EMPLOYEE CREATION CHECKLIST

Employee Details:

- ❏ Salutation*
- ❏ Username (Login ID)
- ❏ First Name
- ❏ Surname
- ❏ Gender
- ❏ Email Address
- ❏ Employee Number*
- ❏ Phone Number*
- ❏ Personal Email Address
- ❏ Password
- ❏ Master Photo

Employment Details:

- ❏ Schedule*
- ❏ Position
- ❏ Payment Mode
- ❏ Compensation Level
- ❏ Employee Type
- ❏ System Permission
- ❏ Employment Date
- ❏ Payment Method

Payroll Info:

- ❏ Marital Status
- ❏ Number of Children
- ❏ Middle Name

Add employees on the first day of your pay period to ensure a smooth first payroll.
*Items marked with an * are optional and do not affect Payroll or Reports.*

Enrollments:

- ❏ **BIR**
  - ❏ **Join Date**: Date when they join this enrollment on your company.
  - ❏ **Membership Code**: This is the employee BIR number, this is a 9 digit number. If the employee supplies 12 digit number, the last 3 digits can be ignored as they are the branch number which is not used.
  - ❏ **Exemption code**: The marital status of the employee - codes are: S=Single, ME=Married, Z=Zero exemption. The numbers are amount of qualified dependant children. For example S3 would be Single with 3 children. ME1 would be Married with 1 children.
  - ❏ **Region of Enrollment**: The Philippine region for this enrollment.
  - ❏ **Substituted Filing**: If the company does the tax deductions on behalf of the employee this should be set as Yes. If the employee pays their Income Tax directly, this would be set as No.
  - ❏ **Is wife claiming the additional exemption for qualified dependent children?:** Yes/No
  - ❏ **Name and Date of birth for each of the claimed children.**

- ❏ **Pag-IBIG**
  - ❏ **Join Date**: Date when they join this enrollment on your company.
  - ❏ **Membership Code**: The 12 digit membership code, format is XXXX-XXXX-XXXX
  - ❏ **Membership Program**: Pag-IBIG I, Pag-IBIG II or Modified Pag-IBIG II.

- ❏ **SSS**
  - ❏ **Join Date**: Date when they join this enrollment on your company.
  - ❏ **Membership Code**: The 10 digit membership code, format is XX-XXXXXXX-X

- ❏ **PhilHealth**
  - ❏ **Join Date**: Date when they join this enrollment on your company.
  - ❏ **Membership Code**: The 12 digit membership code, format is XX-XXXXXXXXX-X

- ❏ **Bank Account Number***

- ❏ **13th Month Enrollment**
  - ❏ **Join Date:** Generally same as employment date.

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*Note that enrollments do NOT act retroactively, **they only affect payrolls generated after the details have been added**. This is why its important to have the enrollments details as complete and as up to date as possible!*

Adding Employees

Add employees on the first day of your pay period to ensure a smooth first payroll.

Adding a single Employee via the 'Wizard'

1. Click On Add/Update Employees
2. Choose Wizard to add the employee
3. Complete the 'Employee Info' section
4. Complete the 'Employment Details' section
5. Complete the 'Extra Info' section and hit 'Create'

After creating the employee via the wizard make sure to go to the Employee's Profile and:
1. Add the Profile Photo.
2. Set the Default Worksite.
3. (Optional) Configure if the employee should work on holidays and or is allowed to clock in without a schedule.
4. Add schedules for the employees:
   a. If it's a standard recurring schedule: Go to the Employee's schedules page within their profile page and add a new schedule.
      Related Knowledge Base Article: Assigning Recurring Schedules to Employees
   b. If the schedule changes weekly: Add the schedule using the 'Scheduling' page.
      Related Knowledge Base Article: Adding Schedules via Weekly Scheduler
5. Adjust the payment mode for the employee by clicking edit on their profile. Select either Hourly, Monthly or Salary mode. To mass update this, check "Updating Enrollments for Multiple Employees".
6. If you have added the employee's bank details, make sure to change the pay method on his profile to the banking institution and set the effective date to the beginning of the pay period.

Adding Multiple Employees using the Multi - Insert Tool

1. Click On Add/Update Employees.
2. Choose Multi Insert Tool to add the employees.
3. Step 1: Employee Create.
4. Click on 'Download Update File'.
5. Open the downloaded file in your spreadsheet software, but keep the Multi Insert Tool page open.
6. Once you have entered all of your employee's information save the changes to the spreadsheet.
7. Go back to the Multi Insert Tool and upload the updated spreadsheet.
8. Click 'Upload' and wait for the confirmation email to make sure all employees has been added.

After creating the employees via the Multi - Insert Tool we recommend to **mass update their enrollments** as explained below on this document, after this:

1. Go to each of the Employee's Profile and add their Master Photos.
2. Add schedules for the employees:
   a. If it's a standard recurring schedule: Go to the Employee's schedules page within their profile page and add a new schedule.
      Related Knowledge Base Article: Assigning Recurring Schedules to Employees
   b. If the schedule changes weekly: Add the schedule using the 'Scheduling' page.
      Related Knowledge Base Article: Adding Schedules via Weekly Scheduler
3. Configure the compensation and compensation level of the employee via the Positions page within the employee profile.
4. If you have added the employee's bank institution details, make sure to change the pay method on his profile to the banking institution and set the effective date to the beginning of the pay period.

Updating Employee Profiles and Enrollments

Updating Profile for Multiple Employees

1. Click On Add/Update Employees
2. Choose Multi Insert Tool
3. Step 1: Employee Profile Update
4. Click on 'Download Update File'
5. Open the downloaded file in your spreadsheet software, but keep the Multi Insert Tool page open.
6. Once you have edited all of your employee's desired details, save the changes to the spreadsheet.
7. Go back to the Multi Insert Tool and upload the updated spreadsheet
8. Click 'Upload' and wait for the confirmation email to make sure all employees details have been added or edited.

Updating an individual Employee's Enrollments

1. Go to the Employee's Profile Page
2. Click on 'Enrollments'
3. On the Enrollments Page, select the bank you want to add and click on Add a new bank enrollment.
4. Add the membership code
5. Add the Join Date
6. Click on "Create"

Updating Enrollments for Multiple Employees

1. Click On Add/Update Employees.
2. Choose Multi Insert Tool.
3. Step 1: Employee Enrollment Update
4. Click on 'Download Update File'
5. Open the downloaded file in your spreadsheet software, but keep the Multi Insert Tool page open
6. Once you have entered all of your employee's enrollment numbers save the changes to the spreadsheet
7. Go back to the Multi Insert Tool and upload the updated spreadsheet
8. Click 'Upload' and wait for the confirmation email to make sure all employees has been added.

Updating BIR Enrollments for Multiple Employees

1. Click On Add/Update Employees.
2. Choose Multi Insert Tool.
3. Step 1: Select BIR Update
4. Click on 'Download Update File'
5. Open the downloaded file in your spreadsheet software, but keep the Multi Insert Tool page open
6. Once you have entered all of your employee's enrollment numbers save the changes to the spreadsheet
7. Go back to the Multi Insert Tool and upload the updated spreadsheet
8. Click 'Upload' and wait for the confirmation email to make sure all employees has been added.