Accounting
**Setting Up New Hires
in Sage**

AC (7.309)
Rev. # 0.1

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Purpose:

To outline the process of setting up new employees in Sage for payroll purposes.

Procedure:

1) HR will provide all new hire documentation after the onboarding process has been completed.
   A) This information/documentation will be entered or uploaded in BambooHR under the new employee profile.
      i) Go to the people tab.
      ii) Scroll to find the new employee and click their name.
      iii) Click the Personal Tab to find full name, DOB, SSN, Mailing Address, Phone Number, Email address, and Ethnicity.
         (1) If the employee has a personal email address and a Crain email address listed, then find out which email address is preferred for direct deposit information.
      iv) Click the Documents tab and open the New Hire Paperwork folder to find Direct Deposit and W-4 information.
      v) An offer letter will be sent by HR via email detailing hourly rate, PTO days, allowances, bonuses, etc.
   B) Full name, mailing address, DOB, SSN, phone number, email address, ethnicity, W-4, and hire date are required before Sage will allow a new employee to be added.
   C) Once an employee has been added to Sage, additional information can be added at any time such as hourly rate, direct deposit information, etc.
      i) This information isn't always available when the employee is initially added to Sage.

2) To add a new employee to Sage:
   A) Open the PR module.
      i) Click Setup.
      ii) Click Employees
      iii) Aster.prm File.
      iv) Open.
   B) In the Employee box, enter the first 4 letters of the employee's last name and the last 4 digits of their SSN.
      i) For example, John B. Smith with an SSN of XXX-XX-1234 would be entered as SMIT1234.
   C) In the Name box, enter the last name; first name middle initial.
      i) For example, above, enter SMITH, JOHN B.
      ii) Make sure to enter the name in ALL CAPS.
   D) Under the General tab, enter the employee's mailing address, email address, phone number, SSN, gender, DOB, and ethnicity.
      i) Enter the mailing address in ALL CAPS.
   E) Click the Entry info tab.
      i) Enter TN in Residence and Work State
      ii) Enter TN In WC State
      iii) Enter 5604 in WC code for Supt/Asst Supt/PE and APM.
      iv) Enter 5403 in WC code for all other field employees.
      v) Click the Use W-4 amounts box.

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        (1) Enter information from W-4.
    vi) Click the Department box.
        (1) Hit F4 to select field.
    vii) Click the certified class box.
        (1) Hit F4 to select Supt/Asst Supt/PE/APM/Carpenter/Laborer.
F) Click the misc. info tab.
    i)   Click the retirement plan box.
    ii) Enter the hire date.
G) Click the Pays tab.
    i)   Under Pay ID, hit F4 to select 1-Regular Pay, then click OK.
        (1) Enter the pay rate in the Amount box.
        (2) Click accept line, then click accept table.
H) Click the deducts tab.
    i)   Under dedication ID, hit F4 and type DD to find and select DD-Net.
        (1) Calc method should be default.
        (2) Click the Direct Deposit tab at the bottom.
            (a) Enter the bank routing number and the bank account number.
            (b) Select checking or savings under account type, then click OK.
        (3) Click the white box under Auto.
        (4) Click accept line, then click accept table.
I) Click the fringes tab.
    i)   Under fringe ID, Hit F4 and type 401 to find and select 401k – field.
        (1) Calc method should be default.
        (2) Click the white box under auto.
        (3) Click accept line.
    ii) On the next line under Fringe ID, hit F4 and type BUR to find and select burden.
        (1) Calc method should be default.
        (2) Click the white box under auto.
        (3) Click accept line.
    iii) On the next line under Fringe ID, Hit F4 and type WC to find and select WC -Field.
        (1) Calc method should be default.
        (2) Click the white box under auto.
        (3) Click accept line.
    iv) Click Accept Table.
J) Click the state tab.
    i)   Enter TN in the state box.
    ii) Click the white box next to "use federal".
    iii) Click accept/OK.
K) Click save at the bottom.
    i)   Then click close.

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