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.
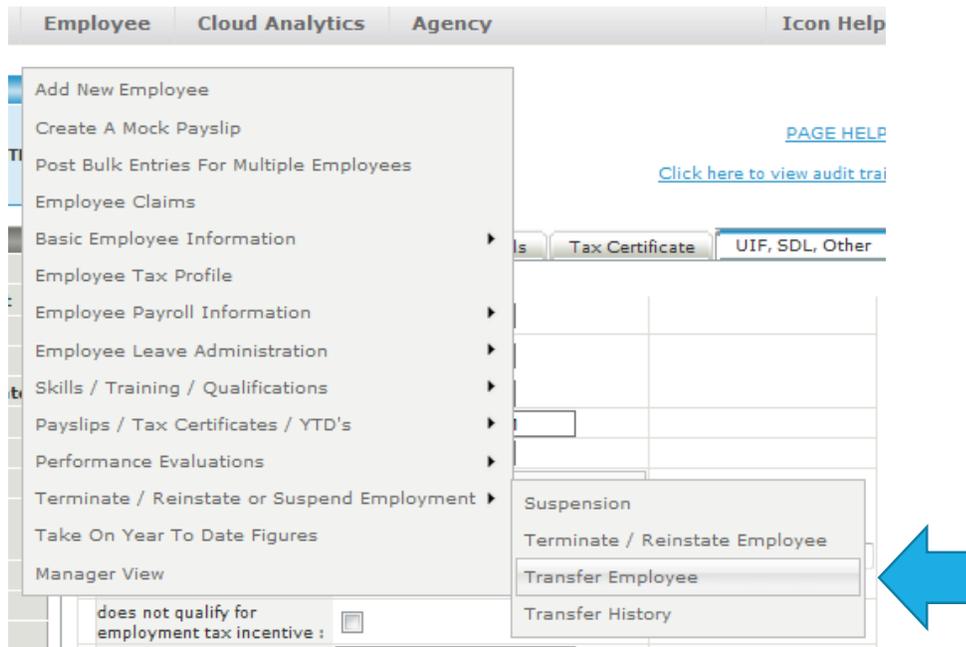

This is set up when you first take on your company. If you have not set it up, give us a holler and we will gladly assist.

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.

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.

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.

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.

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.

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.

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**.

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**.

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