Starting Payroll Mid-Year Entering Year-to-Date Pay

Document #:	3003	Product:	CenterPoint® Payroll

When CenterPoint Payroll is started mid-year beginning balances must be entered for all employees that received a pay check during the year. Beginning balances should be entered in **Setup > Payroll Details > Start-up Pay** so CenterPoint Payroll can be used to produce quarterly reports for the employer and W-2 forms for the employee. You can enter start-up pay for each pay period, each quarter, or year-to-date only.

> Note: It is important to enter start-up pay (mid-year beginning balances) prior to entering and processing any new pay runs.

1. Select **Setup** > **Payroll Details > Start-Up Pay** or **Setup** > **Start-Up Pay**
2. Click **New**.

Select Employees

3. On the **1. Select Employees** tab, enter the appropriate **Company, Bank Account** and **Deduction/Benefit Frequency**.
4. The pay run **Number** will fill in automatically.
5. Enter the **Pay Period From** and **To** dates with the date range for the totals you are entering. Select the **Pay Date** as the last day of that period.
6. Select the employees you paid in this pay run using the green arrow buttons to move the employees to the right. The single arrow selects only the highlighted employees; the double arrow selects all employees.

> Note: Hold the CTRL button the keyboard while clicking with the mouse to highlight more than one employee at a time.

Enter Pay

7. Click the **2. Enter Pay** tab.
8. Highlight an employee name in the upper-left box.
9. Enter the gross wage totals for each Earning.
10. Expand the Deductions and Employee Taxes groups by clicking on the plus signs. Verify the amount calculated for each and change as needed so that it matches the total amount withheld from the employees pay. If the amount or percentage is changed, the Override check box is automatically selected.
11. Expand both the **Employer Benefit** and **Employer Taxes** sections to verify or change the employer benefits or employer taxes. If the amount or percentage is changed, the Override check box is automatically selected.
12. Repeat steps 8-11 for each employee. To select the next, previous, last, or first employee:
    » Select the employee by clicking the employee name
    » Select an employee by using the selection icons under the employee list
    » Select the last employee by pressing Alt + End.
    » Select the first employee by pressing Alt + Home.
    » Select the previous employee by pressing Alt + <.
    » Select the next employee by pressing Alt + >.

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Totals tab

a. Click the **4. Totals** tab to verify your pay run totals. If the totals match your pay run information click **Save (Alt + S)**. If the totals do not match, click on the **2. Enter Pay** tab, and review each employee's entries. Click **Close (Alt + C)**

b. Various reports can be used to verify the beginning balances were entered correctly. Click on **Reports > Reports > Payroll Data Reports** and **Reports > Reports > Payroll Tax Data Reports**.

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