Payroll admin daily use guide

Employment Hero HR and Payroll

Contents

Introduction

Welcome, you're either newly Live in your new payroll + HR platform or maybe you're a new Admin to an organisation that already uses both. This Admin guide will help you in early adoption and understanding of your new HR + Payroll software, it should also come in handy down the line as well in case you forget anything or need to onboard a new Administrator.

It is important that the Payroll Administrator has access to the HR platform as many areas of employee pay details will now be managed via the HR platform.

What's Covered

How information flows between HR and Payroll for different segments of the systems. Important considerations before applying some changes.

What's Not

Configuration and set up.

Assumptions made by this manual

→ You are connected to HR

→ You have set up Workzone and ClockMeIn if using these time and attendance features

→ You have decided on your BMS ID method

→ You have Linked your payroll platform to the Australian Tax Office

Further Support

→ Help Desk

→ Payroll support

→ Hero Academy — a selection of videos similar to the guided journey for implementation but focused at a post live/launch level.

1. Employees

1.1 Onboarding Employees

Employee payroll data will be captured through the HR platform as part of the paperless onboarding process. Data that will be collected can be summarised in the help desk article here.

New employees will not come through to payroll until they have completed these steps and they will appear in the HR side with Payroll Errors as this information isn't available.

How to Onboard Employees Video

Read the support article here

1.2 Managing Employees

The table below gives a high level overview of which fields from an Payroll Administrator perspective need to be edited in either HR or Payroll first.

Further information on how to manage or perform these changes can be found in the pages after this one.

Fields	Managed in HR First	Managed in EH Payroll
Employee Name Address Email Contact details	✓	✗
Primary Pay Category	✓	✗
Leave Allowance Templates	✓	✗
Employing Entity	✓	✗
Employee cost centres (locations)	✓	✗
Work hours	✓	✗
HR Timesheets + Leave	✓	✗
Worktype access	✓	✗
Linking an Employee to an Award + Pay rates	✓	✗
Bank Details	✓	✗
Tax File Declaration	✓	✗
Superannuation	✓	✗
Salary Sacrifice, Deductions	✗	✓
Additional Pay Rates	✗	✓
Workzone or Clockmein access + settings	✗	✓
Opening Balances	✗	✓
Employee STP Pay ID	✗	✓
Running Pay Runs	✗	✓

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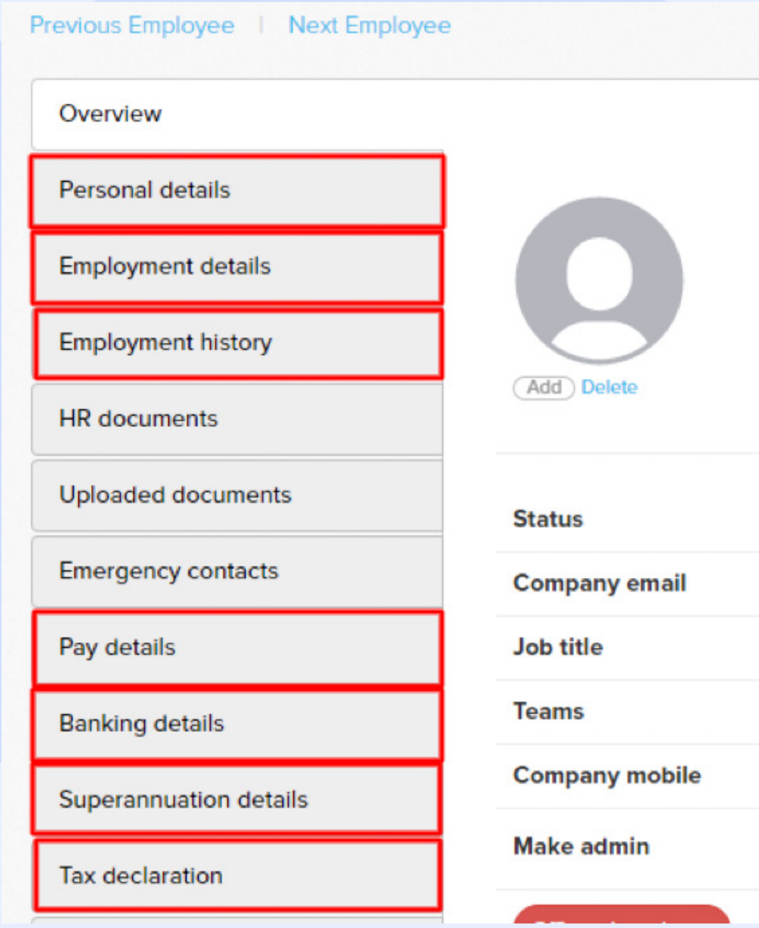

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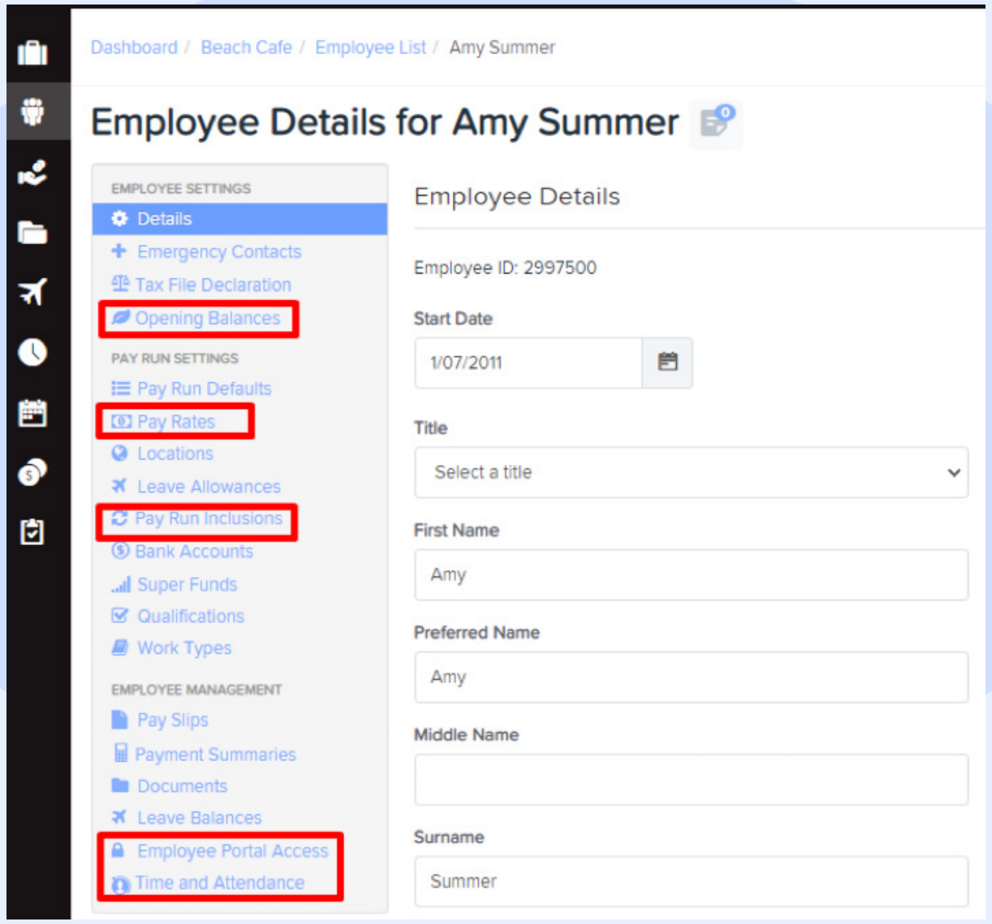

In HR the Tabs that feed into your Payroll platform are highlighted above - Edits must be made in HR first and feed through automatically upon **saving**.

Refer to image a

To verify the changes in Payroll you can check your employees file in payroll - Particularly the Pay run Details section.

There are some areas of an employee's payment details that are solely managed within your payroll platform. Above are the fields of an employee file within payroll that can **only** be accessed and managed via **payroll.**

Refer to image b

Employee Portal Access and time and attendance highlighted above are **only** to be used if you are using Workzone or Clockmein; if you are using HR then employee portal access should be **off** in payroll.

Note

→ When entering Casual Rates in HR, do this minus the 25% loading as this is defaulted to the Payroll side to calculate on top of the base rate you enter into HR.

→ Tags for Award allowances need to be added to the employee file in PY and do not relate to HR at all.

→ Superannuation, like casual loading, is automatically applied on top of salary or hourly rates entered in the HR side.

→ To perform bulk employee updates (eg for annual salary reviews) follow instructions here, Back dated bulk updates instructions here.

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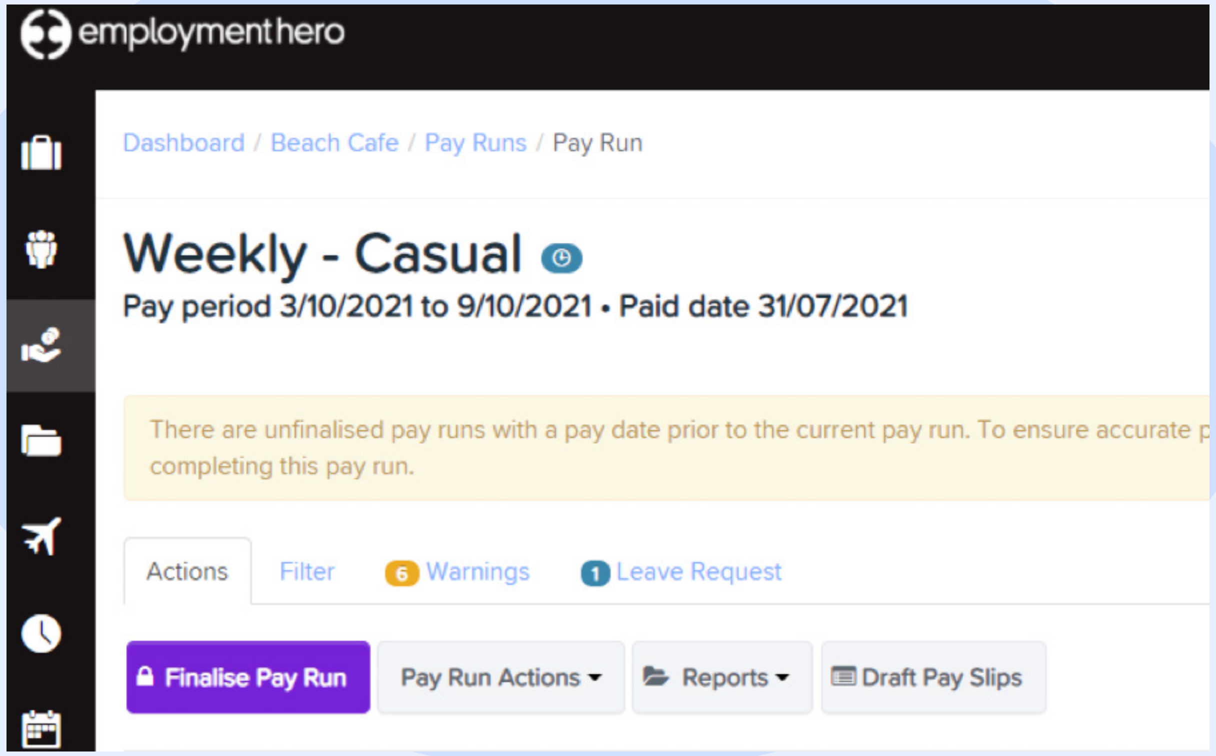

1.3 Leave Management

Employees will now be able to apply for leave themselves via their HR login. This will flow through to payroll after it has been approved by the manager of the employee in HR. Leave requests will appear in the pay run as a "request" to be applied in the pay run.

Refer to image c

If your leave requests need to be applied in the pay run as a timesheets; you will need to go into create timesheets screen, click on the clock on the left hand of screen, in payroll and convert the leave request into a timesheet prior to running the pay run. Video here.

Note

Admin in HR are **not** able to see the leave balances of employees within the employee file, you can however see it if you apply for leave on their behalf. Note if you **hide** leave from an employee view you will not be able to see it via the HR view.

1.4 Payslips

Payslips will become visible to employees within 72 hours of processing the pay run. The HR system will look for payslips once a day for 3 days within the date of payment of a pay run.

If the payslips do not come through you can follow the steps here to manually pull them through.

Note

Admin's in HR are **not** able to see the payslips of employees. Employee guide to viewing payslips here.

2. Time and attendance

As will have been covered during your implementation there are 3 different ways timesheets can be submitted and flow through to payroll. **You need only refer to the section in this part of the guide for the relevant time and attendance method your business uses.**

The three time and attendance systems available are:

→ HR timesheets (one app for employees)

→ Workzone (will be an additional app for your employees + the HR one)

→ Clockmein (fixed iOS Kiosk for onsite sign in and out)

2.1 HR Timesheets

→ Setting up approval permissions. View webinar here.

→ Employees will submit timesheets via Employment Hero HR app or web browser. Once timesheets have been approved in HR by either the Manager(s) or Admin they will push through to payroll to be processed within a pay run.

2.2 Workzone

Workzone timesheets will be submitted straight into the payroll to be approved within the payroll platform and then once approved they are locked for editing and can flow into a pay run. Submitted sheets will not be available within a pay run.

Setting up Workzone webinar

2.3 Clock me in

Clock me in produces timesheets from your employees clocking in and out on the kiosk. This is submitted straight into the payroll to be approved within the payroll platform. Once approved they are locked for editing and can flow into a pay run. Submitted sheets will not be available within a pay run. If you have Managers who

Setting up Clock Me In webinar

Note

If you have Managers who need to approve the timesheets you will need to give them restricted access to the payroll platform to allow them to do this. Instructions on this can be found in section 5.3 User Access.

3. Rostering

You need only refer to the section in this part of the guide if you utilise the roster function within your business.

→ You will set up your roster settings in your payroll platform and a window frame of this will copy across to the HR side for viewing.

Common Questions

Can I/Managers change shifts in the HR roster screen view? **A:** No

Can my employees view their colleagues shifts through the roster view **A:** No.

[How to set up Rostering Webinar here]

Note

If you have Managers who need to create and manage the Roster you will need to give them restricted access to the payroll platform to allow them to do this. Instructions on this can be found in section 5.4 User Access.

4. Reporting

Both HR and Payroll have reporting methods you can utilise

HR

Custom templates are custom to each individual admins and can't be shared. To perform a bulk update to employee files for the purposes of a CPI increase instructions here.

Reports available in HR summarised here.

Payroll

Payroll should always be your first point of call for reports regarding what has been processed within the payroll system. A list of payroll reports is summarised here.

5. Updates and maintenence

5.1 Updating Pay Schedules/ worktypes/locations

You can Update or add a new Pay Schedules/worktypes/locations without issue. Remembering to

→ Create the category in your payroll software first

→ Then go into HR > Payroll Settings > Update the category.

Note

If you need to apply a new schedule/ worktype or category to an employee you will need to go to their file and add it in the relevant spot.

5.2 Updating or adding Leave Categories/pay categories

Once you have started running live payruns we do advise **caution** in making any changes to leave categories in regards to the way their **unit** rate calculates.

You can add a new leave/pay category without issue. Remembering to:

→ Create the category in your payroll software first

→ Add it to leave allowance templates

→ Then go into HR > Payroll Settings > Update Leave Categories and Leave Allowance templates.

→ **Note** you do not need to change LAT's against employees as updating the template does this.

Adding a new Leave/pay Allowance Template.

→ Create the Leave Allowance Template in your payroll software first

→ Then go into HR > Payroll Settings > Update Leave Allowance templates.

→ **Note**: you will need to change LAT's against employees if it is a new template to be applied.

5.3 Award Management (AU only)

If you use a pre-built award in your payroll platform there are regular updates to these due to annual pay rate changes and other legislative changes as well. The payroll System dashboard will flag when you have an award that needs to be updated see below. After you update your award in Payroll you will then need to update this in HR.

Refer to image d

[Award Update Guide here]

5.4 Managing Admin and User Access between HR and Payroll

Admin Access in HR

To give or take away admin access in the HR platform you can do this in the employee file of HR from the overview tab; the last option is to make Admin Yes or No simply select and save. **This will be the same account they access their own employee files through.**

Admin Access in Payroll

To give or take away admin access in the Payroll platform, you do this in the Payroll Settings Manage Users section. **Note this can and may be a separate email address accessed from their employee file.**

Creating restricted levels of access

HR - [Security groups]

Payroll - [Restricted user groups]

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