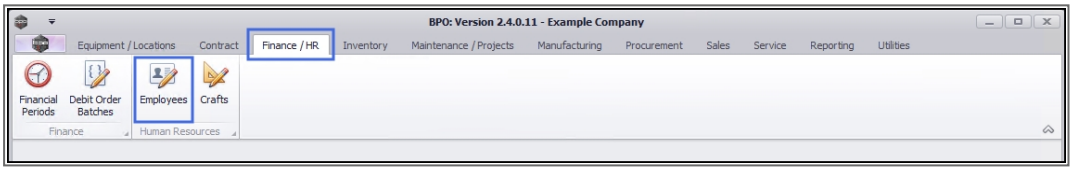
HUMAN RESOURCES

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***.

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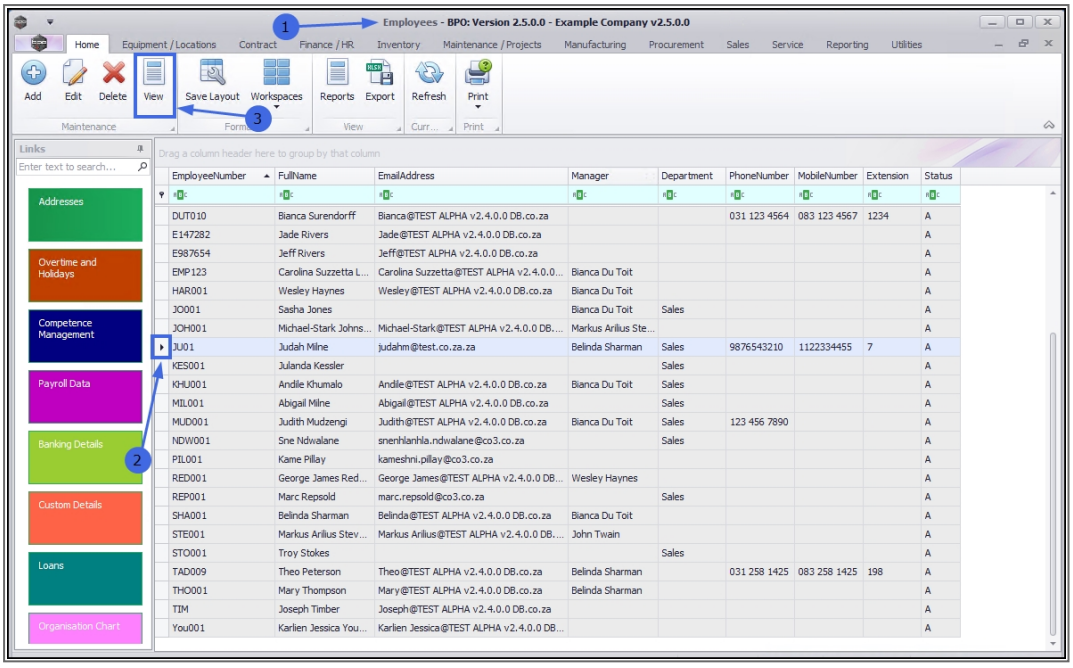

VIEW LINKED DEPENDANTS

1. 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.
2. The ***Dependants*** frame is located in the top right of this screen.
3. 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**)

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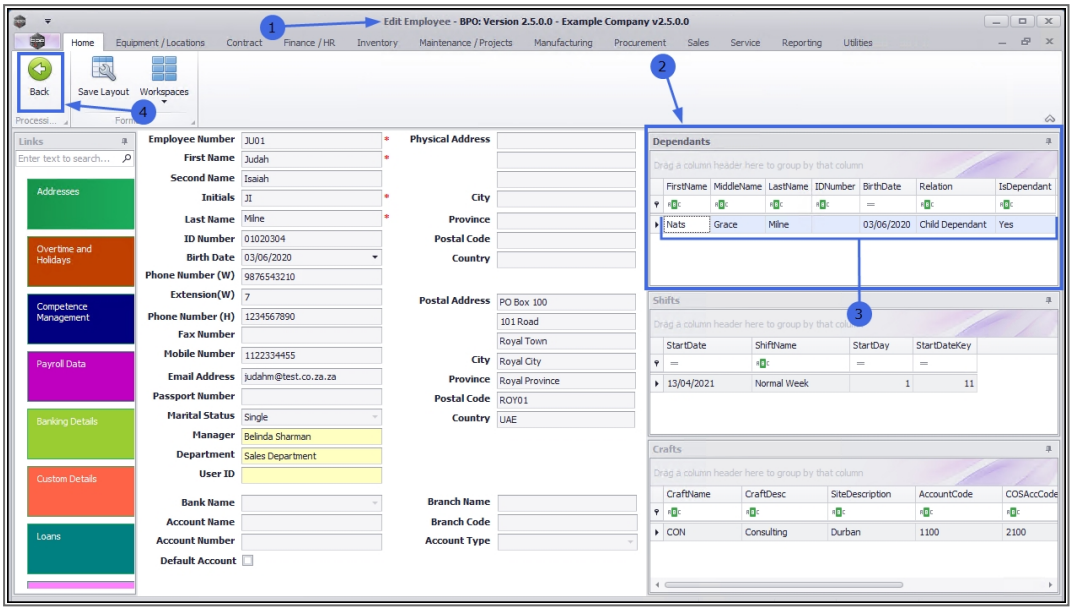
When you have finished viewing the Dependants details, click on ***Back*** to return to the ***Employees*** listing screen.



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***.

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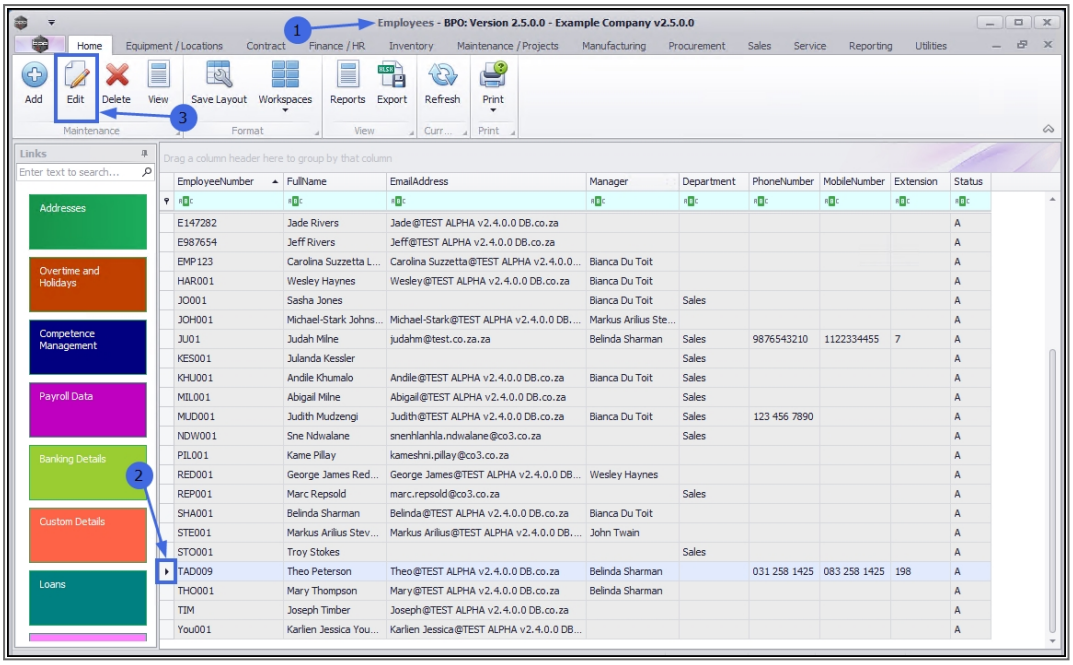

ADD NEW DEPENDANT

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.

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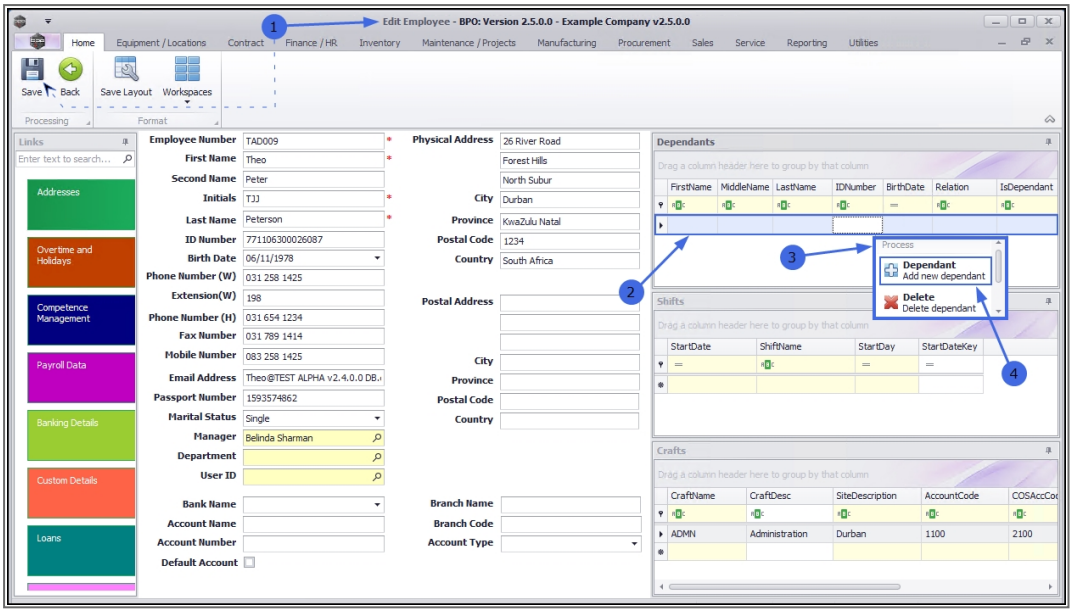

SELECT DEPENDANT'S RELATIONSHIP

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***.

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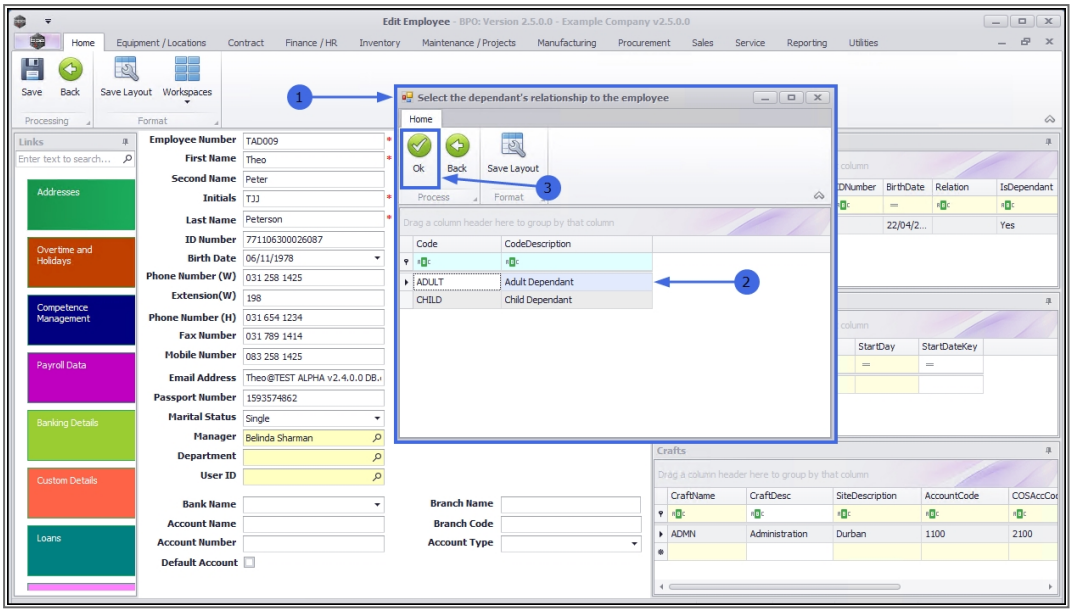

ADD NEW DEPENDANT DETAILS

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**

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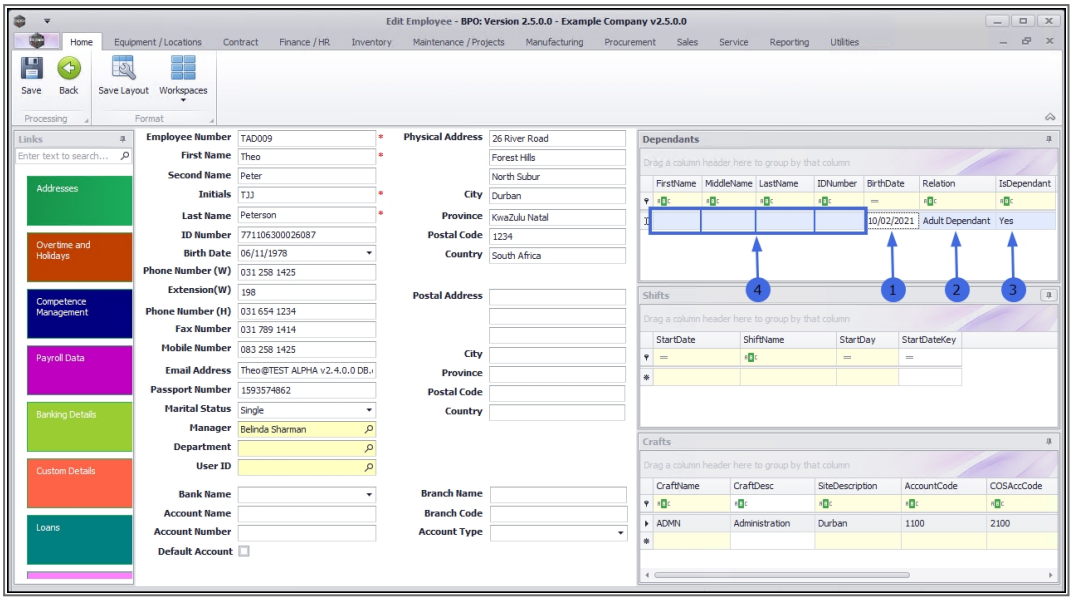
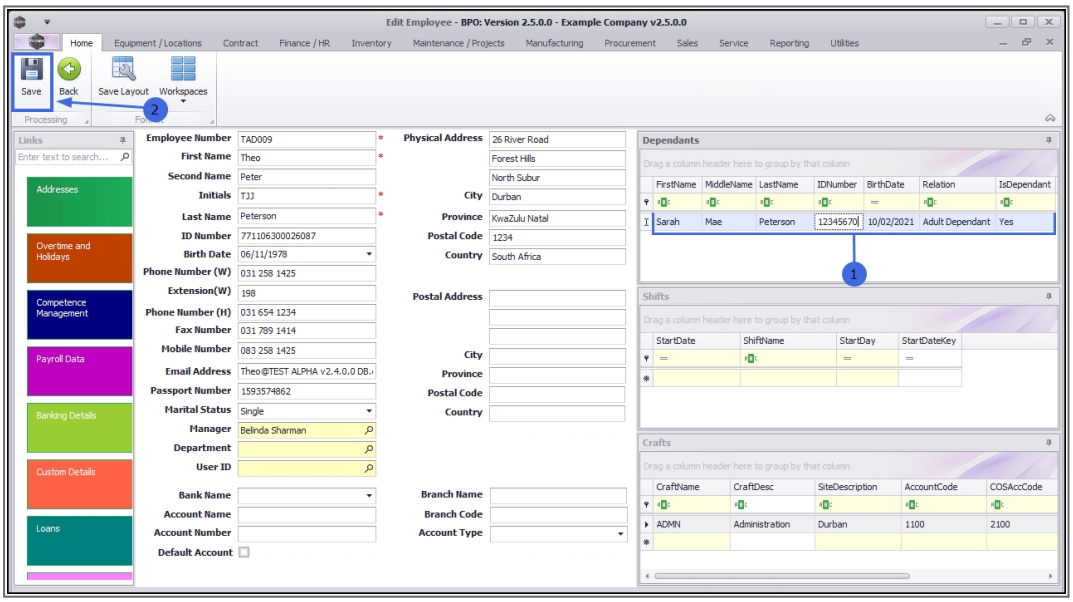


SAVE NEW DEPENDANT

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.***

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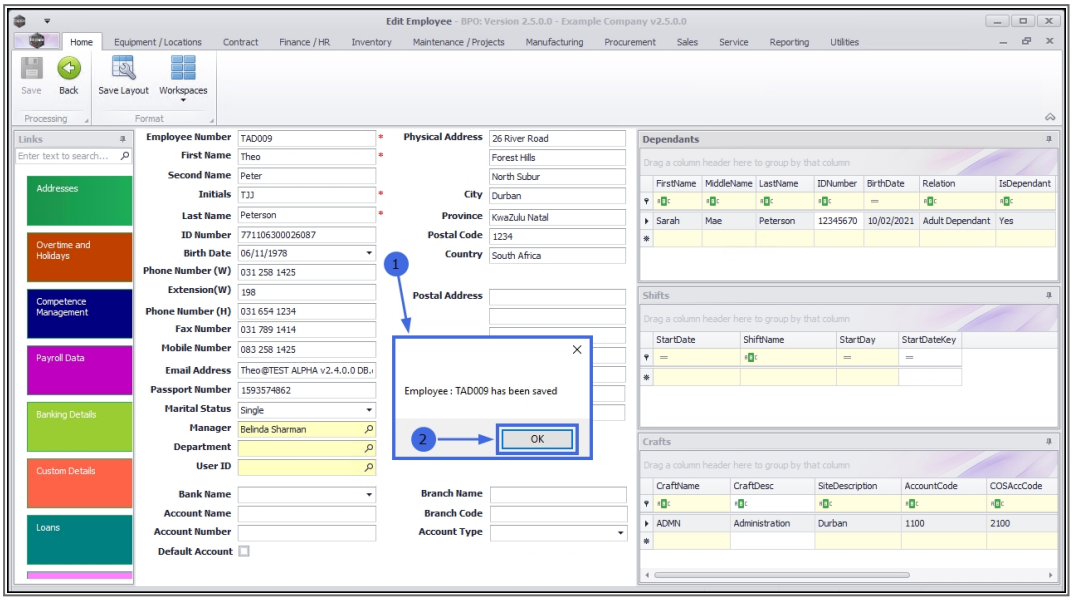
2. Click on **OK**.



- 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***.

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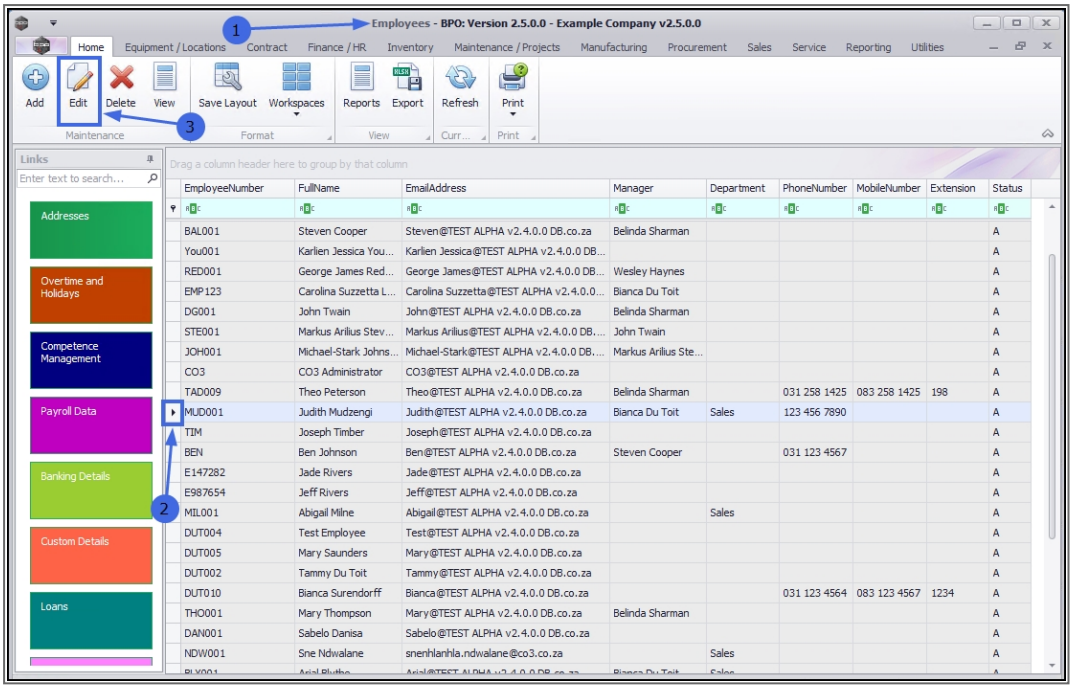

EDIT DEPENDANTS DETAILS

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.

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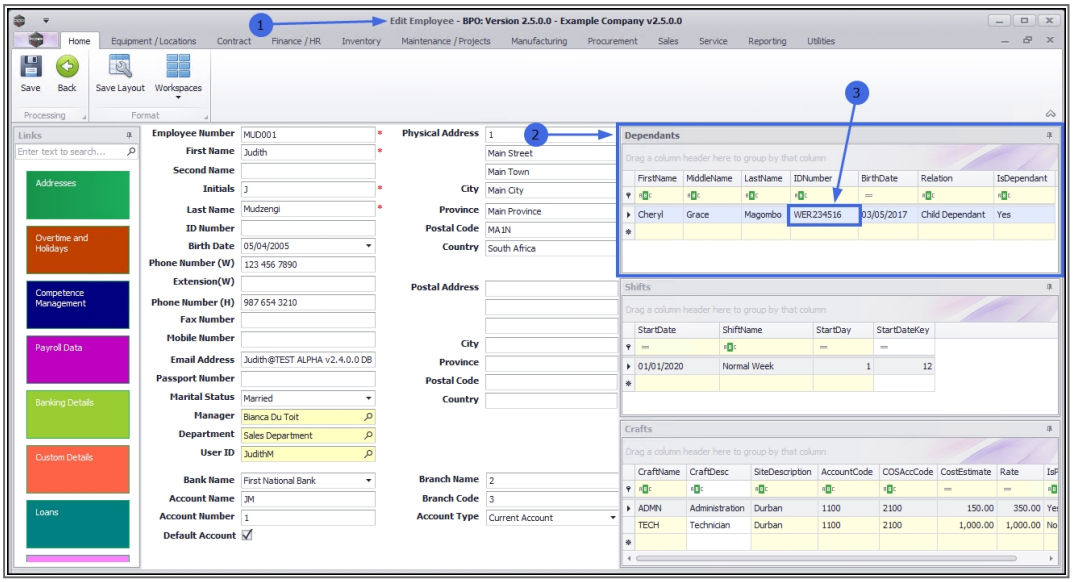
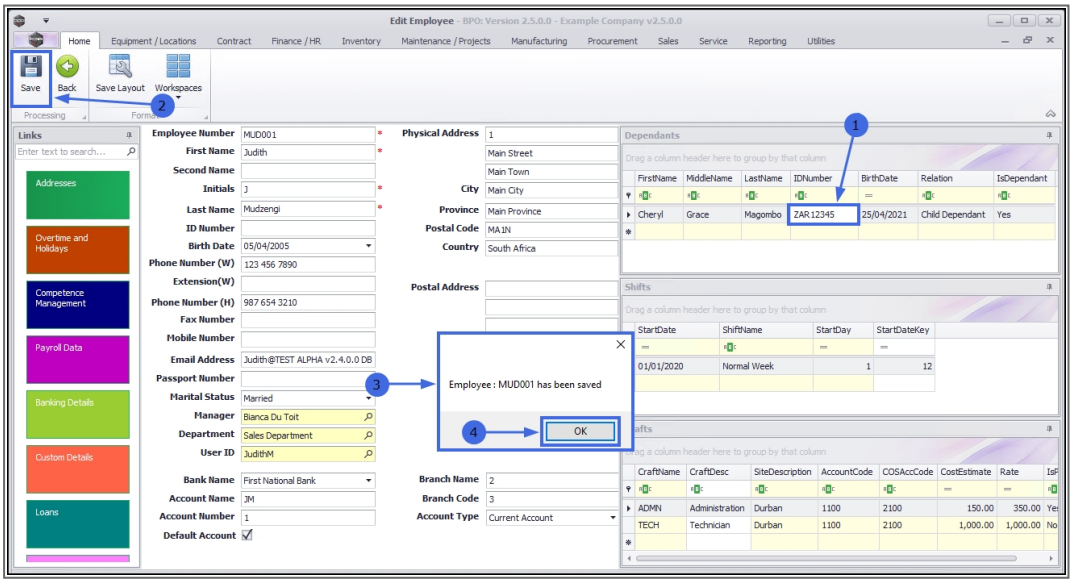


1. In this example, the ***ID Number*** has been changed.

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***.



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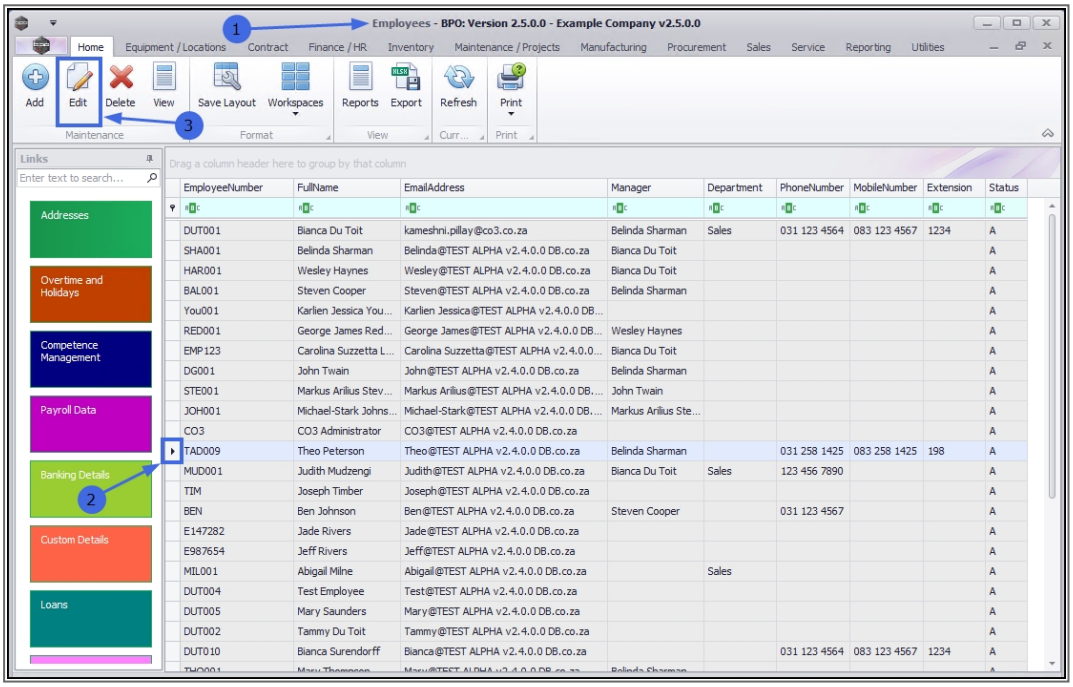
You will return to the ***Employees*** listing screen.

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.

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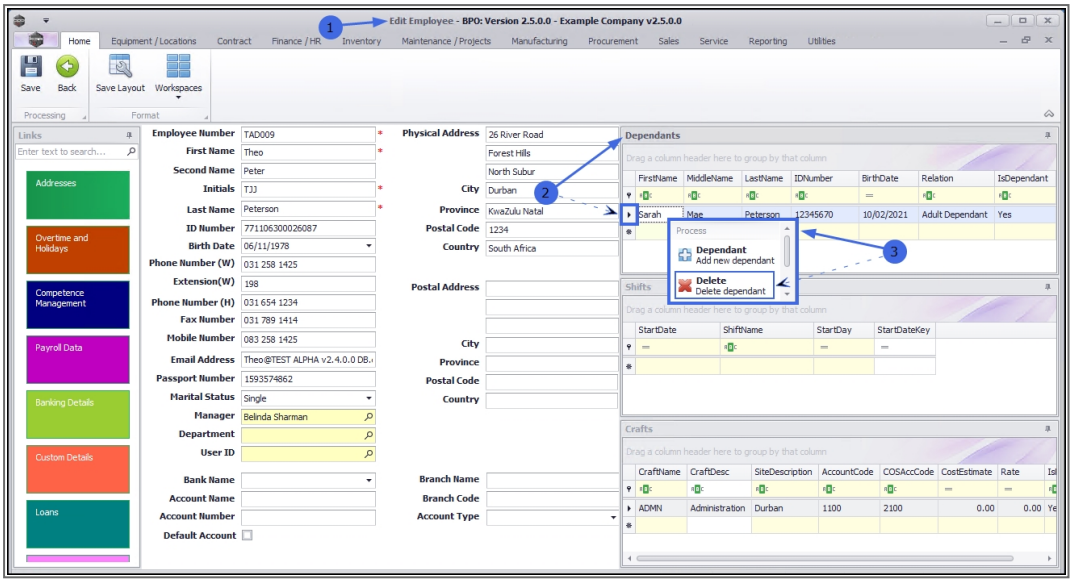
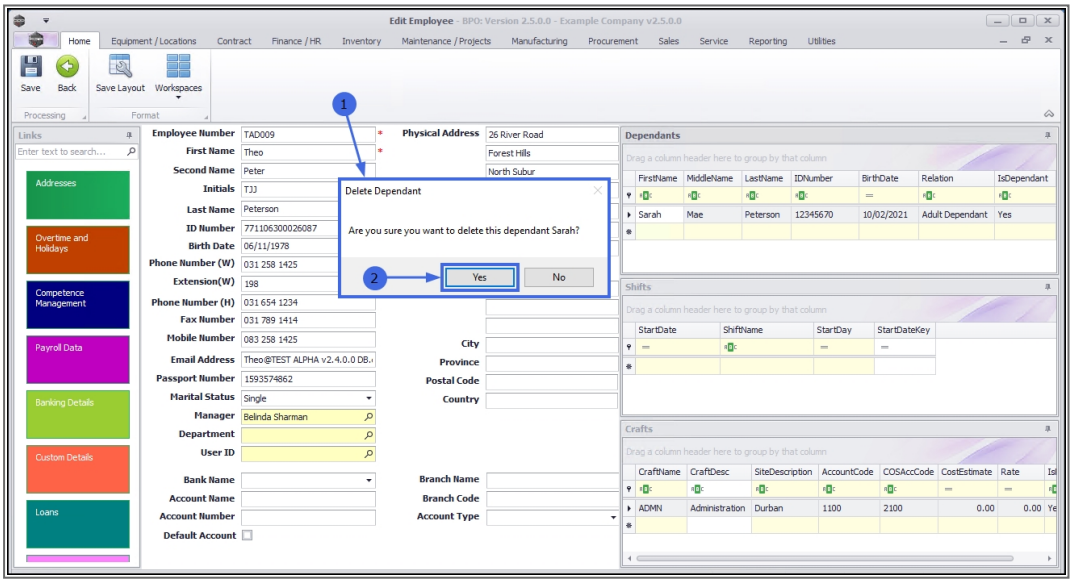


CONFIRM DELETION

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.

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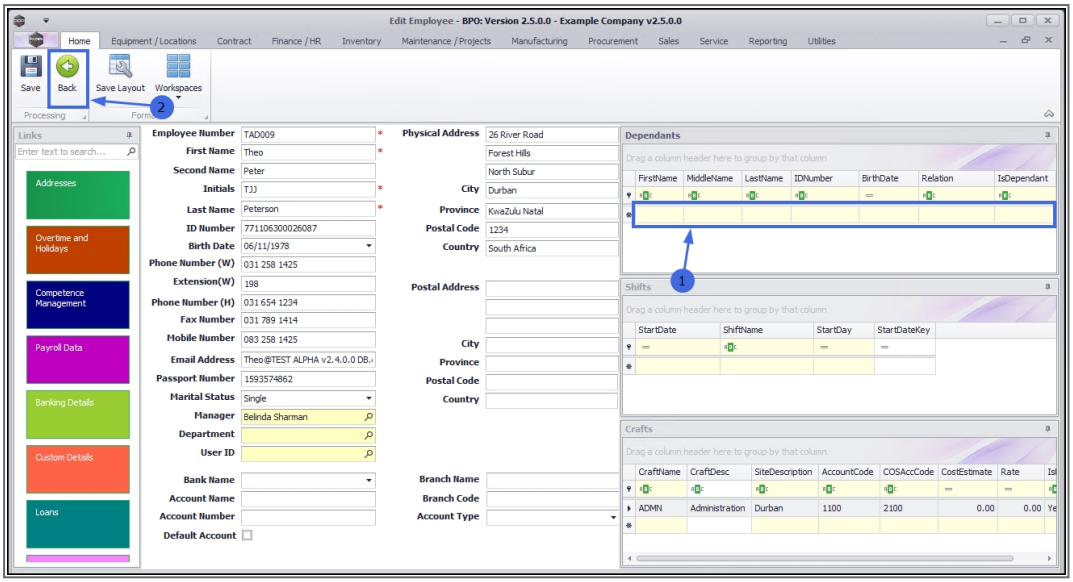

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