

Acclaim - How to setup Group Insurance

There are two parts to setup Group Insurance Setup.

We need to create two Payroll categories: one is a Deduction type for the Employee side and the other Benefit type for the Employer side

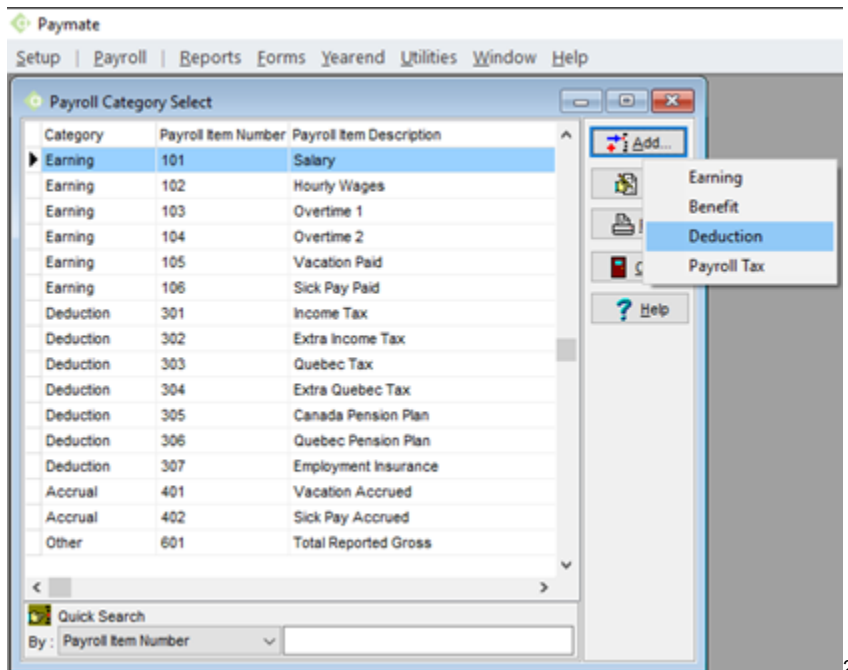
Create a **SANDBOX** company where you can test prior applying to the real company.

1. Backup your data: utilities > backup company data > write down the location and file name.
2. Create the test company: Setup > Company > Add button > enter test company name (Example: **SANDBOX**. Company name visible in the left bottom corner in Acclaim)
3. In the **SANDBOX** : Utilities > Restore > browse for the backup saved at step 1 > Restore.
4. In the **SANDBOX** apply the changes and run a mock payroll for one or two employees, post and print the history detail report to see the results.

NOTE: The numbers of the pay categories in the screenshots are fictive and the user can enter their own number

Employee part (EE) – deduction pay category

1. Go to Setup > Payroll categories > Click on button “Add” on the right hand side and click “Deduction” Type



2. Include code of the payroll category “Item Number” Description, Abbreviation (EE) Means Employee Part

Payroll Category Edit

Deduction

Identification:

Item Number: 316

Description: GroupLife(EE)

Abbreviation: GL(EE)

Type: Regular

☒ Show on Paystub

☐ Two Tiered Calculation

Annual Threshold: 0.00

% to Apply to Lower Tier: 0.0000

% to Apply to Upper Tier: 0.0000

Prorate Threshold ☒

☐ Maximum Per Year

0.00

☒ Reset at Yearend

☐ Deduct before Calculating Taxes

Form Assignments:

T4: Not Reported

RL-1: Not Reported

T4A: Not Reported

Save Cancel Close Help

3. User can select the T4 box from the drop down list, select the type of the pay category and if this needs to be deducted before taxes.

- If type is defined as "Regular" then user need to enter the amount when creating the Paycard
- If type is defined as "Formula" then the user need to select the pay categories that will be user in the deduction.

Payroll Category Edit

Deduction

Identification:

Item Number: 316

Description: GroupLife(EE)

Abbreviation: GL(EE)

Type: Formula

☒ Show on Paystub

☐ Two Tiered Calculation

Annual Threshold: 0.00

% to Apply to Lower Tier: 0.0000

% to Apply to Upper Tier: 0.0000

Prorate Threshold

☐ Maximum Per Year

0.00

☒ Reset at Yearend

☐ Deduct before Calculating Taxes

Form Assignments:

T4: Not Reported

RL-1: Not Reported

T4A: Not Reported

Save Cancel Close Help

Formula Definition

Payroll Category: GroupLife(EE)

Enter a percentage next to any applicable items. For unit or hourly based items, you can specify straight amounts to apply against the rate and the hours.

100.000 % of Salary

+ 100.000 % of Hourly Wages

+ 0.000 x Hours

+ 0.000 x Rate

+ 0.000 % of Overtime 1

+ 0.000 x Hours

+ 0.000 x Rate

+ 0.000 % of Overtime 2

+ 0.000 x Hours

+ 0.000 x Rate

+ 0.000 % of Vacation Paid

Close Help

Once the deduction is created the user can go to the employee master paycard and enter the %:

Setup > employees > select employee > edit > Paycard tab > locate the pay category and enter the %.

Please specify which items should appear on the employee's timesheet, and specify any hourly rates and regular payments.

	Regular Amount :	0.00
<input type="checkbox"/> 197	VACATION DAYS	Regular Amount : 0.00
<input type="checkbox"/> 310	Health Insurance Plan	Regular Amount : 0.00
<input type="checkbox"/> 315	Under Payment of Taxes	Regular Amount : 0.00
<input checked="" type="checkbox"/> 316	GroupLife(EE)	Percentage (Rate) : 2.00
<input type="checkbox"/> 800	Child Support Garnishment	Regular Amount : 0.00

Navigation: < < > > > Save Cancel Close

Employer part (ER) – Benefit Pay Category

1. Go to Setup > Payroll categories > Click on button “Add” on the right hand side and click “Benefit” Type

Paymate

Setup | Payroll | Reports | Forms | Yearend | Utilities | Window | Help

Payroll Category Select

Category	Payroll Item Number	Payroll Item Description
Earning	101	Salary
Earning	102	Hourly Wages
Earning	103	Overtime 1
Earning	104	Overtime 2
Earning	105	Vacation Paid
Earning	106	Sick Pay Paid
Deduction	301	Income Tax
Deduction	302	Extra Income Tax
Deduction	303	Quebec Tax
Deduction	304	Extra Quebec Tax
Deduction	305	Canada Pension Plan
Deduction	306	Quebec Pension Plan
Deduction	307	Employment Insurance
Accrual	401	Vacation Accrued
Accrual	402	Sick Pay Accrued
Other	601	Total Reported Gross

Quick Search
By : Payroll Item Number

Buttons: Add, Earning, Benefit, Deduction, Payroll Tax, Help

2. Include code of the payroll category “Item Number” Description, Abbreviation (ER) Means Employer Part

Payroll Category Edit

Benefit

Identification:

Item Number: 222

Description: GroupLife(ER)

Abbreviation: GL(ER)

Type: Regular

☒ Show on Paystub

Subject to ...

☒ Federal Tax ☐ Québec Tax

☒ CPP ☐ QPP

☒ EI

☒ Payroll Taxes

☒ WCB

Flags

☐ Maximum Per Year 0.00

☒ Reset at Yearend

Contributes to ...

☒ Vacation Pay

☒ Sick Pay

☐ Two Tiered Calculation

Annual Threshold: 0.00

% to Apply to Lower Tier: 0.0000

% to Apply to Upper Tier: 0.0000

Private Threshold: ☐

Form Assignments:

T4: [Box 40] Other Taxable Allowances & Benefits

RL-1: [Box L] Other Benefits

T4A: Not Reported

☐ Report as Employer QPIP

Save Cancel Close Help

If type is equal as **"Regular"** the user will enter the amount when creating the Paycard

If type is equal as **"Formula"** then the user need to select the pay category that will be considered for the Pay Category.

Payroll Category Edit

Benefit

Identification:

Item Number: 222

Description: GroupLife(ER)

Abbreviation: GL(ER)

Type: Formula

☒ Show on Paystub

Subject to ...

☒ Federal Tax ☐ Québec Tax

☒ CPP ☐ QPP

☒ EI

☒ Payroll Taxes

☒ WCB

Flags

☐ Maximum Per Year 0.00

☒ Reset at Yearend

Contributes to ...

☒ Vacation Pay

☒ Sick Pay

☐ Two Tiered Calculation

Annual Threshold: 0.00

% to Apply to Lower Tier: 0.0000

% to Apply to Upper Tier: 0.0000

Private Threshold: ☐

Form Assignments:

T4: [Box 40] Other Taxable Allowances & Benefits

RL-1: [Box L] Other Benefits

T4A: Not Reported

☐ Report as Employer QPIP

Save Cancel Close Help

Formula Definition

Payroll Category: GroupLife(ER)

Enter a percentage next to any applicable items. For unit or hourly based items, you can specify straight amounts to apply against the rate and the hours.

100.000 % of Salary

+ 100.000 % of Hourly Wages

+ 0.000 x Hours

+ 0.000 x Rate

+ 0.000 % of Overtime 1

+ 0.000 x Hours

+ 0.000 x Rate

+ 0.000 % of Overtime 2

+ 0.000 x Hours

+ 0.000 x Rate

+ 0.000 % of Vacation Paid

Close Help

On Employee master paycard under the Benefit can adjust the amount he wants to contribute for GL(ER) for this particular employee by adjusting the factor. By default the factor is 100 (i.e. 100% of the formula definition) and if the Employer wants to contribute a different amount for this employee then the factor can be changed to represent the correct percentage.

Basic Miscellaneous Tax Net Claim Pay Card Bank NotePad History

Please specify which items should appear on the employee's timesheet, and specify any hourly rates and regular payments.

Regular Amount :	0 . 00
<input checked="" type="checkbox"/> 222 GroupLife(ER)	Percentage (Rate) : 2 . 00
<input type="checkbox"/> 310 Health Insurance Plan	Regular Amount : 0 . 00
<input type="checkbox"/> 315 Under Payment of Taxes	Regular Amount : 0 . 00
<input checked="" type="checkbox"/> 316 GroupLife(EE)	Percentage (Rate) : 2 . 00
<input type="checkbox"/> 800 Child Support Garnishment	Regular Amount : 0 . 00

Regular E

☐ Accru R
Owing a January
☐ Pay a
☐ Tax a
☐ Accru Vaca
☐ Repor

☐ Accru R
Owing a January
☐ Repor

Save Cancel Close Help

If the user has multiple group insurance then user need to determine which will pay : the employee or the employer , or both.

In the case above the employee and employer will pay and deduction and benefit pay categories will be created.

If only the employee will pay then only deduction pay category should added.

If only the employer will pay then only one benefit pay category should added.