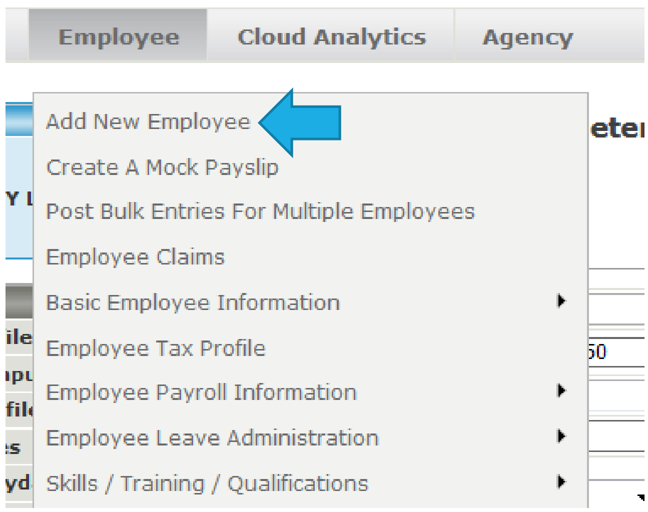
Paymaster Online Tutorial

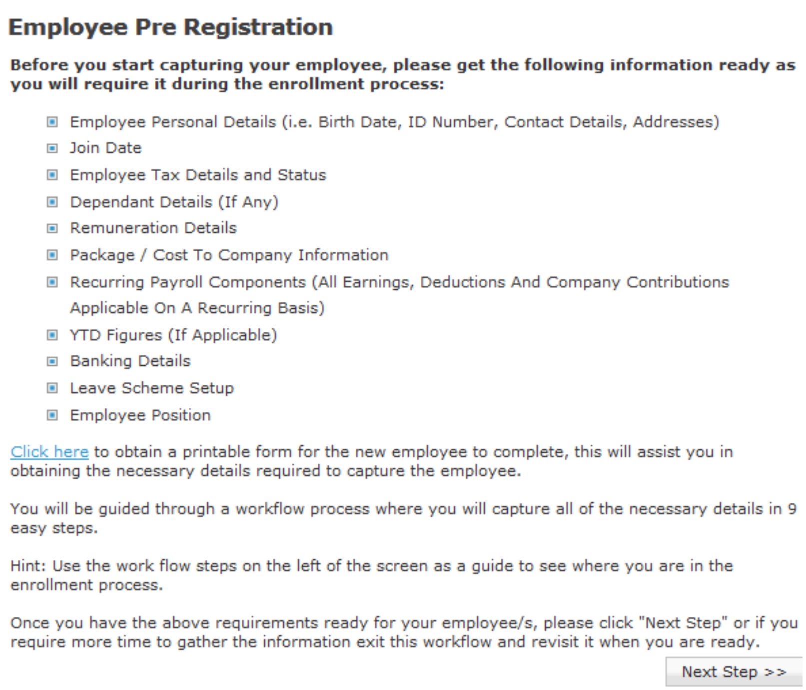
Adding Employees

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.

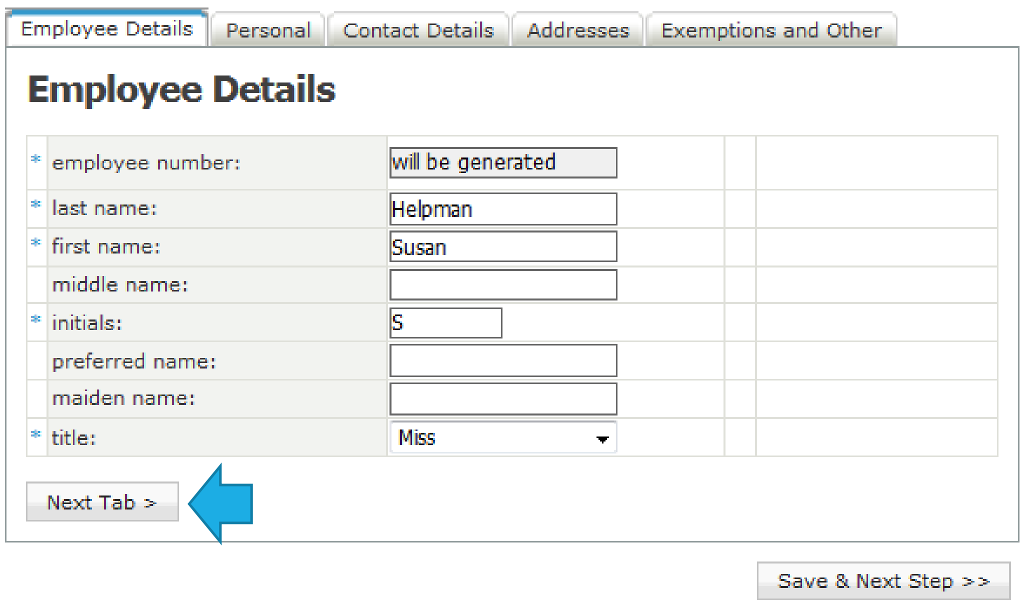
Once you have the above requirements ready for your employee/s, please click "Next Step" or if you require more time to gather the information exit this workflow and revisit it when you are ready.

Next Step >>

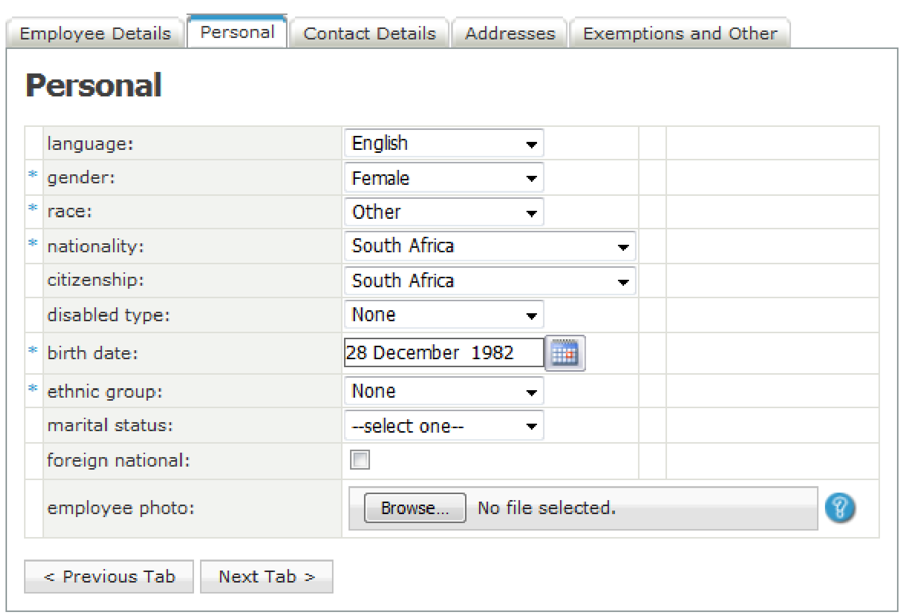
This is the employee details section. Basic information, address, contact details etc all goes here. Complete the fields with the correct information.

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

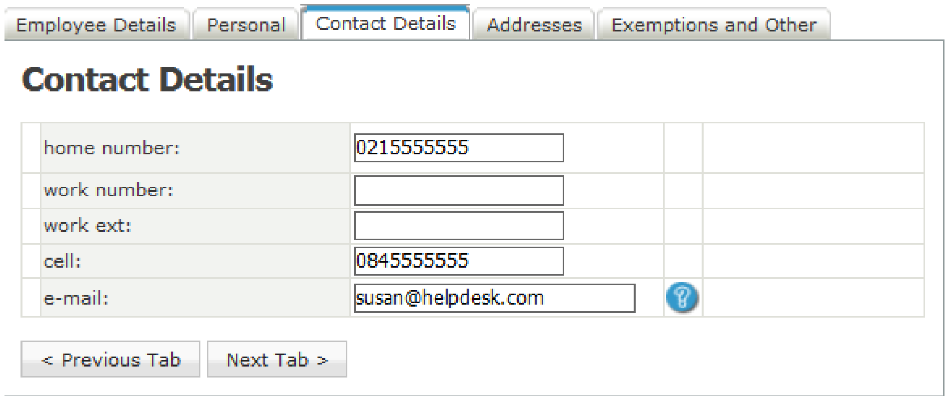
If, when you created your company, you selected the system generate your employee numbers, it will show “will be generated” in the section for the employee number. If not, type in the required information here. When you are ready, click on **next tab**.



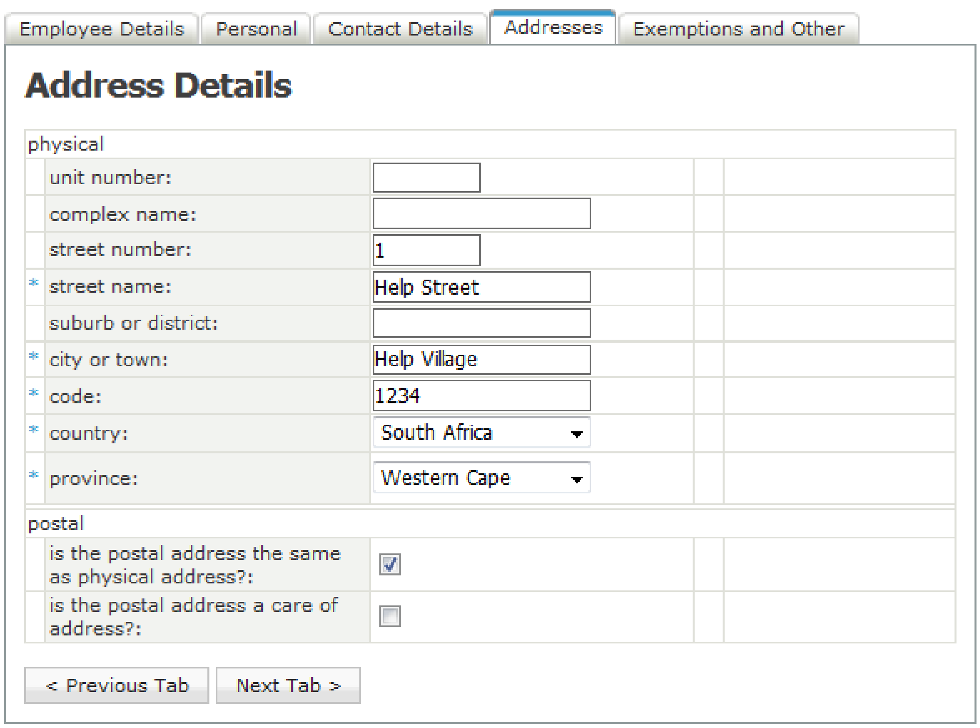
In the next section, Personal, you can select the options you require from drop down menus. Language, Gender, race, birthdate and marital status can be selected. You can also upload your employee’s photo here by browsing on your computer for a suitable picture. Once completed, click on next tab.



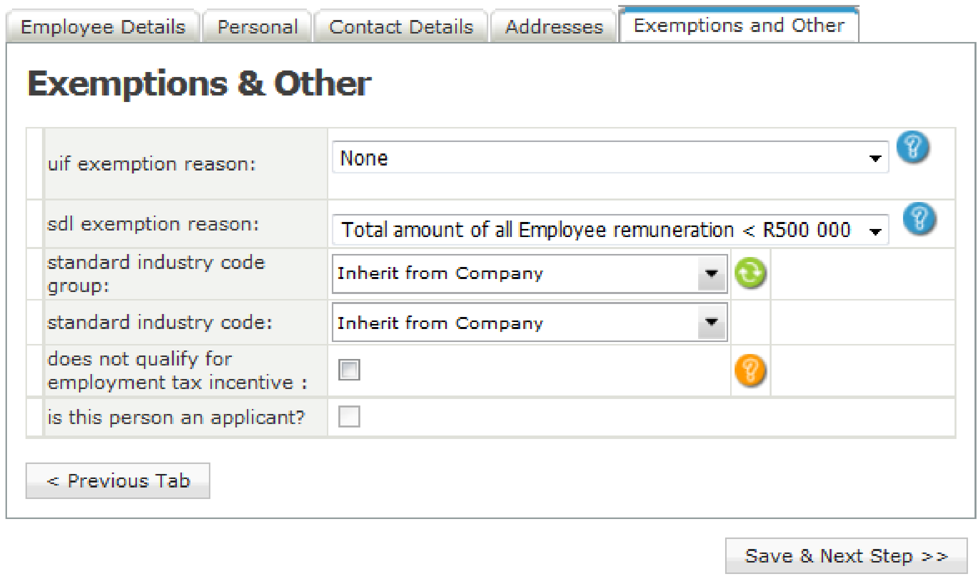
Next, fill in the contact details for the employee. There needs to be at least one contact number. When completed, click on next tab.



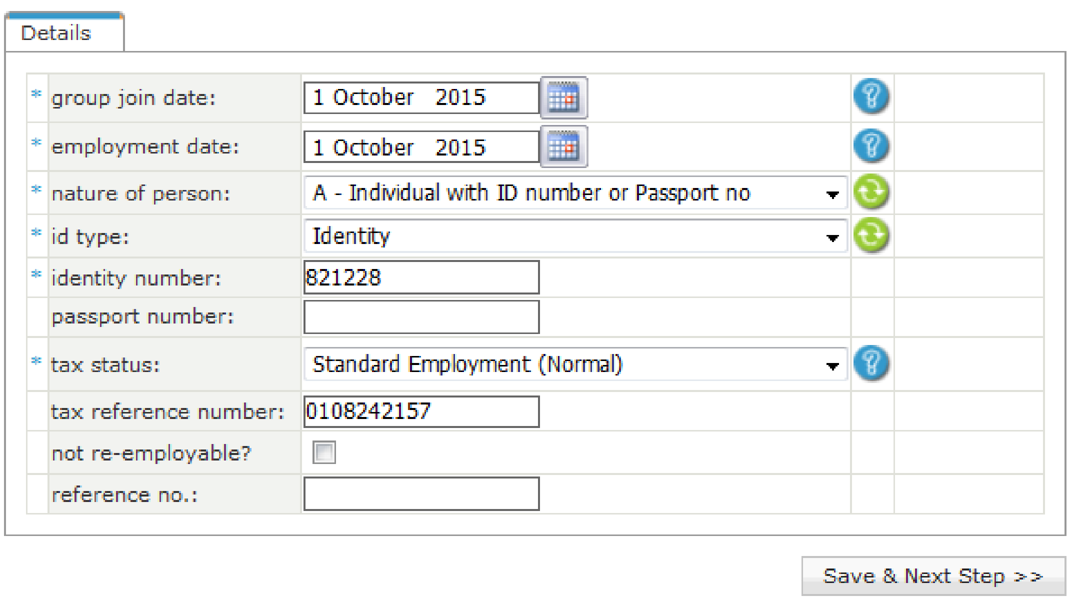
This is where you complete the address details. If the postal address is the same as the physical address, you can tick the necessary block. When complete, click on next tab.



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**.



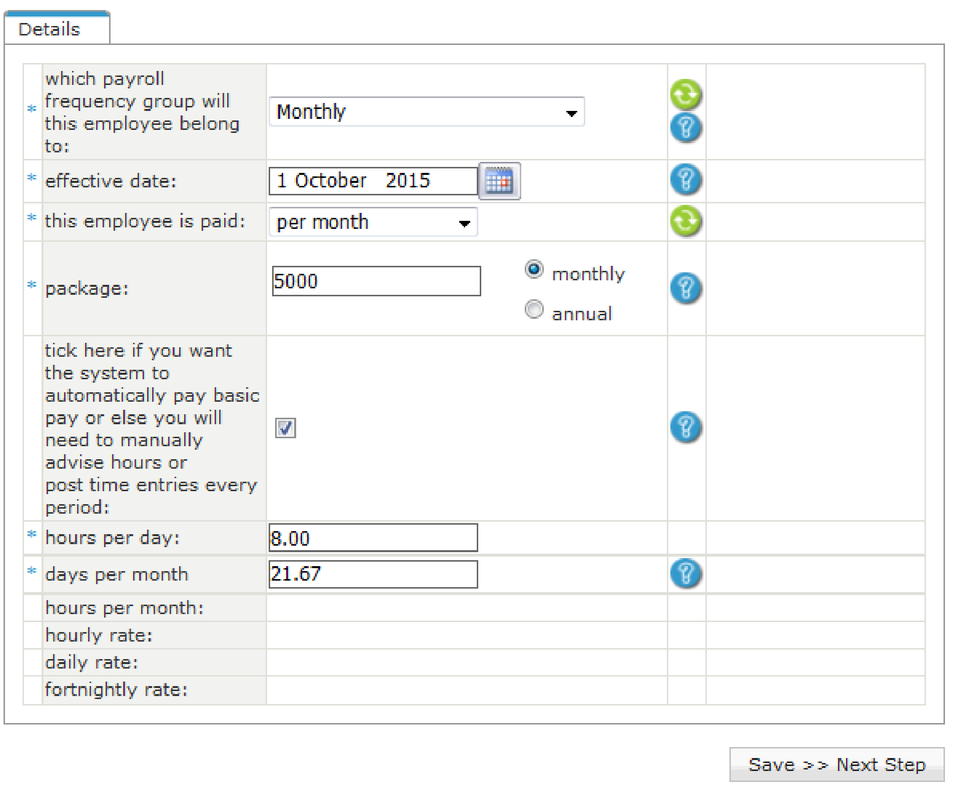
You will now be on the Employment status step of the workflow. Here, you need to input the ID number or passport number, date of employment and tax reference number if you have one. Once fields are completed, click on **Save & next step**.



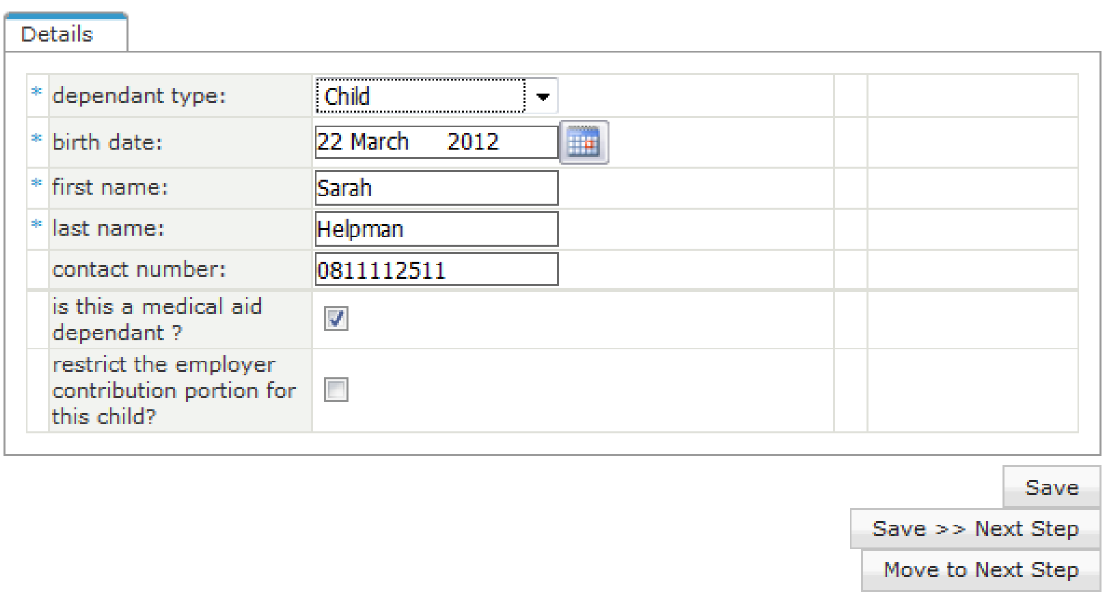
You are now on the payrate screen. This tells the system how much the salary or wage for the employee is, and if you pay them per month, per day or per hour.

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.

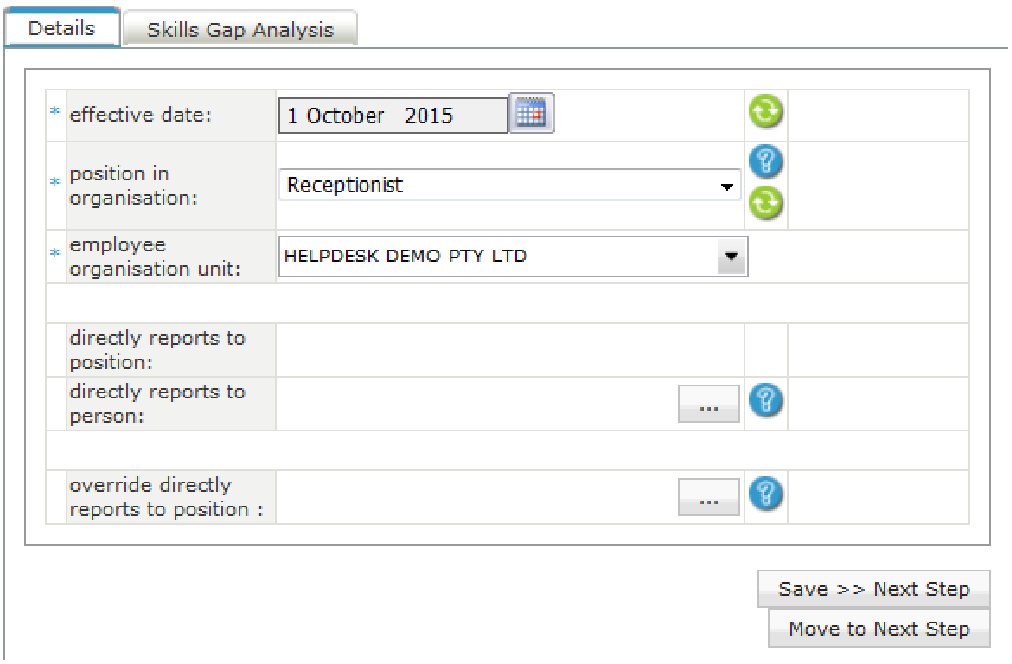
Once you have put in the required information, click on **save >> next step**.



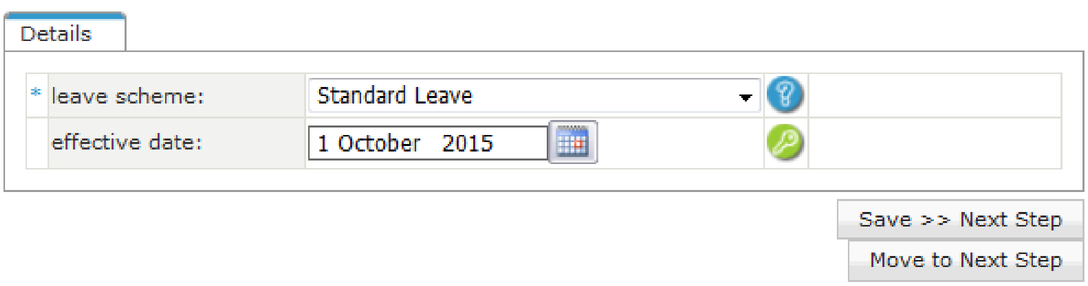
You are now on the dependents section. If your employees are on medical aid and you need to add the dependents, you will do so here. This is also for the next of kin details if necessary. Once you are done, click on **save >> next step**. If you are not putting any information on this screen, you can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



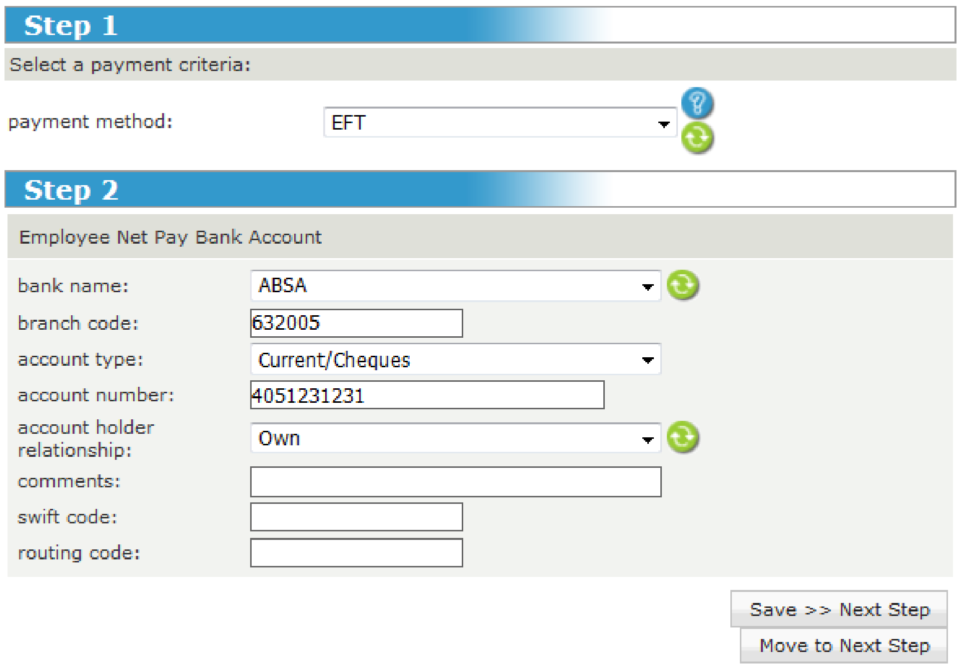
You can now link the employee to the position screen. If you have not setup any positions yet, you can click on **Move to next step**, and come back to this screen later. If you positions are setup, you can select the option from the drop down list and click **save >> next step** when you are done.



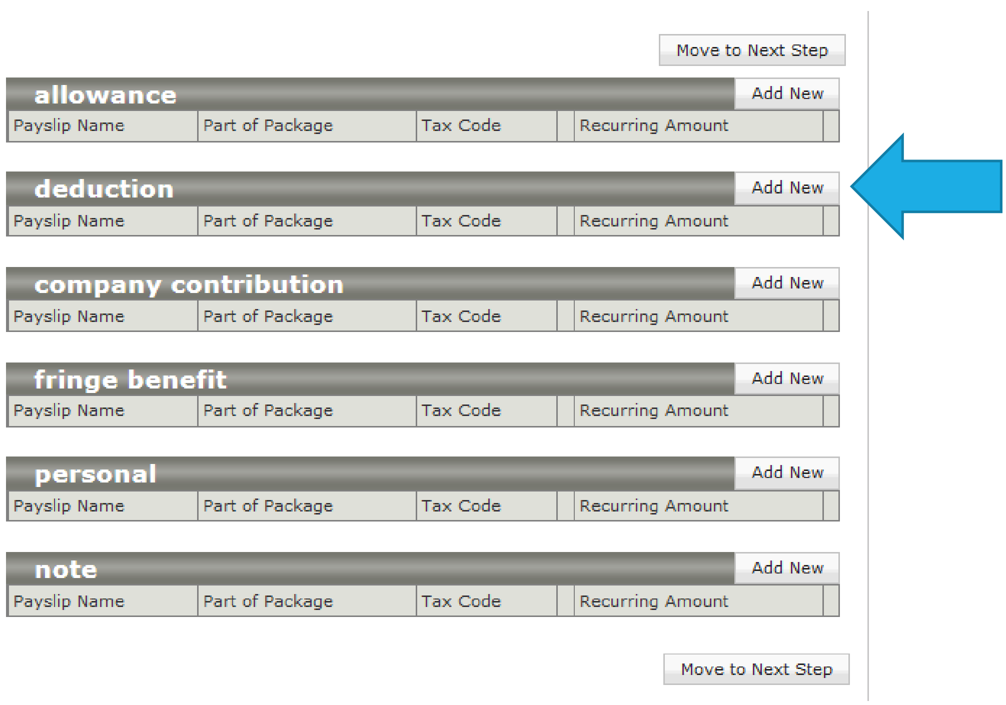
You are now on the screen to link the employee to leave. Here, you can select standard leave (15 days) or managers leave (20 days) from the drop down list. Once you have selected your required option, click on **save >> next step**.



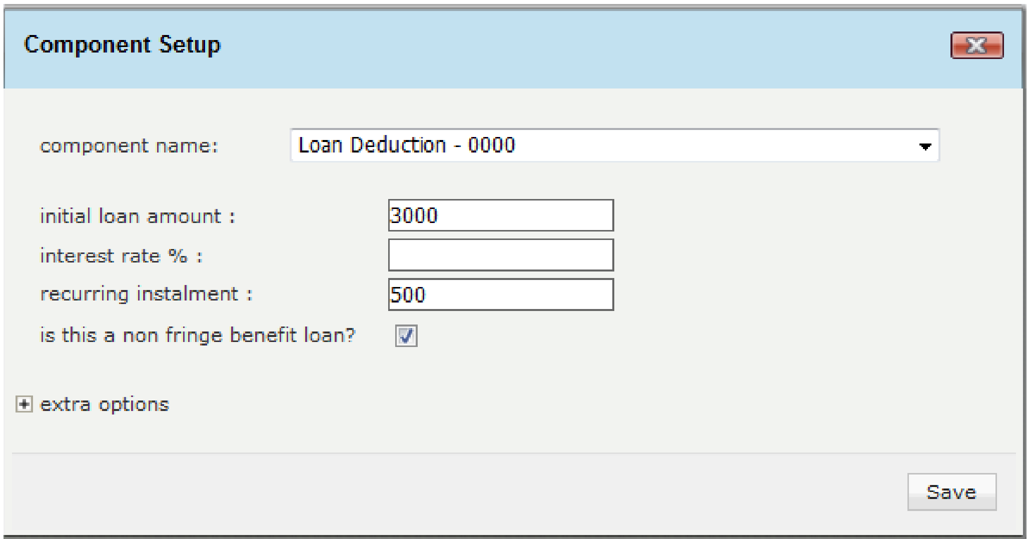
Next are the bank details. Here you need to select EFT for bank deposit, and then complete the employees banking details from the options. Once complete, click on **save >> next step**.



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.

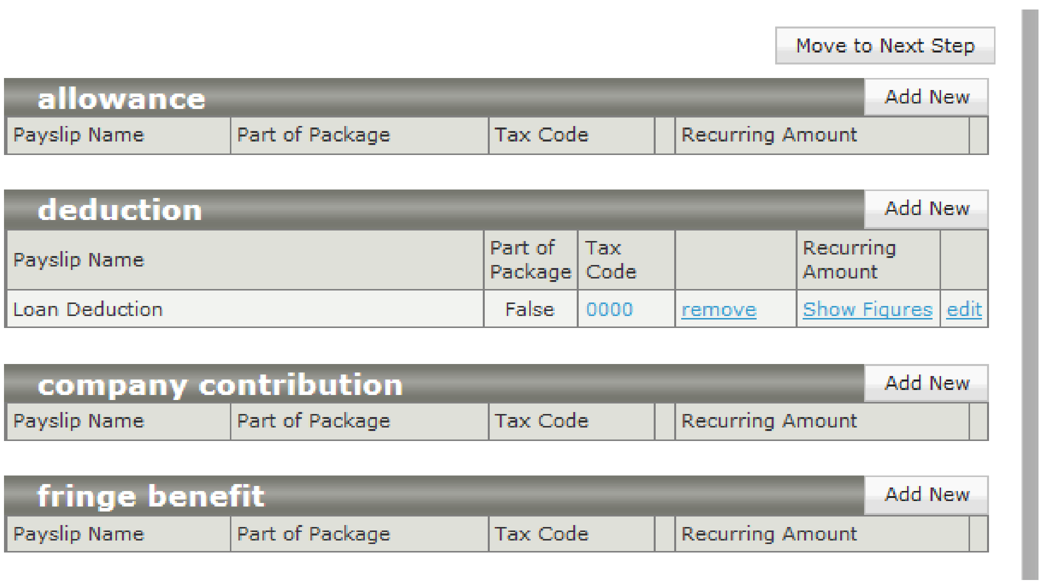


I am going to add a loan deduction for this employee. I have selected loan deduction, and can now complete the options.

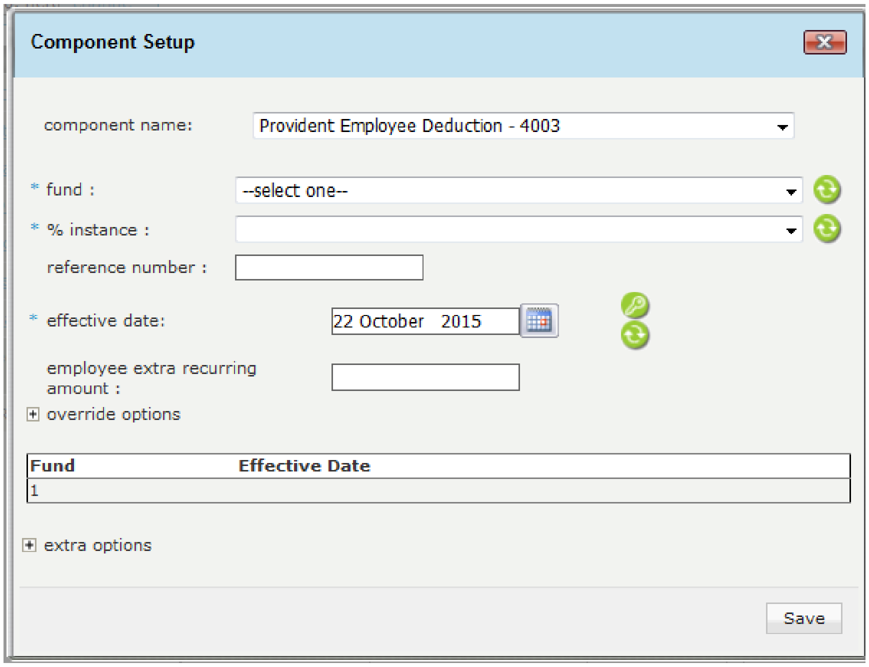


If the loan is more than R3000, SARS say you have to pay fringe benefit tax on it, so you will leave the last block unticked. This will automatically create a fringe benefit tax component on your reports.

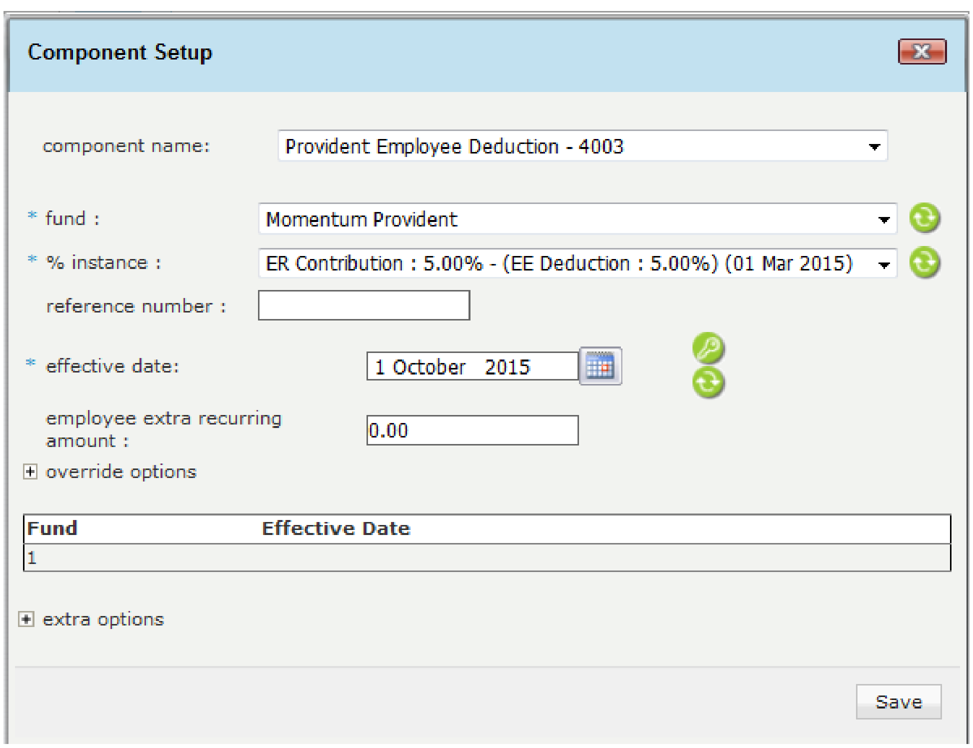
Once you are done, click save. This loan now shows in the list of items on this employee's recurring screen.



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



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.



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

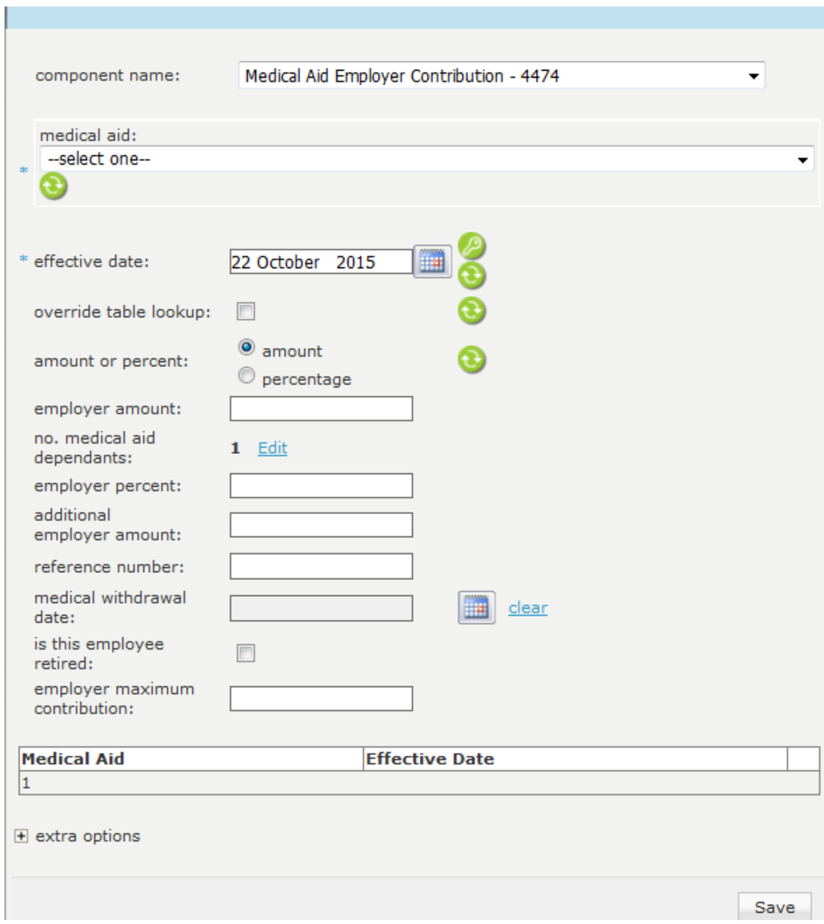
deduction Add New

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

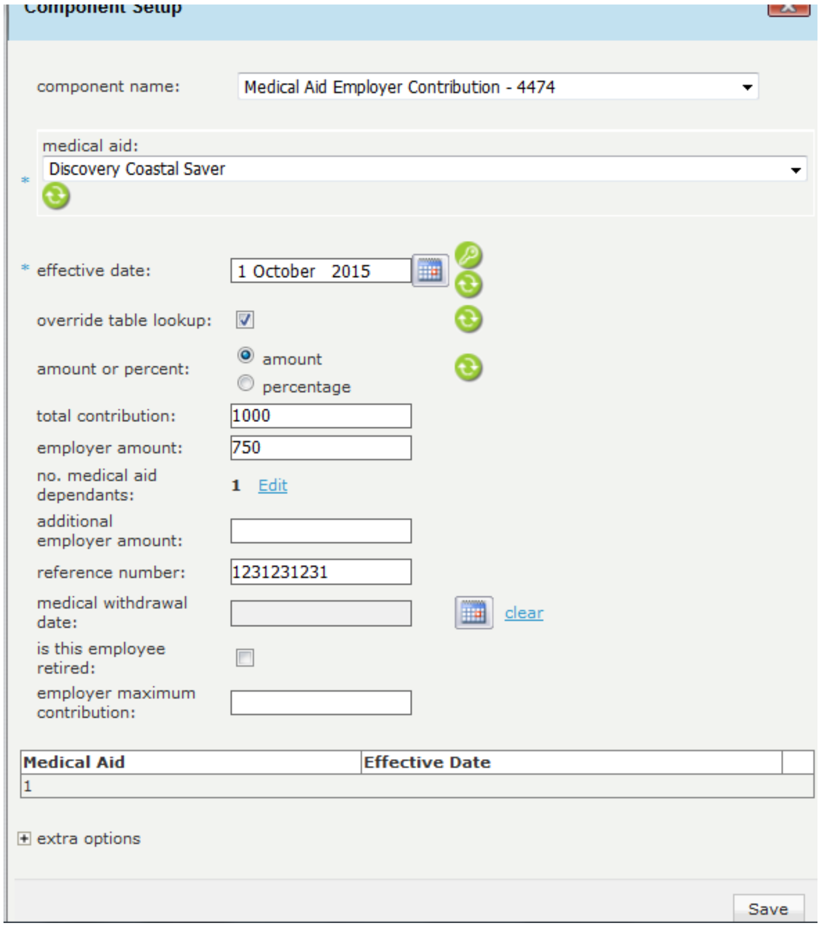
Repeat these steps with the company contribution, and anything else required for the employee's setup.

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

Before:

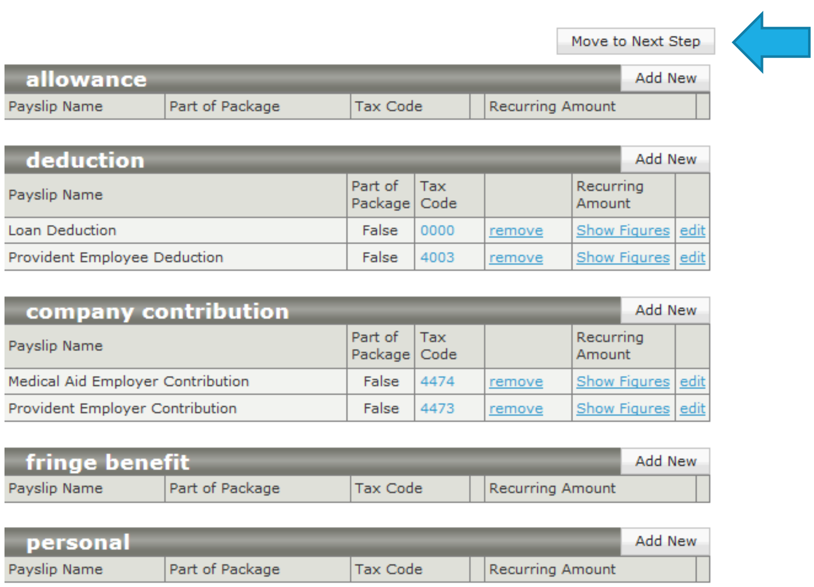


After:

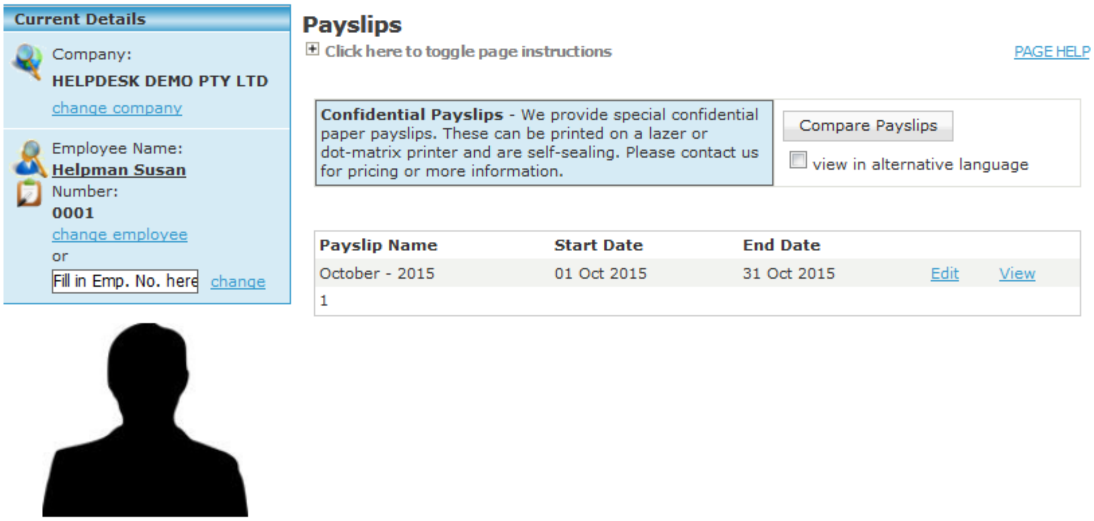


Once you have filled in all the fields, click on save.

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



Your employee is now registered and active on the payroll!



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.