



Take your business to the **next level**

MYOB EXO Employer Services

Payroll

– Employee Maintenance



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📍 Suite 22, Ocean Central, 2 Ocean Street, Maroochydore, 4558

☎ +617 5479 1877 📠 +617 5345 5267



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This training manual has been developed by the MYOB Enterprise Division - Professional Services Team for use in the delivery of training.

This manual uses a simple step-by-step approach to give you the skills and knowledge necessary to set up and edit employees in EXO Payroll.

This manual has been designed for the following MYOB product:

- EXO Payroll

EXOPEMP

Employee Maintenance

EXO Payroll

Course duration: 0.5 hrs

MYOB Australia Pty Ltd

ABN 13 086 760 198

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Participants

This course is aimed at:

- Users of EXO Payroll.

Prerequisites

Basic PC experience is required.

Understanding of payroll processes and procedures.

Instructional method

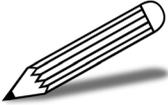
The instructional method uses examples of system configuration. The instructional method makes use of trainer-led exercises. Each unit concludes with a Review Task.

Conventions used in this manual

- Objects such as buttons or icons that you must click or select are shown in **bold**.
- Information to be entered (typed in) or selected is shown in ***bold and italics***.
- Keyboard keys are shown as **TAB**, **CTRL**, etc.

Screenshots in this manual are for illustration purposes only and may differ from those in the actual product due to configuration settings.

Symbols used in this manual

Symbol	Name	This symbol tells you...
	Practice task Review task	... to complete a task to practice the skills you have just learnt, or as a review task at the end of the unit to consolidate what you have learnt.
	Written Review task	... to complete written questions to review the content covered in the unit.
	Optional Challenge	... to complete this task if you have finished early and are looking for an extra challenge.
	Tip	... about helpful tips
	Note	... to take note of an important message.
	Warning	... about potential problems to be aware of.
	Important	... to pay attention to an important notice.
	New	... where features are new for EXO Payroll.
	Reference	... where to go to find more information.
	Skills Checklist	... to tick off a list of skills that you have learnt during the unit.

Objectives

Upon completion of this course you will be able to:

- Set up Employees

Before you begin:

This training manual has been designed for use with the Demonstration Company and assumes that you do not have any other MYOB Employer Services products, e.g EXO Time and Attendance.

- 1 From the Login screen, double-click on the Demonstration Company.
- 2 From the **Utilities** menu, click on **Setup Exo Payroll**.
- 3 From the list of setup areas, click on **Other Setup**.
- 4 Click on the **Wages** section.
- 5 Ensure that the options **“Do not copy wages for Time and Attendance employees”** and **“Do not copy wages for Rapid employees”** are not selected.
- 6 Click on the **Save** button or press **F10**.

Function Keys

F1	Help
F2	Maintenance Menu
F3	Change Sort
F4	Add
F5	Edit
F6	Delete
F7	Previous
F8	Next
F9	Find/Print
F10	Save
F11	About Screen
F12	Employee Notes
Page Up/Page Down	Switch between pages
Alpha/Numeric Keystrok	Activates incremental search of picklists
Spacebar	Opens dropdown lists
Home	Skips to start of field
End	Skips to end of field
Tab	Skips to next field
Shift+Tab	Skips to previous field
Ctrl+H	Activates the hide screen, which can only be unlocked using the password you logged in with.
Ctrl+D	Activates the Diary. This is a form of daily planner, providing you with a place to enter comments on any given day for payroll company-related tasks, appointments and reminders.
Ctrl+L	Activates the Calculator.

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Employee Maintenance

1

In this unit, you will learn how to set up new employees, edit an existing employee's records, set up leave entitlements and set up a standard pay.

By the end of this unit, you will be able to:

- ▶ Set up a new employee
- ▶ Edit an existing employee record
- ▶ Set up Leave entitlements
- ▶ Set up a Standard Pay

Overview

This section details the steps and areas that need to be completed when setting up a new employee.

The Employee Maintenance is divided into the following 6 sections:

Employee Details

This section contains the employee's personal details and tax classification.

Leave Entitlements

This section contains the employee's entitlements to Annual Leave, Personal Leave and Long Service Leave.

Other

This section contains the employee's e-mail address, Rostered Days Off entitlements (if applicable) and other options relating to how this employee's payroll information is entered.

User Defined

This section contains a number of user definable fields to store additional employee information.

Notes

This section contains all the employee's payment history notes.

Standard Pay

This section contains the employee's pay template of what they are normally paid per pay period.

To Add a new Employee

- 1 From the **File** menu, select **New Employee**.



Add Employee

- The **Enter New Employee Code** field will automatically display the highest available employee number. Override this number if you want to assign a different number to the employee.
- Click on the **Add Employee** button to add the employee to the system.

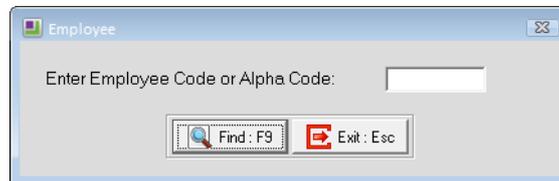
NOTE



When adding a new employee, you do not have to save after completing each section. You can save once you have completed the employee's setup.

To Edit an existing Employee

- From the **File** menu, select **Open Employee**.



Find Employee

- In the **Enter Employee Code or Alpha Code** field, enter either the employee code or their alpha code.

TIP



You can also find the employee by clicking on the **Find** button or pressing **F9**. You can also change the order from **Code** to **Alpha Code** by clicking on the **Change Sort Order** button, using **F3** or by clicking on the column headings.

- Press **TAB**, click on the **Find** button or press **F9** to load the employee's details.

Employee Details

To enter an employee's personal details:

Click on the **Employee Details** tab if this screen is not active.

Employee Maintenance - Employee Details

Enter the following Details:

Field	Description
Surname, First Names	Enter the employee's Name in these fields.
Alpha Code	This code is used as the employee's Alpha Sort and is typically the first 8 characters of their surname. Note: The Alpha Code must be unique.
Start Date	Enter the employee's date of employment.
Cost Centre	Enter the employee's Default Cost Centre. Click on the <input type="button" value="..."/> button to get a list of your Costs Centres.
Department	Enter the employee's Department. Click on the <input type="button" value="..."/> button to get a list of your Departments.

Pay Frequency	From the dropdown list, select the employee's pay frequency. Note: If the employee is a Casual, no frequency is required.
Address Details	Enter the employee's address details. Note: Only complete the Country field if the employee resides outside Australia.
Telephone	Enter a contact number for the employee.
Mobile	Enter a mobile number for the employee.
Occupation	Enter the employee's occupation or job title.
Apprentice	Select this option if the employee is an Apprentice. Click on the Apprentice button to enter the details of their apprenticeship.
TFN	If this record is for an Employee, enter the employee's Tax File Number.
ABN	If this record is for a Contractor, enter the contractors' Australian Business Number
Tax Classification	Select the appropriate Tax Classification from the available options.
Earnings are Not Liable for Payroll Tax	Select this option if this employee's earnings are not liable for payroll tax paid by the company.
WorkCover	To use the default WorkCover rate to calculate your WorkCover payments, select the option Use WorkCover rate .
Male/Female	Select the employee's Gender.
Salary/Wage	Specify if the employee is Waged (paid an hourly rate) or Salaried (paid a fixed dollar amount). For a Salaried employee, also select the option Allow Overtime if the employee is paid for overtime hours.
Standard Hours per pay	Enter the employee's standard hours per pay period. <i>Tip: Use the Full-Time equivalent for part-time employees.</i> Note: This field must be completed for all employees entitled to leave. Note: If the employee is entitled to Rostered Days Off, this field must reflect the number of hours worked not paid.

Standard Hours per day	<p>Enter the employee's standard hours <i>per day</i> . Note: If the employee accrues RDO's on RDO's, enter the standard hours the employee works per day. The employee will be paid these hours when taking an RDO with the RDO accrual being deducted from these hours, e.g. if the employee normally works 8.00 hours, 0.05 will be deducted and the employee is paid 7.60 hours for the day.</p> <p>If the employee does not accrue RDO's on RDO's, enter the standard hours the employee is paid per day. The employee will be paid these hours when taking an RDO with no RDO accrual deducted from these hours, e.g. if the employee is normally paid 7.60 hours, no RDO accrual will be deducted and the employee is paid 7.60 hours for the day.</p>
Full-Time/Part-Time/Contractor	Select the employee's Hours of employment.
Trade Labour Content	If this record is for a Contractor, enter the percentage at which the their payroll tax is calculated.
Permanent/Casual/Temporary	Select the employee's Term of employment.
Birth Date	Enter the employee's date of birth.
Due Back Date	Leave this field blank.
Annual Review	Enter the date of this employee's next annual review. This is an optional field.

Full-Time

These employees are employees on a permanent basis and are commonly entitled to leave provisions and notice of termination.

Part-Time

Employees working less than 38 hours per week are classed as part-time employees, yet still have regular, set hours of work. Part-time employees generally receive a pro-rata equivalent of the benefits and entitlements a full-time employees receives.

Casual

Casual employees do not work set hours and are called upon to work ad-hoc hours. Casuals typically do not have guarantee of work beyond their current hiring.

After you have entered all the employee's personal details, click on the Save button or press F10 to ensure the employee is added.

Edit the employee to complete the remaining areas. (Refer to *“To Edit an existing Employee” on page 3*)

Leave Entitlements

Click on the **Leave Entitlements** tab if this screen is not active.

Employee Maintenance

Employee: 1 Wallace, Edward James

	Group	Group Entitlement Changes	Entitlement Units		Balance	Cost Centre	Direct Cost	Other Details
Annual Leave	NL	Edit	160.00	Hours	207.31	2210	<input type="checkbox"/>	Edit
Personal Leave	PL	Edit	80.00	Hours	104.15	2210	<input type="checkbox"/>	Edit
Long Service	NSW	Edit	173.33	Hours	454.00	2020	<input type="checkbox"/>	Edit

Entitled to Leave Loading at 0.00 % Edit History Hours Paid

Claim leave loading tax-free threshold (valid for periods prior to FY 2011/2012 only)

Days of sick leave without a medical certificate: 0.00

← Prev : F7 → Next : F8 🔍 Find : F9 💾 Save : F10 🗑 Delete : F6 🚪 Exit : Esc

Employee Maintenance - Leave Entitlements

TIP



To view a breakdown of the employee's leave balances, click on the **Edit** button under the **Other Details** section for the respective leave type.

Annual Leave

To set up an employee's Annual Leave entitlements

- 1 In the **Group** field, assign the appropriate Annual Leave Group.

- The following screen will appear:



Employee Details - Leave Entitlements - Assign Annual Leave Group

- Select the option **From the employee's start date**.
- Click on the **Ok** button.
- The **Entitlement Units** field shows how much leave the employee will accrue each year, based on the rules you've specified in the Annual Leave Group.
- The **Balance** field shows the employee's total entitlement to Annual Leave.
- The **Cost Centre** field records the Cost Centre to which the employee's Annual Leave Paid will be costed.

To enter balances for Annual Leave

- Click on the **Edit** button under **Other Details** to alter the employee's **Balance** for Annual Leave.



Employee Maintenance - Leave Entitlements - Annual Leave Balances

- In the **Carry Over** field, enter the hours of Annual Leave carried over from your previous system.
- Click on the **Save** button or press **F10**.

Personal Leave

To enter an employee's Personal Leave entitlements

- 1 In the **Group** field, assign the appropriate Personal Leave Group.
- 2 The following screen will appear:



Employee Maintenance - Leave Entitlements - Assign Personal Leave Group

- 3 Select the option **From the employee's start date**.
- 4 Click on the **Ok** button.
- 5 The **Entitlement Units** field shows how much leave the employee will accrue each year, based on the rules you've specified in the Personal Leave Group.
- 6 The **Balance** field shows the employee's total entitlement to Personal Leave.
- 7 The **Cost Centre** field records the Cost Centre to which the employee's Personal Leave will be costed.

To enter balances for Personal Leave

- 1 Click on the **Edit** button under **Other Details** to alter the employee's **Balance** for Personal Leave.



Employee Maintenance - Leave Entitlements - Personal Leave Balances

- 2 In the **Carry Over** field, enter the hours of Personal Leave carried over from your previous system.

- 3 Click on the **Save** button or press **F10**.

Long Service Leave

To enter an employee's Long Service Leave entitlements

- 1 In the **Group** field, assign the appropriate Long Service Leave Group.
- 2 The following screen will appear:



Employee Maintenance - Leave Entitlements - Assign Long Service Leave Group

- 3 Select the option **From the employee's start date**.
- 4 Click on the **Ok** button.
- 5 The **Entitlement Units** field shows how much leave the employee will accrue each year, based on the rules you've specified in the Long Service Leave Group.
- 6 The **Balance** field shows the employee's total entitlement to Long Service Leave.
- 7 The **Cost Centre** field records the Cost Centre to which the employee's Long Service Leave Paid will be costed.

To enter balances for Long Service Leave

- 1 Click on the **Edit** button under **Other Details** to alter the employee's **Balance** for Long Service Leave.

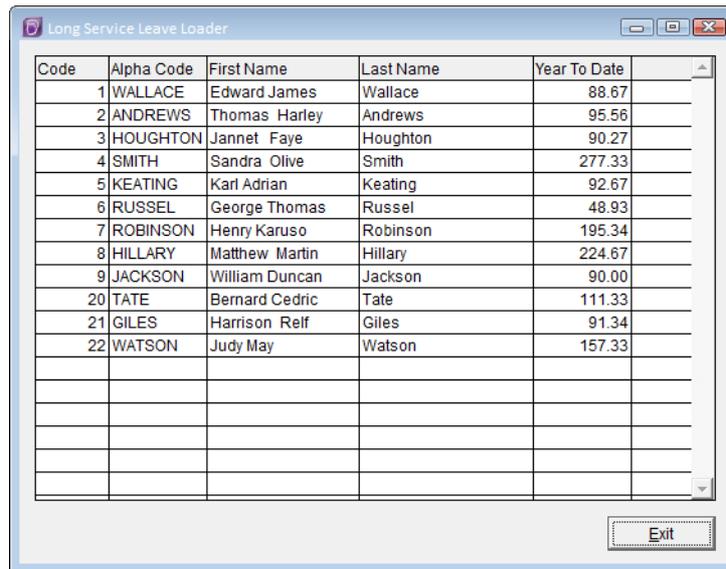
Employee Maintenance - Leave Entitlements - Long Service Leave Balances

- 2 If the employee has outstanding Long Service Leave accrued prior to 16 August 1978, enter the hours in the **Hours Prior to 16/08/1978** field.
- 3 If the employee has outstanding Long Service Leave accrued between 16 August 1978 and 17 August 1993, enter the hours in the **Hours between 16/08/1978 and 17/08/1993** field.
- 4 If the employee has outstanding Long Service Leave accrued after 17 August 1993, enter the hours in the **Hours after 17/08/1993** field.
- 5 Click on the **Save** button or press **F10**.

To load Long Service Leave Accrual (Year To Date)

The Year-To-Date value for Long Service Leave is loaded via a special utility. This utility (LoadLSL) is located on your Employer Services CD. Once this utility is installed, it can be accessed from the **Special** menu in EXO Payroll.

- 1 From the **Special** menu, select **Special Applications**.
- 2 Select **Load YTD LSL** and click on **Save** or press **F10**.



Load Long Service Leave Year-To-Date accrual

- 3 In the **Year to Date** field, enter the *year-to-date accrual* for each employee.
- 4 Click on the **Exit** button.
- 5 Click on the **Exit** button or press **Esc**.

Other options

If the Annual Leave Group assigned to the employee includes a Leave Loading rate, the option *Entitled to Leave Loading at x.xx%* will automatically be selected, with the Leave Loading rate from the Annual Leave Group shown.

IMPORTANT



If the option *Entitled to Leave Loading* is selected, an Annual Leave Group with a Leave Loading Rate **must** be assigned to the employee.

The **Days of sick leave without a medical certificate** field shows the number of days Sick Leave the employee has had in their current entitlement year without providing a medical certificate.

Other

Click on the **Other** tab if this screen is not active.

Employee Maintenance - Other

Email

You can record e-mail addresses for your employees. If you are going to e-mail payslips to your employees, you must complete the following fields:

- 1 In the **Email address** field, enter the e-mail address where the employee's payslip should be sent.
- 2 In the **Password** field, enter the password with which their payslip will be encrypted.

TIP



If you have purchased EXO MyStaffInfo, the employee's e-mail address and password will be their login for the MyStaffInfo website.

Rostered Days Off

To set up an employee's Rostered Days Off:

- 1 Click on the option **Track RDO's for this employee.**
- 2 Enter the following Details:

Field	Description
Accrue x hours for each hour worked	Enter the rate at which the employee accrues RDO's.
Cap accrual to x hours per pay	Enter the maximum number of hours the employee accrues RDO's on per pay period.
Value hours at x pay rate	From the dropdown list select: <ul style="list-style-type: none"> • <i>An average</i> to value RDO's at an average rate, or • <i>Rate X</i> to value the RDO's at a specified hourly rate. This value will be used for both the accrual and payment of RDO's.
Available hours	This field displays the employee's RDO's balance.

To enter balances for Rostered Days Off

- 1 In the **Available hours** field, enter the employee's balance up to the last pay.

Time in Lieu

This field is used for recording time in lieu the employee has accrued.

To enter balances for Lieu Time

- 1 Click on the **Other** tab.
- 2 In the **Time in Lieu Hours** field, enter the employee's balance up to the last pay.

Pay rounding carried forward

If you have set up the system to apply rounding to an employee's pays, each time an employee's net pay is rounded, the system will accumulate the rounded-off cents in this field. Once the minimum payout value is reached, this accumulated value will be automatically be paid to the employee in their next pay.

Rapid Employee

If you are using Rapid Load Pay and will enter this employee's pay using Rapid Load Pay, select this option.

Time and Attendance Employee

If you have EXO Time and Attendance and will record the employee's time and attendance information using EXO Time and Attendance, select this option.

User Defined

Click on the **User Defined** tab, if it is not currently active.

Employee Maintenance - User Defined

User Defined Fields

This area contains user definable fields that can be used to record additional information on your employees.

To rename a User Defined Field

- 1 Double-click on the **User Defined** caption of the field you want to use.

Employee Maintenance - User Defined - Renaming Using Defined Field

- 2 Enter a title for this field.
- 3 Press **Enter**.

To reset the User Defined Field

- 1 Double-click on the title of the field.

- 2 Delete the title.
- 3 Press **Enter**.
- 4 The following user definable fields are available:

Field	Description
2 x Check boxes	Used for yes/no options.
2 x Dates	Used to record a date.
3 x Text Fields	Used to enter short text descriptions.
1 x Number Field	Used to enter a value.
1 x Comment Field	Used to enter comments.

Notes

Click on the **Notes** tab if this screen is not active.

Date	Type	Entered By	Note	Remind Me
18/05/2011	H		Annual Leave Entitlement changed from 160 Hours to 160 Hours on 18 May 2011	//
18/05/2011	H		Annual Leave Entitlement changed from 160 Hours to 160 Hours on 18 May 2011	//
18/05/2011	H		Annual Leave Entitlement changed from 160 Hours to 160 Hours on 18 May 2011	//
18/03/2011	H		Annual Leave Entitlement changed from 160 Hours to 160 Hours on 17 May 2007	//
17/03/2011	H		Annual Leave Entitlement changed from 160 Hours to 160 Hours on 16 May 2007	//

Employee Maintenance - Notes

This screen shows all the notes that have been entered against an employee.

Every time an employee is paid leave, their leave entitlements are changed or their Hourly Rate/Salary is altered, the system automatically generates a note, which is stored in this area.

To Edit an exiting Note:

- 1 Double-click on the note you want to edit.

To Add a new Note:

- 1 Click on the **Add** button or press **F4**.

Employee Maintenance - Notes - Adding a Note

- 2 Enter the following details:

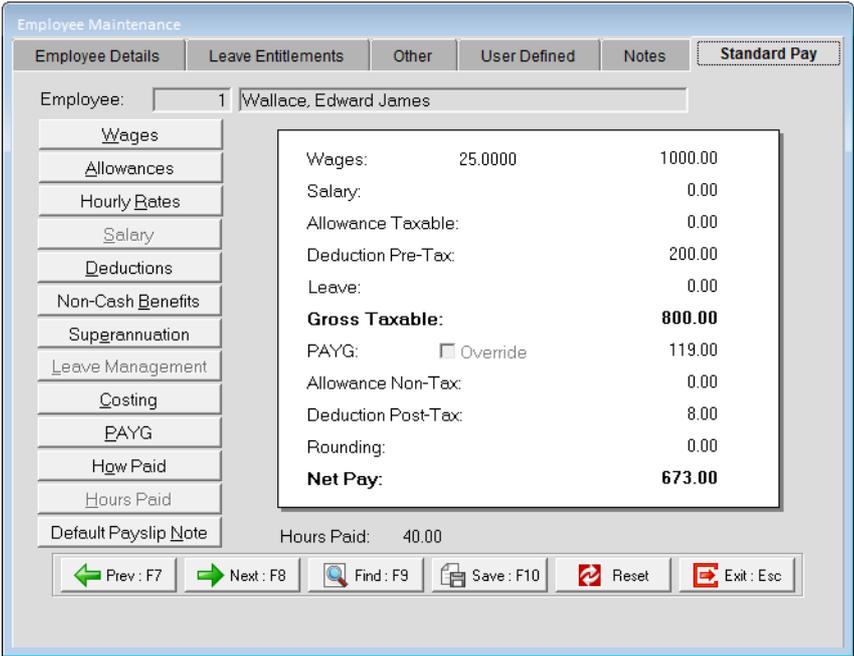
Field	Description
Date	This is the date on which the note is added.
Entered By	This field default to the User Code of the user adding this note.
Note Type	From the dropdown list, select the type of note you are adding.
Reminder Date	If you want the system to remind you of this note, enter the date on which you want to be reminded.
Recipients	Click on the ... button to select the Users that should be reminded.

- 3 In the space provided, enter your note.
- 4 Click on the **Save** button or press **F10** to save the note.

Standard Pay

Click on the **Standard Pay** tab if this screen is not active.

This area stores the employee’s pay template; what they are normally paid each pay period.



Employee Maintenance - Standard Pay

IMPORTANT

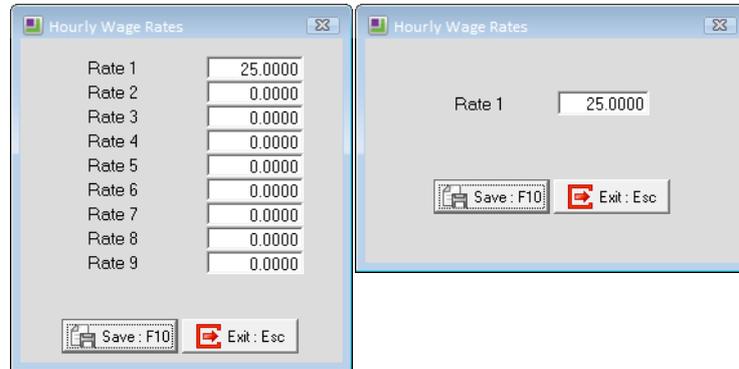


If changes are made to the employee’s Standard Pay after a Current or One-Off Pay is created, the pay will not automatically be updated with the changes.

Hourly Rate

To enter an Hourly Rate

- 1 Click on the **Hourly Rates** button.



Standard Pay - Hourly Rates

- 2 Enter the employees Hourly Rate. If you have the option for **Multiple Wage Hourly Rates** turned on, you will be able to enter up to 9 Hourly Rates for each employee.

NOTE



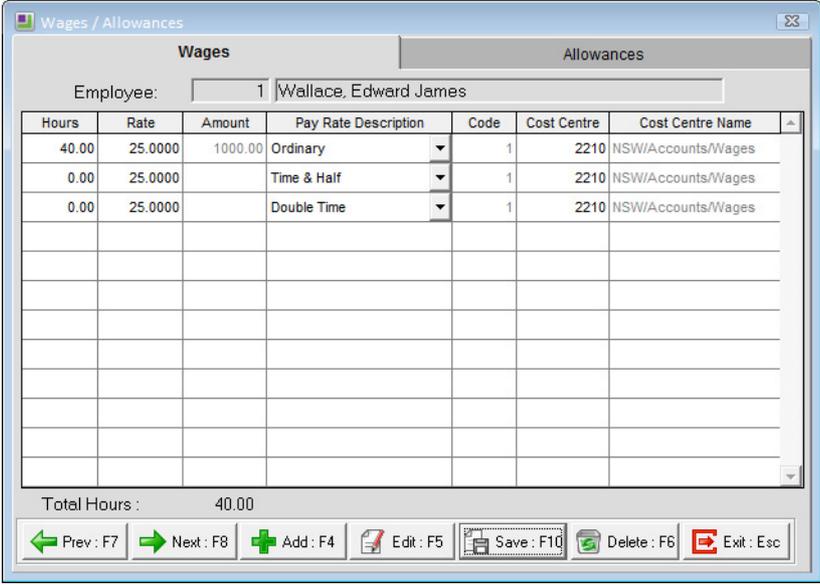
You can change the description(s) of the Hourly Rate(s) from the **Hourly Rates**. Refer to your EXO Payroll user guide for more information.

- 3 Click on the **Save** button or press **F10**.

Wages

To add Standard Pay Wages

- 1 Click on the **Wages** button.



Hours	Rate	Amount	Pay Rate Description	Code	Cost Centre	Cost Centre Name
40.00	25.0000	1000.00	Ordinary	1	2210	NSW/Accounts/Wages
0.00	25.0000		Time & Half	1	2210	NSW/Accounts/Wages
0.00	25.0000		Double Time	1	2210	NSW/Accounts/Wages
Total Hours : 40.00						

Standard Pay - Wages

- 2 In the line corresponding with **Ordinary**, enter the standard hours the employee is paid in each pay period.

NOTE



If there are no lines in the employee's Wages screen, click on the **Add** button or press **F4** to add a new line.

- 3 Alternatively, you can click on the corresponding line and click on **Edit** or press **F5**.

Standard Pay - Edit Wages

- 4 From the **Wage Rate Type** field, select **Ordinary**.
- 5 The **Hourly Rate** field shows the rate at which hours against this pay rate multiplier will be paid.
- 6 If the employee has multiple hourly rates, enter the appropriate **Hourly Rate Code** in the **Hourly Rate Code** field.
- 7 In the **Number Hours** field, enter the standard number of hours the employee is paid in a pay period.

IMPORTANT



If the employee is entitled to Rostered Days Off, the value entered into the **Number Hours** field reflect the number of hours *worked not paid*.

- 8 If you want to cost the hours to a specific Cost Centre, enter the appropriate **Cost Centre Code** in **Cost Centre** field.
- 9 In the **Alternative Type Description** field you can enter an alternative description for this pay rate multiplier.
- 10 Click on the **Save** button or press **F10** to save from this screen.
- 11 Click on the **Save** button or press **F10** to save the employee's Standard Pay Wages.

3 Enter the following information:

Field	Description
Code	Enter the code for the Allowance you want to add. Note: You can click on the Find button or press F9 to get a list of your Allowances.
Allowance Name	This field displays the name of the Allowance. Note: If you have selected the option Can Modify Name in the Allowance Setup , you can change the name here.
Units	Enter the number of Units to pay against this Allowance.
Rate	Enter the rate at which the Units should be paid.
Amount	Enter the Amount of this Allowance.
Rate Type	Enter the Pay Rate Multiplier used for this Allowance.
Periods to Tax Over	If the Allowance Type is set to Bonus , enter the number of periods the Bonus should be taxed over. Note: You would normally only enter a value in this field when you pay this Allowance to the employee in the Current Pay.
Wage Rate Code	Enter the Wage Rate Code of the Hourly Rate at which this Allowance should be paid.
Cost Centre	Enter the Cost Centre to which this Allowance should be costed.

NOTE



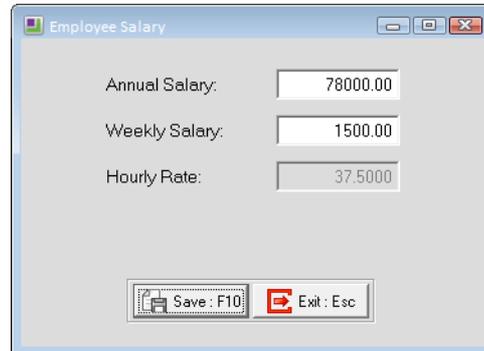
The availability of these fields are determined by the setup of the Allowance.

- 4** Click on the **Save** button or press **F10**.
- 5** Click on the **Save** button or press **F10** to save the employee's Standard Pay Allowances.

Salary

To add a Standard Pay Salary

- 1 Click on the **Salary** button.



Annual Salary:	78000.00
Weekly Salary:	1500.00
Hourly Rate:	37.5000

Save : F10 Exit : Esc

Standard Pay - Salary

- 2 Enter the employee's **Annual Salary**. The system will automatically calculate the Salary per pay period and the Hourly Rate.

NOTE



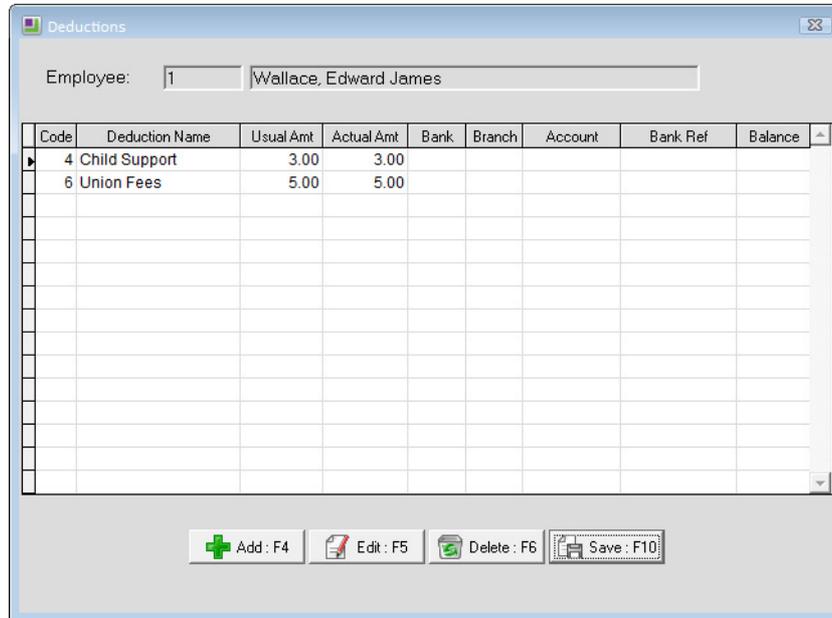
Once the salary per pay period is calculated, the system may adjust the Annual Salary to reflect the actual annual value paid to the employee.

- 3 Click on the **Save** button or press **F10** to save the employee's Standard Pay Salary.

Deductions

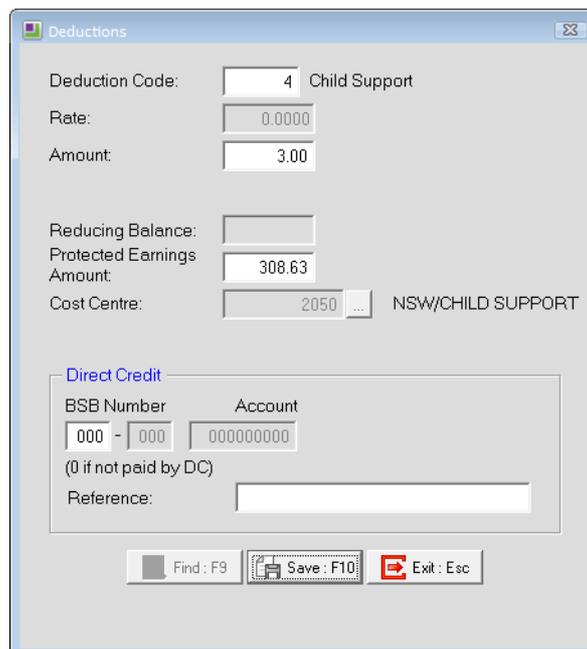
To add Standard Pay Deductions

- 1 Click on the **Deductions** button.



Standard Pay - Deductions

- 2 Click on the **Add** button or press **F4**.



Standard Pay - Deductions - Add Deduction

3 Enter the following information:

Field	Description
Deduction Code	Enter the code of the Deduction you want to add. Note: You can also click on the Find button or press F9 to get a list of your Deductions.
Rate	Enter the Rate at which this Deduction is made.
Amount	Enter the Amount of this Deduction.
Reducing Balance	If the Deduction Type is set to Reducing Balance , enter the remaining balance of this Deduction.
Protected Earnings Amount	If the Deduction Type is set to Child Support , this field will show the protected earnings.
Cost Centre	This field will default to the employee's Default Cost Centre. To have the deduction costed to a specific Cost Centre, enter the appropriate <i>code</i> in this field.
BSB Number, Account	Enter the bank account details for this Deduction.
Reference	Enter the Reference for the bank account.

NOTE



The availability of these fields are determined by the setup of the Deduction.

- 4 Click on the **Save** button or press **F10**.
- 5 Click on the **Save** button or press **F10** to save the employee's Standard Pay Deductions.

Superannuation

To add Standard Pay Superannuation Contributions

- 1 Click on the **Superannuation** button.

The screenshot shows the 'Superannuations' window for employee Wallace, Edward James. The table below displays the current superannuation contributions:

Type	Name	Amount	% of Gross	Cost Centre	Cost Centre Name
	Wallace Private Supe	200.00		2040	NSW/EMPLOYEE SUPER
	Wallace Private Supe	135.00	9.0000	2041	NSW/EMPLOYER SUPER

At the bottom of the window, there are buttons for 'Add : F4', 'Edit : F5', 'Save : F10', 'Delete : F6', and 'Exit : Esc'.

Standard Pay - Superannuations

- 2 Click on the **Add** button or press **F4**.
- 3 A list of your Superannuation Calculations will appear. Double-click on the Contribution you want to add.

The screenshot shows the 'Superannuation Edit' window for Wallace, Edward James. The fields are configured as follows:

- Name: Wallace Private Supe
- Calculation Method: % of Gross Pay
- Superannuation Type: Employer Superannuation
- Superannuation Provider: Wallace Private Insurance
- Contribution Type: SG
- Percentage Rate: 9.0000
- Amount: 135.00
- Fund Number: (empty)
- Cost Centre: 2041 NSW/EMPLOYER SUPER

At the bottom of the window, there are buttons for 'Find : F9', 'Save : F10', and 'Exit : Esc'.

Standard Pay - Superannuations - Add Superannuation Contribution

- 4 In the **Percentage Rate** field, enter the rate at which the superannuation should be calculated.
- 5 In the **Amount** field, enter the amount of the superannuation contribution.
- 6 In the **Fund Number** field, enter the employee's superannuation fund membership number.
- 7 In the **Cost Centre** field, enter the Costs Centre this Superannuation Contribution should be costed to.
- 8 Click on the **Save** button or press **F10**.

NOTE



The availability of these fields are determined by the setup of the Superannuation Contribution.

- 9 Click on the **Exit** button or press **Esc** to return to the employee's Standard Pay.

How Paid

To set up Standard Pay Payment Methods

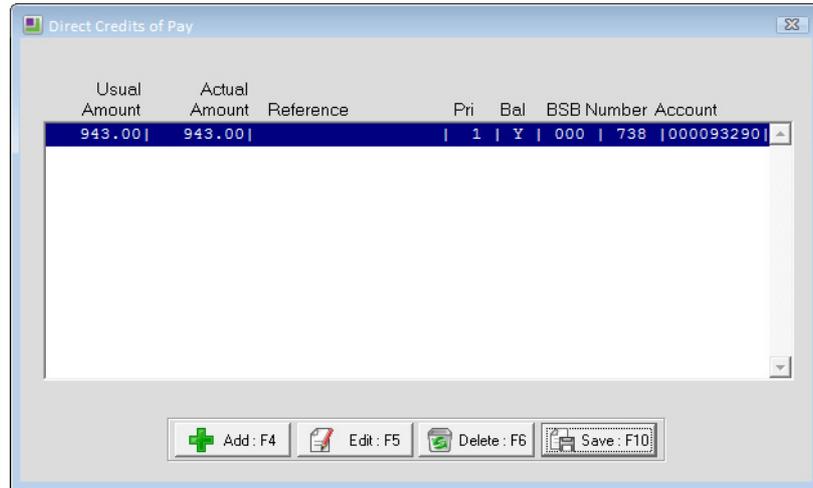
- 1 Click on the **How Paid** button.

Standard Pay - How Paid

To set up Standard Pay Direct Credit information

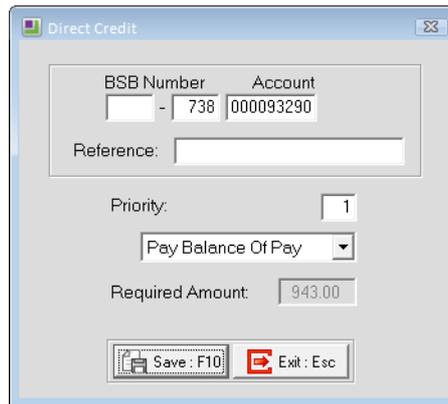
- 1 Click on the Yes option for Direct Credit.

2 Click on the **Add/Edit Direct Credits** button.



Standard Pay - How Paid - Direct Credits

3 Click on the **Add** button or press **F4**.



Standard Pay - How Paid - Direct Credits Setup

4 Enter the following information:

Field	Description
BSB Number, Account	Enter the employee's bank account.
Reference	Enter the reference that should appear on the employee's bank statement.
Priority	Set the priority order for this bank transfer.

Fixed Dollar Amount, Pay Balance of Pay, Allow Part Payment	Select the type of transfer for this account. Use Fixed Dollar Amount for a set amount that has to be transferred every pay. Use Allow Part Payment for transfers if there is sufficient funds. Use Pay Balance of Pay for any remaining money to be transferred. Note: At least one of the bank accounts must be set to Pay Balance of Pay .
Required Amount	Enter the amount to be transferred to bank accounts set to Fixed Dollar Amount or Allow Part Payment .

- 5 Click on the **Save** button or press **F10**.
- 6 Click on the **Save** button or press **F10** to return to the employee's **How Paid**.

To set up Standard Pay Cash Payment information

- 1 Click on the **Yes** option to pay a fixed amount in cash.
- 2 Enter the amount in the **Cash Amount** field.
- 3 Click on the **Balance** option to pay the balance of the employee's pay in Cash.

To set up Standard Pay Cheque Payment information

- 1 Click on the **Yes** option to pay a fixed amount by cheque.
- 2 Enter the amount in the **Cheque Amount** field.
- 3 Click on the **Balance** option to pay the balance of the employee's pay by cheque.

NOTE



If you make any payments by Cash, the **Cash Analysis** area will show you the breakdown of denominations required to pay the employee.

NOTE

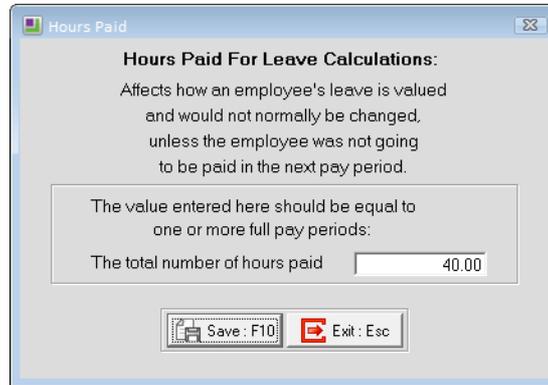


If you are applying any rounding to the employee's Net Pay, the **Rounding** field will show the value that is rounded from the employee's Net Pay.

Hours Paid

To set up Standard Pay Hours Paid for a Salaried Employee

- 1 Click on the **Hours Paid** button.



Standard Pay - Hours Paid

- 2 In the **The total number of hours paid** field, enter the employee's standard number of hours paid.

IMPORTANT



The value you enter in this field **must** be equal to the number of hours entered in the **Hours per Pay Period** field in the **Employee Details** screen.

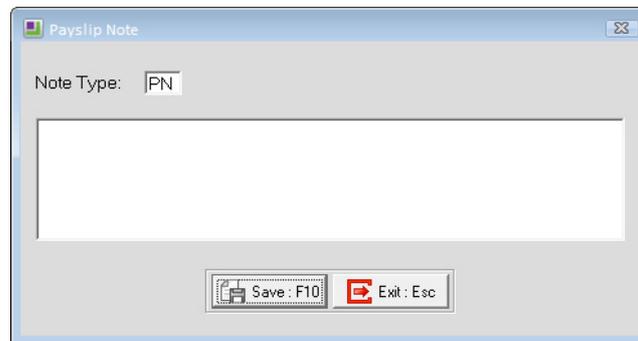
- 3 Click on the **Save** button or press **F10** to save the employee's Standard Pay Hours Paid.

Click on the **Save** button or press **F10** to save the employee's Standard Pay Payment Setup.

Default Payslip Note

To add a Standard Pay Default Payslip Note

- 1 Click on the **Default Payslip Note** button.



Standard Pay - Payslip Note

- 2 In the space provided enter the default note to appear on the employee's payslip.

NOTE



This default note can be changed when processing a pay. Any changes to this note will only be applicable to that pay.

- 3 Click on the **Save** button or press **F10** to save the employee's Default Payslip Note.



Skills checklist

Tick the skills that you have learned in this unit.

Skills	✓
Add a new employee	
Set up Leave Entitlements	
Set up Rostered Days Off Entitlements	
Record employee's e-mail address	
Add an employee note	
Set up the employee's Standard Pay information	

Appendices

2

This unit contains a number of appendices for further study:

- ▶ Appendix 1: Migrating employee data from MYOB AccountRight Premier/MYOB PowerPay

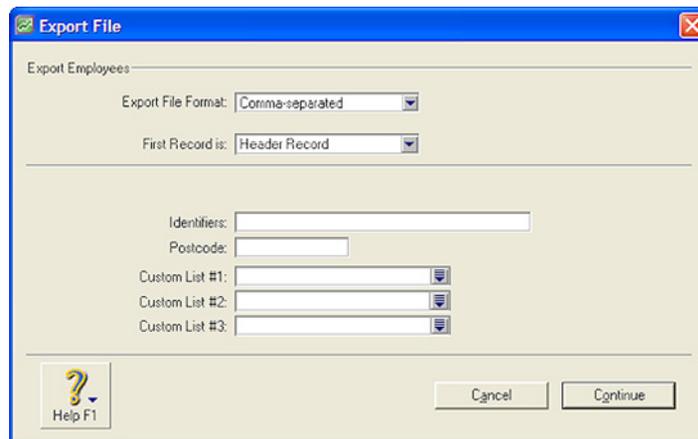
Appendix 1: Migrating employee data

If your previous payroll system was MYOB AccountRight or MYOB PowerPay, you can migrate your employees' basic information to EXO Payroll using the **Migration Wizard** available in EXO Payroll.

In order to be migrated using the Migration Wizard, data must be exported from the source payroll system in comma-separated format.

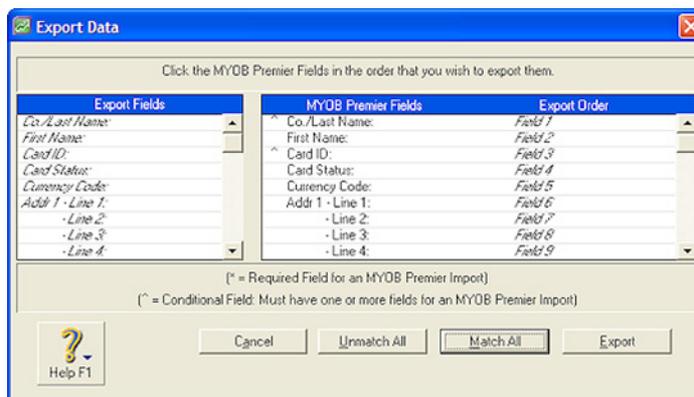
To export data from MYOB AccountRight

- 1 Select **Export Data > Cards > Employees** from the **File** menu. This opens the Export File window.



- 2 Select **Comma-separated** for the **Export File Format**.
- 3 Select **Header Record** for the **First Record**.
- 4 Use the fields on the bottom half of the window to specify which employees you want to export.

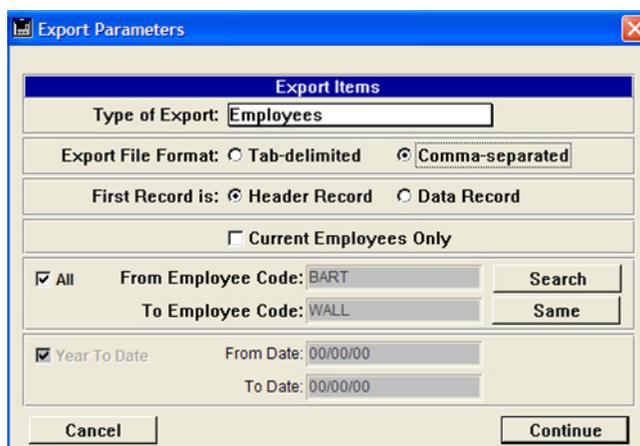
- Click Continue.



- On the Export Data window, click **Match All**.
- Click **Export**.
- Enter a **name** for the export file.
- Click **Save**.

To export data from MYOB PowerPay:

- Select **Export Data...** from the **File** menu. This opens the Export Parameters window.



- Select **Employees** for the **Type of Export**.
- Select **Tab Delimited** for the **Export File Format**.
- Select **Header Record** for the **First Record**.
- Use the fields on the bottom half of the window to specify which employees you want to export.

6 Click **Continue**.



7 On the Export Employees window, click **Match All**.

8 Click **Continue**.

9 Enter a **name** for the export file.

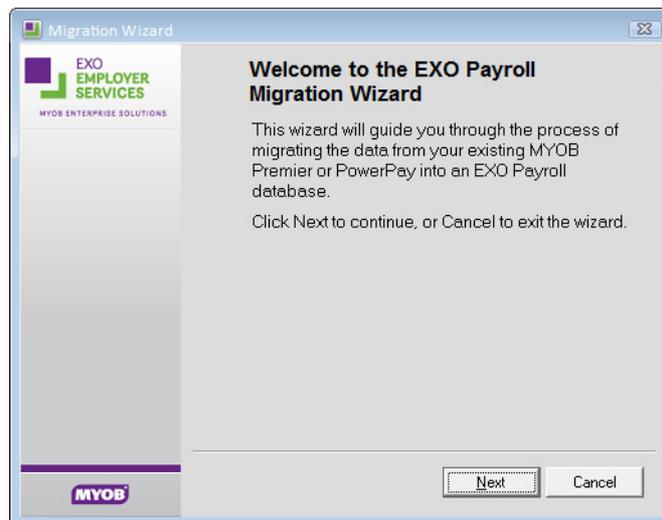
10 Click **Save**.

11 Open the file in Microsoft Excel.

12 Save the file in **Comma Separated Values (CSV)** format.

To migrate the exported information to EXO Payroll

1 From the **Help** menu, select **Migration Tool**. The following window is displayed:



Migration Wizard

2 Click **Next** on the Welcome screen.

- 3 Click **Browse** to specify the location of the CSV file exported from PowerPay/Premier.
- 4 Click **Next**.
- 5 If you are migrating data from MYOB PowerPay, you must map the PowerPay Pay Frequencies in the export file to PayrollEnterprise Pay Frequencies. For each frequency Code listed, select a Pay Frequency (Weekly, Fortnightly, Bi-monthly, 4 weekly or Monthly).
- 6 Click **Next** once all Pay Frequencies have been mapped.
- 7 At this point you must back up your company file before proceeding.
- 8 Once the backup is completed, the Migration Tool will check that it can read the CSV file successfully.
- 9 Once the file has passed all the checks, click **Next** to continue.
- 10 Select the option ***I accept full responsibility...***
- 11 Click **Migrate** to begin the migration operation.
- 12 The progress of the migration is displayed.
- 13 Once the migration is complete, the results of the migration are displayed. Click **Print** to print a copy of the migration log.

NOTE

If any fatal errors were encountered, exit the Migration Tool and correct the problems that caused them.

- 14 Click **Next** to continue.
- 15 Click **Finish**.

Your employees' basic information will now be migrated to EXO Payroll. You can now complete the setup of additional information, e.g. Standard Pay information.

