

Payroll UAT User Guide 2020/08/20

1. Payroll Management Module 📗



1.1. Usage

- 1. Go to Payroll > Calculation Result
 - Please delete the payroll results that you want to re-calculate for some employees for the fiscal year.
- 2. Go to Payroll > Salary Setting for Employee
 - Firstly, please delete the old salary setting up data that you want to calculate for some employees.
 - Then, please add salary setting up again for them.
- 3. Go to Payroll > Salary Formula Assign to Employee
 - Please re-assign them with "Default Rule".
- 4. Go to Payroll > Payroll Calculation
 - After step 1, 2 and 3, you can calculate the payroll.

1.2. Review saved payroll results

- Go to Payroll > Calculation Results.
- Please filter each employee to show the result. It's better in the UAT version.

If you find incorrect calculation results,

• Click on the row that has the wrong result, and then **Delete**.

Note: You **cannot re-generate** payroll, without first deleting the results.

1.2.1. Export payslips

You can export payslips at these places:

- 1. Payroll > Calculation Results
- 2. Payroll > Payslip Report

At Payroll > Calculation Results,

- Select an employee by clicking on the row that corresponds to the employee, and
- Click Print Payslip.

At Payroll > Payslip Report,



• Apply filters to get desired employees.

Note: You can export to Excel, PDF and MS Word.

1.2.2. Update pay packages

Pay packages can be updated for employees 1) Individually and 2) By Job Titles.

1). Update by individual employees

To update individual employee pay packages,

- Go to Payroll > Salary Setting for Employees.
- On the list in the upper section, click on an employee; you'll find her pay package in the bottom right corner. Then, click **Update**.

Note: Make necessary changes and Save.

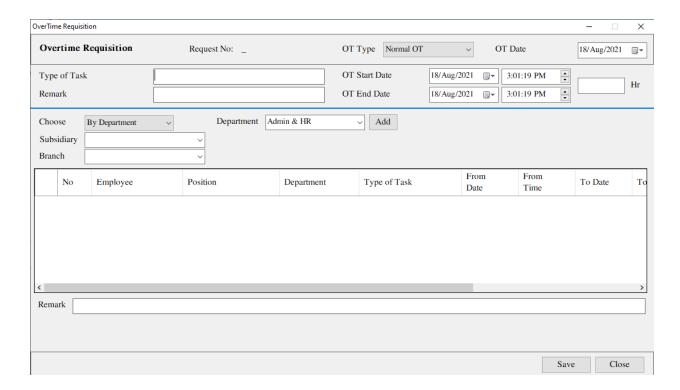
If you wish to overwrite or correct the pay item amounts of an existing package,

• Do **Correction**, instead of **Update**. Remember to save your changes.

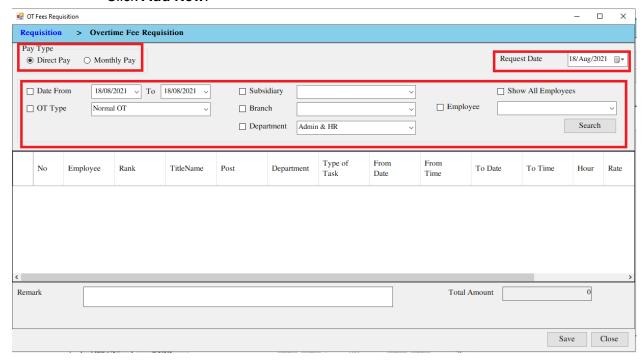
1.2.4. Set up OT Requisition

- Go to Requisition > OT Hour Setting List
- Go to Requisition > Overtime Requisition
 - Click Add New and fill OT Type, OT Date, Type of Task, OT Start Date/Time and OT End Date/Time.
 - Choose Department or Individually and Click Add.





- o Click Save.
- Go to Requisition > Overtime Fees Requisition
 - o Click Add New.



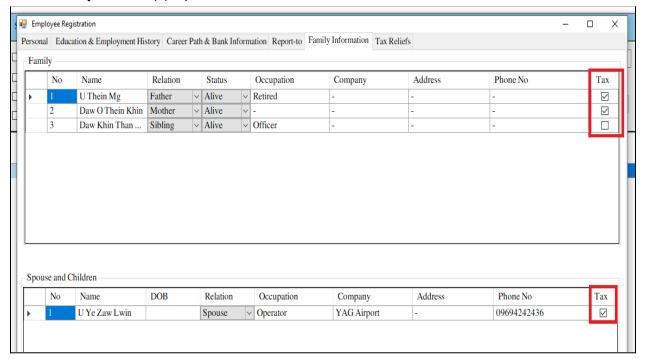
o Click Save.



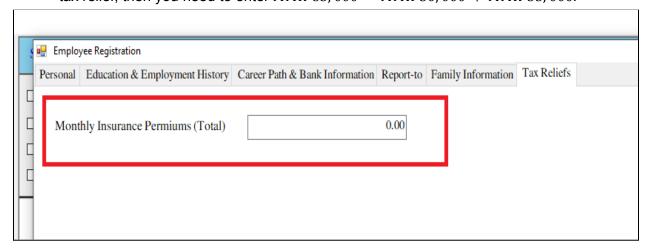
1.2.5. Update tax relief info for applicable employees

You can change Parent Relief, Spouse Relief, Child Relief and Insurance Relief info; to do so:

- Go to Set Up > Employee List.
- Click **Update** on an employee of your choice.
- On the "Family Information" tab, tick the checkboxes under the "Tax" column for the family member(s), spouse or children to be considered for tax relief.



On the "Tax Reliefs" tab, enter monthly insurance payment.
Note: It has to be the total amount; e.g. if the employee is on more than one insurance policies with monthly fees of MMK 50,000 and MMK 35,000, which are both entitled to tax relief, then you need to enter MMK 85,000 = MMK 50,000 + MMK 35,000.





• **Save** your changes and, afterwards, the taxes will be auto-calculated with the updated relief info.

1.2.6. View reports

Payroll Reports

In this release, you can use the following reports:

- Pay List
- To Pay Account
- Payslip Report
- Departmental Addition/Deduction Report
- Salary Change Report for Individual
- Payroll Summary Report for Individual
- Departmental Addition Report
- Departmental Deduction Report

Tax Reports

You can see two reports: 1) Tax Details and 2) Annual Summary.

On the *Tax Details Report*, you can find, for an employee of your choice and for each fiscal month:

- Taxable Income
- Projected/Estimated Annual Taxable Income
- Tax Relief Amounts
- Payable Tax Amount at each tax bracket
- Payable Annual Income Tax
- Payable Monthly Income Tax

To view the report,

• Go to Tax > Tax Detail Report.

To view all payable monthly taxes throughout an entire fiscal year,

• Go to Tax > Tax Yearly Summary Report.

Note: You can export the reports to Excel and PDF.