



Insperity®

Payroll Process Guide - User Guide

Reference Guide for Time & Attendance Users

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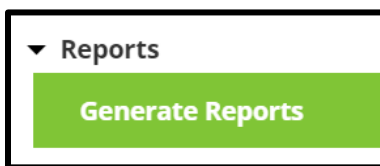
Introduction

Time tracked within Time and Attendance can be sent to Insperity Payroll with minimal user intervention. This document outlines the steps for a system administrator to successfully submit payroll.

Running Reports

Running suggested reports prior to exporting payroll will ensure that timesheets are completed and correct. The specific reports to be run are based on the needs of each customer and therefore should be discussed with the Time and Attendance representative. Some common reports include “Admin - Missing Punch” ensure there are no missing punches, “Admin - Request” to look for unanswered requests, and “Payroll – Transfer” to review time. To access the requests page, follow the below steps:

1. Open the **Reports** folder located within the **Main Navigation** menu.
2. Click on the **Generate Reports** page.

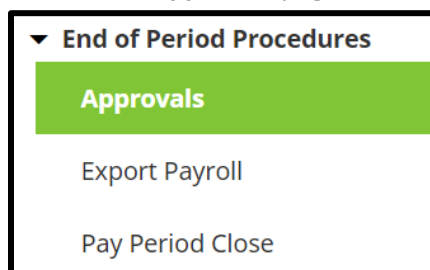


The Generate Reports page opens.

Approving Time

The Approvals page is used to approve timesheets at the end of a pay period. It provides one place for reviewing timesheet hours for many or all employees at once.

1. In the **Main Navigation** menu, open the **End of Period Procedures** folder.
2. Click on the **Approvals** page.



The Approvals landing page opens.

3. Click the **Launch Approvals** button.

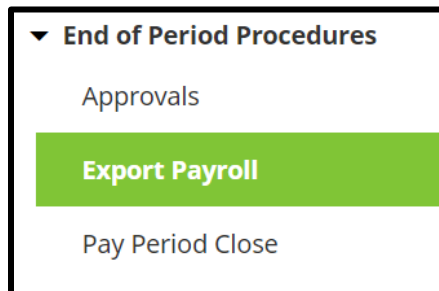
LAUNCH APPROVALS

The Approvals page opens in a new window or tab.

4. Ensure that all employees have checkmarks in the checkboxes by their name. You can use the **Filter List** drop down at the top to get the list of only unapproved employees. You may also sort the screen by Supervisor or Pay Group.
5. Outstanding time off requests for the current period must be acted upon, and all missing punches must be fixed prior to approving time.

Exporting Accruals from Time and Attendance

1. In Time and Attendance, open the **End of Period Procedures** folder located within the **Main Navigation** menu.
2. Click on the **Export Payroll** page.



The Export Payroll page opens.

3. Select the **Accrual Export** tab.

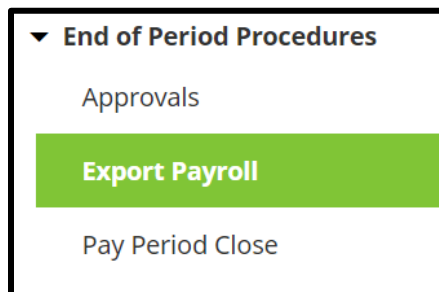
EXPORT ACCRUALS

4. Ensure that the **Select Export** drop down is set in the same manner as it is when exporting payroll.
5. Click the **Export Accrual** button.

EXPORT ACCRUALS

Exporting Payroll from Time and Attendance

1. In Time and Attendance, open the **End of Period Procedures** folder located within the **Main Navigation** menu.
2. Click on the **Export Payroll** page.



The Export Payroll page opens.

3. If a Payroll Export tab and Accrual tab button exist, ensure that the Payroll Export tab is selected. If it is not selected, click the **Payroll Export** tab.
 - a. If the tabs are not available, continue to step 4.
4. Time and Attendance will now auto-populate payrolls that have been created in Insperity Payroll. If a Client ID is not active in Insperity Payroll, no payroll export will exist in Time and Attendance. If there are multiple Client IDs, each will appear separately. Locate the payroll to export based on Company ID and date.
5. Click on the payroll's **Transmit** button, located on the far right of the row within the Action column.



Warnings and errors may appear at this time. Errors must be fixed prior to a successful payroll export by following the steps on screen. Once the errors are fixed, repeat steps 4-5 to transmit the corrected file.

A confirmation message will appear when the payroll was successfully transferred.

6. Repeat steps 4-5 for any additional company IDs.
7. Continue to the next section, "Completing the Payroll Submission in Insperity Payroll" to finish processing payroll.

Completing the Payroll Submission in Insperity Payroll

1. Using an internet browser, navigate to Insperity Premier by typing the following website in to the address bar: <https://portal.insperity.com>
2. Type in your username and password to the **Username** and **Password** fields.
 - a. Usernames ARE NOT case sensitive. Passwords ARE case sensitive.
 - b. If the Username or Password is forgotten, click on the **Forgot your Username or Password?** link located below the **Username** and **Password** fields.
3. Click the **Log In** button.



The Insperity Premier homepage opens.

The system may prompt you to confirm your identity. If so, follow the steps provided on-screen.

4. Open the **Company** folder and click on the **Payroll** page.

 **COMPANY**

The Payroll page opens, displaying a list of active payrolls.

5. Find the correct Client ID and Pay Date, and click on its corresponding **Action** drop down. Select the **Verify Payroll** option.

Select action ▼

Re-Transmit

Verify Payroll

6. Review warnings and errors.
 - a. Fix any errors as needed in Time and Attendance, repeat the steps in “Exporting Payroll from Time and Attendance”, followed by steps 1-4 in this section. In step 5, select the option in the **Action** drop down to “Retransmit Payroll”.

Select action ▼

Re-Transmit

Verify Payroll

- b. Once errors and warnings are fixed or can be bypassed, click **Submit Payroll**



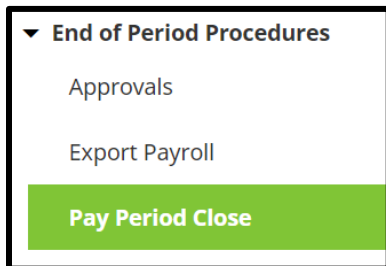
A confirmation message will appear once the payroll is submitted successfully.

7. Repeat steps 5-7 for any additional Client IDs.

Ending the Pay Period

The final step that an administrator must take in Time and Attendance at the end of every pay period is to formally end the pay period. This action should not be taken until all of the timesheet approvals have been completed, payroll has been processed, and checks have been cut. Ending the pay period commits all of the timesheet and accrual information into history and advances the dates of the current pay period forward. To end the current pay period(s) in the Time and Attendance system, follow the steps below:

1. In the **Main Navigation** menu in Time and Attendance, open the **End of Period Procedures** folder.
2. Click on the **Pay Period Close** page.



The Pay Period Close page opens.

3. Select the appropriate pay period to end using the **Select Pay Period** drop down. Verify that the **Period to End** and **Next Period** fields are accurate. **Payroll History** and **Accruals History** drop downs should be set to "Yes".
4. Click the **End Period** button.



If any missing punches or outstanding requests exist, an error will appear and the pay period will not be ended. These errors must be resolved prior to completing the end of period processing.

A confirmation will appear if the pay period end was successful.