

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**.

[illegible]

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

OT Fees Requisition

Requisition > Overtime Fee Requisition

Pay Type

☒ Direct Pay
 ☐ Monthly Pay

Request Date

18/Aug/2021

☐ Date From

18/08/2021

To

18/08/2021

☐ Subsidiary

☐ Show All Employees

☐ OT Type

Normal OT

☐ Branch

☐ Employee

☐ Department

Admin & HR

Search

No	Employee	Rank	TitleName	Post	Department	Type of Task	From Date	From Time	To Date	To Time	Hour	Rate
<div> <div>Remark</div> <div></div> <div>Total Amount</div> <div>0</div> </div> <div> <div>Save</div> <div>Close</div> </div>												

- 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.

Employee Registration

Personal Education & Employment History Career Path & Bank Information Report-to Family Information Tax Reliefs

Family

No	Name	Relation	Status	Occupation	Company	Address	Phone No	Tax
1	U Thein Mg	Father	Alive	Retired	-	-	-	<input checked="" type="checkbox"/>
2	Daw O Thein Khin	Mother	Alive	-	-	-	-	<input checked="" type="checkbox"/>
3	Daw Khin Than ...	Sibling	Alive	Officer	-	-	-	<input type="checkbox"/>

Spouse and Children

No	Name	DOB	Relation	Occupation	Company	Address	Phone No	Tax
1	U Ye Zaw Lwin		Spouse	Operator	YAG Airport	-	09694242436	<input checked="" type="checkbox"/>

- 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 $MMK\ 85,000 = MMK\ 50,000 + MMK\ 35,000$.

Employee Registration

Personal Education & Employment History Career Path & Bank Information Report-to Family Information Tax Reliefs

Monthly Insurance Premiums (Total)

- **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.