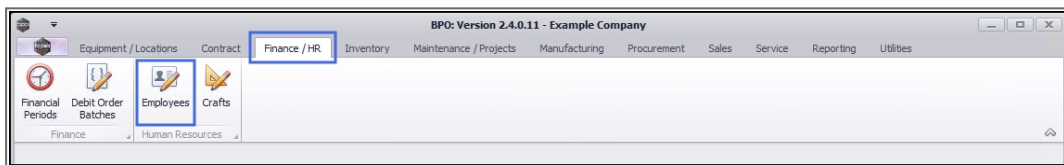


HUMAN RESOURCES

EMPLOYEES – ADD DEPENDANT

In the **Edit Employee** screen, the **Dependants** docking panel lists all the **dependants** (child or adult) that are linked to the selected employee. You can Add, Edit and Delete a dependant in this panel.

Ribbon Access: *Finance and HR > Employees*

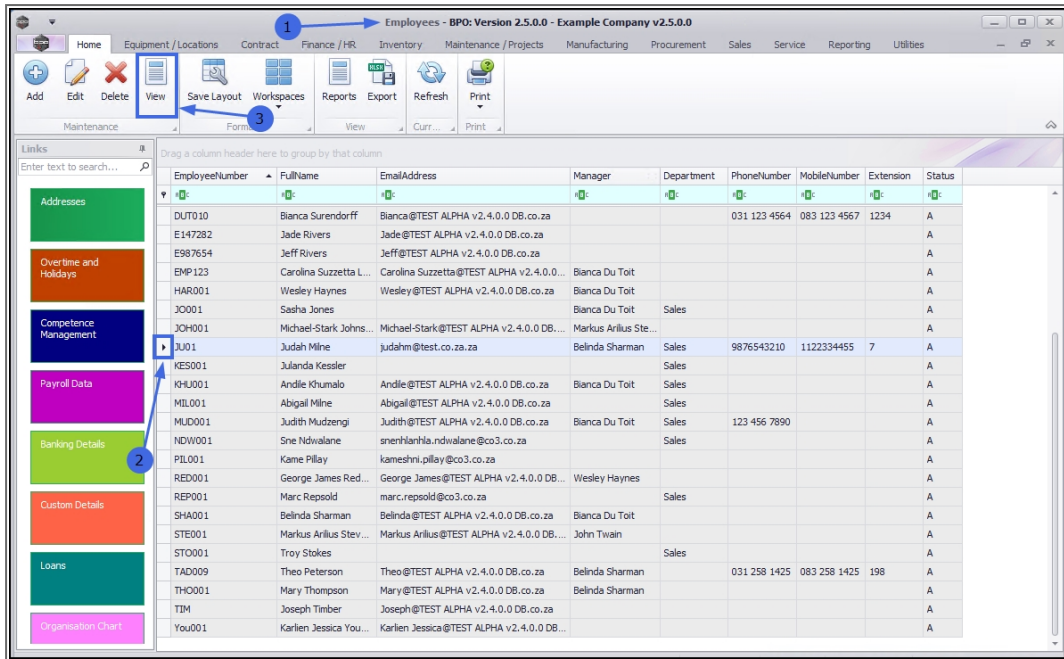


1. The **Employees** listing screen will display.

VIEW DEPENDANTS

SELECT EMPLOYEE

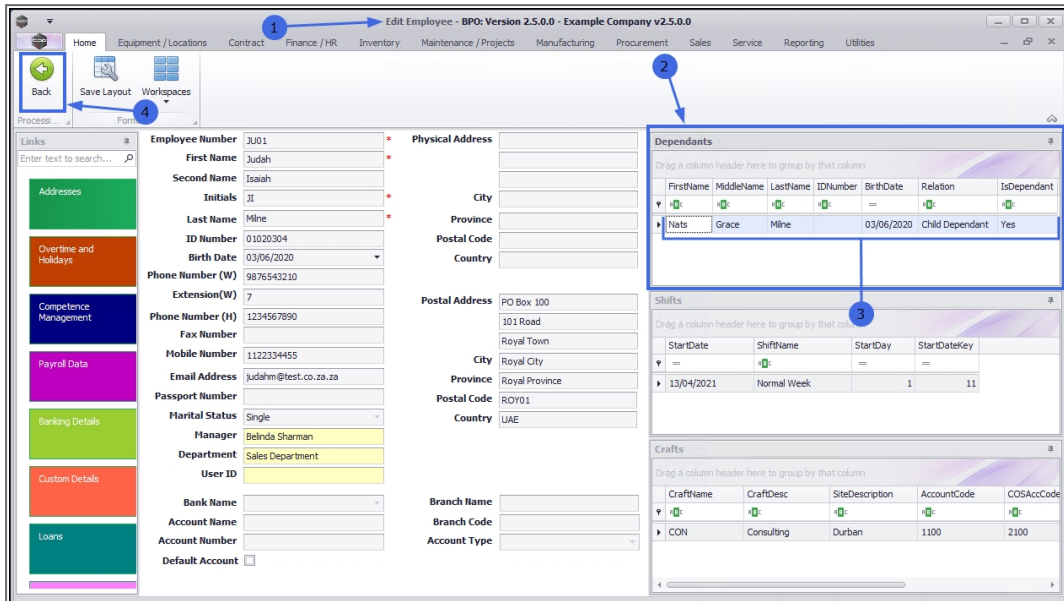
2. Select the **employee** for whom you wish to **view** the linked dependants.
3. Click on **View**.



VIEW LINKED DEPENDANTS

- The **Edit Employee** screen will open.
 - Note:** Although this screen title is '**Edit Employee**', you cannot make or save changes here as it is a view only screen - there is no **Save** button.
- The **Dependants** frame is located in the top right of this screen.
- Here you can **view** the following details of any dependants currently linked to the selected employee:
 - First Name
 - Middle Name
 - Last Name
 - ID Number
 - Birth Date
 - Relation
 - Is Dependant (Yes or No)

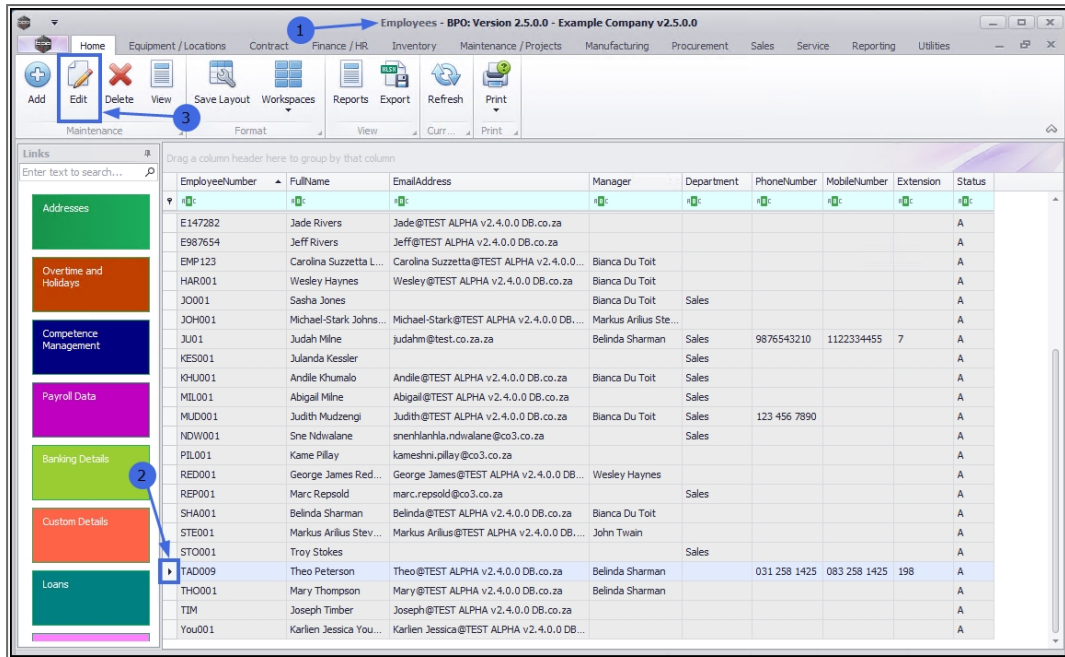
When you have finished viewing the Dependants details, click on **Back** to return to the **Employees** listing screen.



ADD DEPENDANT

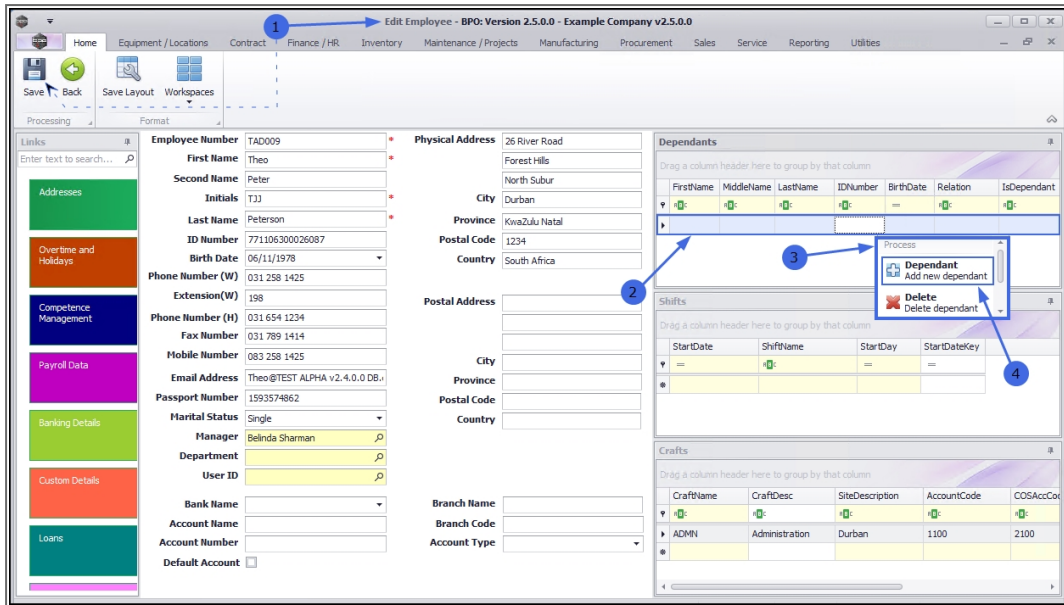
SELECT EMPLOYEE

1. In the **Employees** listing screen,
2. Select the **employee** to whom you wish to **add** a dependant.
3. Click on **Edit**.



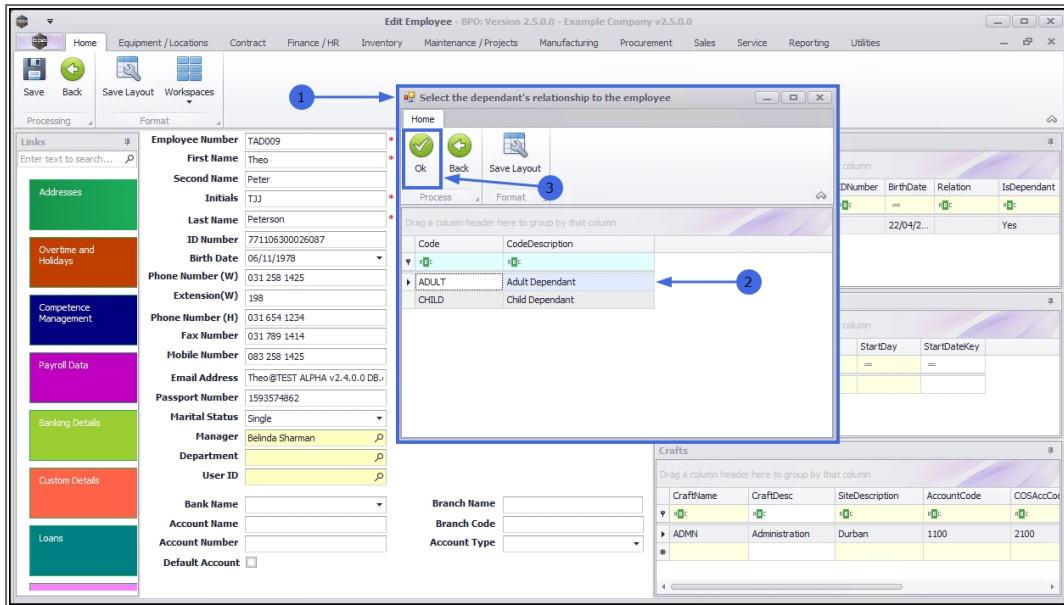
ADD NEW DEPENDANT

1. The **Edit Employee** screen will open.
 - **Note:** You can add and edit details in this screen, there is an active **Save** button.
2. In the **Dependants** frame, right click in any row (except the filter row).
3. A **Process** menu will pop up.
4. Select **Dependant - Add new dependant** from the list.



SELECT DEPENDANT'S RELATIONSHIP

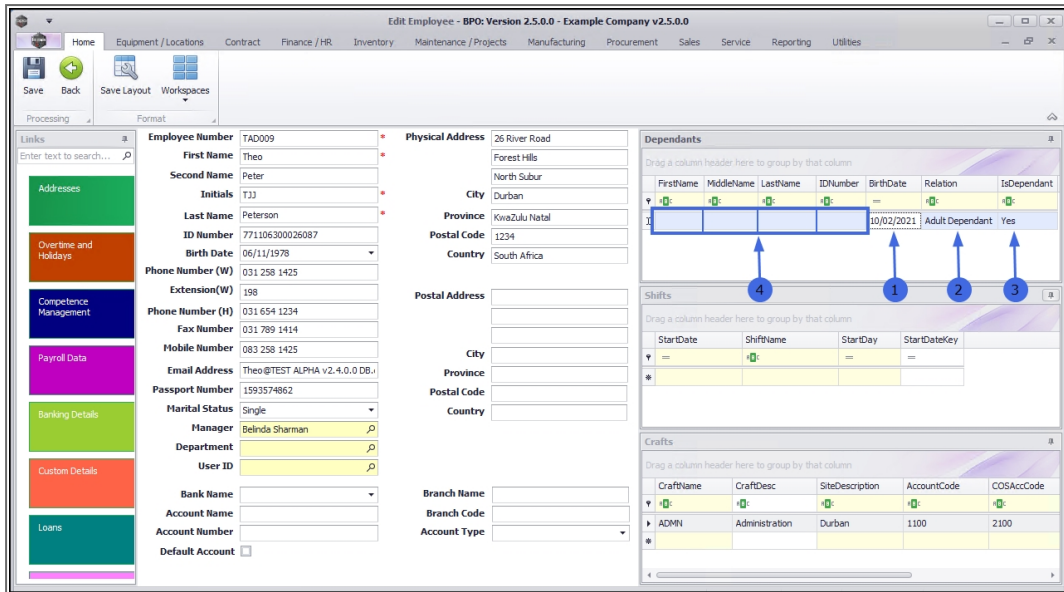
1. A *Select the dependant's relationship to the employee* screen will pop up.
2. Select the **row** of the type of dependant that applies.
 - In this example, an **Adult Dependant** (the wife of the employee) is selected.
3. Click on **Ok**.



ADD NEW DEPENDANT DETAILS

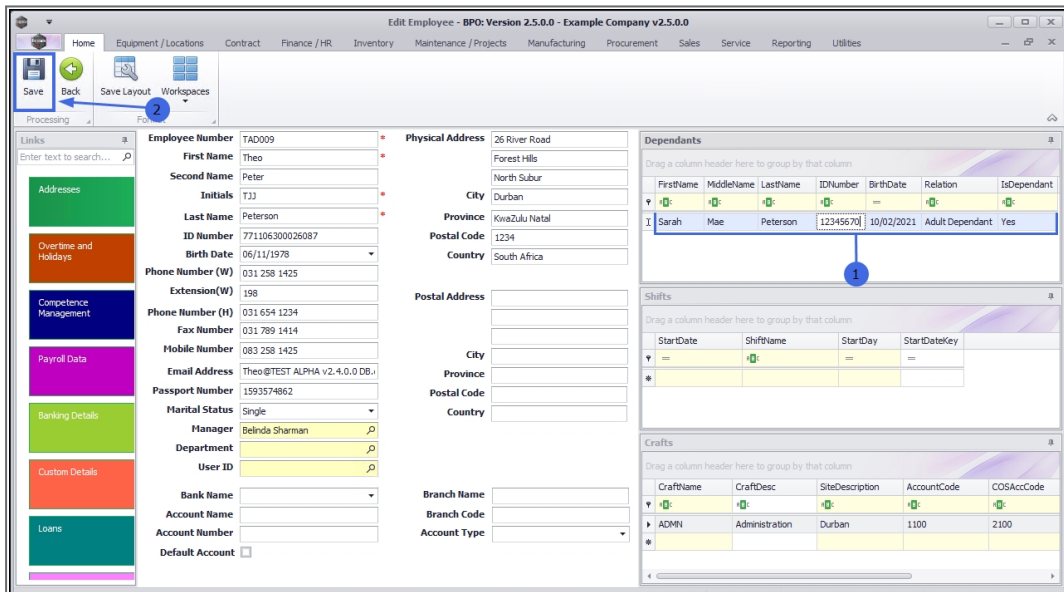
The **Select** screen will close and the following fields in the Dependants frame will auto populate:

1. **Birth Date:** This will populate with the current date. Click on the drop-down **arrow** and use the calendar function displayed, to select a different birth date, if applicable.
2. **Relation:** This will populate with the **relationship** selected in the pop up screen.
3. **Is Dependant:** This will populate with **Yes**.
4. The **4** remaining fields are free text fields, you can **type in** the required details:
 - **First Name**
 - **Middle Name**
 - **Last name**
 - **ID Number**



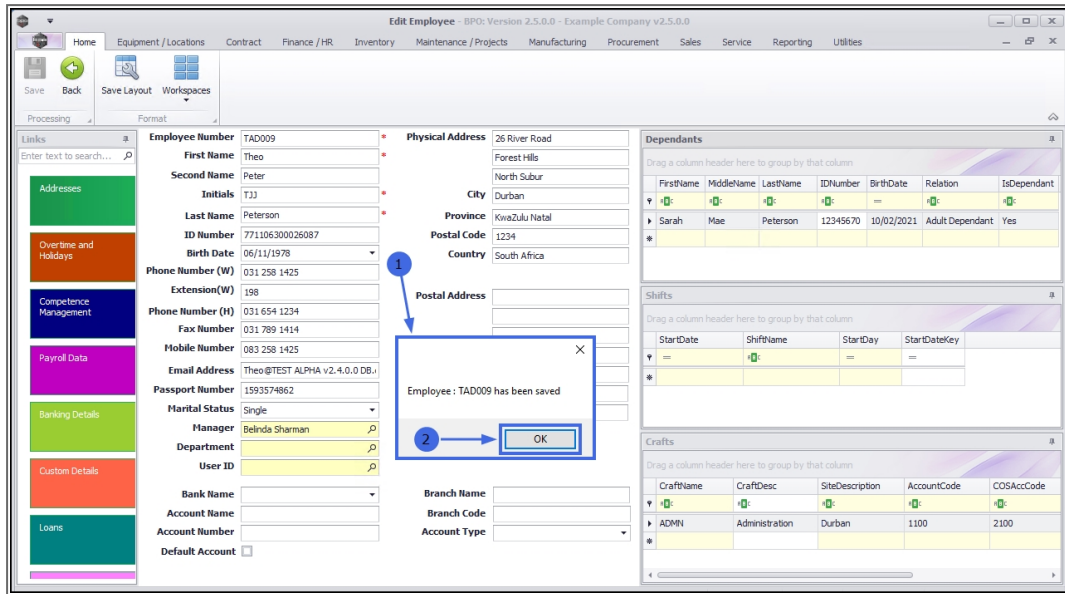
SAVE NEW DEPENDANT

1. When you have finished adding the new dependant details,
2. Click on **Save**.



1. A message box will pop up informing you that;
 - **Employee: [] has been saved.**

2. Click on **OK**.

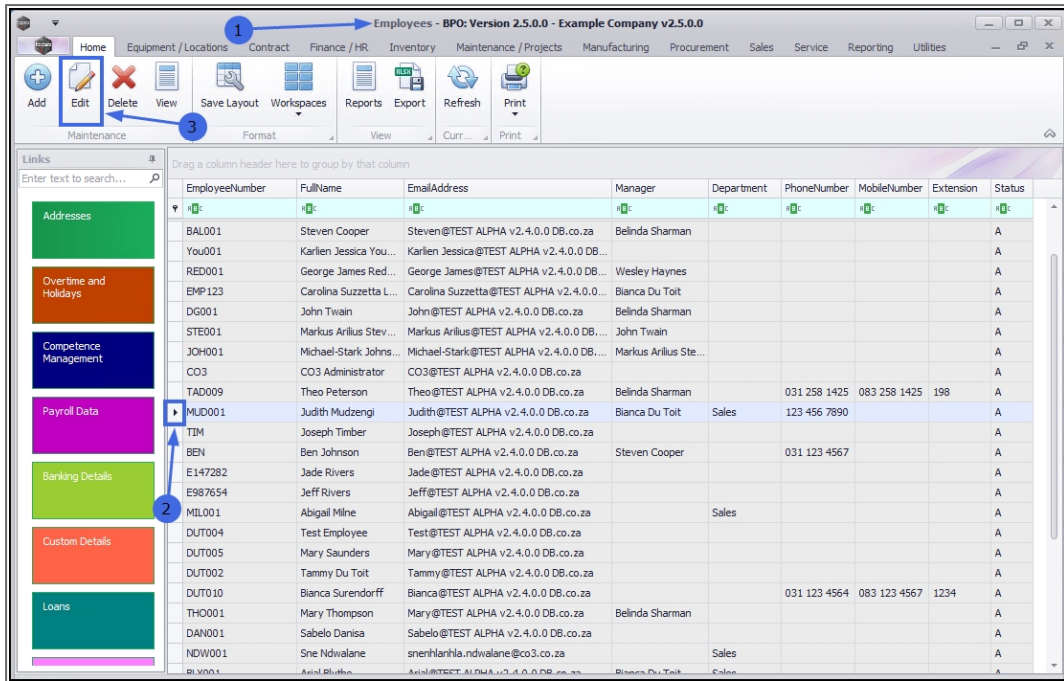


- The new dependant details will be saved and you will return to the **Employees** listing screen.

EDIT DEPENDANT

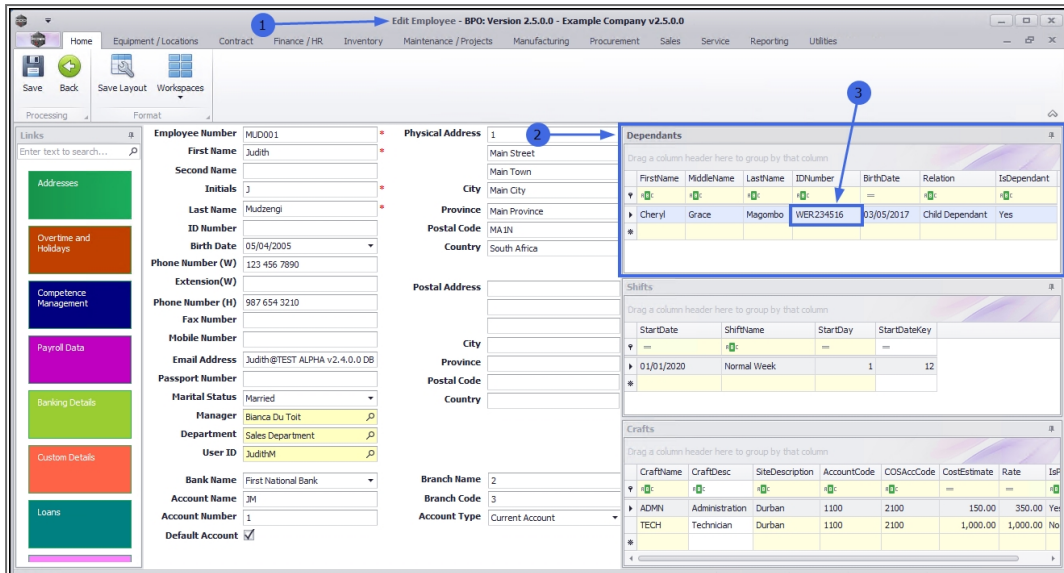
SELECT EMPLOYEE

1. In the **Employees** listing screen,
2. Select the **employee** whose dependant's details need to be **changed**.
3. Click on **Edit**.



EDIT DEPENDANTS DETAILS

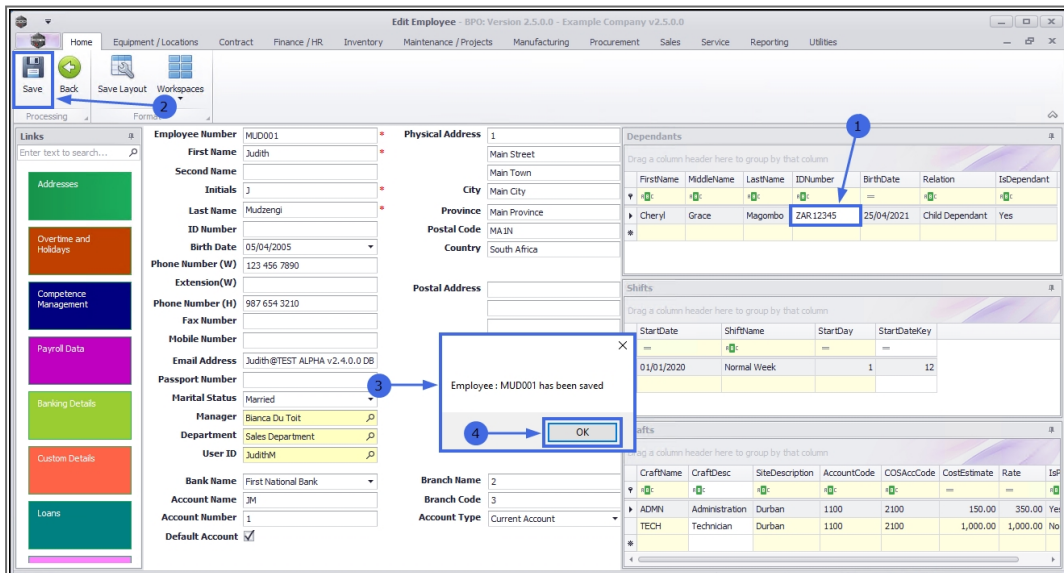
1. The **Edit Employee** screen will open.
2. In the **Dependants** panel,
 3. Click in the field where you wish to make the change.
 - Either type the new information in the field, or if necessary, **delete** the text that is there and type in the new information.



1. In this example, the **ID Number** has been changed.

SAVE CHANGES

2. When you have finished editing the details, click on **Save**.
3. A message box will pop up informing you;
 - **Employee: [] has been saved.**
4. Click on **OK**.

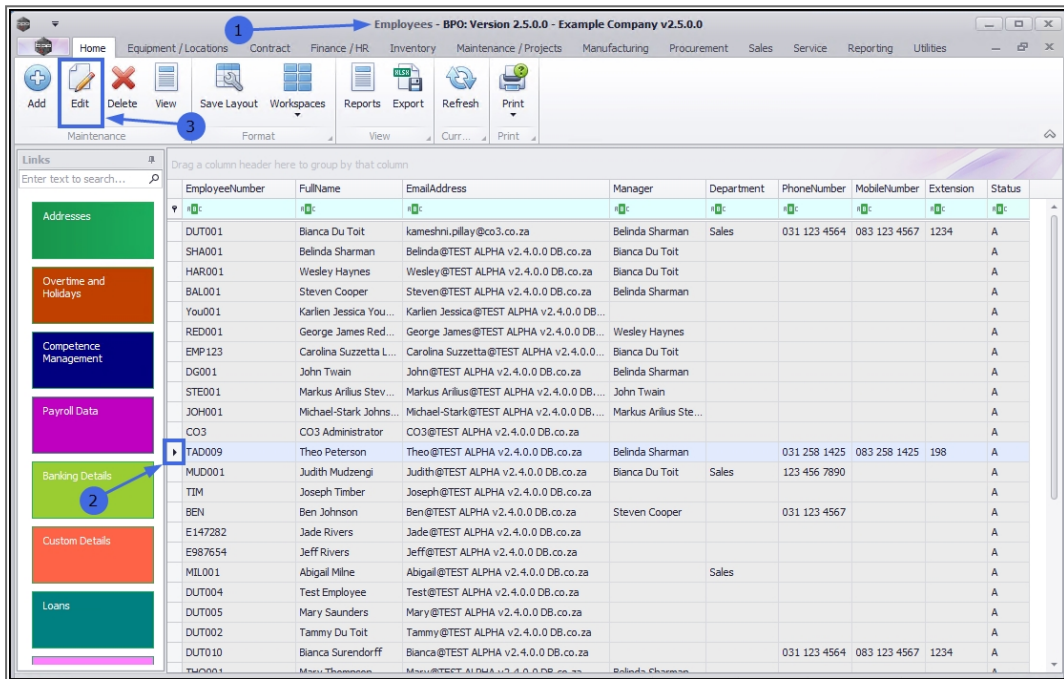


You will return to the **Employees** listing screen.

DELETE DEPENDANT

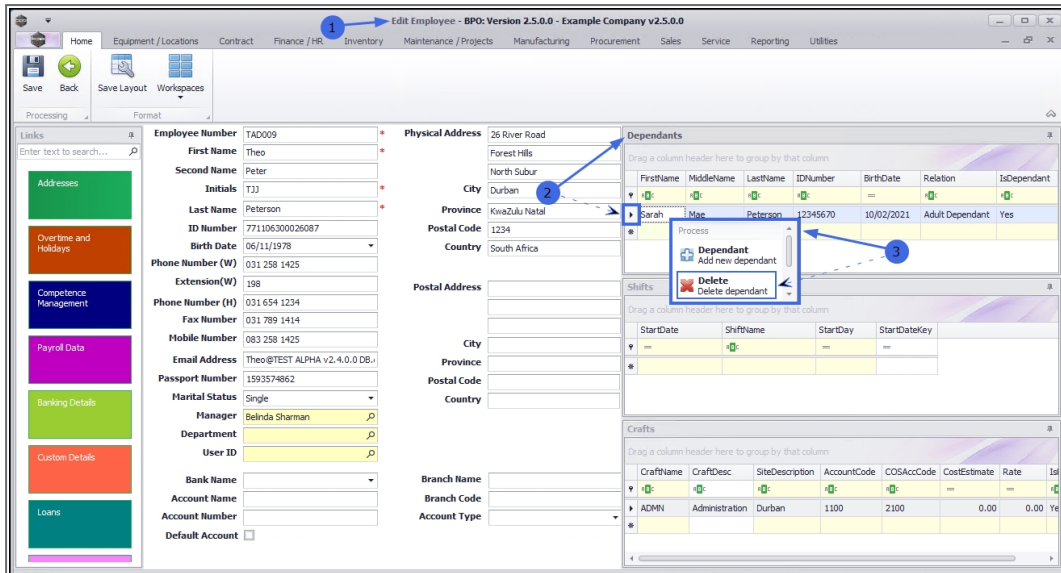
SELECT EMPLOYEE

1. In the **Employees** listing screen,
2. Select the **employee** whose dependant's details need to be **deleted**.
3. Click on **Edit**.



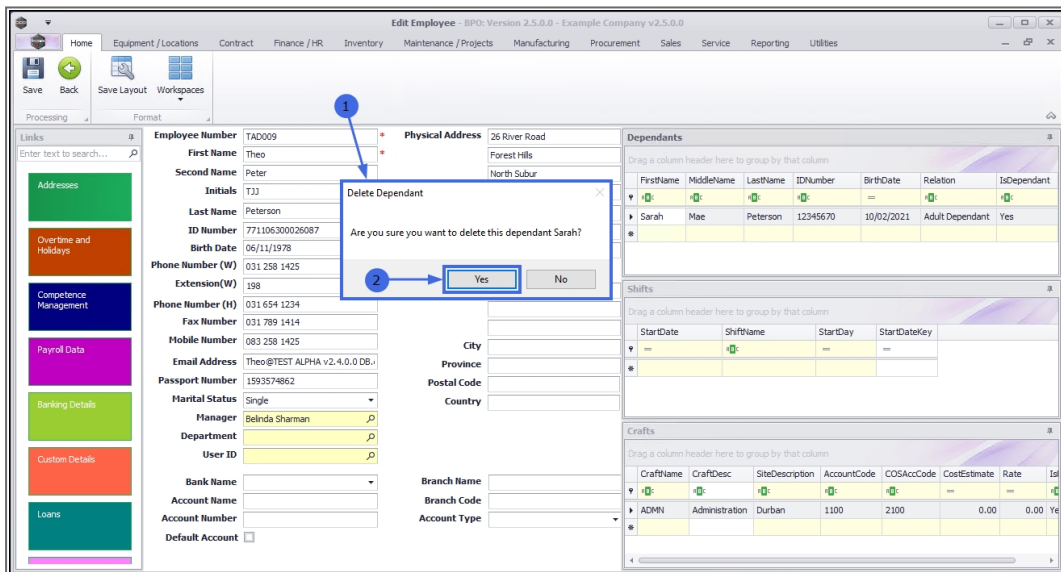
DELETE DEPENDANT DETAILS

1. The **Edit Employee** screen will open.
2. In the **Dependants** panel, **right click** in the **row** of the dependant you wish to delete.
3. A **Process** menu will pop up, click on **Delete - Delete dependant** in the list.



CONFIRM DELETION

1. A **Delete Dependant** message box will pop up asking;
 - **Are you sure you want to delete this dependant []?**
2. Click on **Yes**.



1. The selected dependant's details will be **removed** from the panel.
2. Click on **Back** to return to the **Employees** listing screen.

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Save Layout Workspaces

Processing

Links

Enter text to search...

Addresses

Overtime and Holidays

Competence Management

Payroll Data

Banking Details

Custom Details

Loans

Employee Number TAD009

First Name Theo

Second Name Peter

Initials TJJ

Last Name Peterson

ID Number 771106300026087

Birth Date 06/11/1978

Phone Number (W) 031 258 1425

Extension(W) 198

Phone Number (H) 031 654 1234

Fax Number 083 789 1414

Mobile Number 083 258 1425

Email Address Theo@TEST ALPHA v2.4.0.0 DB

Passport Number 1593574862

Marital Status Single

Manager Belinda Sharman

Department

User ID

Bank Name

Account Name

Account Number

Default Account

Physical Address 26 River Road
Forest Hills
North Subur
Durban

Province KwaZulu Natal

Postal Code 1234

Country South Africa

Postal Address

City

Province

Postal Code

Country

Branch Name

Branch Code

Account Type

Dependants

Drag a column header here to group by that column

FirstName	MiddleName	LastName	IDNumber	BirthDate	Relation	IsDependant

Shifts

Drag a column header here to group by that column

StartDate	ShiftName	StartDay	StartDateKey

Crafts

Drag a column header here to group by that column

CraftName	CraftDesc	SiteDescription	AccountCode	COSAccCode	CostEstimate	Rate	Is
ADMN	Administration	Durban	1100	2100	0.00	0.00	Ye

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