			True
VACATION	80	1	A	4/1/2012				True
PERSONAL	8	6	M	1/1/2012				True

Below the table, the 'SICK' benefit is selected. The configuration shows: 'Give this employee 4 hours every 1 month starting after 1/1/2012'. The 'Limit' is set to 40. The 'Date of Last Accrual' is 12/27/2012. The 'Active' checkbox is checked. Buttons for 'Insert', 'Edit', 'Delete', and 'Exit' are visible. A 'Tips on Starting Date' section provides examples of how to set the starting date relative to the hire date.

4. Added a flag in the Miscellaneous Deductions for the Employer Paid Insurance. Checking this will put the Employee and Employer year to date totals in Box 12 on the W2s.

Miscellaneous Deductions - Accounting Year: 2012

Search Print Deduction List

Deduction	Description	Fica Exempt	Exempt 1	Exempt 2	Exempt 3	Exempt 4
BACK TAXES		False				
BCBS ADJ	BCBS NOTAX ADJ	True	FEDERAL-M	FEDERAL-S	STATE	
BCBS NOTAX	BCBS NOTAX / SPLIT DED	True	FEDERAL-M	FEDERAL-S	STATE	
BCBS TAXED	BCBS TAXED	False				
BOSTON LIFE		False				

Insert Edit Delete Exit

Deduction Code (Maximum of 15 Characters)

Description

Exempt from FICA?
 No
 Yes

Exempt From Tax:
 1 ...
 2 ...
 3 ...
 4 ...
 5 ...

Check Boxes Below for Proper Inclusion on W2 Forms

Def Comp Box 12
 Employer Paid Insurance Box 12
 Non Tax Box 14

Save Changes Cancel Changes

- Added an entry field in the Employee's Miscellaneous Deduction screen to show the employer's matching year to date total. If the deduction is flagged to be shown in Box 12 of the W-2's, this total will be added to the employee's year to date total and displayed in Box 12 of the W-2's.

Employee Miscellaneous Deductions - Accounting Year: 2012

ROBBY D AKINS

Employee ID	Deduction ID	Frequency	Employee Amount	As %	Total \$ Limit	Employer Amount	Contribution As %	Deduction Active
429435952	BCBS NOTAX		31.5	<input type="checkbox"/>	0	125.98	<input type="checkbox"/>	<input type="checkbox"/>
429435952	DENTAL NOTAX		25.49	<input type="checkbox"/>	0	0	<input type="checkbox"/>	<input type="checkbox"/>
429435952	AIREVAC		25	<input type="checkbox"/>	0	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>
429435952	LINC NTL NOTAX		0.62	<input type="checkbox"/>	0	1.23	<input type="checkbox"/>	<input checked="" type="checkbox"/>
429435952	BOSTON LIFE		4.77	<input type="checkbox"/>	0	0	<input type="checkbox"/>	<input type="checkbox"/>
429435952	LINC NTL VOLUNT		6.63	<input type="checkbox"/>	0	0	<input type="checkbox"/>	<input type="checkbox"/>
429435952	RETIREMENT		5	<input checked="" type="checkbox"/>	0	14.24	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Deduction ID

Employee Amount 31.5 **As %** **Total \$ Limit** 0 **Deduction Active** **Employee Year to Date** \$1,911.48

Employer Amount 125.98 **As %**

Employer Year to Date

6. Added more Poll Worker options on the Federal 941 report to help with matching to the W-2 Totals that include Poll Worker wages.

Quarterly Federal Wage / 941 Report or State Wage Report - Accounting Year: 2012

Report Criteria

Date Range

Start Date
12/27/2012

End Date
12/27/2012

Report Name

Federal Wage/941
 State Wage

Other Options

Employee Options

Exclude Poll Workers
 Poll Workers Only
 Include Poll Workers

Exclude Elected Officials
 Hide SSN

Fund Code to Exclude: []

Poll Worker 941 Options:

Don't Include Poll Worker's Fica Gross in Totals
(This will show the fica gross, but not include it in totals)

Don't Include Poll Worker's Federal Gross in Totals
(This will show the federal gross, but not include it in totals)

Only Include Gross > \$600 in Totals
(This will show the gross, but will only include Fica Gross > \$600 in totals)

Report Destination:

Printer
 Screen
 PDF (Fed941.PDF, StWage.PDF)

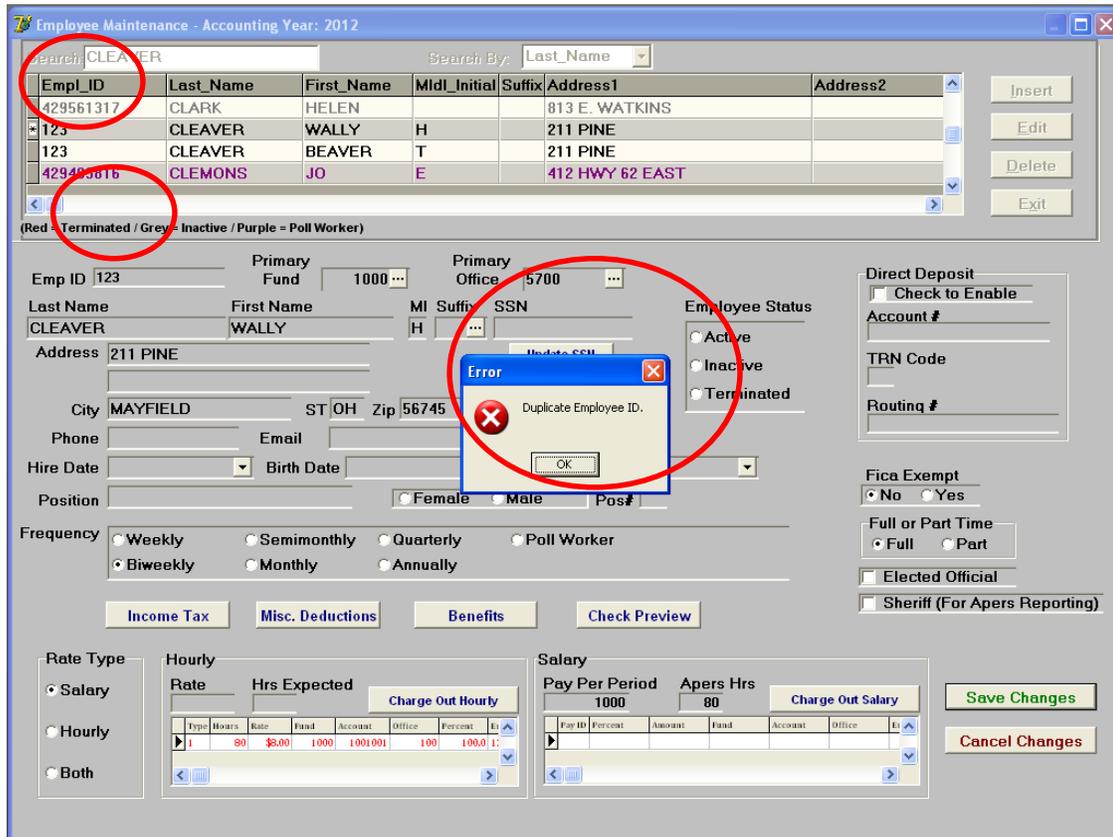
Print
Exit

The Poll Worker totals (Grand Totals and > \$600 Totals) will be displayed at the end of the report

7. Added processing for calculating and displaying the Employer Paid Insurance on the W-2 Creation, W-2 Listing, W-2's and Electronic W-2's.

8. Duplicate ID Protection

In order to prevent accidental assignments of duplicate ID's the program now verifies any new ID against the existing Employee ID list. If the new Employee ID is a duplicate, an error message will display if (see below). The program will then take the user back to the Employee ID Field to enter a new (non-duplicate) number.



9. Miscellaneous Deduction refunds will now show on reports.