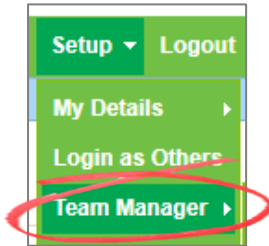


SETTING UP A SALARY SACRIFICE

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



The following screen will appear:

Team Manager													Add Team Member	Bulk Activity Codes	Opening Balances	Leave Calendar
Search		Job Title	Access Level	Team	Remuneration Type	Pay Frequency	Employee Type	Location					Status	GO		
			-- all --	-- all --	-- all --	-- all --	-- all --	-- all --					active			
viewing records : 1 to 9 of 9																
Actions (selected) ▾																
<input type="checkbox"/>	Team Member	Job Title	Access Level	Team	Email / Username	IRD Number	Daily Contracted Hours	Remuneration Type	Pay Frequency	Gross Annual Remuneration	Employee Type	Location(s)	Actions			
<input type="checkbox"/>	Elizabeth Green		Administrator		Liz		-	salary	fortnightly	-	Admin only	• no location	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>			
<input type="checkbox"/>	George Hamilton	Farm Manager	Farm Manager		george@gmail.com / George	123-456-789	10.00	salary	fortnightly	60400.00	Full-time	• Waihou Farm	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>			
<input type="checkbox"/>	Harry Brown	Relief Milker	Relief Milker		hannah.raza@agrismart.co.nz / Harry	111-222-333	-	wages	fortnightly	-	Casual	• Kaireka Farm	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>			
<input type="checkbox"/>	Jane Smith	Farm Assistant	Farm Manager		hannah.raza@agrismart.co.nz / Jane	111-222-333	10.00	wages	fortnightly	76756.00	Full-time	• Farm 1	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>			
<input type="checkbox"/>	Lisa Glass	Farm Assistant	Farm Assistant		hannah.raza@agrismart.co.nz / Lisa	111-222-444	10.00	salary	fortnightly	62969.00	Full-time	• Farm 1 • Waihou Farm	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>			

Click on the applicable team member to bring up their details:

General	Employment Details	Payroll	Leave	Payroll Audit	Notes	Reminders	User Files	Skills	Preferences
Username : * <input type="text" value="George"/> Password : * <input type="password" value=""/> minimum 8 characters (minimum 2 numbers, case sensitive) First Name : * <input type="text" value="George"/> Last Name : * <input type="text" value="Hamilton"/> Employee Type : * <input type="text" value="Full-time"/> Remuneration Type : * <input type="text" value="salary"/> Email Address : <input type="text" value="george@gmail.com"/> Job Title : <input type="text" value="Farm Manager"/> Team : <input type="text" value="no team"/> Primary Location : <input type="text" value="Waihou Farm"/> Other Locations : <input type="text" value="Select Some Options"/> Access Level : <input type="text" value="Farm Manager"/> Health and Safety Responsibility Level : <input type="text" value="manager"/> Roster display colour : <input type="text" value="test"/> Hide rostered days off : <input checked="" type="checkbox"/> Exclude from Rosters and Tasks : <input type="checkbox"/> Pay Week Ending Day : <input type="text" value="Sunday"/> Exclude from dashboard : <input type="checkbox"/> Access Timesheet Viewer Report : <input type="checkbox"/> * this overrides access level Timesheet Supervisor : <input type="checkbox"/>									
<input type="button" value="save >>"/>									

Select the *Active KS Member* option:

Kiwisaver Status :	Active KS Member
Over Opted Out Date :	<input type="text"/>
Pay Frequency :	Active KS Member
Gross Annual Remuneration :	Contribution Holiday
Eligible / Pay Period :	Not eligible for KS
Holiday Entitlement :	Non-Member
Rostered Days On :	Opted Out
Rostered Days Off :	

Enter in the *KiwiSaver Contributions*:

Employee KiwiSaver Contribution :	<input type="text" value="4"/>	%
Employer KiwiSaver Contribution :	<input type="text" value="3"/>	%

Click *Save*:

General
Employment Details
Payroll
Leave
Payroll Audit
Notes
Reminders
User Files
Skills
Preferences

IRD Number :

Employee Code :

Tax Code :

* Start Date :

Date Entitled To Sick Leave : (casual employees not entitled to sick leave)

Termination Date :

Employee KiwiSaver Contribution : %

Employer KiwiSaver Contribution : %

KiwiSaver Status :

KiwiSaver Opted Out Date :

Pay Frequency :

* Gross Annual Remuneration : (total package value)

Amount Payable / Pay Period :

* Number of Weeks Holiday Entitlement : (only leave this field as zero if the employee is a Casual Employee)

* Rostered Days On :

* Rostered Days Off :

* Daily Contracted Hours :

* Weekly Contracted Hours :

* Actual Hourly Rate Paid :

Minimum Hourly Rate : (leave this blank to use default rate of 17.70)

Sick Day entitlement for the full year :

Maximum number of sick days available :

Latest pay change :

Latest pay period start :

Latest pay period end :

Bank Account Number :

Click on the *Payroll* tab:

General
Employment Details
Payroll
Payroll Audit
Notes
Reminders
User Files
Skills
Preferences

Payslips :

Tax Code :

IRD Number :

Autocreate Payslips : (will be created 0 days after the end of the pay period)

Regular Payments

Add regular payments this team member will receive each pay where the end date falls between from and to.
If dates are left empty, payments will be included indefinitely.

category	description	amount	from	to	exclude from KiwiSaver	
					<input checked="" type="checkbox"/>	<input type="button" value="+"/>

Regular Non-Taxable Allowances

Add regular non-taxable allowances team member will receive each pay where the end date falls between from and to.
If dates are left empty, payments will be included indefinitely.

category	description	amount	from	to	
					<input type="button" value="+"/>

Regular Deductions

Add regular deductions this team member will pay each pay where the end date falls between from and to.
If dates are left empty, deductions will be included indefinitely.

category	description	amount	from	to	
					<input type="button" value="+"/>

Other Deductions

Regular Child Support Payments :

Regular Taxable Extra Pay :

Tax on Extra Pay :

Compulsory Student Loan Deductions : % from to

Voluntary Student Loan Deductions : \$ from to

Payroll Opening Balances

This only needs to be done once when migrating from another payroll system during the financial year.

Opening Balance Date :

Opening YTD Payments :

Opening YTD Deductions :

Opening YTD Non-Taxable Allowances :

Go to the *Regular Deductions* section and click on the *plus* icon:

Regular Deductions

Add regular deductions this team member will pay each pay where the end date falls between from and to.
If dates are left empty, deductions will be included indefinitely.

category		description	amount	from	to	
	⚙					+

Enter in *Salary Sacrifice* for the *Description*:

Regular Deductions

Add regular deductions this team member will pay each pay where the end date falls between from and to.
If dates are left empty, deductions will be included indefinitely.

Category		Description	Amount	From	To	
Rent	⚙	Rent	\$ 200.00	from	to	×
-- select category --		Salary Sacrifice	\$ amount *	from	to	×

Enter in the amount.

To ensure the deduction amount is correct, see below examples:

1. Salary when there is no rent

- Annual Salary: \$52000
- Per period amount: $\$52000/26 = \2000 (salary per fortnight)
- Employer KiwiSaver: 3%
- Salary sacrifice amount: 3% of \$2000 = **\$60**

2. Salary when there is Rent

- Annual Salary (including rent): \$62400
- Less annual rent amount: $\$62400 - \$10400 = \$52000$
- Per period amount (excluding rent): $\$52000/26 = \2000 (salary per fortnight excluding rent)
- Employer KiwiSaver: 3%
- Salary sacrifice amount: 3% of \$2000 = **\$60**

3. Salary when there is Holiday Pay

- Annual Salary (including holiday pay): \$56160
- Less annual holiday pay amount: $\$56160/1.08 = \52000
- Per period amount (excluding holiday pay): $\$52000/26 = \2000 (salary per fortnight excluding holiday pay)
- Employer KiwiSaver: 3%
- Salary sacrifice amount: 3% of \$2000 = **\$60**

4. Salary when there is Holiday Pay and Rent

- Annual Salary (including rent and holiday pay): \$67392
- Less annual holiday pay amount: $\$67392/1.08 = \62400
- Less annual rent amount: $\$62400 - \$10400 = \$52000$
- Per period amount (excluding rent and holiday pay): $\$52000/26 = \2000 (salary per fortnight excluding rent and holiday pay)

- Employer KiwiSaver: 3%
- Salary sacrifice amount: 3% of \$2000 = \$60

Click **Save**:

General	Employment Details	Payroll	Leave	Payroll Audit	Notes	Reminders	User Files	Skills	Preferences
Payroll: Report / Labels Tax Code: M IRD Number: 123-456-789 Autocrate Payslips: <input type="checkbox"/> (will be created 0 days after the end of the pay period) Payslip Option: <input type="radio"/> Email <input type="radio"/> Print <input checked="" type="radio"/> Email & Print <input type="radio"/> No Email / Print									
Regular Payments									
Add regular payments this team member will receive each pay where the end date falls between from and to.									
If dates are left empty, payments will be included indefinitely.									
Category	Description	Amount	From	To	exclude from Kiwi Saver				
Rent	Rent	\$ 200.00	from	to	<input checked="" type="checkbox"/>				
Regular Non-Taxable Allowances									
Add regular non-taxable allowances team member will receive each pay where the end date falls between from and to.									
If dates are left empty, payments will be included indefinitely.									
Category	Description	Amount	From	To					
Wet Weather Gear	Wet Weather Gear	\$ 14.25	from	to					
Phone Allowance	Phone Allowance	\$ 8.50	from	to					
Regular Deductions									
Add regular deductions this team member will pay each pay where the end date falls between from and to.									
If dates are left empty, deductions will be included indefinitely.									
Category	Description	Amount	From	To					
Rent	Rent	\$ 200.00	from	to					
-- select category --	Salary Sacrifice	\$ 60.00	from	to					
Other Deductions									
Add Payslip deductions									
If dates are left empty, deductions will be included indefinitely.									
Category	Description	Total Amount	From	Amount Per Pay Period	Balance				
Regular Child Support Payments: <input type="text"/>									
Regular Taxable Extra Pay: <input type="text"/>									
Tax on Extra Pay: <input type="text"/>									
Compulsory Student Loan Deductions: 0 % From <input type="text"/> to <input type="text"/>									
Voluntary Student Loan Deductions: \$ 0 from <input type="text"/> to <input type="text"/>									
Payroll Opening Balances									
This only needs to be done once when migrating from another payroll system during the financial year.									
Opening Balance Date: Apr 01, 2018									
Opening YTD Payments: 0.00									
Opening YTD Deductions: 0.00									
Opening YTD Non-Taxable Allowances: 0.00									
Save >>									