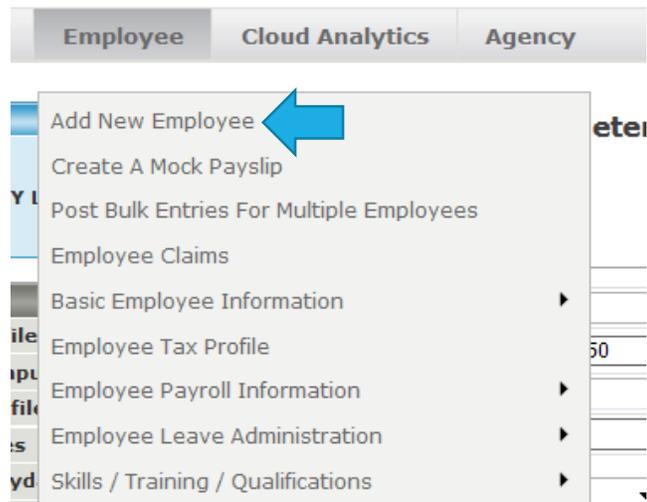


Paymaster Online Tutorial

Adding Employees

We have setup our company, and now we need to get the people onto the system. This is done in a nice, neat workflow so everything required for the employee is added all at once.

To get started, you need to click on **employee, add new employee**. Nice and simple.



You will now see a list similar to when you created the company. It is things you require when adding a new employee, and makes life quick and easy if you have the information at hand. Once you have everything ready, click on next step.

Employee Pre Registration

Before you start capturing your employee, please get the following information ready as you will require it during the enrollment process:

- Employee Personal Details (i.e. Birth Date, ID Number, Contact Details, Addresses)
- Join Date
- Employee Tax Details and Status
- Dependant Details (If Any)
- Remuneration Details
- Package / Cost To Company Information
- Recurring Payroll Components (All Earnings, Deductions And Company Contributions Applicable On A Recurring Basis)
- YTD Figures (If Applicable)
- Banking Details
- Leave Scheme Setup
- Employee Position

[Click here](#) to obtain a printable form for the new employee to complete, this will assist you in obtaining the necessary details required to capture the employee.

You will be guided through a workflow process where you will capture all of the necessary details in 9 easy steps.

Hint: Use the work flow steps on the left of the screen as a guide to see where you are in the enrollment process.

Once you have the above requirements ready for your employee/s, please click "Next Step" or if you require more time to gather the information exit this workflow and revisit it when you are ready.

Next Step >>

This is the employee details section. Basic information, address, contact details etc all goes here. Complete the fields with the correct information.

NB: The items with a blue asterisk next to the description are compulsory items.

If, when you created your company, you selected the system generate your employee numbers, it will show “will be generated” in the section for the employee number. If not, type in the required information here. When you are ready, click on **next tab**.

Employee Details	
* employee number:	will be generated
* last name:	Helpman
* first name:	Susan
middle name:	
* initials:	S
preferred name:	
maiden name:	
* title:	Miss

Next Tab >

Save & Next Step >>

In the next section, Personal, you can select the options you require from drop down menus. Language, Gender, race, birthdate and marital status can be selected. You can also upload your employee’s photo here by browsing on your computer for a suitable picture. Once completed, click on next tab.

Personal	
language:	English
* gender:	Female
* race:	Other
* nationality:	South Africa
citizenship:	South Africa
disabled type:	None
* birth date:	28 December 1982
* ethnic group:	None
marital status:	--select one--
foreign national:	<input type="checkbox"/>
employee photo:	Browse... No file selected.

< Previous Tab Next Tab >

Next, fill in the contact details for the employee. There needs to be at least one contact number. When completed, click on next tab.

Employee Details	Personal	Contact Details	Addresses	Exemptions and Other
Contact Details				
home number:	<input type="text" value="0215555555"/>			
work number:	<input type="text"/>			
work ext:	<input type="text"/>			
cell:	<input type="text" value="0845555555"/>			
e-mail:	<input type="text" value="susan@helpdesk.com"/>			
<input type="button" value=" < Previous Tab"/> <input type="button" value=" Next Tab >"/>				

This is where you complete the address details. If the postal address is the same as the physical address, you can tick the necessary block. When complete, click on next tab.

Employee Details	Personal	Contact Details	Addresses	Exemptions and Other
Address Details				
physical				
unit number:	<input type="text"/>			
complex name:	<input type="text"/>			
street number:	<input type="text" value="1"/>			
* street name:	<input type="text" value="Help Street"/>			
suburb or district:	<input type="text"/>			
* city or town:	<input type="text" value="Help Village"/>			
* code:	<input type="text" value="1234"/>			
* country:	<input type="text" value="South Africa"/>			
* province:	<input type="text" value="Western Cape"/>			
postal				
is the postal address the same as physical address?:	<input checked="" type="checkbox"/>			
is the postal address a care of address?:	<input type="checkbox"/>			
<input type="button" value=" < Previous Tab"/> <input type="button" value=" Next Tab >"/>				

On the last tab, you can advise if the employee is exempt from UIF or SDL, or does not qualify for Employment Tax Incentive. If none of these apply to the employee, click on **save & next step**.

Employee Details Personal Contact Details Addresses Exemptions and Other

Exemptions & Other

uif exemption reason:	None	
sdl exemption reason:	Total amount of all Employee remuneration < R500 000	
standard industry code group:	Inherit from Company	
standard industry code:	Inherit from Company	
does not qualify for employment tax incentive :	<input type="checkbox"/>	
is this person an applicant?	<input type="checkbox"/>	

< Previous Tab

Save & Next Step >>

You will now be on the Employment status step of the workflow. Here, you need to input the ID number or passport number, date of employment and tax reference number if you have one. Once fields are completed, click on **Save & next step**.

Details

* group join date:	1 October 2015		
* employment date:	1 October 2015		
* nature of person:	A - Individual with ID number or Passport no		
* id type:	Identity		
* identity number:	821228		
passport number:			
* tax status:	Standard Employment (Normal)		
tax reference number:	0108242157		
not re-employable?	<input type="checkbox"/>		
reference no.:			

Save & Next Step >>

You are now on the payrate screen. This tells the system how much the salary or wage for the employee is, and if you pay them per month, per day or per hour.

NB! There is a block you can tick that allows payslips to be created automatically. This is great for monthly paid employees, but I strongly recommend you untick this block for weekly paid employees. The reason for this is so that there are no slip ups with paying employees who did not work that week, and then the payslips are only created when you add the hours worked.

Once you have put in the required information, click on **save >> next step**.

Details			
* which payroll frequency group will this employee belong to:	Monthly		
* effective date:	1 October 2015		
* this employee is paid:	per month		
* package:	5000	<input checked="" type="radio"/> monthly <input type="radio"/> annual	
tick here if you want the system to automatically pay basic pay or else you will need to manually advise hours or post time entries every period:	<input checked="" type="checkbox"/>		
* hours per day:	8.00		
* days per month	21.67		
hours per month:			
hourly rate:			
daily rate:			
fortnightly rate:			

[Save >> Next Step](#)

You are now on the dependents section. If your employees are on medical aid and you need to add the dependents, you will do so here. This is also for the next of kin details if necessary. Once you are done, click on **save >> next step**. If you are not putting any information on this screen, you can click on **move to next step**.

Details			
* dependant type:	Child		
* birth date:	22 March 2012		
* first name:	Sarah		
* last name:	Helpman		
contact number:	0811112511		
is this a medical aid dependant ?	<input checked="" type="checkbox"/>		
restrict the employer contribution portion for this child?	<input type="checkbox"/>		

[Save](#)
[Save >> Next Step](#)
[Move to Next Step](#)

You can now link the employee to the position screen. If you have not setup any positions yet, you can click on **Move to next step**, and come back to this screen later. If you positions are setup, you can select the option from the drop down list and click **save >> next step** when you are done.

Details		Skills Gap Analysis	
* effective date:	1 October 2015		
* position in organisation:	Receptionist		
* employee organisation unit:	HELPDESK DEMO PTY LTD		
directly reports to position:			
directly reports to person:		...	
override directly reports to position :		...	

[Save >> Next Step](#)
[Move to Next Step](#)

You are now on the screen to link the employee to leave. Here, you can select standard leave (15 days) or managers leave (20 days) from the drop down list. Once you have selected your required option, click on **save >> next step**.

Details			
* leave scheme:	Standard Leave		
effective date:	1 October 2015		

[Save >> Next Step](#)
[Move to Next Step](#)

Next are the bank details. Here you need to select EFT for bank deposit, and then complete the employees banking details from the options. Once complete, click on **save >> next step**.

Step 1

Select a payment criteria:

payment method:

Step 2

Employee Net Pay Bank Account

bank name:

branch code:

account type:

account number:

account holder relationship:

comments:

swift code:

routing code:

Our last selection is the recurring components screen. This is where you will add components that will appear every month, like medical aid and provident fund. You also need to add the loan deduction here. It is really simple – click on the ADD NEW button next to allowance, deduction or company contribution (depending on what you want to add), and a small screen will pop up. This will allow you to select the component you want.

allowance				Add New
Payslip Name	Part of Package	Tax Code	Recurring Amount	

deduction				Add New
Payslip Name	Part of Package	Tax Code	Recurring Amount	

company contribution				Add New
Payslip Name	Part of Package	Tax Code	Recurring Amount	

fringe benefit				Add New
Payslip Name	Part of Package	Tax Code	Recurring Amount	

personal				Add New
Payslip Name	Part of Package	Tax Code	Recurring Amount	

note				Add New
Payslip Name	Part of Package	Tax Code	Recurring Amount	



I am going to add a loan deduction for this employee. I have selected loan deduction, and can now complete the options.

Component Setup ✖

component name: Loan Deduction - 0000

initial loan amount : 3000

interest rate % :

recurring instalment : 500

is this a non fringe benefit loan?

[+ extra options](#)

Save

If the loan is more than R3000, SARS say you have to pay fringe benefit tax on it, so you will leave the last block unticked. This will automatically create a fringe benefit tax component on your reports.

Once you are done, click save. This loan now shows in the list of items on this employee's recurring screen.

Move to Next Step

allowance Add New

Payslip Name	Part of Package	Tax Code	Recurring Amount

deduction Add New

Payslip Name	Part of Package	Tax Code		Recurring Amount	
Loan Deduction	False	0000	remove	Show Figures	edit

company contribution Add New

Payslip Name	Part of Package	Tax Code	Recurring Amount

fringe benefit Add New

Payslip Name	Part of Package	Tax Code	Recurring Amount

Let us add provident fund as well. When you select Provident fund, you will have these options:

Component Setup

component name:

* fund :

* % instance :

reference number :

* effective date:

employee extra recurring amount :

+ override options

Fund	Effective Date
1	

+ extra options

Save

When you fill in the details, you can select them from the drop down lists. The date normally defaults to the date the component was created, or the date the employee started. I have now completed her information.

Component Setup

component name:

* fund :

* % instance :

reference number :

* effective date:

employee extra recurring amount :

+ override options

Fund	Effective Date
1	

+ extra options

Save

When complete, click on save. This deduction will now show in your recurring screen list.

deduction				Add New	
Payslip Name	Part of Package	Tax Code		Recurring Amount	
Loan Deduction	False	0000	remove	Show Figures	edit
Provident Employee Deduction	False	4003	remove	Show Figures	edit

Repeat these steps with the company contribution, and anything else required for the employee's setup.

This is what medical aid looks like when you are setting it up:

Before:

component name:

medical aid:

* effective date:   

override table lookup:

amount or percent: amount  percentage

employer amount:

no. medical aid dependants: **1** [Edit](#)

employer percent:

additional employer amount:

reference number:

medical withdrawal date:  [clear](#)

is this employee retired:

employer maximum contribution:

Medical Aid	Effective Date
1	

[+ extra options](#)

After:

component name: Medical Aid Employer Contribution - 4474

medical aid: Discovery Coastal Saver

* effective date: 1 October 2015

override table lookup:

amount or percent: amount percentage

total contribution: 1000

employer amount: 750

no. medical aid dependants: 1 [Edit](#)

additional employer amount:

reference number: 1231231231

medical withdrawal date: [clear](#)

is this employee retired:

employer maximum contribution:

Medical Aid	Effective Date
1	

+ extra options

Save

Once you have filled in all the fields, click on save.

When all of your recurring components have been added, you can click on **move to next step**.

Move to Next Step

allowance Add New

Payslip Name	Part of Package	Tax Code	Recurring Amount
--------------	-----------------	----------	------------------

deduction Add New

Payslip Name	Part of Package	Tax Code	Recurring Amount
Loan Deduction	False	0000	remove Show Figures edit
Provident Employee Deduction	False	4003	remove Show Figures edit

company contribution Add New

Payslip Name	Part of Package	Tax Code	Recurring Amount
Medical Aid Employer Contribution	False	4474	remove Show Figures edit
Provident Employer Contribution	False	4473	remove Show Figures edit

fringe benefit Add New

Payslip Name	Part of Package	Tax Code	Recurring Amount
--------------	-----------------	----------	------------------

personal Add New

Payslip Name	Part of Package	Tax Code	Recurring Amount
--------------	-----------------	----------	------------------

Your employee is now registered and active on the payroll!

Current Details

Company: **HELPDESK DEMO PTY LTD**
[change company](#)

Employee Name: **Helpman Susan**
Number: **0001**
[change employee](#)
or
Fill in Emp. No. here [change](#)

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Payslip Name	Start Date	End Date		
October - 2015	01 Oct 2015	31 Oct 2015	Edit	View
1				



If you want to add more employees, repeat these steps. If you want to change the employee you are working in, click on change employee above the employee's photo, or type in the employee's name or code in the search box.

Current Details

Company: **HELPDESK DEMO PTY LTD**
[change company](#)

Employee Name: **Helpman Susan**
Number: **0001**
[change employee](#)
or
Fill in Emp. No. here [change](#)

Payslips

[Click here to](#)

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