

# Payroll Profiles

## Payroll Profiles

### Purpose and when to use this record

Maintain an employee's payroll setup, including pay basis, rates, tax treatment, earning defaults, and deduction choices.

### At a glance

- **Identify it by:** **Federal Filing Status**, and **State Filing Status**.
- **Check its business context:** **Employee**.
- **Why care:** Payroll setup and run state affect employee pay, taxes, and accounting. Restrict changes to authorized payroll staff and verify them against the approved pay-period records.
- **Why care:** Availability and publication flags affect future use without erasing history. Prefer disabling an obsolete setup record when existing transactions still refer to it.

### Before you begin

You need the Brisk permission for the action you are taking on payroll profiles. If a Create, Edit, or Delete control is absent, do not work around it with another user's account; ask an administrator to review your role.

Have valid **Employee** records ready first. Those selections determine where this Payroll Profile belongs and which later screens can find it.

### Create a Payroll Profile

The Payroll Profiles create screen in the Brisk documentation demo.

Create a Payroll Profile only when the existing choices do not represent the policy or classification you need. Near-duplicate setup values split reporting and make later selection harder.

1. Select the business context first: **Employee**.
2. Enter the required identifying and operational values: **Employee**.
3. Review **Pay Type**, **Pay Schedule**, **Federal Filing Status**, **Federal Step2**, **State Filing Status**, and **Is Active** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Payroll Profile, then confirm **Federal Filing Status**, and **State Filing Status** on its detail page before continuing.

After saving: Open the screen that uses this choice and confirm the Payroll Profile appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

## Review Payroll Profile details

Use the detail page as the shared record of what this Payroll Profile currently means. Verify **Pay Type**, **Pay Schedule**, **Federal Filing Status**, **State Filing Status**, and **Is Active** before relying on it for a decision.

Follow **Employee** to determine whether the issue is on this Payroll Profile or on one of those linked records.

Next check: Open the screen that uses this choice and confirm the Payroll Profile appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

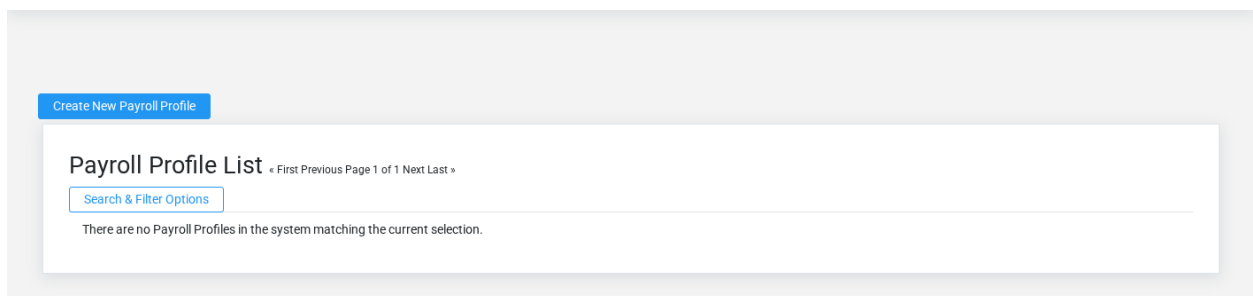
# Edit an existing Payroll Profile

Edit this Payroll Profile when the underlying policy or classification changed. First determine whether historical transactions should retain the old value; if so, deactivate the old choice and create a new one.

1. Open the detail page. Compare **Employee** with the supporting document or approved request.
2. Recheck **Pay Type**, **Pay Schedule**, **Federal Filing Status**, **State Filing Status**, and **Is Active**. These values are most likely to change employee pay, deductions, tax, and payroll accounting.
3. Save the change, return to the list, and confirm that the Payroll Profile now appears under the expected **Pay Type**, **Pay Schedule**, **Federal Filing Status**, **State Filing Status**, and **Is Active**.

After the change: Open the screen that uses this choice and confirm the Payroll Profile appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

## Find and review payroll profiles



The Payroll Profiles list screen in the Brisk documentation demo.

Use the Payroll Profiles list to find the correct record before opening or changing it. Compare **Federal Filing Status**, and **State Filing Status**. Records with similar names or numbers can still belong to different **Employee**.

- The initial order emphasizes **Last Name**, and **First Name**. Select a column heading when you need a different comparison.

Open the Payroll Profile whose **Federal Filing Status**, and **State Filing Status** match the task. If it is missing, clear the list filters and recheck **Pay Type**, **Pay Schedule**, **Federal Filing Status**, **State Filing Status**, and **Is Active** rather than creating a replacement immediately.

## Fields and business rules

Brisk stores 16 user-relevant fields for this Payroll Profile, including 1 linked-record selection and 4 controlled-choice fields. Create and edit screens may hide calculated or workflow-managed values from this full reference.

| Field                               | Required | What it controls                                                                                                                                             |
|-------------------------------------|----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Employee</b>                     | Yes      | The employee associated with this payroll profile.                                                                                                           |
| <b>Pay Type</b>                     | No       | The pay type recorded for this payroll profile. Available values: Hourly, Salary.                                                                            |
| <b>Pay Schedule</b>                 | No       | The pay schedule recorded for this payroll profile. Available values: Weekly, Biweekly, Semimonthly, Monthly.                                                |
| <b>Hourly Rate</b>                  | No       | The hourly rate value recorded for this payroll profile.                                                                                                     |
| <b>Salary Annual</b>                | No       | The salary annual value recorded for this payroll profile.                                                                                                   |
| <b>Overtime Multiplier</b>          | No       | The overtime multiplier value recorded for this payroll profile.                                                                                             |
| <b>State</b>                        | No       | Employee work state for withholding.                                                                                                                         |
| <b>Federal Filing Status</b>        | No       | The federal filing status recorded for this payroll profile. Available values: Single, Married Filing Jointly, Married Filing Separately, Head of Household. |
| <b>Federal Step2</b>                | No       | IRS Form W-4 Step 2 checked.                                                                                                                                 |
| <b>Federal Dependents</b>           | No       | The federal dependents value recorded for this payroll profile.                                                                                              |
| <b>Federal Other Income</b>         | No       | The federal other income value recorded for this payroll profile.                                                                                            |
| <b>Federal Deductions</b>           | No       | The federal deductions value recorded for this payroll profile.                                                                                              |
| <b>Federal Extra Withholding</b>    | No       | The federal extra withholding value recorded for this payroll profile.                                                                                       |
| <b>State Filing Status</b>          | No       | The state filing status recorded for this payroll profile. Available values: Single, Married.                                                                |
| <b>State Additional Withholding</b> | No       | The state additional withholding value recorded for this payroll profile.                                                                                    |
| <b>Is Active</b>                    | No       | Whether this payroll profile is active.                                                                                                                      |

# What happens next

Open the screen that uses this choice and confirm the Payroll Profile appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

## Common mistakes and troubleshooting

- **The record will not save:** Recheck **Employee** and any message beside the field. A required related record may also be inactive or unavailable to your role.
- **The record saved but is not available where expected:** Recheck **Pay Type, Pay Schedule, Federal Filing Status, State Filing Status**, and **Is Active**, then clear the filters on the destination list. A saved record can still be inactive, unpublished, locked, unapproved, or in the wrong workflow state.
- **The values look right but the result is wrong:** Open **Employee** from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.

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