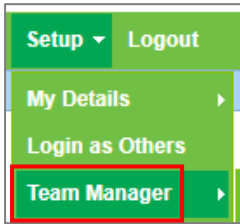


SENDING NEW TEAM MEMBER DETAILS TO THE IRD

Sending an individual's Employee Details to the IRD

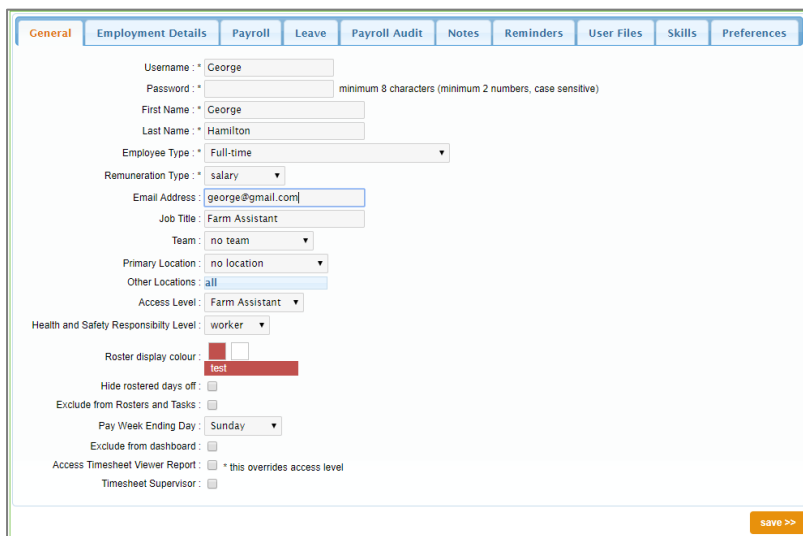
1. Hover on *Setup* and click on *Team Manager*:



The following screen will appear:

Team Manager											Add Team Member	Leave Calendar
Team Member	Job Title	Access Level	Team	Email / Username	Daily Contracted Hours	Remuneration Type	Pay Frequency	Gross Annual Remuneration	Employee Type	Location(s)		
Elizabeth Green	Administrator	Administrator		Liz	-	salary	fortnightly	-	Admin only	no location	<input checked="" type="checkbox"/>	<input type="checkbox"/>
George Hamilton	Farm Manager	Farm Manager		george@gmail.com / George	10.00	salary	fortnightly	55000.00	Full-time	Waihou Farm	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Harry Brown	Relief Milker	Relief Milker		hannah.naza@agrismart.co.nz / Harry	-	wages	fortnightly	-	Casual	Kareika Farm	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Jane Smith	Farm Assistant	Farm Manager		hannah.naza@agrismart.co.nz / Jane	9.00	wages	fortnightly	47007.00	Full-time	Farm 1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lisa Glass	Farm Assistant	Farm Assistant		hannah.naza@agrismart.co.nz / Lisa	10.00	salary	fortnightly	62969.00	Full-time	Farm 1 Waihou Farm	<input checked="" type="checkbox"/>	<input type="checkbox"/>

2. Click on the team member's name whose details it is you need to send to the IRD. This will bring up the following screen:

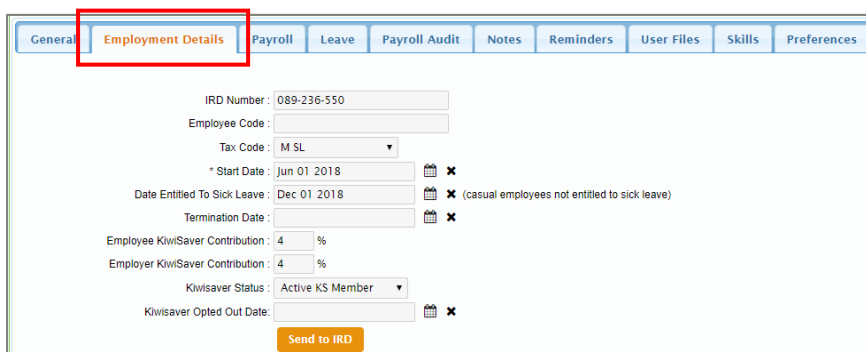


The image shows a form with several tabs: General, Employment Details, Payroll, Leave, Payroll Audit, Notes, Reminders, User Files, Skills, and Preferences. The 'General' tab is active. The form contains the following fields:

- Username: George
- Password: (minimum 8 characters (minimum 2 numbers, case sensitive))
- First Name: George
- Last Name: Hamilton
- Employee Type: Full-time
- Remuneration Type: salary
- Email Address: george@gmail.com
- Job Title: Farm Assistant
- Team: no team
- Primary Location: no location
- Other Locations: all
- Access Level: Farm Assistant
- Health and Safety Responsibility Level: worker
- Roster display colour: test
- Hide rostered days off:
- Exclude from Rosters and Tasks:
- Pay Week Ending Day: Sunday
- Exclude from dashboard:
- Access Timesheet Viewer Report: * this overrides access level
- Timesheet Supervisor:

A 'Save >>' button is located at the bottom right of the form.

3. Click on the *Employment Details* tab:



The image shows the 'Employment Details' tab selected. The form contains the following fields:

- IRD Number: 089-236-550
- Employee Code: (empty)
- Tax Code: M SL
- * Start Date: Jun 01 2018
- Date Entitled To Sick Leave: Dec 01 2018 (casual employees not entitled to sick leave)
- Termination Date: (empty)
- Employee KiwiSaver Contribution: 4 %
- Employer KiwiSaver Contribution: 4 %
- KiwiSaver Status: Active KS Member
- KiwiSaver Opted Out Date: (empty)

A 'Send to IRD' button is located at the bottom center of the form.

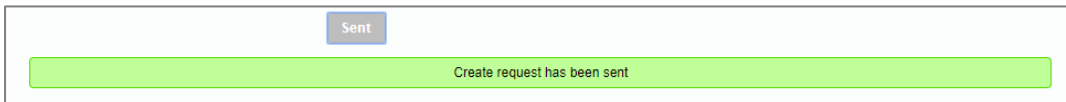
4. Click *Send to IRD*:

The screenshot shows the 'Employment Details' tab with various fields for employee information. The 'Send to IRD' button is highlighted with a red box.

Fields visible include:

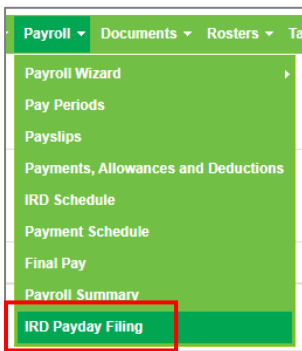
- IRD Number: 089-236-550
- Employee Code: [Empty]
- Tax Code: M SL
- * Start Date: Jun 01 2018
- Date Entitled To Sick Leave: Dec 01 2018 (casual employees not entitled to sick leave)
- Termination Date: [Empty]
- Employee KiwiSaver Contribution: 4 %
- Employer KiwiSaver Contribution: 4 %
- KiwiSaver Status: Active KS Member
- KiwiSaver Opted Out Date: [Empty]

You will be notified as per below screenshot:



Sending bulk Employee Details to the IRD

1. Hover on *Payroll* and click on *IRD Payday Filing*:



This will take you to the *Payday Filing Dashboard*:

The screenshot shows the 'Payday Filing Dashboard' with two main sections: 'Returns' and 'Owing'.

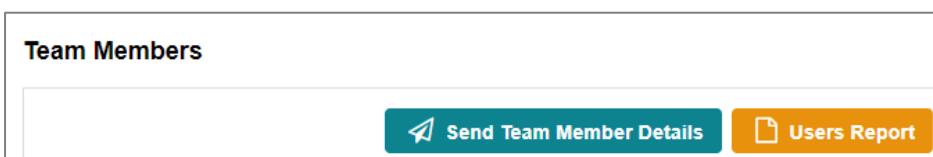
Returns

#	Pay Date	Status	Response	Total Owing
3	Mar 30 2019	Last filed on Mar 29 2019 11:05 am	Success	1998.64
1	Mar 28 2019	Last filed on Mar 28 2019 9:29 am	Success	1166.69
2	Mar 24 2019	Last filed on Mar 28 2019 10:56 am	Success	600.86

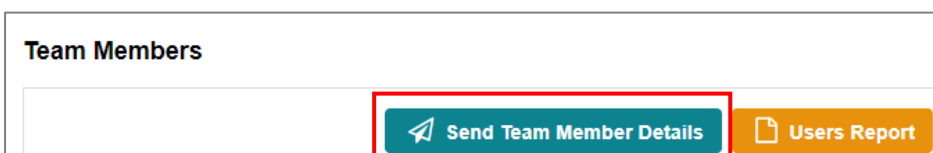
Owing

Month	1st - 15th	16th - End	Full
April	-	-	-
March	-	3766.19	3766.19

2. Scroll down to the *Team Members* section:



3. Click *Send Team Member Details*:




The following screen will appear:

Payday Filing > Employee Service > Select Employees

Please select employees to send to IRD

<input type="checkbox"/>	Employee	Last Sent	Enabled?	Terminated?	Changed?
<input type="checkbox"/>	George Hamilton	Mar 28 2019 11:16 am	Yes	No	No
<input checked="" type="checkbox"/>	Jane Smith		Yes	No	No
<input type="checkbox"/>	Frank Underwood		No	Yes	No
<input checked="" type="checkbox"/>	Lisa Glass		Yes	No	No
<input checked="" type="checkbox"/>	Harry Brown		Yes	No	No
<input type="checkbox"/>	Example Unpaid		No	Yes	No



4. Here you will see that the employees whose details have not been sent to the IRD, have been automatically selected. You can also see that the employees who are no longer employed by you are highlighted in red, meaning that their details won't be sent to the IRD. When you are happy with the bulk selection, scroll down to the bottom and click *Save*:



The following screen will appear:

Payday Filing > Employee Service > Submission Detail

Submitted by Timesmart Limited on Mar 28 2019 11:20 am

	Employee	Operation	Operation Status	Processed Time	Errors	Response Code	Response Message
1	Jane Smith	Create	Not Processed				
2	Lisa Glass	Create	Not Processed				
3	Harry Brown	Create	Not Processed				

