

würk

New Administrator Resource Guide

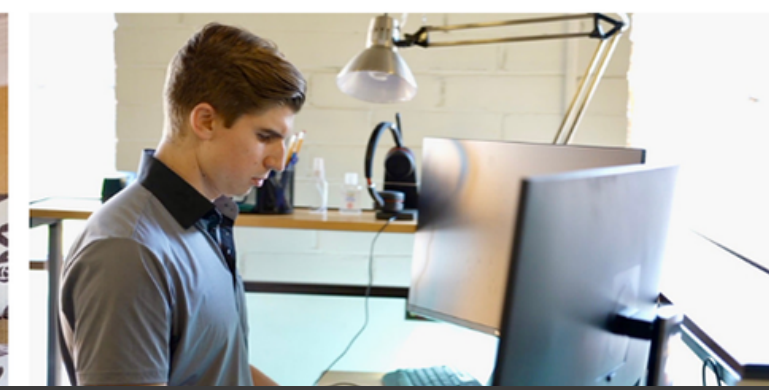
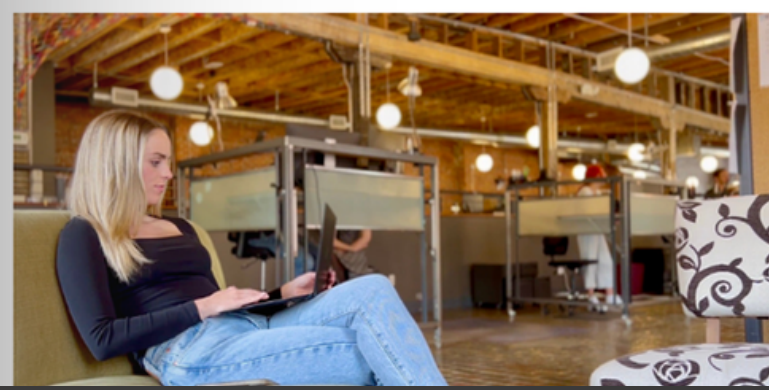
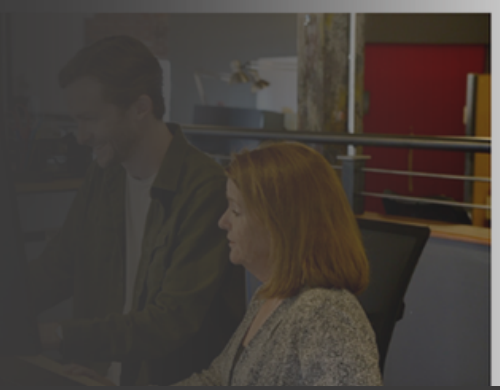
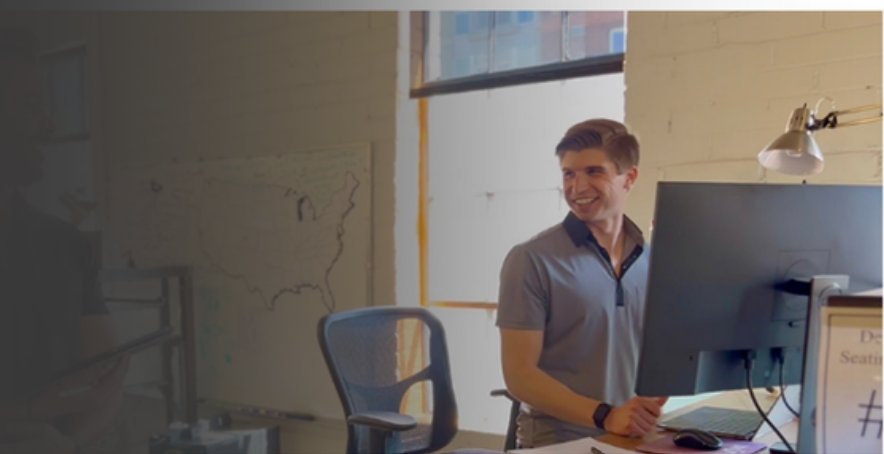


Table of Contents

Get Started as a New Würk Administrator

Würk Training

Würk Help Portal

Enjoy Würk Support Information

New! Case Portal

Your WürkTeam

Potential Project Options

Tax Information

Quarter End Timeline

Additional Würk Resources

Würk's Solution & Services

Get Started as a New Administrator

START HERE Training Videos!

[New Wurk Administrator Resources \(Video\)](#)

- *About Würk*
- *Getting Started*
- *Available Resources*
- *Contact Information*
- *Q&A*

[Administrator Training \(Video\)](#)

- *Employee Profile*
- *Security/Group Access*
- *Custom Forms*
- *Workflow s*
- *Inventory Profiles*
- *Credentials*

Additional Training

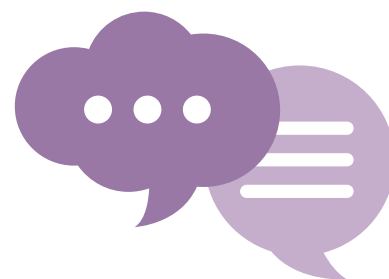
[Wurk Training Webinars Video Library](#)

Bookmark to save this category library of videos filled with how-to's surrounding our most commonly asked for trainings such as:

- Reports and dashboards creation, tax resources, Wurk module overviews, & more

[Wurk Rate Card](#)

Common transaction fees that could be associated with Würk Services. It is not a complete list of all costs that could be assessed by Würk. This schedule is provided for informational purposes only and may be changed at any time



**Please reach out to Support and
your CSM for Scheduled Trainings**

[Payroll Reports Overview \(Video\)](#)

Payroll Processing Report

- *Payroll Register*
- *Payroll Recap & Funding*
- *Vendor Payments*
- *Labor Distribution*
- *Taxes*
- *Pay History*

Employee Information Payroll Reports

- *Base Compensation*
- *Direct Deposit*
- *Tax*
- *Earnings/Deductions*

[Reports & Mass Editing EE Info \(Video\)](#)

Reports

- *Profile Information Reports*
- *Adding/Removing Columns*
- *Grouping/Sorting*
- *Saving*
- *Sharing*

Mass Editing

- *Employee Information*

[TLM Reports & Dashboards \(Video\)](#)

- *Operational Timekeeping Reports*
- *Labor Analysis Reports*
- *Schedules & Exceptions Reporting*
- *Admin & Manager Dashboards*

[TLM Accruals](#)

Accruals Manager / Admin Function

- *Balance Views*
- *View History*
- *Execute Accruals*
- *Adjust Balances (edit/remaining)*
- *Change updated-through-date*
- *Delete Transactions in view history*
- *Zero out*
- *Move Balances*
- *Roll Back*

Additional Training Videos!

- [Wurk 2023 Training Webinars Video Library](#)



Click Here:

[Wurk Help Portal for Administrators](#)

Helpful step-by-step instructions for managers & administrators to reference!



Top Referenced Article Links

- [1. Changing Company Banking Info.](#)**
- [2. Changing Company Address](#)**
- [3. Managing Payroll](#)**
- [4. Unlocking Employee Accounts](#)**
- [5. Managing Time & Labor](#)**
- [6. Working with Company Documents](#)**
- [7. Setting Up InTouch Clocks](#)**
- [8. System Admin](#)**

Additional Resources

[Wurk Client Training \(Video\)](#)

[Wurk Connect](#)

An additional way for Wurk to communicate with our administrators.



[Wurk Help Portal for Employees](#)

Employee Self-Service View Help Portal

Support FAQs

1. How do I handle a garnishment?

Submit Garnishment Smartsheet - [Garnishment Smartsheet](#)

Wurk Support will set up the deduction and upload the document to the employee's deduction record.

2. What if I'm an administrator and become locked out?

If there is another Administrator at your organization, they will be able to unlock your account. Otherwise, submit a case or call the support line.

3. How do I make a new employee/manager an administrator with Wurk?

Navigate to: *Admin > Company Settings > Global Setup > Groups > Edit > All Company Employees Group > View > Group Permissions > Add Manager.*

Confirm that the security profile is assigned as Admin or Manager

4. Where do I find my organization's invoices?

Client can search "invoices" under 'hamburger' menu in Wurk system. This will pull up all invoices by EIN. Click on the little magnifying glass to see the detail by product. Once client goes live, 99% of invoices should be reflected there. Implementation fees, one-time fees, or fees before go-live are billed to client and emailed to the client contact listed as the billing contact for client.

5. What do I need to know when setting up a new tax location? (not a new EIN add)

Submit Smartsheet: [New Tax Code Smartsheet](#)

Wurk will set up the new tax code based on the information provided.



[Wurk Client Submission
Quick Reference Guide](#)

Enjoy Würk Support

Your [Würk Community Case Portal](#)
Login here to submit your support cases

For Urgent Payroll Issues:

- Please call (720) 707-1676 or
- Email support@enjoywurk.com with URGENT in the subject line

Note: Contact Support or your Customer Success Manager to create an account for administrators.

You will be sent an email with login instructions for the Würk Community platform.

Best Practices:

- To help our team better support you, please provide as much detail as possible within the case
- Please keep track of the case number for reference
- Upload full paged screenshots of any errors
- Provide employee names and examples of errors to show what your issue is

Please do not email Personal Identifiable Information in screenshots. If the issue requires viewing a screen with PII visible, please contact support so we can perform a screen share to help troubleshoot

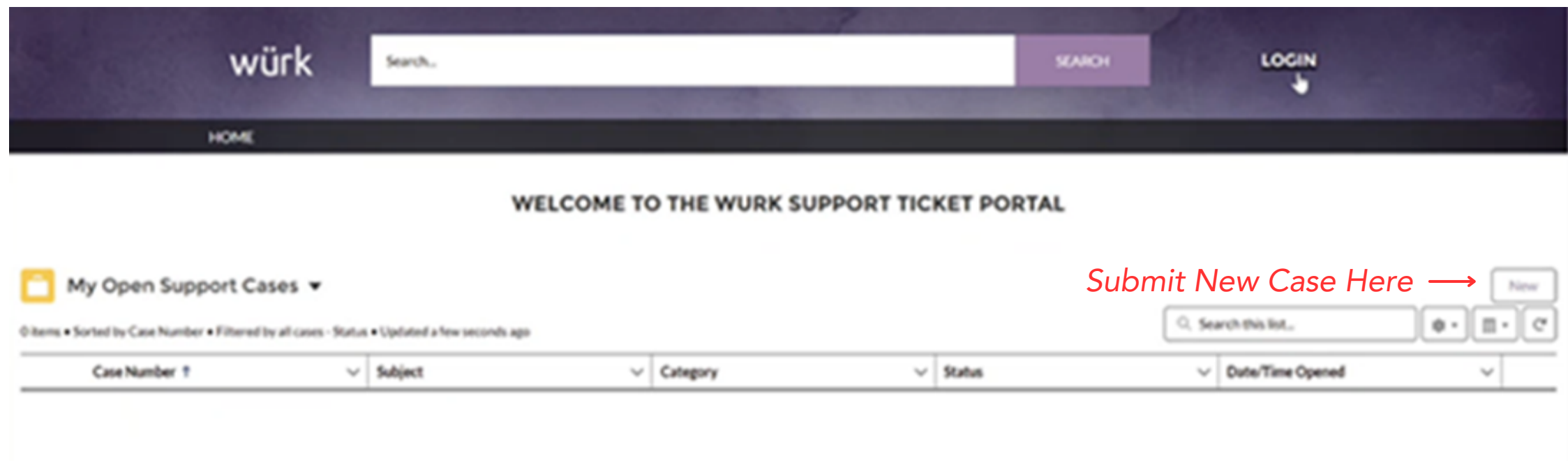
Case Portal

Login Here: [Wurk Community Case Portal](#)

NOTE: Contact Support or your Customer Success Manager to create an account for administrators.

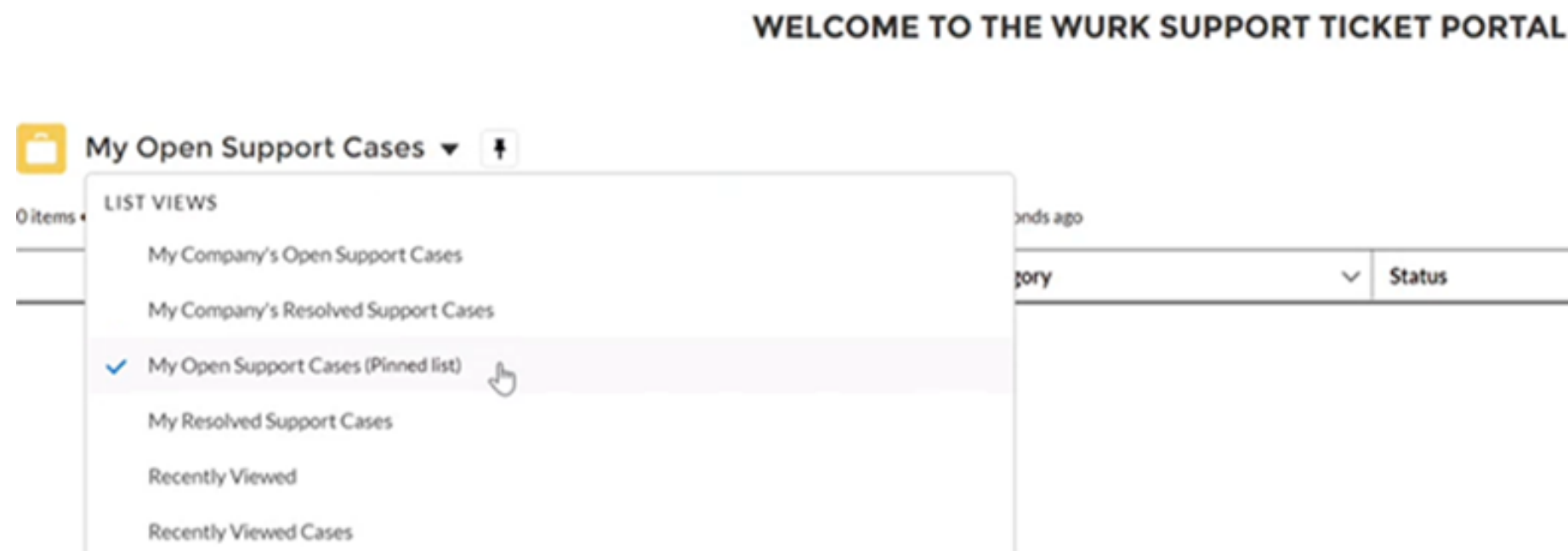
You will be sent an email with login instructions for the Wurk Communities platform.

Only Administrators at your organization are allowed to contact Wurk Customer Support. Please assist your employees with their request(s) & should you need assistance send your inquiry to support.



Case Follow Up & Escalation:

1. Case Number will generate when you submit both tax & support cases through portal & select the case topic for faster routing
2. Send generated case number to CSM/AE to reference in order to ask for priority or an update on case
3. Types of activity updates on case record: change in case owners, emails, status change
4. If you cannot submit case through portal use email submission & let your CSM know about the error. You have the ability to post a comment on the case
5. To upload supporting information you must first create the case, then go to Files & Attachments tab to add New File



Your Würk Team

CUSTOMER SUPPORT

Our support team is here to help with any system problems and/or defects. They are your resource for payroll emergencies and troubleshooting any issues that you run into with the system.

CUSTOMER SUCCESS MANAGER

Your CSM is your assigned Würk rep and is here to help you navigate the organization. The CS teams works internally across all departments & can facilitate meetings with the appropriate contacts to answer account questions. They will meet with your team on a regular basis to manage any projects post-implementation whether it be upgrading services and modules, re-contracting, EIN adds, or mergers & acquisitions.

ACCOUNT EXECUTIVE

Your Account Executive will lead the sales cycle and will transition you into the implementation of your account. If you have any questions about what was included in your contract, they will be able to assist.

Potential Project Options

Please notify your CSM of any project requests. Cost depends on project type, please see [Wurk Rate Card](#) for more details.

IMPLEMENTATION PROJECT

An extended timeline project for an add-on module, Add New Employer Identification Number (EIN), Account Migrations, 401(k) build-out, Annual Open Enrollment and Benefit Plan Changes, and carrier connectivity feeds.

Please complete the forms below for the following requests:

- [EIN Add Discovery Tracker](#)
- [Open Enrollment and Benefit Plan Change Questionnaire](#)

OPTIMIZATION PROJECT

A shorter implementation project to rework existing configurations and perform updates to client's system due to a change in legislation or company policy. Solutions Experts are available to review desired configurations, make recommendations, and provide a scope of work based on those recommendations.

Examples include ad hoc HR configurations, custom reports, GL programming, and training services.

INTEGRATION PROJECT

Requests for integration with current Wurk partners, open API software providers, or creation of SFTP inbound and outbound files.

Tax Information

[Tax Overview Training \(Video\)](#)

- How Wurk system handles Taxes
- Best Practices for Locations
- Employee Taxes (Blocked vs. Exempt)
Very important!
- Quarter End Prep
- System Audits

[Tax Overview Training 2 \(Video\)](#)

- How Wurk system handles Taxes
- Best Practices for locations
- Employee taxes (blocked vs. Exempt)
- W2 Reports
- Quarterly End Prep
- System Audits

[Wurk Training Webinars Video Library](#)

You will find all Quarterly Tax Webinars in Video Library

[Tax Year-End Prep Overview Video](#)

For Tax Notices:

- Submit through Case Portal
- Categorize as Tax Notice when applicable

Quarter End Timeline

For quarter end, Wurk will:

- Run tax variance audits on the **10th of every month**
- Hold **tax webinar on the last month of each quarter-end.** (March, June, October, December)
- Provide a **quarterly checklist** for clients to complete

For quarter end, the Client will:

- Need to have **all payrolls finalized and submit all quarter-end corrections by the 5th following quarter-end.**
 - Anything submitted **after this date will be considered an amendment** (if the 5th follows on holiday, it will be the following day)
- **To close their quarter by the 5th**
 - If the Quarter is not closed, Wurk will close on the client's behalf

After the quarter end:

- Wurk closes the quarter on the 5th, following each quarter end
 - Anything submitted after this date will be considered a memo
- Wurk has a **tax blackout week** following the close of the quarter
- Wurk will upload the company's tax packages within Wurk no later than the 15th following quarter-end
- Wurk begins filing and paying quarterly taxes per state ordinances
- Wurk will reach out to you if they are unable to file due to missing or incorrect data

Tax FAQs

Block W/H vs. Exempt in the Wurk System, what's the difference?

If the employee does not want taxes withheld, but we still need to record the Taxable Wages on their W2, then we would set them up with the 'Block W/H' status. Wages must be reported to the IRS, so they can determine the withholding at the end of the year if this is marked incorrect. Using Exempt in our system No wages will be reported to the IRS and this will cause incorrect tax filings and W2s.

In our system, the 'Exempt' status means exempt from wages. The 'Block W/H' status means exempt from withholding. It is CRITICAL that you update these employees before the quarter close.

Where can I find my tax documents in Wurk?

Tax packets can be found by navigating to the Wurk hamburger menu > My Info icon > My Reports > Payroll Reports > Taxes > Tax Documents.

What does Wurk handle & what should we look out for as the customer?

Tax Notices, Rate Change Notices and Payment Frequency Change Notices should be looked out for as the customer & submitted to support

How will my employee(s) receive their W2?

Wurk will provide clients with electronic W2's through system.

If printed W2's are requested customer will be charged \$5/W2 printed, referenced in Wurk Rate Card

How do I handle paying taxes for an employee that lives in a different state than they work?

First, you must determine if there is a state of reciprocity agreement between the states. If you are unsure, please reference this [interactive state map](#). If there is no reciprocal agreement between the states, the employee is responsible for paying taxes where they work.

By default, Wurk will tax the employee based on where they work (i.e. Tax location). If you do not know the cost center, please contact Wurk Support.

What do I need to know when setting up a new tax location? (not a new EIN add)

Be aware of the new state/local this employee lives & works, please submit case with information such as:

1. State/Local taxes set up
2. Accruals specific to new state
3. Pay calculations - what overtime laws are in place?
4. Workers Comp Codes
5. Other specific Items related to set up

Tax FAQs Continued

What do I do when an employee wants to withhold income tax where they live and work?

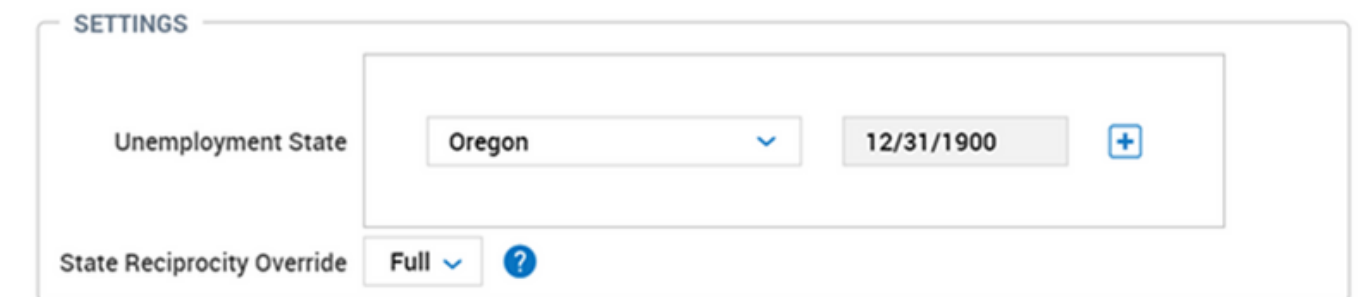
As an employer, you are required to withhold where the employee works unless there is a state of reciprocity agreement between the states. However, depending on the state your employee lives in, your company may choose to withhold as a courtesy for the employee. It is the employer's responsibility to register with the new state. You will need to ensure that the state is set up in Wurk. Please contact Wurk Support to add the tax code and to check the Nexus box. Clients only have View access.

If you chose to curtesy withhold for your employees, you will need to determine if they would like to pay the full amount in both states or just the difference between the Tax rate.

Example: Employee Lives in state that has a rate of 3% Works in a state that has a rate of 2% and the employee makes \$2,000 each payroll

If the employee selects full amount, they will have the following taxes 5% of their check go State income taxes. Home State \$60 and Worked state \$40.

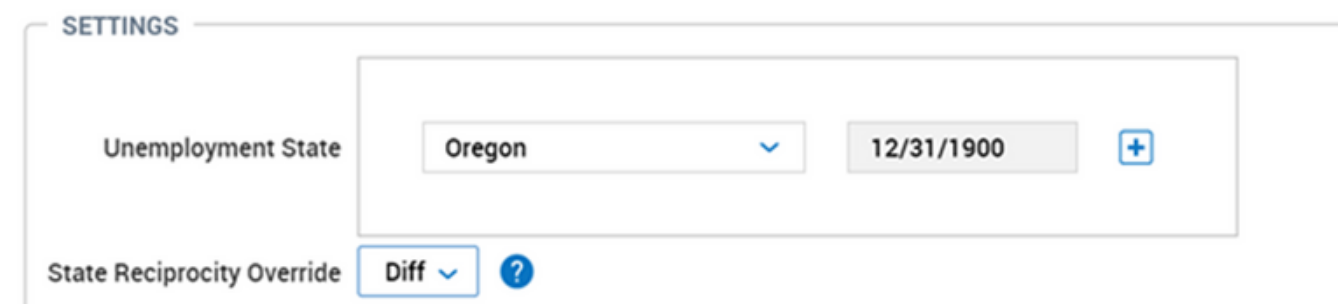
To only withhold the full amount, you would select the state reciprocity override to be "Full."
To do this, go to Employee Information -> Payroll -> Taxes.



The screenshot shows a 'SETTINGS' panel with two rows. The first row is 'Unemployment State', with a dropdown menu set to 'Oregon' and a date field set to '12/31/1900'. The second row is 'State Reciprocity Override', with a dropdown menu set to 'Full' and a blue question mark icon to its right.

If the employee selects the difference, they will have 3% of their check go to state income taxes. Home State \$20 and work state \$40

To only withhold the difference between the states you would select the state reciprocity override to be "Diff". To do this, go to Employee Information Payroll Taxes.



The screenshot shows a 'SETTINGS' panel with two rows. The first row is 'Unemployment State', with a dropdown menu set to 'Oregon' and a date field set to '12/31/1900'. The second row is 'State Reciprocity Override', with a dropdown menu set to 'Diff' and a blue question mark icon to its right.

Tax FAQs Continued

Should I withhold income tax where my employee lives and not where they work when there is no state of reciprocity agreement between the states?

The employee is responsible for paying taxes where they work unless there is a state of reciprocity agreement between the states. We don't recommend setting up an employee like this because the state could hold the employer liable for taxes not withheld/reported to the agency.

To only withhold where the employee lives when there is no agreement between the states, you will need to update the employee state of reciprocity to be resident only.

To do this, go to Employee Information -> Payroll Tab -> Taxes.

SETTINGS

Unemployment State: New York (dropdown), 12/31/1900 (text), + (button)

State Reciprocity Override: Resident Only (dropdown), ? (button)

What do I do if my employee wants me to withhold income tax where they live and not where they work per the state reciprocity agreement?

The employee can elect to pay taxes where they live, since there is an agreement between the states. The employee must fill out the non-residents state form to declare this. By default, Wurk will tax the employee where they work unless the Non-Residency Statement box is checked in Wurk.

It is the employer's responsibility to register with the new state. You will need to ensure that the state is set up in Wurk. Please contact Wurk Support to add the tax code and to check the Nexus box. Clients only have View access.

To only withhold where the employee lives when there is an agreement between the states, you will need to check the Non-Residency Statement filed box on the employee worked state tax code.

To do this, go to Employee Information -> Payroll Tab -> Taxes -> Find the work state. Then, click on the magnify glass and select the Non-Residency Statement filed box.

PENNSYLVANIA (DEFAULT) (SIT)

EE WITHHOLD ?	NON-RESIDENCY STATEMENT FILED	# OF ALLOWANCES
Yes (dropdown)	<input checked="" type="checkbox"/>	Lock In Letter Received <input type="checkbox"/> Allowances 0

Additional Wurk Resources

Short Demonstration Videos

Password is "wurk1" for each video

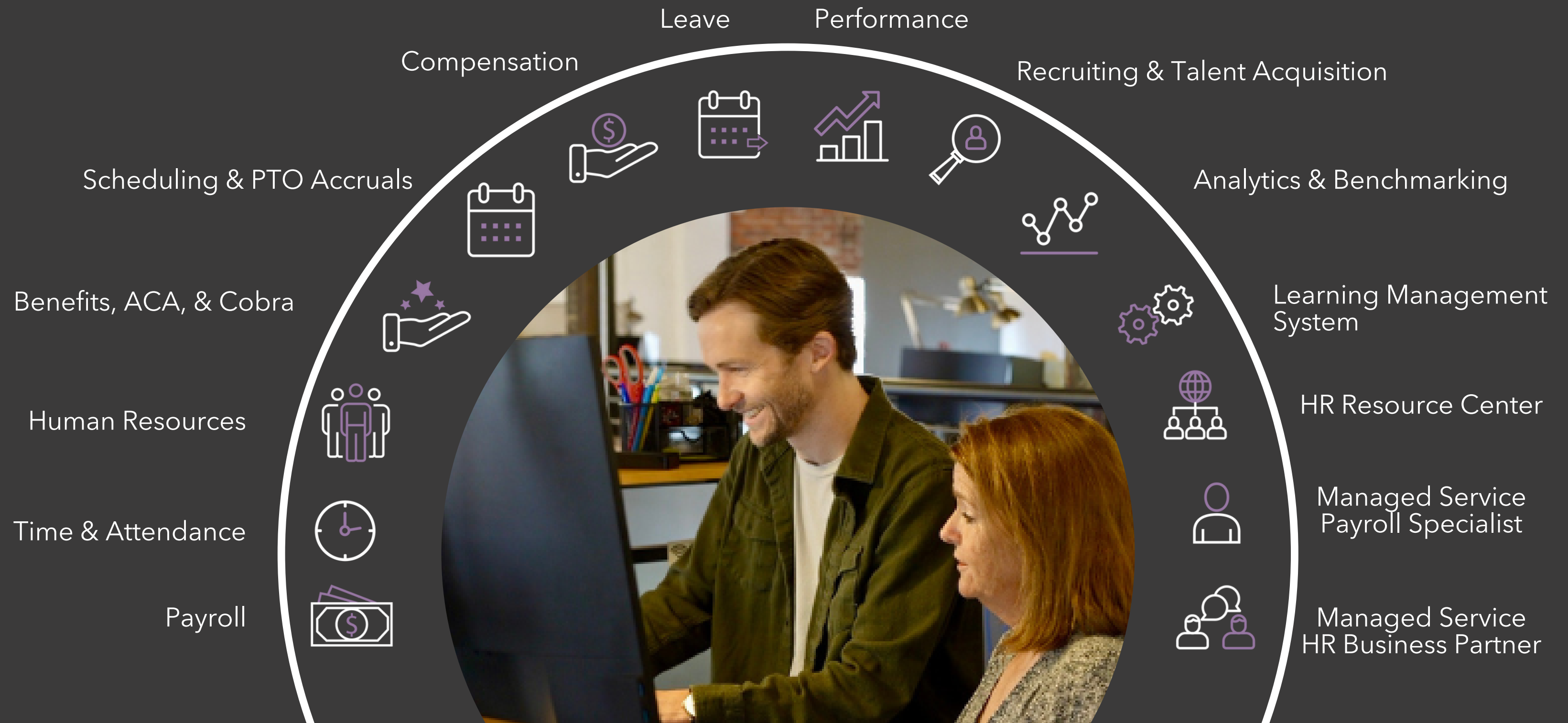
- [Time Clock & Requesting Time off](#)
- [Benefits- Mobile](#)
- [Employee Pay Info](#)
- [Viewing Employee Profile- Desktop](#)
- [Approving Time Off Requests- Desktop](#)
- [Manager Dashboard](#)
- [Applying for a Job](#)

[Wurk's Webinar Resource Center](#)

- 401k State Mandates
- OSHA & COVID-19:
 - *What Cannabis Employers Need to Know*
 - *Structuring Your Cannabis Business for M&A Activity*
 - *Workplace Harassment Prevention*

Würk's Solution & Services

Meet the all-in-one HCM solution you have been looking for



Thank you!

würk

