

Paymaster Online Tutorial

Transferring employees

If you have got more than one company on the Paymaster system, and they are linked as part of a group of companies, you can transfer your employees from one company to another. This is much easier and faster than terminating the employee in the one company, and then re-adding them in the other company if you are moving them.

To ensure your companies are linked, you can check on the last tab of the basic company information.

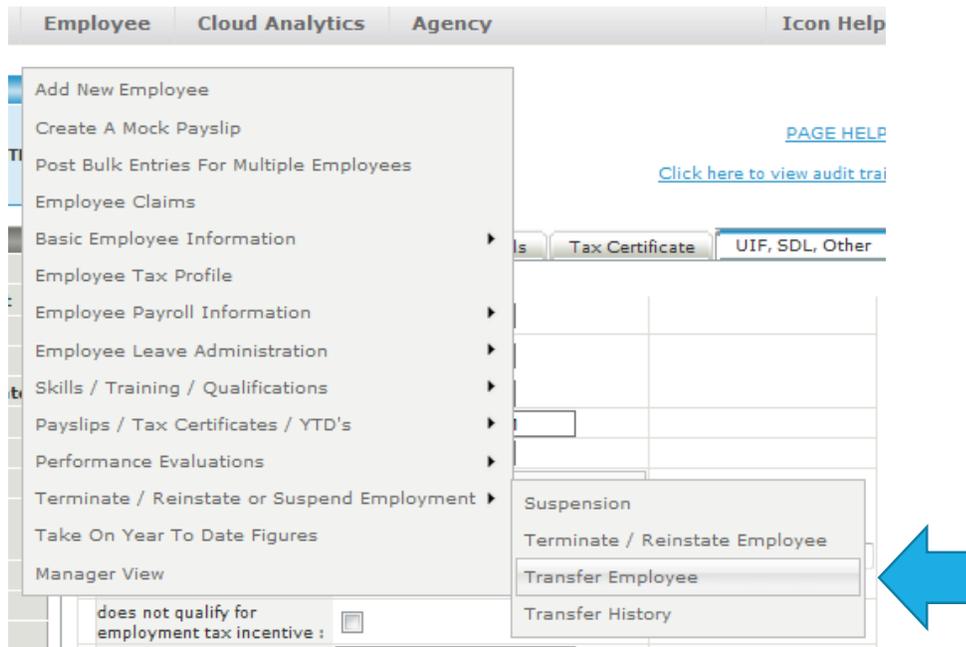
Company Details	Addresses	Contact Details	Tax Certificate	UIF, SDL, Other
uif reference number:	0000000/0			
uif contact person:	HELPDESK			
uif telephone number:	0861555222			
uif e-mail address:	HELP@HELPDESK.COM			
uif id number:				
uif signature for UI19 form:	Browse... No file selected.			
company sdl exemption reason (does not override existing employee's sdl reason):	Total amount of all Employee remuneration < R500 000			
does not qualify for employment tax incentive :	<input type="checkbox"/>			
company group name:	Paymaster demo			
outsource customer?	<input type="checkbox"/>			
add this company (+ all other companies in the group) to cloud analytics?	<input type="checkbox"/>			
* edition:	Premier Payroll			
SETA:	--select one--			
password expiry period:	0			
financial year end month:	--select one--			
company code:				

< Previous Tab

Save

This is set up when you first take on your company. If you have not set it up, give us a holler and we will gladly assist.

To transfer the employee, click on employee, terminate/reinstate or suspend, transfer employee



Just a note – if the components in the company you are transferring to are not the same, you are going to have to manually add these in once the employee has been transferred. This can be done by importing of course.

To start your transfer, you need to select which frequency you are transferring the employee to. If they are both monthly companies only, you will only be able to select monthly from the drop down list. I am selecting Paymaster Demo – Monthly for this example.

Employee Transfer

Step 1

to which company/frequency are you transferring
Susan Helpman :

Step 2

-- select one --

- select one --
- ABC Development - Monthly
- Core Wealth Managers - Monthly
- DEMO - Monthly
- Demo - Monthly
- DR MOYRA STEIN - Monthly
- HP - Monthly
- Kulu Civils & Project Managers cc - Monthly
- PAYMASTER DEMO - Fortnightly
- PAYMASTER DEMO - Monthly
- PAYMASTER DEMO - Monthly
- PAYMASTER DEMO - Monthly
- PAYMASTER DEMO - Weekly
- PAYMASTER DEMO - Weekly
- PAYMASTER ONLINE DEMO - Fortnightly
- PAYMASTER ONLINE DEMO - Monthly
- PAYMASTER ONLINE DEMO - Weekly

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Step 1	
to which company/frequency are you transferring Susan Helpman :	PAYMASTER DEMO - Monthly 
effective from which pay run in the current company/frequency:	October - 2015
what is the start date in the new company/frequency:	26 October 2015 
Step 2	
the listed component(s) will not be copied over to the new company/frequency being transferred to:	Provident Employee Deduction
Current Component: Medical Aid Employee Deduction	
select fund:	--select one--
Current Component: Medical Aid Employer Contribution	
select fund:	--select one--
Current Component: Provident Employer Contribution	
select fund:	--select one--
Current Component: Loan Deduction	
to which component will the this component be transferred to in the new company/frequency:	Loan Deduction
Save & Next Step >>	

Now I have some new options. I must make sure that the effective run is correct. I will transfer this employee from 1 October, so it must be the October run.

Effective date in the new company will be 1 October.

Step 2 are my components – if they are not setup in the new company, I cannot take them across with me.

I am going to take the medical and provident fund. Oh, and the loan as well.

Step 1	
to which company/frequency are you transferring Susan Helpman :	PAYMASTER DEMO - Monthly
effective from which pay run in the current company/frequency:	October - 2015
what is the start date in the new company/frequency:	1 October 2015
Step 2	
the listed component(s) will not be copied over to the new company/frequency being transferred to:	Provident Employee Deduction
Current Component: Medical Aid Employee Deduction	
select fund:	Discovery Coastal Core
Current Component: Medical Aid Employer Contribution	
select fund:	Discovery Coastal Core
Current Component: Provident Employer Contribution	
select fund:	Test Provident 1 - Instance 1 - (ER Contribution : 2.00%) (EE Dedu.
Current Component: Loan Deduction	
to which component will the this component be transferred to in the new company/frequency:	Loan Deduction
Save & Next Step >>	



When I have made all my selections, I can click on **save and next step**.

Now I am being asked to link the employee to leave. Like I said before, if the settings are not the same, you are going to have to manually link the correct settings. I suggest making sure you have the right settings before starting the transfer.

I have selected standard leave from the drop down list. Click on **save >> next step** when you are ready.

Details	
* leave scheme:	Standard Leave 2
effective date:	2 October 2015
Save >> Next Step	
Move to Next Step	

My next option is to adjust the leave balance. My transferred employee will only have the 1.25 annual days as per the standard leave setup, so if there is a balance to be transferred as well, I can do the adjustment here.

Details	
* adjustment type:	--select one--
* leave type:	--select one--
* effective run:	--select one--
* from the following container:	
* status:	--select one--
* start date:	26 October 2015
* end date:	26 October 2015
balance at end of :	
length of service:	
* number of days:	
comments:	
reference:	
hide on leave application:	<input type="checkbox"/>
attachment:	<input type="button" value="Browse..."/> No file selected.

When I am done, click on **save**. If there is no adjustment to be done, click on **move to next step**.

I can now set up the position screen in the new company. **Save and next step** when I have made my choices.

Details		Skills Gap Analysis
* effective date:	2 October 2015	
* position in organisation:	administrator	
* employee organisation unit:	cape town	
directly reports to position:	manager	
directly reports to person:	...	
override directly reports to position :	...	
workflow role:	--select one--	

Tax status screen next – make sure all the info is set up correctly here, especially the start dates.

Update >> next step when you are ready.

Details [Click here to view audit trail](#)

* i want to ...	<input type="radio"/> terminate this employee	
* group join date:	1 October 2015	
* employment date:	2 October 2015	
* nature of person:	B - Individual without ID number or Passport no	
* tax status:	Standard Employment (Normal)	
tax reference number:	<input type="text"/>	
not re-employable?	<input type="checkbox"/>	
reference no.:	<input type="text"/>	

Update >> Next Step

Next is our pay rate. If nothing is changing, click on **new >> next step**. If you need to make an adjustment to the pay rate, click on **new**.

Details [Click here to view audit trail](#)

* which payroll frequency group will this employee belong to:	Monthly	
* effective date:	02 Oct 2015	
* this employee is paid:	per month	
* package:	5000.00 <input 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:	173.36	
hourly rate:	28.8417 1666	
daily rate:	230.7337 3327	
fortnightly rate:		

New
New >> Next Step

Last is to double check the recurring components screen. If anything is missing, add it in now as normal process on the recurring screen. If you are happy with the setup, click on **move to next step**.

inherit recurring components from company template. --select one-- Inherit

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	500.00	edit
Medical Aid Employee Deduction	False	0000	remove	250.00	edit

company contribution					Add New
Payslip Name	Part of Package	Tax Code	Recurring Amount		
Medical Aid Employer Contribution	False	4474	remove	750.00	edit
Provident Employer Contribution	False	4473	remove	100.00	edit

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

Now my employee is transferred, and is now part of the new company.

Current Details

Company: **PAYMASTER DEMO**
[change company](#)

Employee Name: **Susan Helpman**
Number: **EMP0251**
[change employee](#)
or
 [change](#)

Frequency: **Monthly**



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Payslip Name	Start Date	End Date	Edit	View
November - 2015	01 Nov 2015	30 Nov 2015		
1				