

# HUMAN RESOURCES

## EMPLOYEES – PAYROLL DATA

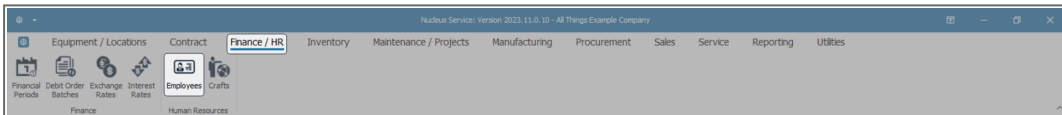
**Payroll Data** can be set up to include payroll, income tax, pension, medical aid and union details for example, that are not already set up on the system.

You can make changes directly in this screen, using the **search** buttons and **drop-down arrows** and **save** any changes as required.

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### Ribbon Access: Finance / HR Employees

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The **Employees** listing screen will display.

## VIEW EMPLOYEE PAYROLL DATA

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### SELECT EMPLOYEE

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- Select the **row** of the employee whose payroll data you wish to **view**.
- Click on the **Payroll Data** tile in the **Links** panel.

idEm	EmployeeID	FullName	EmailAddress	Manager	DepartmentName
925	VAN232	Drew Vance	drew.vance@attexampdomain.co.za	Eleso Felix	Quality Assurance
119	NX654	Dulce Nixon	dulce.nixon@attexampdomain.co.za	Giovanni Brooks	Executive Committee
212	COM114	Dustin Compton	dustin.compton@attexampdomain.co.za	Leslie Miles	Accounts
58	EDW218	Dylan Edwards	dylan.edwards@attexampdomain.co.za	Kerij Faulkner	Service Centre
771	KW723	Dylan Kim	dylan.kim@attexampdomain.co.za	Julia Boyle	Service Centre
484	PAT429	Easton Patrick	easton.patrick@attexampdomain.co.za	Donald Powell	Development
124	POW383	Easton Powell	easton.powell@attexampdomain.co.za	Dulce Nixon	D
195	CAR636	Eden Cardenas	eden.cardenas@attexampdomain.co.za	Leslie Miles	Purchasing
2	ROW002	Eden Rowan			Executive Committee
266	TUC402	Edwin Tucker	edwin.tucker@attexampdomain.co.za	Juilette Becker	Service Centre
775	LI167	Eileen Li	eileen.li@attexampdomain.co.za	Jorge Andrius	Service Centre
421	MUN726	Eliana Munoz	eliana.munoz@attexampdomain.co.za	Ayla Pitman	Administration
783	YAT627	Eleanor Yates	eleanor.yates@attexampdomain.co.za	Jorge Andrius	Service Centre
362	RAS095	Elijah Rasmussen	elijah.rasmussen@attexampdomain.co.za	Langston McMahon	Sales
213	HUN866	Elna Hunt	elna.hunt@attexampdomain.co.za	Leslie Miles	Administration
903	MC331	Elna McIntyre	elna.mcintyre@attexampdomain.co.za	Eleso Felix	Engineering
177	WRI228	Elsbeth Wright	elsbeth.wright@attexampdomain.co.za	Leslie Miles	Human Resources
670	CAR292	Elsie Carson	elsie.carson@attexampdomain.co.za	Hunter Blankenship	Service Centre
904	FEL335	Eleso Felix	eleso.felix@attexampdomain.co.za	Eden Rowan	Executive Committee
142	HAI151	Elisha Hahn	elisha.hahn@attexampdomain.co.za	Dulce Nixon	Safety
446	RDG627	Elisha Rodgers	elisha.rogers@attexampdomain.co.za	Ayla Pitman	Administration
121	CLR479	Ellen Curtis	ellen.curtis@attexampdomain.co.za	Alondra Dyer	Implementations
275	JAR808	Ellen Jarvis	ellen.jarvis@attexampdomain.co.za	BaVee Patel	Development
887	BEC433	Eliana Becker	eliana.becker@attexampdomain.co.za	Kace Dickson	Service Centre
109	POP783	Elianna Pope	eliana.pope@attexampdomain.co.za	Dulce Nixon	Administration
15	POG956	Elianna Pugh	eliana.pugh@attexampdomain.co.za	Eden Rowan	Executive Committee

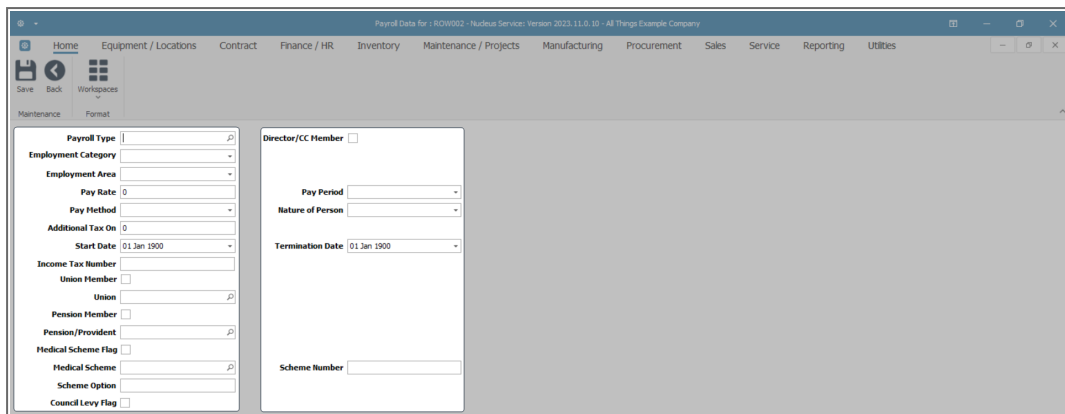
- The **Payroll Data for: [ ]** screen will open.

## VIEW PAYROLL DETAILS

- Here you can **view** any payroll information that has been entered into the system for the selected employee.

## ADD PAYROLL DATA

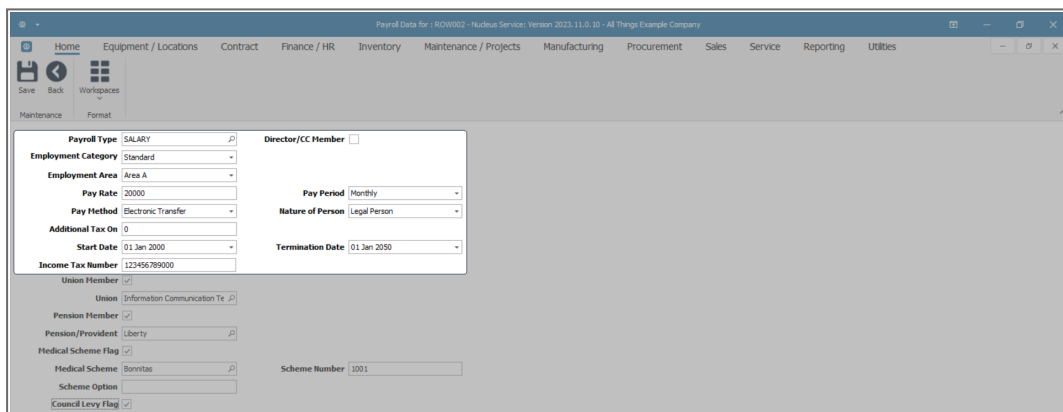
- You will note that there is no **Add** button in this screen. Information is added in the following ways:
- Typing directly in a text box.
- Using the **search** buttons and the subsequent **Select...** screens.
- Using the **drop-down arrows** and the subsequent **drop-down lists**.



## ADD PAYROLL DETAILS

- Type in or use the search and drop-down lists to enter the following information:
  - **Payroll Type:** Click on the **search** button and choose the relevant option from the '**Select a Payroll run type**' pop-up screen.
  - **Director / CC Member:** Select this check box if this employee is a director or a member of a close corporation.
  - **Employment Category:** Click on the drop-down arrow and select from the list the category of employment linked to this employee.
  - **Employment Area:** Click on the drop-down arrow and select from the list the area of the company where this employee is based.
  - **Pay Rate:** Type in the amount of pay per period of work. This works in conjunction with the next field.
  - **Pay Period:** Click on the drop-down arrow and select the recurring length of time over which employee time is recorded and paid - e.g. Daily, Hourly, Monthly, Weekly.

- **Pay Method:** Click on the drop-down arrow and select from the list, the method by which this employee will receive their pay e.g. Cash, Electronic Transfer.
- **Nature of Person:** Click on the drop-down arrow and select from the list the relevant type e.g. **Natural** if the employee is considered to be an ordinary resident for income tax purposes.
- **Additional Tax On:**
- **Start Date:** Either type in, or click on the drop-down arrow and use the calendar function to select the date the employee joined the company.
- **Income Tax Number:** Type in the unique personal number given to the employee by the country's revenue services.

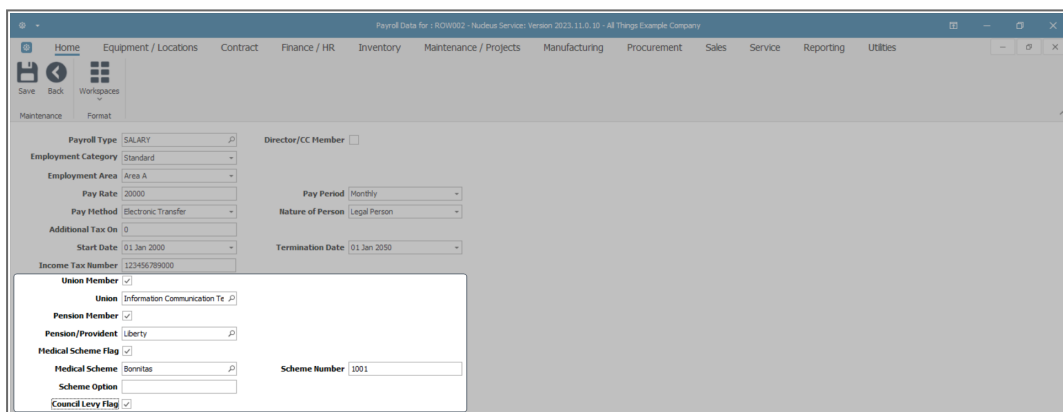


The screenshot shows a web application interface for 'Payroll Data for - RDM002 - Hardware Services - Version: 2023.11.0.10 - All Things Example Company'. The form includes the following fields and options:

- Payroll Type:** SALARY
- Employment Category:** Standard
- Employment Area:** Area A
- Pay Rate:** 20000
- Pay Method:** Electronic Transfer
- Additional Tax On:** 0
- Start Date:** 01 Jan 2000
- Income Tax Number:** 123456789000
- Director/CC Member:**
- Pay Period:** Monthly
- Nature of Person:** Legal Person
- Termination Date:** 01 Jan 2050
- Union Member:**
- Union:** Information Communication Te
- Pension Member:**
- Pension/Provident:** Liberty
- Medical Scheme Flag:**
- Medical Scheme:** Bonitas
- Scheme Number:** 1001
- Scheme Option:**
- Council Levy Flag:**

- **Union Member:** Select this check box if the employee is a union member.
- **Union:** Click on the **search** button and choose the relevant option from the '**Select a Union**' pop-up screen.
- **Pension Member:** Select this check box if the employee is linked to a pension scheme.

- **Pension/Provident:** Click on the **search** button and choose the relevant option from the '**Select a Pension fund**' pop-up screen.
- **Medical Scheme Flag:** Select this check box if the employee is linked to a medical aid scheme.
- **Medical Scheme:** Click on the **search** button and choose the relevant medical aid scheme option from the '**Select a Medical scheme**' pop-up screen.
- **Scheme Option:** Type in the **type** of medical aid plan the employee has with the medical scheme named above - e.g. Hospital Plan, Classic Saver Plan.
- **Scheme Number:** Type in the unique medical aid scheme number, pertinent to the employee.
- **Council Levy Flag:**



## SAVE PAYROLL DETAILS

- When you have finished adding the payroll details, click on **Save**.

The screenshot shows a web application interface for entering payroll data. The form includes the following fields:

- Payroll Type: SALARY
- Employment Category: Standard
- Employment Area: Area A
- Pay Rate: 20000
- Pay Method: Electronic Transfer
- Additional Tax On: 0
- Start Date: 01 Jan 2000
- Income Tax Number: 123456789000
- Union Member:
- Union: Information Communication Te
- Pension Member:
- Pension/Provident: Liberty
- Medical Scheme Flag:
- Medical Scheme: Bonitas
- Scheme Option:
- Council Levy Flag:
- Director/CC Member:
- Pay Period: Monthly
- Nature of Person: Legal Person
- Termination Date: 01 Jan 2050
- Scheme Number: 1001

- A notification message box will pop up informing you -
  - **Payroll has been saved.**
- Click on **OK**.

This screenshot is identical to the previous one, but it includes a small notification dialog box in the center of the screen. The dialog box contains the text "Payroll has been saved" and an "OK" button at the bottom.

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

## EDIT PAYROLL DATA

### SELECT EMPLOYEE

- In the **Employees** listing screen.
- Select the **row** of the employee whose payroll data you wish to **edit**.

- Click on the **Payroll Data** tile in the **Links** panel.

ID	EmployeeID	FullName	EmailAddress	Manager	DepartmentName
925	IAN232	Drew Vance	drew.vance@tattexampdomain.co.za	Elaeo Felix	Quality Assurance
119	NEX54	Dulce Nixon	dulce.nixon@tattexampdomain.co.za	Giovanni Brooks	Executive Committee
212	COM114	Dustin Compton	dustin.compton@tattexampdomain.co.za	Leslie Miles	Accounts
38	EDW218	Dylan Edwards	dylan.edwards@tattexampdomain.co.za	Kerj Faulner	Service Centre
771	ION723	Dylan Ien	dylan.ien@tattexampdomain.co.za	Jaha Soole	Service Centre
484	PAT439	Easton Patrick	easton.patrick@tattexampdomain.co.za	Donald Powell	Development
124	POW383	Easton Powell	easton.powell@tattexampdomain.co.za	Dulce Nixon	0
195	CAR836	Eden Cardenas	eden.cardenas@tattexampdomain.co.za	Leslie Miles	Purchasing
2	ROW002	Eden Rowan			Executive Committee
266	TUC402	Edwin Tucker	edwin.tucker@tattexampdomain.co.za	Julette Becker	Service Centre
775	LI167	Eileen U	eileen.u@tattexampdomain.co.za	Jorge Andrews	Service Centre
421	MUN726	Eliana Munoz	eliana.munoz@tattexampdomain.co.za	Ayla Pitman	Administration
783	YAT627	Eleanor Yates	eleanor.yates@tattexampdomain.co.za	Jorge Andrews	Service Centre
362	RAG095	Elijah Rasmussen	elijah.rasmussen@tattexampdomain.co.za	Langston McMahon	Sales
212	HAR666	Elija Hunt	elija.hunt@tattexampdomain.co.za	Leslie Miles	Administration
903	MCR811	Eliha McIntyre	eliha.mcintyre@tattexampdomain.co.za	Elaeo Felix	Engineering
177	WR1208	Eliabeth Wright	eliabeth.wright@tattexampdomain.co.za	Leslie Miles	Human Resources
679	CAR292	Elixe Carson	elixe.carson@tattexampdomain.co.za	Hunter Blankenship	Service Centre
904	FEL335	Elaeo Felix	elaeo.felix@tattexampdomain.co.za	Eden Rowan	Executive Committee
142	HAI151	Eliha Hahn	eliha.hahn@tattexampdomain.co.za	Dulce Nixon	Safety
446	RCD627	Eliha Rodgers	eliha.rodgers@tattexampdomain.co.za	Ayla Pitman	Administration
121	CUR479	Ellen Curtis	ellen.curtis@tattexampdomain.co.za	Alondra Dyer	Implementations
275	JAR808	Ellen Jarvis	ellen.jarvis@tattexampdomain.co.za	Baylee Pabel	Development
887	BEC433	Eliana Becker	eliana.becker@tattexampdomain.co.za	Kace Dickson	Service Centre
109	POP783	Elianna Pope	elianna.pope@tattexampdomain.co.za	Dulce Nixon	Administration
15	PUG696	Elianna Pugh	elianna.pugh@tattexampdomain.co.za	Eden Rowan	Executive Committee

- The **Payroll Data for [ ]** screen will open.

## EDIT PAYROLL DETAILS

- Make the changes as required.
- In this example, the **Nature of Person** has been changed from **Legal Person** to **Natural Person** using the drop-down arrow and selection from the subsequent drop-down list.

Payroll Data for : ROW002 - Nucleus Service: Version 2023.11.0.10 - All Things Example Company

Payroll Type: SALARY

Employment Category: Standard

Employment Area: Area A

Pay Rate: 20000

Pay Method: Electronic Transfer

Additional Tax On: 0

Start Date: 01 Jan 2000

Income Tax Number: 123456789000

Union Member:

Union: Information Communication Te

Pension Member:

Pension/Provident: Liberty

Medical Scheme Flag:

Medical Scheme: Bonitas

Scheme Option:

Council Levy Flag:

Director/CC Member:

Pay Period: Monthly

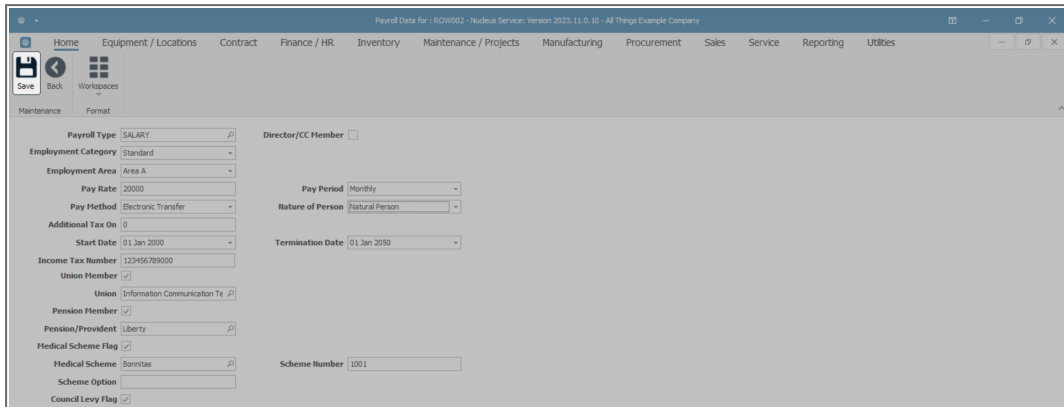
Nature of Person: Natural Person

Termination Date:

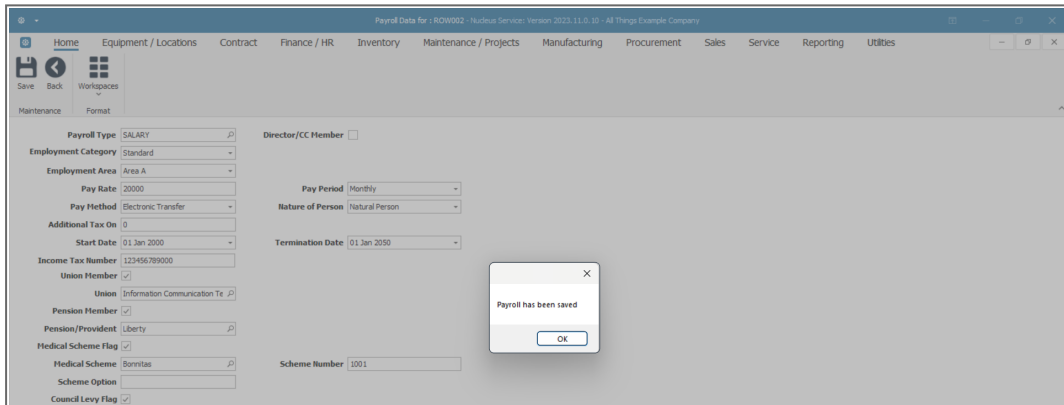
Scheme Number: 1001

- When you have finished making the required changes -

- Click on **Save**.



- A notification message box will pop up informing you -
  - **Payroll has been saved.**
- Click on **OK**.



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

## DELETE PAYROLL DATA

- You can only edit the information in the Payroll Data screen, you cannot delete all the payroll data for an employee.

MNU.021.015