Quick Reference Payrolls

Setting the browser mode to IE8:

Follow these instructions if you use Internet Explorer, version 8 (IE8).

1. Open the Internet Explorer browser.
2. From the Tools menu, select Compatibility View Settings.
3. Clear the Display intranet sites in Compatibility View check box.
4. Click Close.

No changes necessary if you use Internet Explorer, version 9 (IE9).

Logging on to CRLMS

1. Open Internet Explorer and go to the CRLMS link provided by your transportation agency.
2. In the Username field, type your user ID.
3. In the Password field, type your password.
4. In the Domain field, click the dropdown arrow and select External Non-Agency Users.
5. Click the Log On button.

Viewing a payroll:

1. Under the Vendor Payrolls component, in the Quick Find search box, type the appropriate Contract ID.

2. For the desired contract and vendor, click the Row Actions button.

3. Click the View action.

4. Click the desired Payroll ID.

Viewing payroll employee details for a particular payroll:

1. From the External Certified Payroll component, click the Employee quick link.

2. Scroll down to the Employees component.

3. In the Employees dropdown field, select the desired employee.

Viewing the status of a vendor payroll:

1. From the External Payroll Employees component, click the Status quick link.

2. View the payroll status details.

Viewing an unapproved payroll:

1. From the homepage, under the Unapproved Payrolls component, in the Quick Find search box, type search criteria for the Contract ID, Vendor ID, or Vendor Name for the desired payroll.

2. For the desired contract and vendor, click the Row Actions button.

3. Click the Status view.

Manually creating a new payroll:

1. From the homepage, under the Vendor Payrolls component, in the Quick Find search box, type the appropriate Contract ID.

2. Locate the desired contract and vendor and click the Row Actions button.

3. Click the Add action.

4. Fill in the minimum required fields: Payroll Number, Begin Date, End Date, and Fringe Benefit Payment Type. Add other record details as necessary.

5. Click the Save button.

Manually adding a new employee to a payroll:

1. From the External Certified Payroll component, click the Employee quick link.

2. On the Employees component, click the Component Actions button.

3. Click the Add Employee action.

4. Fill in the minimum required fields: First Name, Last Name, Payment Type, Gender, Ethnic Group, Employee Identifier, Address Line 1, City, State / Province, and Zip Code. Add other record details as necessary.

5. Click the Save button.

Manually adding employee classifications, labor hours, and wages to a payroll employee:

1. From the External Payroll Employees component, scroll down to the Classification section for desired employee.

2. Fill in the minimum required fields: Contract Project ID, Labor Classification, Craft Code, Straight Hourly Rate, Overtime Hourly Rate, Regular Hourly Rate, Straight Time Hours, Total Gross Pay, Net Pay, Total Hours, and Total Deductions. Add other record details as necessary.

3. Click the Save button.

Adding a reference employee to a payroll:

1. From the External Payroll Employees component, in the Employees component, click the Component Actions button.

2. Click the Add Ref Employees action.

3. In the Quick Find search box, type the name of the desired employee.

4. In the list of employees returned from the search, click the desired employee name.

5. Click the Add to Employees button.

6. If necessary, under the Employees component, in the Employees section, click the dropdown arrow and select the employee again.

7. Add appropriate classifications, labor hours, and wages to the payroll employee.

8. Click the Save button.

Importing a new payroll:

1. From the homepage, under the Vendor Payrolls component, in the Quick Find search box, type the appropriate Contract ID.
2. Locate the desired contract and vendor and click the Row Actions button.
3. Click the View action.
4. Click the Component Actions button and select the Import Payroll task.
5. Click the Select File button.
6. In the Choose File to Upload window, navigate to the location of the desired file and click the file name.
7. Click the Open button.
8. Click the Import button.

Updating a vendor payroll:

1. From the homepage, under the Vendor Payrolls component, in the Quick Find search box, type the appropriate Contract ID.
2. Locate the desired contract and vendor and click the Row Actions button.
3. Click the View action.
4. Click the desired Payroll ID.
5. Update the payroll details as necessary.
6. Click the Save button.

Copying a vendor payroll:

1. From the homepage, under the Vendor Payrolls component, in the Quick Find search box, type the appropriate Contract ID.
2. Locate the desired contract and vendor and click the Row Actions button.
3. Click the View action.
4. For desired payroll ID, click the Row Actions button.
5. Click the Copy action.
6. Fill in the minimum required fields: New Payroll Number, Begin Date, and End Date.
7. Click the Copy Payroll button.

Deleting a vendor payroll:

1. From the homepage, under the Vendor Payrolls component, in the Quick Find search box, type the appropriate Contract ID.
2. Locate the desired contract and vendor and click the Row Actions button.
3. Click the View action.
4. For desired payroll ID, click the Row Actions button.
5. Click the Delete action.
6. Click the Save button.

Signing a payroll:

1. From the Contract Certified Payroll Overview component, click desired payroll ID.
2. Click the Component Actions button.
3. Click the Sign Payroll action.
4. Review the Payroll Summary Report information. Click the Next button.
5. Review the Verification Requirement text. Click the Next button.
6. Add a comment as needed.
7. Click the Sign Payroll button.

Creating a payroll modification:

1. From the homepage, under the Vendor Payrolls component, in the Quick Find search box, type the appropriate Contract ID.
2. Locate the desired contract and vendor and click the Row Actions button.
3. Click the View action.
4. For desired payroll ID, click the Row Actions button.
5. Click the Create Modification task.
6. Make the desired updates to the new payroll modification.

Adding transition comments to a rejected payroll:

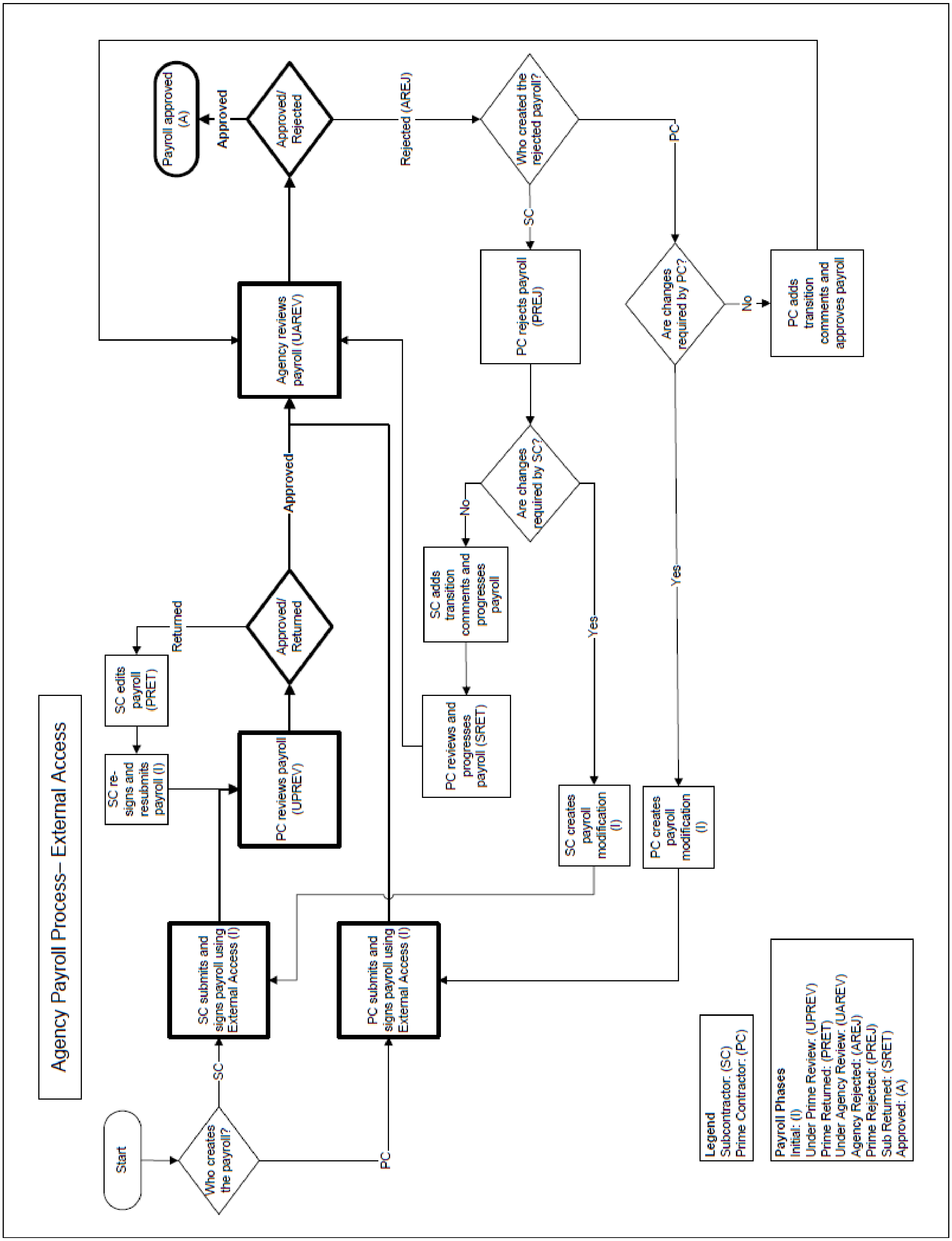
1. From the homepage, under the Unapproved Payrolls component, in the Quick Find search box, type the appropriate Contract ID.
2. Locate the desired contract and vendor and click the Row Actions button.
3. Click the Status view.
4. Under the Status component, in the Transitions section, click the Approve button.
5. Fill in appropriate Comments.
6. Click the Save button.

Adding an attachment to a payroll:

1. From the homepage, under the Vendor Payrolls component, in the Quick Find search box, type the appropriate Contract ID.
2. Locate the desired contract and vendor and click the Row Actions button.
3. Click the View action.
4. For desired payroll ID, click the Row Actions button.
5. Click the Attachments task.
6. Click the Select File button.
7. In the Choose File to Upload window, navigate to the appropriate location and click the file name.
8. Click the Open button.
9. Click the Save button.
10. Close the Attachments modal window.

Reviewing a subcontractor payroll:

1. From the homepage, under the Unapproved Payrolls component, in the Quick Find search box, type the appropriate Contract ID.
2. Locate the desired contract and vendor and click the Row Actions button.
3. Click the Status view.
4. Click the Component Actions button.
5. Click the Prime Review action.
6. Review the Payroll Summary Report information. Click the Next button.
7. Fill in appropriate Comments.
8. Click the Forward to Agency button.



Workflow of Payroll Process With External Access