

payentry.com[™] End User Training Checklist

Client Name/#:	Contact:
Training Date:	Training Time:

SYSTEM NAVIGATION/SECURITY

<input type="checkbox"/>	It's vitally important to have secure passwords. Do NOT let others see/have your password.
<input type="checkbox"/>	Avoid using the browser "BACK" button.
<input type="checkbox"/>	Hit "Add" when adding a new item and "Remove" when trying to remove it.
<input type="checkbox"/>	Hit "Save Changes" after adding new information. "Undo Changes" will only work if you have not already hit "Save Changes."
<input type="checkbox"/>	Point out navigation arrows at appropriate time.
<input type="checkbox"/>	Hit "Refresh" on screens that offer it.

EMPLOYEE INFORMATION

<input type="checkbox"/>	Review sorting options in employee list.
<input type="checkbox"/>	Review Add New EE Wizard
<input type="checkbox"/>	Demographics – address changes, home phone, etc.
<input type="checkbox"/>	Dept/Pos – change EE's dept and/or EE status. Don't forget a Term Date when terminating an EE.
<input type="checkbox"/>	Rates – review adding new rate and ending old one. Do not delete/change current entries, it is your rate history.
<input type="checkbox"/>	Deductions – review adding new deduction & details. <i>Call SB for new deduction codes.</i>
<input type="checkbox"/>	Taxes – review adding new tax, setting up overrides or addt'l amounts in details. <i>Call SB for new tax codes.</i>
<input type="checkbox"/>	Direct deposit – review one that is already set up, explain fields, especially priority. Make "net" entry=99
<input type="checkbox"/>	Pay History – review screen & check details. Voiding.
<input type="checkbox"/>	Auto Pays – review Base Auto Pays
<input type="checkbox"/>	Fringe – for 401k match, GTL or other recurring earnings.
<input type="checkbox"/>	Labor Allocation – if applicable, review set up
<input type="checkbox"/>	Accruals – if applicable, review adding new policy and adjusting hours in 'details'
<input type="checkbox"/>	HR tabs – if applicable

PAYROLL ENTRY

<input type="checkbox"/>	Batch (Auto post in Preferences) & EE entry (Auto Pays in Company setup) methods
<input type="checkbox"/>	Keying data (overrides, additional checks, check review)
<input type="checkbox"/>	Verify totals w/Preprocess Register
<input type="checkbox"/>	Closing & Submitting
<input type="checkbox"/>	Review submitting policy – SB deadlines, etc.

REPORTING

<input type="checkbox"/>	Review reports menu
<input type="checkbox"/>	Select a report to run – review report options (date ranges, sorting, properties for customizing)
<input type="checkbox"/>	Review pick-up area where reports are stored for 24 hours

NOTES/FOLLOW-UPS
