

# Sage Micropay Professional v12.4

## **User Guide**

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## Sage Micropay Professional

This release contains the following new features:

### New Licensing System

The Micropay Professional [licensing system](#) has been simplified so that it's easier than ever to renew and upgrade your licence.

### New Deduction Type: APSS

Micropay Professional now supports Approved Profit Share Schemes (APSS) through the new [APSS deduction sub-type](#).

You can use the APSS deduction sub-type to exempt foregone pay amounts associated with an Approved Profit Share Scheme (APSS) from PAYE and Employer PRSI.

However, Employee PRSI and USC are applied at the time the pay is foregone.

Useful features you may not be using

Are you using Micropay Professional to its full potential?

Click the links below to view short interactive demonstrations of features you may not be using:

- [Timesheet Import](#)

Importing timesheet information from a simple CSV file

- [Batch Timesheet Entry](#)

Processing a batch of timesheets together.

- [Holiday Accrual, Tracking and Processing](#)

Using Micropay Professional's comprehensive set of holiday accrual, tracking and processing features.

- [Interim Paypath](#)

Paying an employee an advance amount.

- [Nett-to-Gross Payments](#)

Configuring the system to pay the employee a specific nett amount in each period.

Noteworthy Features of Micropay Professional

### Improved reinstate leaver process

The procedure for reinstating a former employee to the payroll has been simplified. For more information, see [How do I reinstate an employee?](#)

### Foreign language sample payslips

Micropay Professional provides a payslip translation guide for Polish, Lithuanian and Russian employees. This contains useful explanations of important items on the Micropay Professional payslip. To access these, select the **Help - Payslip Foreign Translations** menu option.

## Holiday Accrual and Processing

Micropay Professional offers a comprehensive set of [Holiday Accrual and Processing](#) features.

## Construction Workers Pensions

You can set up [Construction Workers Pensions](#) in Micropay Professional.

## Batch Timesheet Entry

You can process timesheets in batches using Micropay Professional's [Batch Timesheet Entry](#) feature.

## Essential Cover Plus

The Essential Cover Plus support package offers a range of support and training services relating to standard and extra features. For more information, see:

<http://www.sage.ie>

### Important Topics

[Setting Up the Payroll System](#)

[How do I set up pensions?](#)

[Payroll Reports](#)

[Why have I been locked out of the system?](#)

[Frequently Asked Questions](#)

[Common Messages](#)

If you are using Windows 2000

Microsoft has ended public and technical support for Windows 2000, including security updates.

Your payroll system will continue to work, but Sage strongly recommends that you upgrade to a newer Windows version. This will help to safeguard your system's stability and security.

The links below provide more information:

[Windows 2000 End-of-Support Solution Centre](#)

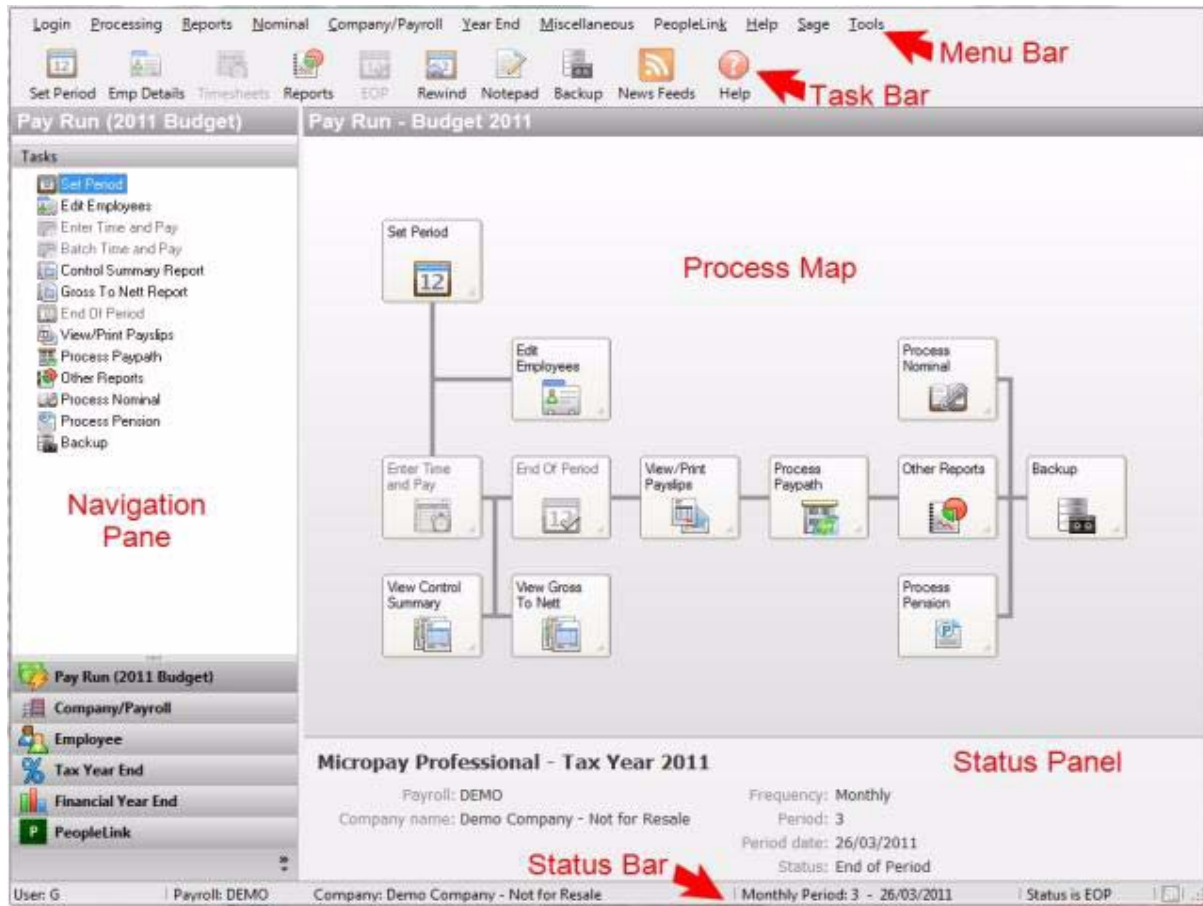
[End of support for Windows 98, Me and XP Service Pack 1](#)

## The Desktop

In Micropay Professional, you work with windows that display over the main workspace.

- [Navigation Pane](#)
- [Process Map](#)
- [Menu Bar](#)
- [Task Bar](#)
- [Status Panel and Status Bar](#)
- [News Feed](#)





## Navigation Pane



The Navigation Pane is on the left-hand side of the application window. It contains a number of view buttons corresponding to the application's main functions.

Clicking a button opens a view containing a list of related sub-functions:

#### **Pay Run**

#### **Company/Payroll**

#### **Employee**

#### **Tax Year End**

#### **Financial Year End**

#### **PeopleLink**

For example, to set a payroll period using the navigation pane, click the **Pay Run** button to open the Pay Run view. Then click the **Set Period** option.

**Note:** You can add and remove Navigation Pane buttons using the drop-down list at the bottom of the pane.

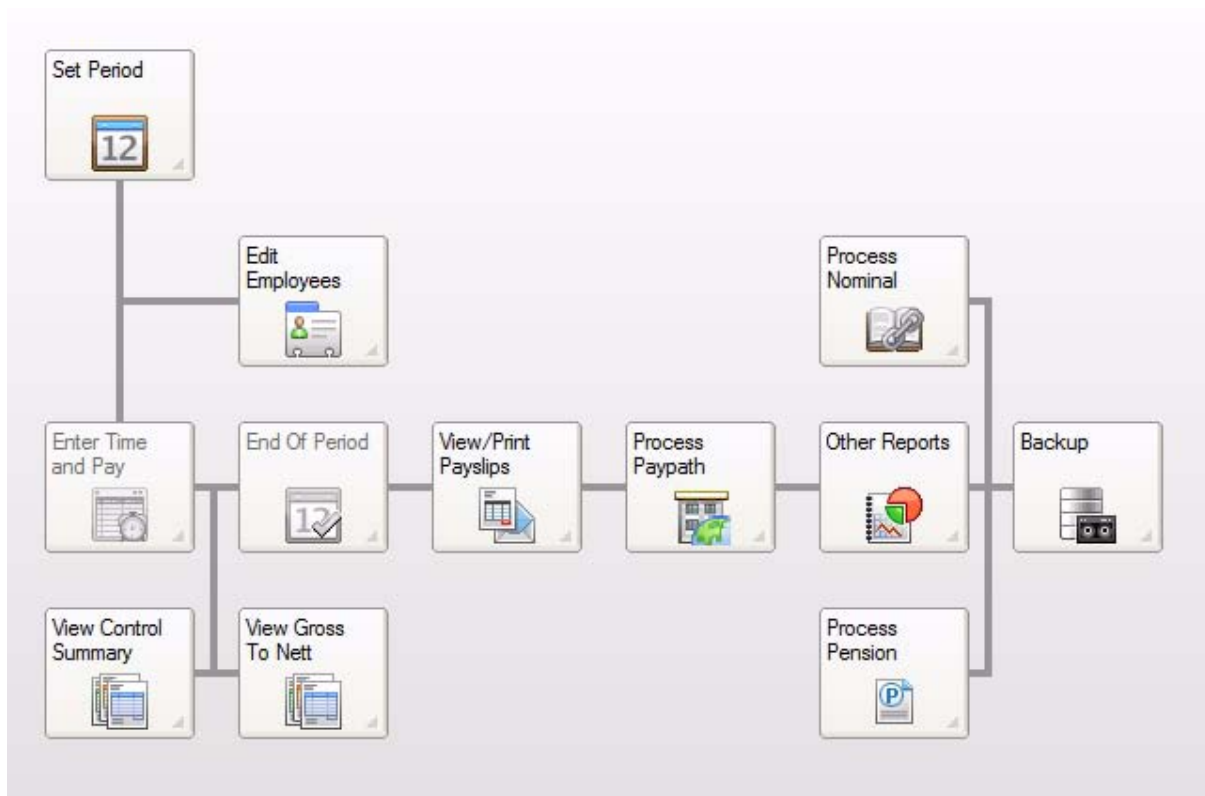
See also

[The Desktop](#)

## **Process Map**

The desktop contains a process map that guides you visually through the tasks involved in a complete payroll period.

You can click an icon in the process map to carry out the associated task.



See also

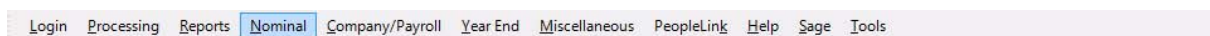
[The Desktop](#)

## Menu Bar

The function menu bar is located just below the Micropay Professional title bar.

Each option in the menu bar provides access to a range of menu options.

For example, to set a payroll period using the menu bar, you select the **Processing - Set Period** menu option.











See also

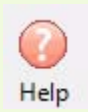
[The Desktop](#)

## Task Bar

All the functions you need to process a payroll are displayed as buttons in the task bar below the menu bar. When a button is greyed out, it is currently unavailable for use.

These are the buttons in the Micropay Professional task bar:

 <p>Set Period</p>	<p><b>Set Period</b> - Used to set the start of period, with options to set the period number, the run date, and the cheque and Paypath dates. A pay period must be set before the corresponding payroll can be processed.</p>
 <p>Emp Details</p>	<p><b>Employee Details</b> - Used to create or maintain records for each of the employees for the currently selected company payroll</p>
 <p>Timesheets</p>	<p><b>Timesheets</b> - Used to process the employee timesheets for the current pay period. For hourly paid employees, this function is used to enter the hours worked against the various payments applicable. You can also enter any variable values for the period.</p>
 <p>Reports</p>	<p><b>Reports</b> - Provides access to the predefined reporting functions within Micropay Professional.</p>
 <p>EOP</p>	<p><b>EOP</b> - (End Of Period) Used to process the end of the current payroll period. Use once you have completed your timesheets and reports for the current period and are satisfied that the details are correct. This option updates the employee details, cost analysis, P30/CC124, and 'closes' the current pay period.</p>
 <p>Rewind</p>	<p><b>Rewind</b> - Can be used to reverse the current End of Period. This will give you access to timesheets again. You can only rewind the current period.</p>
 <p>Notepad</p>	<p><b>Note</b> - Opens the <a href="#">notepad</a> for the payroll that is currently open.</p>
 <p>Backup</p>	<p><b>Backup</b> - Used to back up your Micropay Professional payroll data files. This should be used regularly, especially after each End of Period, so you have a backup of the company payroll, should you require it.</p>
 <p>News Feeds</p>	<p><b>News Feeds</b> - Used to access and set up Micropay Professional news feeds. This provide you with live information about product updates and other important information. For more information, see <a href="#">News Feed</a>.</p>



**Help** - Opens the Micropay Professional online help. You can also press the **F1** key for context-sensitive online help.

See also

[The Desktop](#)

## Status Panel and Status Bar

The status panel and status bar at the bottom of the Micropay Professional window provide essential payroll information.

The **status panel** provides the following information:



- tax year
- company payroll code
- company payroll name
- payroll frequency
- payroll period
- period date
- payroll status

### Micropay Professional - Tax Year 2011

Payroll: DEMO	Frequency: Monthly
Company name: Demo Company - Not for Resale	Period: 4
	Period date: 30/04/2011
	Status: End of Period

The **status bar** at the bottom of the screen provides information including:

- user name
- company name
- payroll name
- period number
- payroll run date
- payroll status

User: G	Payroll: DEMO	Company: Demo Company - Not for Resale	Monthly Period: 4 - 30/04/2011	Status is EOP	 
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Payroll status is indicated in the status bar as follows:

- SOP = Start of Period status
- CALC = Calculation status
- EOP = End of Period status

See also

[The Desktop](#)

## News Feed

The News Feed feature enables you to receive an alert within the payroll system itself whenever an update or critical information is available. You need an Internet connection to use this feature.

1. To enable news feeds in Micropay Professional, begin by selecting the **Help - View Micropay News** menu option, or click the **News Feeds** button in the task bar.
2. The News Feeds page opens. You can switch between this and the Micropay Desktop using the tabs at the bottom of the page.



3. Click the **Configure Feed** button to specify your News Feed connection settings.
4. The Feed Configuration window opens. To enable the News Feed feature, select the **Enable** checkbox.
5. You can change the update frequency if you wish.
6. To make these settings your defaults, click **Set As Default**.
7. Click **OK** to save your settings.
8. To customise how the News Feed provides information, click the **Settings** button.

You can choose to receive popup alerts when new messages arrive. You can also configure proxy settings.

9. Click **OK** to save your changes.

See also

[The Desktop](#)

## Frequently Asked Questions

This section deals with some of the most frequently asked questions about Micropay Professional.

Why am I being prompted to upgrade the payroll software?

If you try to access a payroll belonging to a newer version of the payroll software than you are running, you will be prompted to upgrade.

For example, you may be using a Micropay Professional client computer that was not upgraded when the server and other clients were upgraded.

Or you may be attempting to restore a [backup](#) that was created in a newer version than you are running.

We strongly recommend that you click **Upgrade Now** when prompted onscreen.

### Can I continue without upgrading?

In rare circumstances you may consider it necessary to access the payroll data without upgrading your software.

However, you risk losing payroll information if you opt to continue without upgrading. This is because the payroll schema contains data that may not be interpreted correctly by your version.

How do I perform a backup?

There are two types of backup in Micropay Professional:

- As an ordinary user, you can back up the current company payroll's data by doing one of the following:
  - click **Backup** in the desktop's process map
  - select the **Miscellaneous - Backup** menu option
  - click the **Backup** button

Then specify a storage location for the backup data.

For more information about backing up as an ordinary user, see [Payroll Backup and Restore](#).

- As the payroll system administrator, you can back up data and support files by selecting **Miscellaneous - Backup** and specifying the relevant backup settings.

For more information about backing up as the payroll system administrator, see [Administrative Backup and Restore](#).

What is the Period Archive?

The Period Archive enables you to take automatic pay-period archives. Reverting to an archived period enables you to generate reports from that period, and then switch back to your current pay period to continue with the payroll.

For more information, see [Period Archive](#).

Can I record employee and employer pension deductions?

Micropay Professional allows you to record both employee and employer pension deductions. By generating a Pension Contribution Report (by clicking the **Pension Contrib** button in the Payroll Reports window), you can access information about these deductions.

See [Setting Up Deductions](#).

When setting up a new employee, what P45 information do I need to enter?

When you are setting up a new employee, the following P45 information needs to be entered:

- single-period standard cut-off rate
- total single-period tax credit values

After you get a tax credit certificate from the Revenue Commissioners for this new employment, you can enter the following values:

- total gross pay
- total tax paid to date

See [Mid-Year Employee Setup](#).

How should I deal with an employee who is leaving or has left?

- If the employee is leaving at the end of the current pay period, and WILL be paid at the end of the period, you can mark the employee as a leaver in the Timesheet Entry window.
- If the employee is leaving at the end of the current pay period, and WILL NOT be paid at the end of the period, you enter the finish date and period in the Employee Details window's Tax/PRSI tab.

See [How do I mark an employee as a leaver?](#)

An employee is to receive redundancy pay where a portion of the pay is at PRSI code A1, and another portion is at PRSI code K1. How can I deal with this?

Micropay Professional allows two PRSI codes to be processed in the same period. You do this using the Bonus Run functionality.

See [How do I carry out a bonus run?](#)

The payroll report I need is not listed as a standard report. Is there a way that I can generate the report I need?

Micropay Professional offers two tools that enable you to create custom reports:

- **Report Writer:** This utility allows you generate reports showing cumulative information.
- **Advanced Report Writer:** This application can be used in conjunction with Micropay Professional. It provides a more advanced form of report writing than the Report Writer utility. It allows you to generate a report showing historical information broken down into each pay period.

Advanced Report Writer is not available in [Micropay Professional Lite](#).

See [Payroll Reports](#).

## Common Messages

This section deals with some of the common messages you may encounter in Micropay Professional.

Please close any open windows before selecting this option.

You can use just a single option at a time in Micropay Professional. For example, if the Set Period window is open and you try to open an Employee Details record, this message will be displayed.

Option currently locked.

This message means that the system is locked. Only the system administrator can disengage the lock. When you log in as the administrator, you select **Advanced - Clear Multi-User Locks**. It is important that users are logged out at this time.

See [Why have I been locked out of the system?](#)

This sort code is not on file.

When you enter a bank sort code that is not already listed in the application's bank file, this message displays. You need to add the relevant sort code to the bank file. To do this, you log in as the payroll system administrator. Then you select **Tables - Bank Details** and make the necessary changes.

See [Setting Up Bank Details](#).

Root directory will be deleted.

When you are backing up data onto a floppy disk (Sage recommends that you use a more reliable storage medium instead, such as a network share or a memory stick), you may encounter this message. It means that if you proceed with the backup, all existing data on the disk will be deleted and replaced by the new backup.

A backup already exists in the selected folder. If you continue this backup will be lost.

Similarly to the previous message, this means that the location at which you wish to back up your data already contains a backup. If you proceed, the new backup will overwrite the old one.

## Micropay Professional Lite

If you are a Micropay Professional Lite user, you may come across references in documentation to features that you do not see in your payroll system.

These include:

- [Multi-Timesheets](#)
- [Cost Centres](#)
- [Job Codes and Location Codes](#)
- [Cost Allocations](#)
- [Editing Cost Analysis Details](#)



- [User Defined Fields](#)
- [Employee Profiles](#)
- [ARW](#)
- [Payments Report](#)
- [Deductions Report](#)
- [JLC \(Joint Labour Committee Pay Rates\)](#)

## Nominal Integration

If you have a Micropay Professional Lite Nominal licence, you should have access to the [Nominal Integration](#) feature.

However, this is not available with other Micropay Professional Lite licences.

## Upgrading your Payroll System

If you would like to speak to a Sage representative about upgrading to receive these features, call **1890 88 20 60**.

## SageCover

To get the most from your software, Sage Ireland provides a comprehensive **SageCover** service that ensures that you get the best results for your business.

Purchasing **SageCover** provides you with year-round peace of mind and assurance. Most importantly, it supports you when you are dealing with the government's annual payroll year-end changes. In previous years, these changes involved legislative amendments relating to the following areas:

- Tax credits and standard-rate cut-off
- Employee PRSI
- Employer PRSI
- Payroll in the Euro currency environment
- Introduction of PRSAs and benefit-in-kind

**SageCover** provides updates to keep you current with legislative changes, which ensures that your employees are always paid correctly without the need for extra manual calculations. It guarantees a smooth and trouble-free process.

Our customer support advisers can help you to adopt the best payroll procedures. Have you ever wondered how tax is actually calculated using the Revenue tax tables? Have you ever set up an employee's sick pay or maternity pay? Have you ever been asked for a breakdown of your company's wage bill in each department, as well as for the company as a whole? Sage Ireland's support helpline staff will answer such questions carefully and patiently to ensure that you understand fully, whether you are a payroll expert or a beginner.

We can help with the cost of running your business by offering discounts on a range of Sage products and services. As you grow, you may want to purchase a software upgrade to cope with your increased payroll needs. As a **SageCover** member, you qualify for a 25% discount on this purchase.

As a **SageCover** member you receive the following services:

- **Telephone Helpline - available Monday to Friday 9am to 5pm**

Access to our expert customer service staff, who are fully trained in all aspects of computerized payroll and payroll fundamentals, including holiday pay, manual PAYE, PRSI calculations, pensions and sickness.

- **E-mail Support**

You can e-mail Sage with your queries at [support@sage.ie](mailto:support@sage.ie), and in turn can receive knowledge-base articles by e-mail from our support advisors.

- **Knowledge Base**

Access to articles that cover Sage software operations, plus Accounting and Payroll issues.

These articles can be accessed 24 hours a day at the Sage web site - [www.sage.ie](http://www.sage.ie).

- **Maintenance Updates**

You receive software maintenance updates free of charge. These updates include all legislative updates.

At the end of each tax year you receive a program update for the new tax year, and documentation explaining payroll year-end procedures.

To purchase SageCover, or for further information, call **1890 88 20 60** (Republic of Ireland) or **0800 169 0315** (Northern Ireland).

Alternatively, e-mail [sales@sage.ie](mailto:sales@sage.ie), or visit our website: [www.sage.ie](http://www.sage.ie).

See also

[Setting Up the Payroll System](#)

## Previous Releases

- [New in Version 10.2](#)
- [New in the Payroll Year End 2009 Release](#)
- [New in the Version 9.7 Release](#)
- [New in the Supplementary Budget 2009 Update](#)
- [New in the Budget 2009 Update](#)
- [New in the PYE 2008 release of Micropay Professional](#)

## New in the Jobs Initiative Release

This release of Micropay Professional brought your payroll software up to date with the requirements of the Government's Jobs Initiative of May 2011.

### New Employer PRSI Rate

The principal change affecting payroll is that the lower rate of [employer PRSI](#) for A0 and AX employees (previously 8.5%) will be halved to 4.25% on jobs paying up to € 356 per week.

This change applies to payments made to employees on or after July 2nd 2011, and is intended to remain in place until the end of 2013.

### New 'Shares' Payment Type

The new Shares payment type enables you to record Share-Based Remuneration amounts in compliance with the provisions of the Jobs Initiative, which has abolished the employer PRSI previously applicable to these amounts. This abolition applies retrospectively to share-based remuneration amounts dating on or after January 1, 2011.

For more information, see [Setting Up Payments](#).

## New in the PYE 2010 Release

### Updated Levy Recalculations

The software's [automatic levy recalculations](#) were updated to comply with 2010 Payroll Year End requirements.

These cover:

- Health Levy
- Income Levy
- Pension-Related Deduction (Pension Levy)

## New in Micropay Professional v11.0

This version of Micropay Professional includes a number of improvements and enhancements, including the following new features:

- **JLC pay rate enforcement**

The new [JLC Feature](#) enables you to comply with the statutory minimum rates of hourly pay for workers in the 'Retail, Grocery and Allied Trades' category.

These rates were agreed by a Joint Labour Committee (JLC) and are contained in Employment Regulation Orders made by the Labour Court.

To view an interactive demonstration of the JLC Feature, [click here](#).

- **Improved Timesheet Entry screen**

The [Timesheet Entry screen](#) now includes a Timesheet Calculation pane that provides you with a summary of the values that will appear in the employee's payslip, based on the values currently entered in the employee's timesheet.

- **New version of the P35 data file**

As of March 26, 2010, the Revenue Commissioners require that P35 returns must conform to a new format. This version of Micropay Professional [generates a P35 data file](#) that complies fully with the new requirement.

- **Improved integration with Sage HR**

Micropay Professional's integration with Sage HR has been improved. For more information, [Importing Employee Records from Sage HR](#).

- **Improved pension amount setup**

You can now specify both employee and employer standard pension amounts in the [Employee Details window](#).

And the [Timesheet Entry window](#) enables you to adjust these amounts when you are preparing the employee's current timesheet.

## New in Version 10.2

The Micropay Professional v10.2 release contained a number of behind-the-scenes enhancements and improvements, and the following new features:

- **Electronic version of the CSO NES report**

You can generate an [electronic version of the CSO National Employment Survey report](#), which you can submit to the CSO by uploading it on their website.

- **PRD30 and PRD45 reports**

Sage Micropay Professional now also enables you to generate the [PRD30](#) and [PRD45](#) reports.

## **New in the Payroll Year End 2009 Release**

This release of Micropay Professional prepares the software for Payroll Year End 2009 tasks. It includes a number of new features and enhancements, including:

### [New statutory Tax Year End reports](#)

Micropay Professional now supports the following [Tax Year End reports](#) required for the first time in 2009:

- [PRD60](#)
- [PRD35](#)

### [Health Levy, Income Levy and Pension-Related Deduction recalculation](#)

To ensure that your Tax Year End values are correct, the Health Levy, Income Levy and (if applicable) Pension-Related Deduction values are recalculated when an employee reaches 52 insurable weeks in the tax year.

If the employee is entitled to a refund on any of these amounts, it will be included in their payslip in the pay period in which the recalculation was carried out.

For more information, [click here](#).

### [New printable Payroll Year End 2009 checklist](#)

You can open a printable Payroll Year 2009 checklist by selecting the **Year End - Tax - View Checklist** menu option.

### [Easy access to the Payroll Year End 2009 User Guide](#)

You can open a printable copy of the Payroll Year End 2009 user guide by selecting the **Year End - Tax - View User Guide** menu option.

### [Improved Payroll and Employee Notepads](#)

The [Payroll Notepad](#) and [Employee Notepad](#) have been made easier to use. These provide a useful way of setting up reminders and adding notes to payslips.

## **New in the Version 9.7 Release**

The v9.7 release of Micropay Professional contains a number of updates and enhancements that improve the software's performance and usability.

In addition, it offers the following new features:

### [CSO Earnings, Hours and Employment Costs Survey \(EHECS\) XML report output](#)

You can now generate an electronic XML version of your EHECS report. You can submit this electronically on the CSO web site. For more, [click here](#).

### [Income Levy Override](#)

You can use the Timesheet Entry window's **Override** tab to make adjustments to the Income levy amounts calculated by the system. For more, [click here](#).

## New in the Supplementary Budget 2009 Update

This version of Micropay Professional addressed the payroll changes introduced in the supplementary Budget of April 2009. These changes are as follows:

### New Income Levy rates and thresholds

- The previous 1% rate has been raised to 2%.
- The previous 2% rate has been raised to 4%.
- The previous 3% rate has been raised to 6%.
- The lower annual threshold of € 100,100 has been reduced to € 75,036 for the new 2% rate.
- The higher annual threshold of € 250,120 has been reduced to € 174,980 for the new 6% rate.

For more information, see [Income Levy](#).

### New PRSI Ceiling

The PRSI Ceiling has been raised from € 52,000 to € 75,036.

### New Health Levy rates and thresholds

- The previous 2% rate has been changed to 4%.
- The previous 2.5% rate has been changed to 5%.
- The annual threshold has been reduced from € 100,100 to € 75,036.

### New Pension-Related Deduction (PRD) rates and thresholds

Threshold	Rate
First € 15,000	0% (exempt)
Next € 5000	5%
€ 20,000 - € 60,000	10%
€ 60,000 +	10.5%

The following pre-Supplementary Budget PRD rates and thresholds apply to payments made in March and April 2009:

Threshold	Rate
First € 15,000	3%
Next € 5000	6%
€ 20,000 +	10%

For more information about the PRD, see [Pension-Related Deduction \(PRD\)](#).

### When do these changes come into effect?

All budget changes come into effect on the May 1, 2009.

The new rates and thresholds apply to payments made on or after that date, even if the payment was actually earned before that date.

The old rates and thresholds apply to payments made on or before April 30, 2009.

### How is holiday processing affected?

If you need to process holidays that span the end of April and the start of May, it's important to be aware that

the system will not be able to process holiday weeks with the new rates if the run date for the initial period is in May.

If a pay period is in April, but an associated holiday period is in May, the holiday period should be processed separately. This will ensure that it will be processed correctly with the new rates. Contact your Micropay Professional support centre if you need more information.

### PRSI Ceiling for the 2009 Tax Year

The Supplementary Budget, announced in April 2009, increased the PRSI ceiling from € 52,000 to € 75,036 per annum.

However, the Department of Social Protection subsequently issued guidelines relating to a claw back of PRSI payments from employees who had already exceeded the € 52,000 ceiling.

As a result of this, it is possible for certain employees to have a **personal PRSI ceiling value**.

The following information is taken from page 12 of the SW 14 document issued by the Department of Social and Family Affairs in April / May 2009 (see [http://www.welfare.ie/EN/Publications/sw14\\_apr09/Documents/sw14\\_apr09.pdf](http://www.welfare.ie/EN/Publications/sw14_apr09/Documents/sw14_apr09.pdf)):

#### ***Employees who reach the PRSI ceiling prior to 1 May 2009***

*Most employees will not have reached the previous PRSI ceiling of € 52,000 by 1 May 2009 and will therefore continue to pay PRSI up to the revised ceiling of € 75,036.*

*Where an employee reached the PRSI ceiling of € 52,000 prior to 1 May 2009, earnings from 1 May 2009 to 31 December 2009 will be subject to a ceiling of € 23,036.*

*That is, the employee concerned, having ceased payment of PRSI prior to May 1, will recommence payment of PRSI on earnings from May 1 and will, over the course of the year, pay up to the € 75,036 ceiling.*

*(Where an employee commences employment and presents a P45 dated after May 1, the employer should assume that total income, as recorded on the P45, has been subject to the correct rate of PRSI.)*

Micropay Professional calculates a **personal PRSI ceiling for any employees who had already exceeded the € 52,000 ceiling by the 30th of April**.

#### So what happens when an employee's pay is calculated for the first time after April 30?

First, Micropay Professional determines whether their 'PRSIable Pay to Date' value exceeds the old € 52,000 ceiling.

- If the employee's pay has not exceeded this value, it applies the standard new ceiling value of € 75,036 to that employee.
- If the employee has exceeded the € 52,000 value, the system will add € 23,036 (i.e. the difference between the old € 52,000 ceiling and the new annual ceiling value of € 75,036) to the employee's 30th April amount of 'PRSIable Pay to Date'.

The following examples of PRSI ceiling calculations detail the two possible scenarios that can arise:

#### Example 1: Standard PRSI Ceiling Applied

- Period 18, Run Date: 1st May 2009
- PRSIable Pay to Date (from Tax Deduction Card): € 38,500
- PRSI Ceiling (on Details 1 tab of Employee Details): € 75,036 (Standard PRSI Ceiling from May 1st 2009)

### Example 2: Personal PRSI Ceiling Applied

- Period 18, Run Date: 1st May 2009
- PRSIable Pay to Date (from Tax Deduction Card): € 60,000
- PRSI Ceiling (on Details 1 tab of Employee Details): € 83,036 (€ 60,000 + € 23,036)

(In Example 2, the employee did not pay PRSI on € 8,000 that was earned prior to May 1st, because this amount had exceeded the original € 52,000 ceiling. From May 1st, the employee has an additional € 23,036 added as a second PRSI ceiling. This value is added to their PRSIable pay of € 60,000 at the end of April. The employee will stop paying PRSI contributions when their PRSIable pay exceeds € 83,036.)

### See also

[Mid-Year Employee Setup Procedure](#)

### Personal PRSI Ceiling Check (Part 1)

Before you begin Payroll Year End procedures for 2009, it's important that you do everything you can to ensure that each employee's pay has been calculated correctly.

To assist you in this process, Micropay Professional has run the **Personal PRSI Ceiling Check** on this payroll.

In most cases, an employee's PRSI Ceiling for 2009 [should be € 75,036](#). There can also be cases in which [a personal PRSI Ceiling was applied by the system to the employee](#).

If the system detects that an employee was manually assigned a PRSI Ceiling value that differs from the one it expects (one of the above), these employees are listed by the Personal PRSI Ceiling Checker.

### Action(s) Required of You:

1. Check whether it was correct to manually assign a different PRSI Ceiling to each of these employees.

To learn how a PRSI Ceiling is determined in 2009, [click here](#).

2. If you determine that the PRSI value calculated by the system is correct, select the relevant **Apply** checkbox to accept this value.

Alternatively, if you are happy that the existing PRSI ceiling for the employee is correct, select the **Keep** checkbox.

3. If the employee has a 'PRSIable Pay to Date' value that exceeds the PRSI Ceiling assigned to them, they may have paid an incorrect amount of PRSI so far this year.

To determine the amount by which the Employee PRSI should be adjusted, [carry out these steps](#).

### Personal PRSI Ceiling Check (Part 2)

Before you begin Payroll Year End procedures for this year, it's important that you do everything you can to ensure that each employee's pay has been calculated correctly.

To assist you in this process, Micropay Professional has run the **Personal PRSI Ceiling Check** on this payroll.

If an employee:

- has been assigned the [Department of Social Protection standard PRSI Ceiling of € 75,036](#)
- has a 'PRSIable Pay to Date' value that exceeds this amount

the employee may have paid an incorrect amount of PRSI so far this year.

**Action(s) Required of You:**

You'll need to adjust the Employee PRSI value in the employee's next timesheet by overriding it manually.

To determine the amount by which the Employee PRSI should be adjusted, [carry out these steps](#).

**PRSI Recalculation**

To determine whether an employee is due a PRSI refund, and how much the refund should be, use the Benefit in Kind (BIK) Recalculation utility, which recalculates:

- PAYE
- PRSI Code
- Employee PRSI
- Employer PRSI

The utility does not actually change any values in the employee's records. It is used for reporting purposes only.

Even though the BIK Recalculation utility was designed for a slightly different purpose, it provides you with all the information you need for the PRSI Recalculation.

You use the recalculation results to determine the value by which the employee's PRSI liability in the current period should be adjusted.

**How do I carry out the recalculation?**

Carry out the following steps in the current pay period:

1. Select **Processing - BIK Recalculation**.
2. Select an employee whose PRSI Ceiling has been corrected.
3. Select the most recent period.
4. Click the **Recalculate** button.
5. The system recalculates the EE PRSI values for all previously processed periods, and then determines the overall adjustment required as a result of all of the individual period value adjustments. Click **Report**.
6. The Recalculation report opens. Scroll down to the Differences section at the bottom of the report. Make a note of the 'Employee PRSI' value.

```

Differences:
-----
Employee PRSI      14.44
Employer PRSI      0.00
Tax                 0.00
Income Levy        0.00
  
```

7. Close the report and the BIK Recalculation window.
8. Click the **Enter Time and Pay** button on the Micropay Professional desktop. The Timesheet Entry window opens.
9. Select **Random**, and then click the **Continue** button.
10. Select the relevant employee.
11. Open the **Override** tab.



12. Use the [PRSI Override fields](#) to adjust the Employee PRSI value in this period by the amount that you noted down in Step 7.

13. Click **Payslip**.

You have applied the necessary Employee PRSI adjustment amount to the employee's payslip in this period.

### New in the Budget 2009 Update

The Budget 2009 Update includes all the rate and legislation changes you need to process payroll correctly in 2009.

The changes that relate to the Income Levy are as follows:

- When you are logged in as the Administrator (user name *ADMIN*), the **Tables - Income Levy Rates and Thresholds** menu option enables you to access key information about the Income Levy.
- The [P30/CC124](#) window now includes a new **Income Levy** column that includes the Levy amount in each month's Total PAYE calculation.
- The Payments screen (see [Setting Up Payments](#)) now includes a new **Inc Levy** column, which enables you to specify which payments are subject to the Income Levy. (All 'Taxable' payments are subject to the Levy, except for 'Disability' and 'Paid Disability' payments.)
- The Employee Details window's [Pay/YTD Tab](#) now includes an Income Levy Year to Date section, which shows the employee's current Gross Income total for the year, and the amount deducted from it for the Income Levy. A breakdown of this calculation can be displayed using the **Show Details** button.
- Because full Medical Card holders are exempt from the Income Levy, the Employee Details window's [Tax/PRSI Tab](#) now contains a **Medical Card Holder** checkbox.
- The Employee Details window's [ETP \(Earnings, Tax and PRSI\) Tab](#) now contains new columns that show each period's Gross Income amount for the employee, and the Levy amounts at 1%, 2% and 3%. It also includes a new BIK Levy This Period column.
- The following [Micropay Professional Standard Reports](#) now contain Income Levy totals:
  - Control Summary
  - Gross-to-Nett
  - Earnings, Tax and PRSI
  - Employee Details
  - Payslip
  - P30/CC124
  - P30 to ROS
- The new Certificate of Cessation has been added to Micropay Professional's set of [Employee Reports](#). The cert must be provided to any leaving employee along with their P45.

### Pre-Supplementary Budget PRD rates and thresholds

The following pre-Supplementary Budget PRD rates and thresholds apply to payments made in March and April 2009:

Threshold	Rate
First € 15,000	3%
Next € 5000	6%
€ 20,000 +	10%

**See also**

[Pension-Related Deduction \(PRD\)](#)

**PRSI Rates and Thresholds from 1 January 2009 to 30 April 2009**

PRSI Contribution Rates From 1 January 2009 to 30 April 2009								
Non Cumulative Weekly Earnings Band	PRSI Sub-classes	How Much Of Weekly Earnings	Cumulative Earnings Ceilings					
			First € 52,000			Over € 52,000		
			EE %	ER %	EE+ER %	EE %	ER %	EE+ER %
Private And Some Public Sector Employments								
Up to € 37.99	J0*	ALL	0	0.50	0.50	0	0.50	0.50
€ 38 - € 352	AO	ALL	0	8.50	8.50	0	8.50	8.50
€ 352.01 - € 356	AX	First € 127	0	8.50	8.50	0	8.50	8.50
		Balance	4.00	8.50	12.50	0	8.50	8.50
€ 356.01 - € 500	AL	First € 127	0	10.75	10.75	0	10.75	10.75
		Balance	4.00	10.75	14.75	0	10.75	10.75
More than € 500	A1	First € 127	2.00	10.75	12.75	2.00	10.75	12.75
	A1	€ 127.01 to € 1,925	6.00	10.75	16.75	2.00	10.75	12.75
	A1	Balance	6.50	10.75	17.25	2.50	10.75	13.25
	A2	First € 127	0	10.75	10.75	0	10.75	10.75
		Balance	4.00	10.75	14.75	0	10.75	10.75
Use the following subclasses (A6, A7, A4 and A5) only for approved Employees under the Employer's PRSI Exemption Scheme.								
Up to € 352	A6	ALL	0	0	0	0	0	0
€ 352.01 - € 500	A7	First € 127	0	0	0	0	0	0
		Balance	4.00	0	4.00	0	0	0
More than € 500	A4	First € 127	2.00	0	2.00	2.00	0	2.00
	A4	€ 127.01 to € 1,925	6.00	0	6.00	2.00	0	2.00
	A4	Balance	6.50	0	6.50	2.50	0	2.50
	A5	First € 127	0.00	0	0	0	0	0
		Balance	4.00	0	4.00	0	0	0
Use the following subclasses for Community Employment participants.								
Up to € 352	A8	ALL	0	0.50	0.50	0	0.50	0.50
More than € 352	A9	First € 127	0	0.50	0.50	0	0.50	0.50
		Balance	4.00	0.50	4.50	0	0.50	0.50
Class J normally relates to people with reckonable earnings of less than € 38 per week (from all employments). However, the following employees are insurable at Class J, regardless of earnings: employees aged 66 or over and people in subsidiary employment.								
Up to € 500	J0	ALL	0	0.50	0.50	0	0.50	0.50

PRSI Contribution Rates From 1 January 2009 to 30 April 2009								
More than € 500	J1	First € 1,925	2.00	0.50	2.50	2.00	0.50	2.50
	J1	Balance	2.50	0.50	3.00	2.50	0.50	3.00
	J2	ALL	0	0.50	0.50	0	0.50	0.50
FAS Allowance	J9	ALL	0	0.50	0.50	Training in FAS training centres.		
Occupational Pensions								
More than € 500	K1	First € 1,925	2.00	0	2.00	2.00	0	2.00
	K1	Balance	2.50	0	2.50	2.50	0	2.50
ALL	M	ALL	0	0	0	0	0	0
CLASS M: This class should be used where there is a NIL liability, that is employees under 16 years of age, people within Class K with a NIL liability, such as persons aged 70 or over, medical card holders, widows or widowers, etc.								
Public Sector Employments								
Up to € 352	B0	ALL	0	2.01	2.01	0	2.01	2.01
€ 352.01 - € 500	BX	First € 26	0	2.01	2.01	0	2.01	2.01
		Balance	0.90	2.01	2.91	0	2.01	2.01
More than € 500	B1	First € 26	2.00	2.01	4.01	2.00	2.01	4.01
	B1	€ 26.01 to € 1,925	2.90	2.01	4.91	2.00	2.01	4.01
	B1	Balance	3.40	2.01	5.41	2.50	2.01	4.51
	B2	First € 26	0	2.01	2.01	0	2.01	2.01
		Balance	0.90	2.01	2.91	0	2.01	2.01
Up to € 352	C0	ALL	0	1.85	1.85	0	1.85	1.85
€ 352.01 - € 500	CX	First € 26	0	1.85	1.85	0	1.85	1.85
		Balance	0.90	1.85	2.75	0	1.85	1.85
More than € 500	C1	First € 26	2.00	1.85	3.85	2.00	1.85	3.85
	C1	€ 26.01 to € 1,925	2.90	1.85	4.75	2.00	1.85	3.85
	C1	Balance	3.40	1.85	5.25	2.50	1.85	4.35
	C2	First € 26	0	1.85	1.85	0	1.85	1.85
		Balance	0.90	1.85	2.75	0	1.85	1.85
Up to € 352	D0	ALL	0	2.35	2.35	0	2.35	2.35
€ 352.01 - € 500	DX	First € 26	0	2.35	2.35	0	2.35	2.35
		Balance	0.90	2.35	3.25	0	2.35	2.35

PRSI Contribution Rates From 1 January 2009 to 30 April 2009								
More than € 500	D1	First € 26	2.00	2.35	4.35	2.00	2.35	4.35
	D1	€ 26.01 to € 1,925	2.90	2.35	5.25	2.00	2.35	4.35
	D1	Balance	3.40	2.35	5.75	2.50	2.35	4.85
	D2	First € 26	0	2.35	2.35	0	2.35	2.35
		Balance	0.90	2.35	3.25	0	2.35	2.35
Up to € 352	H0	ALL	0	10.05	10.05	0	10.05	10.05
€ 352.01 - € 500	HX	First € 127	0	10.05	10.05	0	10.05	10.05
		Balance	3.90	10.05	13.95	0	10.05	10.05
More than € 500	H1	First € 127	2.00	10.05	12.05	2.00	10.05	12.05
	H1	€ 127.01 to € 1,925	5.90	10.05	15.95	2.00	10.05	12.05
	H1	Balance	6.40	10.05	16.45	2.50	10.05	12.55
	H2	First € 127	0	10.05	10.05	0	10.05	10.05
		Balance	3.90	10.05	13.95	0	10.05	10.05
Self-Employed (On PAYE System Only)								
Up to € 500	S0	ALL	3.00	0	3.00	3.00	0	3.00
More than € 500	S1	All up to - € 1,925	5.00	0	5.00	5.00	0	5.00
	S1	Balance	5.50	0	5.50	5.50	0	5.50
	S2	ALL	3.00	0	3.00	3.00	0	3.00

### Important points to note

- The annual earnings ceiling for PRSI has from € 50,700 to € 52,000 for employees in Classes A, B, C, D and H, effective from 1 January 2009.
- There is no change to the additional 0.5% Health Contribution on earnings exceeding € 1,925 per week (equivalent to € 3,850 per fortnight and to € 8,342 per month).
- Class A employees earning between € 38 and € 352 inclusive per week should be recorded under Subclass AO.
- Class A employees earning between € 352.01 and € 356 per week should be recorded under Subclass AX.
- Class A employees earning between € 356.01 and € 500 per week should be recorded under Subclass AL.
- Community Employment participants earning € 352 or less per week should be recorded under Subclass A8. Subclass A9 applies when earnings are more than € 352 per week.
- Medical card holders and people who get a Widow's or Widower's Pension, a One- Parent Family Payment or Deserted Wife's Benefit/Allowance do not have to pay any Health Contribution (2% or 2.5%) in any week where the reckonable earnings are more than € 500. Where earnings are more than € 500, record under Subclass 2 - that is, A2, B2, C2, D2, H2, J2, S2 or Class M (for people within Class K), as appropriate.
- People aged 70 or over do not pay any Health Contribution (2% or 2.5%), regardless of whether or

not they have a medical card.

- The Class J contribution normally relates to people with reckonable earnings of less than € 38 per week (from all jobs). However, a small number of employees are insurable at Class J, regardless of earnings - for example, employees over age 66 and people in subsidiary employment.
- For employees taken on under the Employer's PRSI Exemption Scheme, Subclass A6 is applied to employees earning € 352 or less per week - normally insurable at Subclass AO. Subclass A7 is for those earning between € 352.01 and € 500 inclusive per week - normally insurable at Subclass AX or AL. In any week where earnings exceed € 500, Subclass A4 applies to exempted employees who would normally be insurable at Subclass A1. Subclass A5 applies to those who would normally be insurable at Subclass A2 (i.e. medical card holders, and people getting a Widow's or Widower's Pension, a One Parent Family Payment or Deserted Wife's Benefit/Allowance).
- You can download PRSI information booklets from <http://www.welfare.ie>.

### **New in the PYE 2008 release of Micropay Professional**

This release of Micropay Professional contains all the updates you need to carry out Payroll Year End 2008 tasks, and to set up Tax Year 2009. For a complete guide to Payroll Year End 2008, refer to the PYE 2008 User Guide included on the installation CD ROM. For a list of common questions about Payroll Year End 2008, see [Payroll Year End FAQs](#).

In addition, this release offers the following new features and enhancements:

#### **Integration with Sage PeopleLink**

Micropay Professional now integrates with the Sage PeopleLink system. PeopleLink enables supervisors to carry out tasks relating to employee records and absences, and submit time and pay information to the Payroll Operator. It also enables their team members to request absences, and access personal details and archived payslips.

In Micropay Professional, you can receive timesheets, absence information and employee details from Sage PeopleLink.

For more information, see [Integration with Sage PeopleLink](#), [Overview of Timesheet Entry](#) and [Licensing Sage PeopleLink](#).

#### **Integration with Sage HR**

Micropay Professional can exchange employee details information with Sage HR. For more information, see [Importing Employee Records from Sage HR](#).

#### **'Company Names' and 'Payrolls'**

The distinction between a company and a payroll has been made more explicit. You can license one or more companies on your system. Each company can have any number of associated payrolls. The number of employees the company is licensed to support is spread across all existing payrolls assigned to the company. See [Licensing the Software](#) and [Licensing and Registration](#) for more details.

#### **Automatic Updates**

You can now set up Micropay Professional to check for and install software updates automatically. You can also check for software updates manually. For more information, see [Automatic Updates](#).

#### **Enhanced 'New Employee' Procedure**

When you are [Setting Up Employees](#), Micropay Professional now prompts you to enter a preliminary set of details, and uses these to check whether a matching employee already exists in the system. If such an employee exists, you can choose to re-activate this employee or continue creating the new one.

#### **CSO Reporting Enhancements:**

- The CSO Earnings, Hours and Employment Cost Survey report now encompasses all CSO-enabled payrolls associated with the same company name. For more information about the report, see [Step 6: Generating the CSO Earnings, Hours and Employment Costs Report](#).
- You can exclude individual employees from the CSO Earnings, Hours and Employment Cost Survey report. To do this, you select the Exclude Employee from CSO Reports checkbox in the Employee Details window's [CSO Details Tab](#).
- The CSO Hours Multiplier value helps you to ensure that the hours information recorded in the Earnings, Hours and Employment Cost Survey report is accurate. See [Setting Up Payments](#).
- The **Fill Blank History** button in the Employee Details window's CSO Details tab now populates an employee's CSO history with a complete dataset. See [CSO Reporting](#) and [Step 5: Recording CSO Information](#), and [CSO Details Tab](#) for more details.
- The [CSO Details Tab](#) in the Employee Details window supports an additional Employment Basis setting: **Other**.
- **CSO National Income Survey (Part D) report** Previously, Micropay Professional compiled the information necessary for the Central Statistics Office's National Employment Survey (Part D) report, but you had to prepare the report itself manually. Now the report is one of Micropay Professional's standard reports. For more information, see [CSO National Employment Survey](#).
- **Improved Report Security** When you are generating the CSO's Earnings, Hours and Employment Cost Survey report or National Employment Survey (Part D) report, you now need to enter the password of each company payroll that will be included in the report. See [Step 6: Generating the CSO Earnings, Hours and Employment Costs Report](#) and [CSO National Employment Survey](#).

#### Printing the P60 on Plain Paper






Previously, you needed special stationery to generate a valid P60 report in Micropay Professional. Now you can generate valid P60s on plain paper and give these to the company's employees.

For more information, see [Payroll Year End Reports](#)






## Setting Up the Payroll System



The following steps guide you through the process of

- creating a new company
- setting up employees
- processing a pay period

	<p><b>Step 1: Licensing the Software</b></p> <p>The first thing you need to do after you have installed Micropay Professional is license the system.</p> <p>This entitles you to a certain number of companies in which you can set up payrolls.</p> <p>It also entitles you to a certain number of employees for whom you can process payroll.</p> <p>See <a href="#">Licensing the Software</a>.</p>
	<p><b>Step 2: Logging in as the administrator</b></p> <p>Next, you need to log into Micropay Professional as the system administrator.</p> <p>This enables you to carry out tasks such as setting up users and companies.</p> <p>For more information, see <a href="#">Logging in as the administrator</a>.</p>
	<p><b>Step 3: Setting up users and user groups</b></p> <p>Now that you have logged in as the system administrator, you can set up the users who will need to log into the payroll system.</p> <p>You can also control access rights by defining user groups.</p> <p>See <a href="#">User Access and User Groups</a>.</p>
	<p><b>Step 4: Adding companies and payrolls</b></p> <p>You are licensed to use a certain number of companies.</p> <p>Within these you can set up payrolls in which you can process pay.</p> <p>For more information, see <a href="#">Adding a New Company</a>.</p>
	<p><b>Step 5: Logging in as an ordinary user</b></p> <p>Once a payroll has been created, you can log in as an ordinary user to begin setting up payroll details.</p> <p>See <a href="#">Logging in as an ordinary user</a>.</p>



	<p><b>Step 6: Setting up payments and deductions</b></p> <p>Before you can begin processing payroll in a payroll, you must set up all the payments and deductions relevant to the employees in the payroll.</p> <p>For more detailed information about payments, see <a href="#">Setting Up Payments</a>.</p> <p>For more detailed information about deductions, see <a href="#">Setting Up Deductions</a>.</p>
	<p><b>Step 7: Setting up departments and cost centres</b></p> <p>Although they are not mandatory, it can be useful to define departments and cost centres in a company payroll.</p> <p>After these are set up, you can you can associate a department and cost centre with each employee in the payroll.</p> <p>For more detailed information, see <a href="#">Departments and Cost Centres</a>.</p> <p><b>Note:</b> Cost centres are not available in <a href="#">Micropay Professional Lite</a>.</p>
	<p><b>Step 8: Setting up the payroll calendar</b></p> <p>You use the Payroll Calendar to set dates that apply to each pay period's payroll processing. These dates relate to areas such as payments, cheques, giros and Paypath (Electronic Money Transfer).</p> <p>When you set a period (see the next step for information about this), the pay period's dates default to those specified in the calendar. Any entries you make will be validated against the calendar.</p> <p>For more detailed information about the Payroll Calendar, see <a href="#">Payroll Calendar</a>.</p>
	<p><b>Step 9: Setting a pay period</b></p> <p>Setting a pay period involves specifying the period number. For example, in a monthly payroll there are twelve pay periods, numbered <b>1</b> to <b>12</b>.</p> <p>Setting the pay period number initialises your payroll files for the new pay period.</p> <p>The first pay period of a tax year has the number <b>1</b>. Thereafter during the year, setting the pay period increments the period number.</p> <p>For more detailed information about setting the pay period, see <a href="#">Setting the Pay Period</a>.</p>
	<p><b>Step 10: Setting up employees</b></p> <p>You can set up employees within a payroll.</p> <p>This enables you to being processing employee pay.</p> <p>For more about this, see <a href="#">Setting Up Employees</a>.</p>

	<p><b>Step 11: Processing timesheets</b></p> <p>You use timesheets to record an employee's payments, deductions, absences and other relevant information in each pay period.</p> <p>For more detailed information, see <a href="#">Processing Timesheets</a>.</p>
	<p><b>Step 12: Backing up your payroll data</b></p> <p>You can back up the current payroll.</p> <p>This safeguards you against data loss in the event of file corruption or error.</p> <p>You can restore a backed up pay period, and use it to resume payroll processing.</p> <p>For more about this, see <a href="#">Backing Up Your Data</a>.</p> <p>Congratulations! When you have reached this point, you have successfully set up a payroll and processed the first pay period.</p>

## Installing Micropay Professional

Micropay Professional is easy to install using the installation CD. Simply insert the CD into the CD-ROM drive and follow the instructions on the screen, entering information when prompted to by the installation program.

Once it is installed, you can launch Micropay Professional, and begin setting up your data files. For further information about the setup and administration of your payroll, refer to [Company/Payroll Details](#).

### Getting Started Checklist

The **recommended** PC specifications for Micropay Professional usage are as follows:

- a Pentium 4 processor or better
- 512MB RAM or more
- a minimum of 2 GB of free disk space after installation
- 1024x768 (XGA) True Colour display supported by Windows
- a Microsoft-compatible mouse
- a laser printer supported by Windows
- installed on your computer Windows XP Professional with Service Pack 2 or better
- Internet access

In addition, you should have read and accepted the terms of the software licence agreement, and registered your Sage Micropay Professional software.

With the requirements above met, you are ready to perform these tasks:

[Installing Micropay Professional](#)

[Logging in as the administrator](#)

[User Access and User Groups](#)

See also

[Other Common Setup Procedures](#)

#### Installation Steps

Before installing Micropay Professional, you should ensure that your computer has Internet Explorer v.6.0 or higher. This is needed for the Revenue Online Service (ROS) Integration facility. (See [P45, P46 and P30, ROS Integration](#) and [P35 to ROS submission.](#))

If a suitable version is not already installed, you will be prompted during the installation process to install it.

When you are ready to install Micropay Professional, you should follow these steps:

1. Insert your installation CD into the CD ROM drive. The CD Browser launches automatically.

**Note:** You should close all programs before you carry out the installation.

2. The licence agreement screen is displayed. Select the checkbox to accept the terms and conditions, and then click **Next**.
3. Specify the type of installation you want to carry out:

A **standalone** installation is appropriate when you want to run Micropay Professional on a single machine. The program files are installed in the program folder you specify, and your payroll data is set up in the data folder you specify.

A **client** installation is appropriate when you want to run Micropay Professional on this computer, but the payroll data you use will be stored in a server. So **ONLY** the program files are installed.

A **server** installation is appropriate when you want to store payroll data on this computer and make it available for use by client machines. So **ONLY** the payroll data is installed.

4. Click **Next**.
5. Specify whether you want to carry out a **Typical** or **Custom** installation.
6. Click **Next**.
7. Check that the installer is specifying the **program folder** and **data folder** you want to use. You can use the **Browse** buttons to specify different locations if necessary.
8. Click **Next**.
9. Ensure that Micropay Professional will be added to the Windows **Start** menu program group you require. Make any changes that are necessary, and then click **Next**.
10. The installer displays a summary of the installation options you have selected. Verify that these are correct. If you need to change anything, click **Back**. Otherwise, click **Install** to proceed with the installation.
11. A confirmation message is displayed when the installation process is complete. Click **Finish** to close the installer.

## Licensing the Software

Your [Micropay Professional software licence](#) entitles you to both:

- a certain number of companies
- a certain number of employees in each company

You can set up as many payrolls as you need within each licensed company. Typically, a payroll is set up for each pay frequency.

If you are licensed for 100 employees per company, you could have 25 employees in each of 4 payrolls, within that company, for example.

Or you could have 50 employees in each of 2 payrolls within the company.

## Launching for the First Time

When you launch Micropay Professional for the first time, you can click either:

- **Licence Now** to licence the software immediately. (You'll need an account number and serial number, which you can obtain from Sage Support or your Sage-accredited business partner.)
- **Licence Later** to use a 30-day trial licence instead (after which you'll need to licence the software).

For more information about how to licence the software, see [Setting Licence Details](#).

## What do I do next?

Having licensed the software, you must log into Micropay Professional as the system administrator to set up users and other system settings.

For more about this, see [Logging in as the administrator](#).

See also

[Setting up the Payroll System](#)

## Logging in as the administrator

After you have licensed Micropay Professional (see [Licensing the Software](#)), you need to log in as the default **system administrator**.

This enables you to carry out administrative tasks, such as creating users and adjusting PRSI and PAYE rates.

To log in as the administrator, carry out these steps:

1. In the Login dialog box, enter the user name ADMIN.
2. Enter the admin password. The default password set up when you install the software is PASS.

**Note:** There is no need to specify a company or company password when signing in as the system administrator.

3. Click **OK**.

The Micropay Professional system administration screen opens.

The administrator does not have access to payroll.

To process payroll you need to log in as an ordinary user.

For more about this, see [Logging in as an ordinary user](#).

## What do I do next?

Now that you have logged in as the administrator, you are ready to begin setting up the system. See [User Access and User Groups](#).

## User Access and User Groups

The **system administrator** sets up other users.

The system administrator's user name is ADMIN. The default [password](#) is PASS, but this may have been changed on your system.

Each user has a user name, and optionally can have a password.

User Group 1 is set up automatically when you install Micropay Professional. Users in this group have full access to all Micropay Professional functionality.

How do I make sure passwords are secure?

Sage recommends that you use best practice when you are setting and maintaining Micropay Professional user and payroll passwords, including the [administrative password](#).

For example, make sure that you use strong passwords. A strong password has the following characteristics:

- It has at least 7 characters long. (You can use up to 15 characters for a user password, and up to 16 for a payroll password.)
- It doesn't contain any information to do with the user's identity.
- It doesn't contain any complete word in the dictionary.
- It is significantly different to previous passwords for this user or payroll.
- It contains a mix of letters, numerals and keyboard symbols. Micropay Professional passwords are not case-sensitive.

Also make sure to use a different password for each user and payroll.

How do I set up a new user?

1. Log in as the system administrator. The user name is ADMIN. The default password is PASS.
2. Click the **Manage Users** icon in the navigation pane's Security view on the left-hand side of the screen. Alternatively, select the **Security - Users** menu option.
3. The Set up Users window opens. This lists all currently defined users. At the top of the list is the ADMIN user (which you can neither amend nor delete).

Before you create any new users, we recommend that you change ADMIN's default password. Ensure that you do not lose this password, since you can't access the system administrator account without it.

4. To add a new user, click the next blank Name field, and enter the user name. This can have up to eight characters.
5. In the Group drop-down list, select the user group to which the user belongs. The section that follows defines user groups and explains how you use them.
6. You can optionally specify a password for the user. This can have up to sixteen characters. Click the relevant password field, click **Change Password**, and enter the password in the dialogue box that opens. Then click **OK** to close this dialogue box.
7. Choose **OK** to store the new user in the system.

The next time you open the Users window, the existing users will be displayed in alphabetical order.

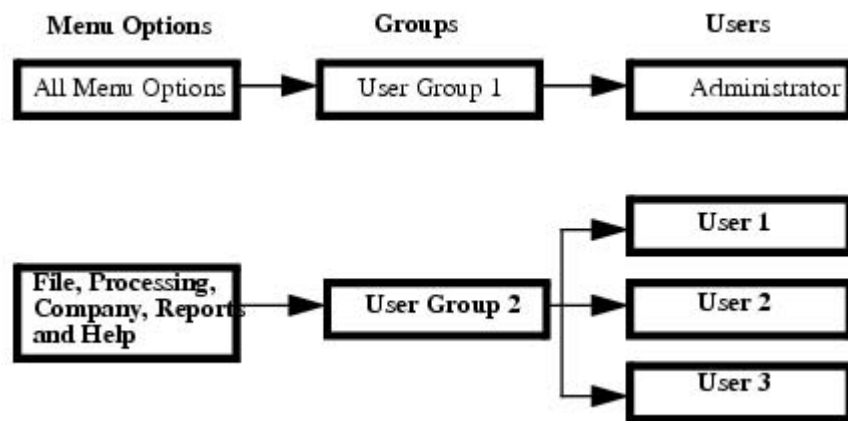
Field name	Description
Name	The name you use to log into the system.

Password	An optional user password.
Group	The number of the user group to which the user belongs. See the next section for information about user groups.

How do I set up a user group?

A user group is a collection of users with access to a specific subset of Micropay Professional functionality. You use groups to control access of users to the payroll system. When you define a user group, you can specify which Micropay Professional menu options will be available to group members.

For instance, members of a particular user group might be able to process payroll and print reports, but unable to carry out Payroll Year End tasks.



1. While you are logged in as ADMIN, select **Manage Groups** in the navigation pane's Security view on the left-hand side of the screen. Alternatively, select the **Security - Group Details** menu option.
2. The Group Details dialog box opens. This enables you to set up the new group. Each group record has a group number and a group name.
3. Click **Save** to store the new group record.

How do I set up user group rights?

Users assigned to the default User Group 1 have access to all Micropay Professional functionality. Suppose that you want to define a subset of access rights for another user group.

1. Logged in as ADMIN, select **Manage Groups** in the navigation pane's Security section. Alternatively, select the **Security - Group Details** menu option.
2. In the dialog box that opens, enter the user group's access details. Specify the relevant group number in the Group No field. You can also enter the group name.
3. Click **Rights**.
4. The Rights - Group Details window opens. Work through the menus at the top of the window, selecting those to which group members should have access. Each menu option has a tick beside it when it is enabled for the group.
5. To save the Group Settings, click the **Microsoft Windows** icon in the top left corner of the Rights - Group Details window, and in the menu that displays click **Save**.
6. Click **Save** in the Group Details dialog box to save the changes you have made to the group.

When you are defining menu access for a new group, be sure to provide access to the **File - Exit** menu option. This enables the group's users to exit Micropay Professional and access the Login screen.

### What do I do next?

Now that you have created users and user groups, you are ready to create a company payroll. See [Creating a New Payroll](#).

### See Also

To learn about how to start using Micropay Professional to process payroll, see [Setting up the Payroll System](#).

## Creating a New Payroll

Before you can start processing employee pay, you need to set up at least one Micropay Professional *payroll*.

Your system is licensed for a particular maximum number of companies.

You set up payrolls within companies.

Typically, you set up a payroll for each pay frequency in a company.

If you need to set up more companies than you are licensed for, you need to contact Support to upgrade your licence.

For more information, see [Licensing](#).

Payrolls associated with a particular company can be consolidated into a single *consolidation company* for cost analysis and Payroll Year End processing. See [Consolidation Companies](#) for more detailed information.

To set up a payroll associated with an existing company, carry out these steps:

1. Log in as the administrator. The user name is ADMIN. The default [password](#) is PASSWORD, but this may be different on your system.
2. Click **Company Setup** in the navigation pane's Companies view.
3. The Company Manager window opens. Click **Add New Payroll**.
4. The New Payroll window opens. Enter the payroll name, the company name, the payroll password, and the payroll frequency.

Payroll details...

Field name	Description
Payroll ID	An unique identifier for the payroll, comprising up to eight characters.  You may find it helpful to use a name that indicated the pay frequency, such as 'Weekly' or 'Monthly'.
Licence Name	The company name associated with the payroll.
Password	An optional password for the payroll.
Frequency	The frequency of the payroll.

5. Click **Create**.

You have set up a new payroll within the relevant company.

### What do I do next?

Now that you have created a payroll, you can log into it as an ordinary user. See [Logging in as an ordinary user](#).

### See also

For more detailed information about payrolls, see [Company/Payroll Details](#).

To learn about how to start using Micropay Professional to process payroll, see [Setting Up the Payroll System](#).

## Logging in as an ordinary user

To process employee pay, you must log into a company payroll as an ordinary (non-administrative) user.

1. Launch Micropay Professional using your Windows desktop's **Start - Programs** menu, or by double-clicking the **Micropay Professional** icon on your desktop.
2. Enter your user name and [password](#) in the Login dialog box. These are not case-sensitive.
3. Specify the relevant payroll ID in the Name field. Generally, it's easiest to select the payroll in the drop-down list.

**Note:** If you try to log into a company with status E (Error), the application displays a warning message before the payroll opens.

4. Enter a password in the Password field (if necessary).
5. Click **OK**.

The company payroll opens.

### What do I do next?

Now that you have logged into a payroll, you are ready to begin working with payroll information.

In a new payroll, the first thing you need to do is set up payments and deductions.

### See also

[Logging into Micropay Professional](#)

To learn about how to start using Micropay Professional to process payroll, see [Setting Up the Payroll System](#).

## Introduction to Payments and Deductions

Generally, you need to set up several payments and deductions in each company payroll.

### Payments

When you are setting up a payment, you must provide information such as:

- pay type (such as basic pay, overtime and bonus pay)
- whether the payment is hourly or unit-based
- whether it is fixed or variable
- whether it is subject to PRSI and tax
- whether it is used for the calculation of holiday and pension entitlement

For more information, see [Setting Up Payments](#).

### Deductions

Deductions can be set up as:

- either pre-tax deductible or post-tax deductible



- having an accumulating or a reducing balance

For more information, see [Setting Up Deductions](#).

Accumulating balances can be used to control cumulative amounts such as pension balance and union fees. Reducing balances can be used to manage amounts that are periodically reduced towards zero, such as employee loans.

## Formulae

A payment or deduction can have a formula for special calculations, such as overtime rates or shift pay. For more information, see [Formulae](#)

**Note:** Payment and deduction formulae are not available in [Micropay Professional Lite](#).

## Employee Profiles

You can also set up employee profiles - groups of payments and deductions corresponding to different categories of employee.

You can assign a payment profile or a deduction profile to an employee record.

For more information, see [Setting up an employee profile](#).

**Note:** Employee profiles are not available in [Micropay Professional Lite](#).

## Setting Up Payments

You define a company's payments in the Payments window.

## Payments window

Item	Description
ID	The number assigned to the payment.
Title	The name assigned to the payment. This will appear on payslips where applicable.
Type	The payment type.  The <b>Shares</b> payment type, enables you to record Share-Based Remuneration amounts. The Government's Jobs Initiative of May 2011 abolished the employer PRSI previously applicable to these amounts. This abolition applies retrospectively to share-based remuneration amounts dating on or after January 1, 2011.
Taxable	Whether the payment is subject to PAYE.
PRSIable (Ee)	Whether the payment is subject to employee PRSI.
PRSIable (Er)	Whether the payment is subject to employer PRSI.
USC	Whether the payment is subject to the Universal Social Charge (USC).
Pens	Whether the payment is included in the pension calculation. This can be used if a pension formula is set up.
PRD	Whether the payment is subject to the Pension-Related Deduction (PRD).
Hol'able	Whether the payment is holidayable.  A holidayable payment is adjusted based on the number of holiday periods entered in the timesheet.
Average	Whether the payment is included in the calculation of the average hourly rate.  This is applicable to hourly payments only.
Hol'acc	Whether the payment is included in the holiday accrual calculation.  This is applicable to hourly payments only.
Formula	A formula to be applied to the payment.
BIK Type	The <a href="#">Benefit-in-Kind type</a> of the payment, if applicable.
CSO Type	The <a href="#">CSO type</a> of the payment, if applicable. CSO stands for Central Statistics Office.
NES Type	The <a href="#">NES type</a> of the payment, if applicable. NES stands for National Employment Survey.
CSO Hours Multiplier	The CSO Hours Multiplier value. This helps you to ensure that the hours information recorded in the <a href="#">Earnings, Hours and Employment Cost Survey report</a> is accurate.
Supervisor Timesheets	Whether the payment is available to supervisors in <a href="#">Sage PeopleLink</a> .

## Employee Profiles

You can define employee profiles that associate particular sets of payments with particular groups of employees. For more information, see [Employee Profiles](#).

**Note:** Employee profiles and payment formulae are not available in [Micropay Professional Lite](#).

To learn about how to start using Micropay Professional to process payroll, see [Setting Up the Payroll System](#)

## Nett to Gross Payments

An employer uses a nett-to-gross payment to pay an employee a specific amount of nett pay.

You enter the nett amount in the employee record or in the timesheet, and the system automatically calculates

the associated PAYE, PRSI and other amounts, and thus determines the corresponding gross amount of pay.

#### How do I use nett-to-gross payments?

1. Select **Company/Payroll – Payments**.
2. Set up a **Variable** payment that is Taxable, PRSIable and subject to the Universal Social Charge (USC) and PRD (if applicable).
3. Select **Company/Payroll – Company/Payroll Details**.
4. Open the **Misc** tab.
5. In the Nett to Gross Elm drop-down list, select the payment you have just set up.
6. In the Nett to Gross Type field, specify the relevant Nett-to-Gross type:
  - **Total** – the employee is paid a specific amount of nett pay in the pay period. They are not paid any other payments in the pay period.
  - **Extra** – The employee is paid an extra nett amount in the pay period, in addition to the other payments they are paid.

You can apply values to the Nett-to-Gross payment in the usual way:

- In the **employee details record**, you can associate a standard amount with the payment for that employee.
- In the **timesheet**, you can specify a nett-to-gross amount for the employee specific to the current pay period.

Enter the value in the **Nett to Gross Pay** field.

#### Setting Up Deductions

Deductions are amounts taken from the employee's pay before they receive it.

Pension contributions and loan repayments are typical deductions.

PAYE, PRSI and [USC](#) are also taken from an employee's pay before they receive it, but are not classed as deductions in the payroll system.

#### Considerations

Gross deduction or nett deduction?

You need to specify whether the deduction is taken from gross pay or nett pay.

*Gross deductions* are taken from the employee's pay before tax and PRSI are calculated.

For more information, see [What is a Gross Deduction?](#)

*Nett deductions* are taken from the employee's pay after tax, PRSI and the [USC](#) are calculated. In other words, the deduction amount is taxed as normal pay.

Union membership subscriptions constitute a typical net monthly deduction.

Accumulating/reducing balance

A deduction can have an associated accumulating or reducing balance, or it may have no balance associated with it.

Typical accumulating balance deductions include pension amounts and union subscriptions.

A typical example of a reducing balance deduction is a loan repayment plan.

**Standard deduction amount**

You can set up a standard deduction amount if the deduction value remains the same for each period and for each employee.

If no standard value is entered, it can be specified on the employee record, and overwritten if necessary on the timesheet.

**Deduction Formulae**

For a complex deduction, you can set up a formula to define the way in which the deduction value is determined. It can involve both payments and other deductions.

Since deduction formulae are relatively complex, it is good practice to contact your support centre for assistance in setting them up.

(See also [Formulae](#).)

**Note:** Deduction formulae are not available in [Micropay Professional Lite](#).

**Setting up a Deduction**

1. Select **Edit Deductions** in the navigation pane's Company section.

Alternatively, select the **Payroll - Deductions** menu option.

2. In the Deductions window, click the next blank line.
3. Complete the fields as appropriate, scrolling across to access fields not initially visible.

Specify:

- whether the deduction is taken from gross or nett pay
- the relevant pension scheme (for further information, see [How do I set up pensions?](#))
- whether there is an accumulating balance, a reducing balance, or no balance

**Deduction fields**

Field Name	Description
ID	The number allocated to the deduction. (Cannot be amended)
Title	The unique name to be given to the deduction.
Type	<p>The type, whether <b>Gross</b> or <b>Nett</b>, of the deduction.</p> <p>A gross deduction is taken from gross pay. The three most common types of gross deduction are:</p> <ul style="list-style-type: none"> <li>▪ Pension</li> <li>▪ Additional Voluntary Contribution (AVC)</li> <li>▪ Permanent Health Insurance (PHI)</li> </ul> <p>A nett deduction is taken from nett pay. Some of the most common nett deductions include union fees and savings clubs.</p>

Field Name	Description
Sub-type: Standard	<p>Use this sub-type for deductions that reduce:</p> <ul style="list-style-type: none"> <li>▪ taxable pay</li> <li>▪ reckonable pay when calculating <a href="#">USC</a></li> <li>▪ reckonable pay when calculating employee PRSI</li> <li>▪ reckonable pay when calculating employer PRSI</li> </ul> <p>Examples of a Standard Gross Deduction are the Travel Pass Scheme and Bike to Work Scheme.</p>
Sub-type: Pension	<p>Use this sub-type for Pension, RAC and PRSA deductions</p> <p>Pension and RAC deductions reduce:</p> <ul style="list-style-type: none"> <li>▪ taxable pay</li> <li>▪ reckonable pay when calculating employer PRSI by 50% of the employee's pension contribution</li> </ul> <p>PRSA deductions reduce:</p> <ul style="list-style-type: none"> <li>▪ taxable pay</li> <li>▪ reckonable pay when calculating employer PRSI by 50% of the employee's PRSA contribution</li> </ul> <p>Employers can also make a contribution towards an employee's PRSA scheme. Employer contributions are liable to USC.</p>
Sub-type: PHI	<p>Use this sub-type for Permanent Health Insurance (PHI) and Income Continuance Insurance schemes</p> <p>PHI amounts are contributions made by the employee towards a health insurance scheme.</p> <p>Employee PHI contributions are deducted from taxable pay before PAYE is calculated.</p> <p>PHI contributions do not reduce reckonable pay when calculating <a href="#">USC</a>.</p> <p>PHI contributions do not reduce reckonable pay when calculating <b>employee</b> PRSI.</p> <p>But 50% of a PHI contribution amount reduces that pay period's reckonable pay when calculating <b>employer</b> PRSI.</p> <p>Employers can also make a contribution towards an employee's PHI scheme. Employer contributions are liable to <a href="#">USC</a>.</p>

Field Name	Description
Sub-type: APSS	<p>You can use the APSS deduction sub-type to exempt foregone pay amounts associated with an Approved Profit Share Scheme (APSS) from PAYE and Employer PRSI. However, Employee PRSI and <a href="#">USC</a> are applied at the time the pay is foregone.</p> <p>APSS is a gross deduction.</p> <p><b>Note:</b> You can instead defer applying Employee PRSI and USC amounts to the foregone pay until shares are actually purchased by the trustees of the APSS. Base these calculations on the Initial Market Value (IMV) of the shares that are purchased.</p> <p>In this case, you do NOT use the APSS deduction subtype. Instead, treat the IMV as notional pay.</p>
Pension	If this deduction has the Sub-Type <b>Pension</b> , select a pension scheme in the Pension drop-down list.
AVC	If the deduction is an additional voluntary pension contribution, you select this checkbox. Otherwise you leave it unselected.
Balance	<p>You use the Balance field to specify whether the deduction involves a balance amount. The field can take three possible values:</p> <p><b>Yes</b> - signifies that the deduction has an associated accumulating balance (such as in the case of a pension contribution)</p> <p><b>No</b> - signifies that the deduction has no associated balance (such as a union subscription)</p> <p><b>Reducing</b> - signifies that the deduction has an associated reducing balance (such as in the case of a loan). To make the deduction operative, you must enter the outstanding balance in the Employee Details window's <b>Deductions</b> tab.</p> <p><b>Note:</b> Pensions, AVCs and permanent health insurance deductions commonly have an accumulating balance.</p>
Holidayable (Holidayable)	<p>This checkbox specifies whether the deduction is to be automatically multiplied by the number of holiday periods.</p> <p>If selected, the system multiplies the deduction value by 1 plus the number of holiday periods.</p> <p>If left unselected, the system multiplies the deduction value by 1.</p> <p>This applies only to weekly and fortnightly paid employees.</p>
Standard Amount	<p>The value specified in this field is the default amount of the relevant deduction. The Std.Amount value specified in the Employee Details window's Deductions tab is the value by which the standard amount should be multiplied.</p> <p>For example, suppose that the Std.Amount value specified in the Deductions tab is 1. Entering 2.5 in the Deductions window's Standard Amount field means 2.50 will be deducted the employee's nett pay.</p>
Employee Formula	A formula for calculating deductions for the employee. See <a href="#">Formulae</a>

Field Name	Description
Employer Formula	A formula for calculating deductions for the employer. See <a href="#">Formulae</a> .
Supervisor Timesheets	If your Micropay Professional installation integrates with Sage PeopleLink, you can use the <b>Supervisor Timesheets</b> checkboxes to determine which deductions will be visible to team supervisors in PeopleLink.

- Click **OK**.

See also

To learn about how to start using Micropay Professional to process payroll, see [Setting Up the Payroll System](#).

## What is a Gross Deduction?

Deductions can be taken either from an employee's gross pay or their nett pay.

- Gross deductions** are taken from the employee's pay before PAYE, PRSI and USC are calculated, with the following important exception:

Although pension deductions are gross deductions, PRSI and USC are taken from an employee's Gross Pay **BEFORE** pension deductions are applied.

- Nett deductions** are taken from the employee's pay **after** tax, PRSI and USC are calculated. This means that the deduction amount is taxed along with the rest of the employee's pay.

See also

[Setting Up Deductions](#)

## Departments and Cost Centres

Department and cost centre descriptions are included in reports such as the Department Time Analysis report and the Cost Analysis report. When you create an employee's master record in the Employee Details window, you can specify the department and cost centre to which the employee belongs.

- Select **Manage Departments** or **Manage Cost Centres**, as appropriate, in the navigation pane's Company/Payroll section.  
  
Alternatively, select the **Payroll - Departments** menu option, or the **Payroll - Cost Centres** menu option.
- Each department or cost centre is identified by a unique code and corresponding description. Click the **Add** button, and complete the fields as necessary.
- Choose **OK** to store the new department or cost centre.

Field Name	Requirement
Code	The alphanumeric code that identifies the department or cost centre.  In the case of departments, the code is four characters long.  In the case of cost centres, it is five characters long.
Description	The department or cost centre name (up to 30 characters).

What do I do next?

Now that you have set up departments and cost centres, you can set up the [Payroll Calendar](#).

See also

To learn about how to start using Micropay Professional to process payroll, see [Setting Up the Payroll System](#).

**Note:** Cost centres are not available in [Micropay Professional Lite](#).

## Payroll Calendar

You use the Payroll Calendar to set up the company payroll's pay dates for the tax year. Calendar information is used to control each period's payroll processing. It specifies dates for pay, cheque, giro and Paypath.

In the case of weekly payroll, there are either 52 or 53 calendar periods. In the case of monthly payroll, there are 12 periods.

When you set a period, the pay period dates default to those in the calendar. Any entries you make will be validated against the calendar.

### How do I set up a new Payroll Calendar?

To set up a new payroll calendar (you would generally do this at the start of a tax year), begin by selecting **Payroll - Calendar**. In the New Calendar tab, enter information such as the first pay date, first cheque and giro issue date, and first Paypath date. You can also specify the period in which the cost analysis should be cleared for a new financial year.

Click **Update** if you want to update the current calendar with the settings you have provided. Check that the calendar was created correctly. All subsequent periods will follow the same sequence as that specified when the period 1 information was entered.

To store the new calendar details, click **Save** on the Calendar Details tab.

### How do I add or edit Payroll Calendar details?

Select the **Payroll - Calendar** menu option.

In the Calendar Details tab, enter the relevant information in each column. This includes the number of insurance weeks in each period, pay dates, cheques and giro issue dates, and Paypath (EMT) dates.

Click **Save** to store the information you have entered.

What do I do next?

Now that you have set up the company payroll's Payroll Calendar, you are ready to set the pay period. See [Setting the Pay Period](#).

See also

For more detailed information about the Payroll Calendar, see [Working with the Payroll Calendar](#).

To learn about how to start using Micropay Professional to process payroll, see [Setting Up the Payroll System](#).

## Setting the Pay Period

Before setting a new pay period you should ensure that the status indicator is blank (or set to EOP if you have already processed payroll on your Micropay Professional system).

After you set the pay period, and before you enter any timesheet information, you should set up any new employees, or edit existing employee information (such as pay rates and tax credit information).

**Note:** If you discover errors, you can rewind the End of Period to correct the errors before setting the new



period.

1. To set the pay period, begin by selecting **Processing - Set Period**.
2. The New Period to Process value defaults to the current period. Change the period number to the next in sequence. Check that the dates displayed are correct for the new period.
3. If you are starting a new cost month, select the **New Cost Month** checkbox.

In a month that is designated to be a cost month, setting the pay period starts a new month for cost analysis.

4. If you are carrying out a bonus run, select the **Bonus Run** checkbox.
5. A bonus run involves producing a second payslips in a particular pay period. The bonus run should NOT be processed until after the normal payroll run is complete in the period.
6. Click **OK** to set the new period with the selected dates.

#### What do I do next?

Now that you have set the pay period, you need to ensure that all the employees whose pay you need to process are set up in the company payroll. See [Setting Up Employees](#).

#### See also

For more detailed information about setting the pay period, see [Setting a Pay Period](#).

To learn about how to start using Micropay Professional to process payroll, see [Setting Up the Payroll System](#).

## Setting Up Employees

Your [Micropay Professional software licence](#) entitles you to the use of a certain number of companies, and a certain number of employees in each of those companies.

For example, if you are licensed for 32 employees per company, you can set up 32 employees in the company. But any additional employees you set up may involve paying an additional charge to upgrade your licence.

To set up an employee, carry out the following steps:

1. Click **Edit Employees** in the navigation pane's Pay Run view.
2. The Employee Details window displays. Click the **New** button.
3. The New Employee window opens. This prompts you to enter a set of initial employee details.
4. Click **Next**.

If the system finds employee records that match the details you have entered, the Matching Employee Records window opens. This contains a list of the employee records that match the details you have entered. Review the information to determine whether the employee is already set up in the system. If so, select the record and click **Next**.

If the selected record includes a Finish Date, the employee has had a previous spell of employment in the company. Use the Reinstate Leaver wizard to reinstate the employee. For more information, see [How do I reinstate an employee?](#)

5. Add all other available information to the employee record.

You do not initially need to have P45 information, but you should add it when it is available. Where applicable, this will be managed by the Tax Credit Import procedure.

6. Click **Save**.

### What do I do next?

With all the necessary employees set up on the company payroll, you are ready to begin processing payroll. See [Processing Timesheets](#).

### See also

For more detailed information about setting up employees, see [Employee Details](#).

Note that there is a particular process you must follow to set up an employee during the course of the tax year. For more information, see [Mid-Year Employee Setup](#).

To learn about how to start using Micropay Professional to process payroll, see [Setting Up the Payroll System](#).

## Processing Timesheets

You use a timesheet to enter the information that determines how much the relevant employee will be paid in the current pay period. When you process the timesheet, the employee's payslip is ready for issue. You can work with timesheets using a number of different entry modes:

- Sequential
  - Random
  - Automatic
  - Import
  - Batch
1. Select the **Processing - Timesheet Entry** menu option. Then specify the entry mode you want to use.
  2. Select the **Multi entry as default** checkbox if you want to split an employee's pay costs over a number of departments and cost centres using 'multi-timesheets'. (Multi-timesheets are currently not available in Batch mode.)
  3. Click **Continue** to process the timesheets. The **Data Entry** tab, **Multi Timesheet** tab or Batch Timesheet entry screen opens, as appropriate.
  4. Click **Payslip** to display a preview of the employee's payslip (or click **View Detailed Payslip** in Batch mode). If the payslip is not correct, you can return to the timesheet to make further adjustments.
    - In Sequential, Random, Automatic or Import modes, when you are happy with the payslip details, click **Payslip** on the Timesheet Entry screen. Repeat this process for all employees.
    - In Batch mode, when you are happy with the timesheets, you can save all the valid timesheets that are listed. For more information, see [Batch Timesheet Entry](#).

If your system integrates with Sage PeopleLink, when you select **Processing - Timesheet Entry** a list of timesheets received from PeopleLink opens. For more information, see [Overview of Timesheet Entry](#).

### What do I do next?

After you have processed employee timesheets for the current payroll period, you should create a backup of your data. See [Backing Up Your Data](#).

### See also

For more detailed information about working with timesheets, see [Timesheets](#).

To learn about how to start using Micropay Professional to process payroll, see [Setting Up the Payroll System](#).

**Note:** Multi-timesheets and cost centres are not available in [Micropay Professional Lite](#).

## Backing Up Your Data

### Company Backup

You can back up the current company's data using the Company Backup utility.

This enables you to restore a pay period in the event of error or system failure.

You should back up to a reliable storage medium, such as a network drive, a secondary disk drive or a memory stick.

1. Begin by selecting **Miscellaneous - Backup**. The Backup dialog box displays. Specify a destination for the backup data.
2. Click **Backup** to carry out the backup procedure.
3. When the system displays a message confirming that the backup copy has been made, click **OK** to finish.

For more information, see [Payroll Backup and Restore](#).

### Administrative Backup

You can back up the programs and data belonging to ALL payrolls on the system.

You should back up to a reliable storage medium, such as a network drive, a secondary disk drive or a memory stick.

1. Log in as the administrator and select the **Miscellaneous - Backup** menu option. The Backup dialog box displays.
2. Select the payrolls you need to back up. If you want to back up support files as well as data, select the **Backup System Files** checkbox.
3. Specify the backup location, and then click **Backup**.

For more information, see [Administrative Backup and Restore](#).

See also

To learn about how to start using Micropay Professional to process payroll, see [Setting Up the Payroll System](#).

## Other Common Setup Procedures

Besides setting up users and user groups, there are a number of other procedures you usually need to carry out when you are setting up Micropay Professional for use. These include:

[Logging into Micropay Professional](#)

[Setting Up Payments](#)

[Setting Up Deductions](#)

[PRSI Table](#)

[PAYE Table](#)

[PRSI Earning Bands](#)

[Setting Up Bank Details](#)

[Setting Up E-mail Capability](#)

See also

[Setting Up the Payroll System](#)

## Logging into Micropay Professional

Depending on whether you wish to carry out administrative tasks or process payroll, you either log in as the system administrator or as an ordinary user:

[Logging in as the administrator](#)

[Logging in as an ordinary user](#)

See also

[Setting Up the Payroll System](#)

## PAYE and PRSI Rates

Micropay Professional maintains tables containing the current:

[PRSI Earning Bands](#)

[PRSI Table](#)

[PAYE Table](#)

The tables apply to all your payrolls.

They should not be adjusted manually except in exceptional circumstances. For more information on updating the tables, see [How do I install the Budget 2011 Update?](#)

### PRSI Table

The PRSI table contains a list of the current tax year's PRSI codes and their associated rates. Micropay Professional uses this in conjunction with the PRSI Earning Bands table to determine how much PRSI the employer and each employee must pay.

#### New Employer PRSI Rate

As part of the Government's Jobs Initiative of May 2011, the lower rate of employer PRSI for A0 and AX employees (previously 8.5%) is halved to 4.25% on jobs paying up to € 356 per week.

This change applies to payments made to employees on or after July 2nd 2011, and is intended to remain in place until the end of 2013.

#### Viewing and manually editing the PRSI table

Sage Ireland strongly recommends that you follow the procedure described in the [How do I install the Budget 2011 Update?](#) topic to update PAYE and PRSI information. However, you can also manually update PRSI information.

1. Start Micropay Professional and sign on as ADMIN.
2. Select **Edit PRSI Table** in the navigation pane's Configuration section.

Alternatively, click the **PRSI Table** button, or select the **Tables - PRSI Table** menu option.

3. The PRSI Table window opens. Make any necessary adjustments to the table.

Field name	Requirement
PRSI Code	The current codes for the PRSI classes.

Field name	Requirement
Employer %	For each PRSI limit, enter the corresponding employer percentage contribution.
Employee %	For each PRSI limit, enter the corresponding employee percentage contribution.

- Click **OK**.

### See also

[Other Common Setup Procedures](#)

### PRSI Earning Bands

The PRSI Earning Bands table contains a list of PRSI categories, and the following associated information:

- employee earning bands (weekly/monthly)
- allowance (weekly/monthly)
- conditions under which one PRSI category switches to another
  - LE: 'less than or equal'
  - LT: 'less than'

Micropay Professional uses this table to determine employer and employee PRSI class and subclass.

Before you start processing payroll in a new tax year, you need to update the PAYE and PRSI tables and earning bands. The best way to do this is described in the FAQ '[How do I install the Budget 2011 Update?](#)'.

#### How to edit PRSI earning bands manually

Sage Ireland strongly recommends that you follow the procedure described in the FAQ '[How do I install the Budget 2011 Update?](#)' to update PAYE and PRSI information. However, you can also manually update PRSI information.

- Start Micropay Professional and sign on as ADMIN.
- Select **Edit PRSI Earning Bands** in the navigation pane's Configuration section.

Alternatively, select the **Tables - PRSI Earning Bands** menu option.

- The PRSI Earning Bands window opens. The PRSI Earning Bands table must incorporate the latest changes specified by the Department of Social and Family Affairs.
- The Condition column enables you to specify a conditional operator that applies to the earning limit. This can determine the PRSI subclass to which a particular employee belongs. These operators are
  - LE (less than or equal to)
  - LT (less than)

Leaving a Condition field blank signifies that no condition applies to the earning limit.

#### Example

In the PRSI class A1, suppose that the weekly earning limit is € 440 weekly or € 1907 monthly.

If the employee earns an amount **less than or equal (LE)** to this, the PRSI class changes to AL.

### See also

[Other Common Setup Procedures](#)

## PAYE Table

The PAYE Table contains the tax year's income tax rates, Emergency Tax Credit value and Emergency Standard Cut-off value. These values are determined each year in the Budget. Every employer is notified of the new values by the Revenue Commissioners before the start of the new tax year.

Before you start processing payroll in a new tax year, you need to update the PAYE and PRSI tables and earning bands. The best way to do this is described in the FAQ '[How do I install the Budget 2011 Update?](#)'.

### Viewing and manually editing the PAYE Table

Sage Ireland strongly recommends that you follow the procedure described in the FAQ '[How do I install the Budget 2011 Update?](#)' to update PAYE and PRSI information. However, you can also manually update PAYE information.

1. Start Micropay Professional and sign on as the administrator using the user name ADMIN. The default administrator **password** is PASS, but this may have been changed on your system.
2. Use the navigation pane to select **Edit PAYE Table** in the pane's Configuration section. Alternatively, select the **Tables - PAYE Table** menu option, or click the **PAYE Table** button.
3. The PAYE Table window opens. Make the relevant changes in the Tax Rates and Emergency Tax Basis sections of the window.

**Note:** The figures entered or amended MUST comply with the current tax year rules supplied by the Revenue Commissioners in the budget each year. Only annual values are stored in the PAYE table. Other values, such as weekly and monthly amounts, are calculated automatically by Micropay Professional.

4. Click **OK** to save the information you have specified.

### See also

[Other Common Setup Procedures](#)

## Setting Up Bank Details

You can set up banks in the Bank Details window. The system supports an unlimited number of banks.

The bank details set up here are used by all the payrolls in your system.

To add a bank to the system, carry out the following steps:

1. Start Micropay Professional and sign in as ADMIN. The default **password** is PASS, but your system may have a different administrative password.
2. Select the **Tables - Bank Details** menu option.
3. The Bank Details window opens. Each bank is identified by its own sort code. Expand the Sort Code drop-down list to display the existing banks already set up in the system. Select a bank to open its record. If you need to change any of the details for a bank, edit the fields in the record and click **Save**.
4. If you need to set up a bank not already in the list, enter its sort code and click **Find**. A message box prompts you to confirm that you want to create the new bank record. Click **OK** to proceed.
5. Specify the bank details in the fields provided, and then click **Save** to store the new bank record.

Item	Description
Sort Code	The sort code identifies a bank and branch. If the bank record already exists on your system, the bank details are shown. You can amend them if necessary.
Name	The name of the bank.
Address	The branch address of the bank.

See also

[Other Common Setup Procedures](#)

## Setting Up E-mail Capability

Micropay Professional provides functionality that enables you to e-mail payroll reports (as PDF-format attachments) to colleagues. In particular, it enables you to send current and historical payslips to employees electronically.

You can password-protect e-mailed PDF payslips. You can also export PDF versions of payroll reports to particular locations.

To set up e-mail capability for a company payroll

To set up e-mail capability for the current company payroll, you specify the necessary settings in the Company Details window's **E-mail** tab. (See [Email Tab](#)).

The PDF Password field enables you to configure Micropay Professional so that PDF reports, such as electronic payslips, are encrypted.

To set up electronic payslip capability for an employee

You need to set up each employee for electronic payslip capability individually. You do this in the Employee Details window's **Pay/YTD** tab by selecting the **Use Email Payslips** checkbox. (See [Pay/YTD Tab](#)).

The application generates a PIN, which the employee must use to gain 'read' access to their electronic payslips.

You can e-mail current payslips to one or more suitably configured employees in the Payroll Reports window's **Employee** tab. (See [Generating a Standard Report](#).)

When you access an employee's historical payslip in the Employee Details screen (by clicking the **Payslip** button), you can e-mail it to the employee by selecting **File - Email Slip**. (See [Pay/YTD Tab](#).)

E-mailing Payroll Reports

You can e-mail standard payroll reports to colleagues from Micropay Professional. You do this in the Payroll Reports window by setting up the relevant report and clicking the **Email** button.

You can also export a PDF or a Microsoft Excel version of the report to a particular location by clicking the **PDF** button or the **Excel** button respectively. Payslips are always exported to the relevant company payroll's Export folder, but in the case of all other standard payroll reports you can specify a location. See [Generating a Standard Report](#).

See also

[Other Common Setup Procedures](#)

## Universal Social Charge (USC)

The Universal Social Charge (USC) is a deduction from your gross income. The deduction amount is calculated:

- AFTER relief amounts for certain capital allowances
- BEFORE relief for losses or pension contributions

It replaces the Income Levy and Health Levy that applied prior to 2011.

Below, some basic questions about the USC are answered.

For comprehensive information about the USC, refer to this [official Revenue Commissioners document](#).

Is any income exempt from the USC?

Important examples of the types of income exempt from the USC include the following:

- If your annual gross income is less than € 4,004, you don't have to pay the USC.
- Social Welfare payments, including those received from abroad.
- Income in lieu of Social Welfare payments, such as Community Employment Scheme payments or the Back to Education Allowance.

What are the current USC rates?

The rates applicable from Jan 1, 2011 for individuals **under 70** are as follows:

USC Rate	Income Threshold Per Annum	Income Threshold Per Week	Income Threshold Per Month
Exempt	Gross Income exceeding € 4004 per annum		
2%	Gross Income up to, but not exceeding, € 10,036 per annum	Gross Income up to, but not exceeding, € 193 per week	Gross Income up to, but not exceeding, € 837 per month
4%	Gross Income between € 10,037 and € 16,016 per annum	Gross Income between € 194 and € 308 per week	Gross Income between € 838 and € 1335 per month
7%	Gross Income exceeding € 16,016 per annum	Gross Income exceeding € 308 per week	Gross Income exceeding € 1335 per month

If you are aged 70 or older, the following rates and thresholds apply:

USC Rate	Income Threshold per Annum	Income Threshold Per Week	Income Threshold Per Month
Exempt	Gross Income exceeding € 4004 per annum		
2%	Gross Income up to, but not exceeding, € 10,036 per annum	Gross Income up to, but not exceeding, € 193 per week	Gross Income up to, but not exceeding, € 837 per month
4%	Gross Income exceeding € 10,036 per annum	Gross Income exceeding € 193 per week	Gross Income exceeding € 837 per month

### Medical Card Holders

The USC rate is capped at a maximum rate of 4% for Medical Card holders, irrespective of the level of their income.

See also

[Sage Micropay Professional](#)

## Pension-Related Deduction (PRD)

The Pension-Related Deduction (PRD), also known as the "Pension Levy", is a gross deduction (see [What is a Gross Deduction?](#)) for certain public sector organisations.

It is calculated BEFORE PRSI and [USC](#) are deducted from the employee's pay.

The 2011 rates and thresholds are as follows:

Threshold	Rate
First € 15,000	0% (exempt)
Next € 5000	5%



Threshold	Rate
€ 20,000 - € 60,000	10%
€ 60,000 +	10.5%

How do I do I activate the PRD feature for a payroll?

1. Select the **Company/Payroll - Pension Related Deduction (PRD)** menu option.
2. The Pension Related Deduction Settings window opens. The window contains two tabs:

- **General**

The **General** tab enables you to carry out the following tasks:

- a) Activate the PRD feature:

To do this, select the **Use Pension Related Deduction (PRD) Feature** checkbox.

- b) Specify whether new employees' PRD Status with respect to PRD is:

- **Do not deduct**

This signifies that although PRD is enabled in this payroll, the employee is not subject to PRD deductions.

- **Week 1**

This signifies that the employee is subject to PRD deductions calculated on a Week 1 basis.

This is applicable when the employee has joined a Public Service organisation during the year and has declared that this is their main employment, but has yet to supply a valid PRD45 from previous employment.

It can also be applied when the employee has significantly underpaid PRD, and an agreement has been reached to recoup the underpayment in this way.

- **Cumulative**

This signifies that the employee is subject to PRD deductions calculated on a cumulative basis.

This is applicable when the employee has supplied the PRD45 from any previous main or subsidiary employments in the current tax year, and the details have been included on the employee's salary history.

- **Rates**

The **Rates** tab enables you to view the current PRD rates and annual thresholds.

If you need to change the Upper Limit and Rate values, click **Edit**.

Then enter the administrative [password](#), and make the necessary alterations.

You should bear in mind that the changes you make apply to all the payrolls set up on your system.

How do I mark a payment as being subject to the PRD?

The Pension-Related Deduction is payable on gross pay. It must be calculated on the individual gross payments:

- basic pay
- overtime
- arrears

- all taxable allowances

**Note:** All non-taxable allowances are exempt from PRD.

You need to explicitly mark payments as being subject to the PRD.

To do this, carry out these steps:

1. Select the **Company/Payroll - Payments** menu option.
2. Select the payment's **PRD** checkbox.
3. Click **OK**.

How do I set up a PRD nominal code?

The Setup - Nominal window now contains a PRD field.

This enables you to set up a PRD nominal code in the usual way. For more information, see [Nominal Setup](#).

The PRD amount will be included in the Credit section of the Nominal Report.

How do I apply PRD to a specific employee?

To enable PRD calculations for the current employee, select a PRD Status option in the Employee Details window's [Deductions Tab](#).

#### **Do not deduct**

This signifies that although PRD is enabled in this payroll, the employee is not subject to PRD deductions.

#### **Week 1**

This signifies that the employee is subject to PRD deductions calculated on a Week 1 basis.

This is applicable when the employee has joined a Public Service organisation during the year and has declared that this is their main employment, but has yet to supply a valid PRD45 from previous employment.

It can also be applied when the employee has significantly underpaid PRD, and an agreement has been reached to recoup the underpayment in this way.

#### **Cumulative**

This signifies that the employee is subject to PRD deductions calculated on a cumulative basis.

This is applicable when the employee has supplied the PRD45 from any previous main or subsidiary employments in the current tax year, and the details have been included on the employee's salary history.

#### **Subsidiary Employment**

The employer can also specify if the employee is in subsidiary employment i.e. has his main employment elsewhere. If the **Subsidiary** checkbox is selected, PRD is calculated at the highest rate (currently 10.5%)

#### **Other PRD Information**

This tab also contains the following PRD information:

- PRD Pay YTD

This field specifies the total amount of the employee's pay to date this year that is subject to the PRD.

- Deduction YTD

This field specifies the total amount of PRD taken from the employee's gross pay so far this year.

How do I edit PRD Year to Date Details?

Click the **Edit YTD Details** button. This opens a screen that displays a breakdown of:

- the PRD Pay
- the PRD paid at each rate
- any adjustments to the calculated PRD (PRD Manual adjust TP) in each pay period

These values are derived from the [ETP \(Earnings, Tax and PRSI\) Tab](#). Any amendments made on the Edit PRD YTD Details screen will be reflected on the ETP, and vice versa.

How do I manually adjust the PRD during Timesheet Entry?

If you need to make a manual adjustment to the PRD amount calculated automatically for an employee, open the [Timesheet Entry: Override tab](#).

Select **+** or **-** in the +/- drop-down list, as appropriate. Then enter the adjustment value in the Value field.

The manual adjustment is shown in the PRD Manual Adjust TP field in the Employee Details window's [ETP \(Earnings, Tax and PRSI\) Tab](#) when the pay period is closed (that is, when the End of Period has been processed).

How is the PRD recorded in the payslip?

The PRD amount is marked 'PRD' in the payslip's Deduction Details section.

How is PRD calculated?

The Pension Related Deduction may be calculated on a Week 1 basis or on a Cumulative basis:

#### **Week 1**

This is applicable when the employee has joined a Public Service organisation during the year and has declared that this is their main employment, but has yet to supply a valid PRD45 from previous employment.

It can also be applied when the employee has significantly underpaid PRD, and an agreement has been reached to recoup the underpayment in this way.

#### **Cumulative**

This is applicable when the employee has supplied the PRD45 from any previous main or subsidiary employments in the current tax year, and the details have been included on the employee's salary history.

Does the PRD appear in standard reports?

Yes, the PRD is included in the following standard reports:

- Payslips
- Control Summary (Non-Tax Deds section)
- Gross to Nett (Non-Tax Ded column)
- Employee Details

## **Parking Levy**

Some employees who are entitled to use a parking space provided by their employer are liable to pay a Parking Levy amount.

For details of how the Parking Levy operates, [click here](#) for the official Revenue Commissioners guide.

### **Enabling the Parking Levy feature in a payroll**

In Micropay Professional you can apply the Parking Levy to employees in a payroll. To do this, you must first enable the Parking Levy feature for the company.

1. Select **Company/Payroll - Parking Levy**.
2. The Parking Levy Settings window opens. Select the **Use Parking Levy feature** checkbox.
3. If you want to take the Parking Levy standard amount into account for timesheet holiday calculations, select the **Include in timesheet holiday calculations** checkbox.
4. Click **OK**.

You have enabled the Parking Levy feature for the current payroll.

### How does the Parking Levy work in payroll?

In each Employee Details record's **Deductions tab**, you can specify a standard Parking Levy amount to be applied in each pay period as a nett deduction.

However, you can edit this amount in each pay period Parking Levy field in the Timesheet Entry window's **Data Entry tab**.

## Licensing

When you set up your Micropay Professional system, you are licensed for both:

- a particular number of companies
- a particular number of employees in each company

You can create as many payrolls as you need within each company. Typically, a payroll is set up for each pay frequency.

You can then add employees to your payrolls up to the maximum you are licensed for.

**Note:** This maximum applies to each company as a whole, not to individual payrolls.

If you attempt to exceed your licensed number of companies or employees, you may need to pay an additional charge to upgrade your licence.

### Learn about Licensing

- [Viewing and Editing Licence Information](#)
  - [Offline Licensing](#)
  - [Contacting Sage with Licence Information](#)
  - [Licence Warnings](#)
- [Companies and Payrolls](#)
  - [Adding a New Company](#)
  - [Deleting a Company](#)
  - [Changing a Company Name](#)
  - [Reassign a Payroll to a Different Company](#)
  - [Adding a Payroll](#)
  - [Restoring an Unlicensed Company](#)
- [Employees](#)
  - [Creating a New Employee](#)

### Micropay Professional Lite

If you are a [Micropay Professional Lite](#) user, you can upgrade your licence to obtain the full set of Micropay Professional features.

### Setting Licence Details

In certain situations you may need to set licence details.

For example, you may be launching the software for the first time.

Or you may have been notified that you need to refresh your licence.

1. Select the **Help - View Licence Information** menu option (if you are not already in the Licence Details screen).
2. The Licence Details window opens. Here you can view and edit licence details.

Licence details...

Option	Description
Account Code	The number of your customer account.
Serial Number	The serial number of your payroll software.
Company Limit	The number of companies your payroll system is licensed to support.
Employee Limit	The number of <a href="#">employees</a> each company in your payroll system is licensed to support.
Extra Features	This field lists the extra payroll features you are currently licensed for.
Expiry Date	The date on which your current software licence expires.
Offline Licensing	Normally, you license your payroll system over the Internet.  However, you can also license the system offline. To do this, click the <a href="#">Offline Licensing</a> link.

3. To change your account code or serial number, click the **Edit** button in the Licence Details window.
4. Enter the Account Code and Serial Number details provided by [Support](#) or your Sage-accredited business partner.

Don't change these details unless you are instructed to by [Support](#) or your Sage-accredited business partner.

5. Click **OK**.
6. You are returned to the Licence Details window. If necessary, click **Refresh Licence**.

## Offline Licensing

Normally, you [license your payroll system](#) over an Internet connection.

However, if you are not normally connected to the Internet, you can still license the system by carrying out the following steps:

1. Select the **Help - View Licence Information** menu option.
2. The Licence Details window opens. Click the **Offline Licensing** link.
3. Follow the onscreen instructions.

## Contacting Sage with Licence Information

If you are prompted to upgrade your licence, you may need to contact Sage.

Here are the necessary contact details:

<b>Support Number</b>	1890 88 20 60
<b>e-Mail Address</b>	pye@sage.ie
<b>Postal Address</b>	Payroll Support  Sage Ireland  3096 Lake Drive  Citywest Business Campus  Dublin 24

## Licence Warnings

You may encounter situations in which you need to register your software or upgrade your current licence.

Below are explanations of the messages you might see.

### Company Licence Messages

Situation	Message
You've set up more companies than you're licensed for.	<p>There are currently x companies in your payroll system.</p> <p>However, you are licensed for a maximum of y companies.</p> <p>You can finish creating the company, but this may result in an additional charge that will be included on your next invoice.</p>

### Employee Licence Messages

Situation	Message
You've set up more employees than you're licensed for.	<p>There are currently x employees in your payroll system.</p> <p>However, you are licensed for a maximum of y employees.</p> <p>You can finish creating the employee, but this may result in an additional charge that will be included in your next invoice.</p>

## Company Manager

Your [Micropay Professional software licence](#) entitles you to the use of a certain number of companies, and a certain number of employees in each company.

The Company Manager window enables you to perform the following tasks:

- [Add a New Company](#)
- [Delete a Company](#)
- [Change a Company Name](#)
- [Set up a Payroll](#)
- [Reassign a Payroll to a Different Company](#)

### Adding a New Company

When you set up your Micropay Professional system, you are licensed for a certain number of companies.

You can set up as many companies as you are licensed for, and create as many payrolls as you need within each.

Typically, a payroll is set up in a company for each pay frequency.

If you try to set up more companies than you are licensed for, you are provided with onscreen instructions about how to contact Support to modify your licence.

To add a new company, carry out the following steps:

1. To add a new company, begin by logging in as ADMIN. (The default [password](#) is PASS, but it may be different in your payroll system.)
2. Click **Company Setup** in the navigation pane's Companies view.
3. The Company Manager window opens. Click **Add New Company**.
4. The Add New Company window opens. Enter the company name.

5. Click **Create Company**.

The Company Manager window displays again. You have created a new company, and it is now listed. You can start adding payrolls to it by clicking **Add New Payroll**.

For more information about adding payrolls, see [Adding a Payroll](#)

## Deleting a Company

You can delete a company as long as it has no payrolls.

If you need to delete a company that has payrolls, you can [reassign the payrolls to other companies](#).

To delete a company, carry out the following steps:

1. Begin by logging in as ADMIN. (The default [password](#) is PASS, but it may be different in your payroll system.)
2. Click **Company Setup** in the navigation pane's Companies view.
3. The Company Manager window opens. In the main grid, select the company you want to delete.
4. Click **Delete Company**. (If this button is inactive, it's probably because the company contains payrolls.)
5. You are prompted to confirm that you want to delete the company. Click **Yes**.

The company is now removed from the Company Manager window's grid.

## Changing a Company Name

You can change the name of a company.

This name change applies to all payrolls that belong to the company.

To do this, carry out the following steps:

1. Begin by logging in as ADMIN. (The default [password](#) is PASS, but it may be different in your payroll system.)
2. Click **Company Setup** in the navigation pane's Companies view.
3. The Company Manager window opens. In the main grid, select the company whose name you want to change.
4. Click **Change Company Name**.
5. The Modify Company window opens. Type the new name of the company.
6. Click **Modify Company**.

The Company Manager window opens again. The company's name is now changed.

## Adding a Payroll

To add a payroll to a company, carry out these steps:

1. Log in as the administrator. The user name is ADMIN. The default [password](#) is PASSWORD, but this may be different on your system.
2. Select the **Company - Company Setup** menu option.
3. The Company Manager window opens. Click **Add New Payroll**.
4. The New Payroll window opens. Enter the payroll name, the company name, the payroll password, and the payroll frequency.
5. Click **Create**.



You have set up a new payroll within the specified company.

#### More information

For more detailed information about setting up payrolls, [click here](#).

### Reassign a Payroll to a Different Company

You can reassign a payroll from one company to another.

For example, you would probably want to reassign the payrolls belonging to a company you need to [delete](#).

1. Log in as the administrator. The user name is ADMIN. The default [password](#) is PASSWORD, but this may be different on your system.
2. Click the **Company Setup** icon in the navigation pane.
3. The Company Manager window opens. Select the payroll you want to reassign.
4. Click **Reassign Payroll**.
5. The Reassign Payroll window opens. Select the company you want to reassign the payroll to.
6. Click **Reassign**.

You have reassigned the payroll to a different company.

### Restoring an Unlicensed Company

Suppose that you have a backup belonging to a company not currently licensed in the payroll system.

You can [restore this backup](#) in the usual way.

This adds the relevant company to your payroll system, enabling you to process payroll using the restored data.

However, if adding the backed-up company exceeds the number of companies you are licensed for, you will be prompted to upgrade your licence.

See also

[Licensing and Registration](#)

### Licensing Sage PeopleLink

Micropay Professional can integrate with the Sage PeopleLink system.

PeopleLink enables supervisors to submit time and pay information for their teams in each pay period.

For information about how to obtain Sage PeopleLink, contact Sage Ireland or your supplier.

When you set up Sage PeopleLink, you must license it from within Micropay Professional.

1. Begin by logging into the relevant payroll.
2. Select the **PeopleLink - Manage Licence** menu option.
3. The Sage PeopleLink Manager window opens.

# of Licences Available	Sage PeopleLink licences are purchased in batches of five. Each licence applies to a single employee. The # of Licences Available field displays number of licences that have been purchased.
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# of Licences in Use	<p>The # of Licences in Use field displays the number of employees that have already been licensed.</p> <p>It is important to be aware that the employee licences apply to all the payrolls set up in your Micropay Professional installation.</p> <p>You can license not only employees in the current company payroll, but also those belonging to the other company payrolls.</p>
Licence Expires On	A Sage PeopleLink licence expires after twelve months. This field shows the date on which the licence must be renewed.
Employees enabled for PeopleLink	This panel lists all the employees in the payroll, and indicates which ones are currently enabled to log into PeopleLink.

4. Click **Save**.

You have licensed PeopleLink for the current payroll.

[Click here](#) to see how to enable an employee to log into and use PeopleLink.

### I need additional PeopleLink employee licences

To get additional PeopleLink licenses, click the **Change Licence** button. Follow the instructions onscreen to obtain additional licences.

### How do I enable an employee to use Sage PeopleLink?

To enable an employee to use [Sage PeopleLink](#), you must log into Sage PeopleLink as a user with 'HR Clerk' access rights.

Licensing an employee to use Sage PeopleLink also adds the **Get Info from PeopleLink** button to the employee's timesheet window in Micropay Professional.

To license an employee to use Sage PeopleLink, carry out the following steps in Sage Peoplelink:

1. Click the **Company** tab.
2. The employee list contains all the employees belonging to the company you are working in. These employees were set up in the Micropay Professional.

Use the checkboxes to select/deselect employees as necessary.

3. Click the **Enable Login** button to enable all the selected employees to use Sage PeopleLink.

In a similar manner, you can use the **Disable Login** button to disable selected employees so that they cannot use Sage PeopleLink.

Each employee you have enabled will receive an e-mail inviting them to activate their Sage Passport.

## Company/Payroll Details

A **payroll** is the set of data associated with a particular pay frequency in a company.

Your organisation may be a single physical company, but it needs a separate payroll for every pay frequency it operates. So there needs to be a payroll for weekly employees, another for monthly employees, and so on.

Micropay Professional supports the following pay frequencies:

- Weekly
- Fortnightly
- 4-weekly
- Monthly
- Bi-monthly
- Quarterly

For information on how to set up a new payroll, see [Creating a New Payroll](#).

For detailed information the information contained in a payroll, see [Company Details Window](#).

### Other important topics

[P30/CC124](#)

[Setting up Paypath details](#)

[How do I set up pensions?](#)

[Disability Benefit](#)

[Employee Profiles](#)

[Job Codes and Location Codes](#)

[Working with the Payroll Calendar](#)

[Payroll Notepad](#)

[Hourly Rates](#)

[Cheque Formatter](#)

[Benefit in Kind](#)

### See also

[Setting Up the Payroll System](#)

**Note:** Employee profiles, job codes and location codes are not available in [Micropay Professional Lite](#).

### Payroll Features

The Company Details window enables you to provide information such as:

- general payroll settings
- Paypath details

- miscellaneous settings
- split nett pay settings (a way of splitting an employee's pay across multiple payment methods)
- benefit in kind details
- e-mail settings

Other payroll features include

- the payroll calendar
- departments and cost centres
- payments and deductions
- the cheque formatter
- employee profiles
- the payroll notepad

See also

[Company/Payroll Details](#)

## Company Details Window

1. To open the Company Details window, begin by selecting **Change Main Company/Payroll Details** in the navigation window's Payroll section. Alternatively, select the **Company Payroll - Company/Payroll Details** menu option.

The Company Details window displays.

2. In the window's various dialog boxes, specify payroll information as appropriate.
3. Click **OK** to store the payroll information you have entered.

The Company Details window contains a number of tabs:

[General Tab](#)

[Paypath Tab](#)

[Misc. Tab](#)

[Split/User-Defined Tab](#)

[BIK Tab](#)

[Email Tab](#)

[Employee Tab](#)

[Holidays tab](#)

[CSO Tab](#)

### General Tab

The Company Details window's **General** tab holds general information about this payroll, such as the company name and address. (Each payroll belongs to a company. When you license a company name in Micropay Professional, you can create any number of payrolls within it.)

Field name	Requirement
Company Name	The licensed company name. You can alter this if necessary, but if you do so, you will need to specify a licence number, which you must obtain from your Micropay Professional supplier.
Address	The company address.
Narrative	Default narrative to be printed on all reports. This enables you to distinguish the reports for this payroll from the same reports for another payroll.
Payroll Frequency	Each pay frequency a company uses requires a separate payroll.  You can change the frequency before the first period is set, and after processing the tax End of Year, but not when processing Mid-Tax Year.
GCD Code	Your company's General Case District code, as issued by your local Tax Office, if applicable. It is included on year-end reports.
Tax Reg. No.	Your Company Registration Number as issued by the Revenue Commissioners. This is necessary for year-end reports. Only valid registration numbers can be entered.
PAYE Unit No.	The PAYE Unit No. of the office that deals with your tax queries. This is non-mandatory field. If you provide the number, it will be entered on the P35 details.
Contact Details	The name, telephone number, fax number and e-mail address of a company contact. The telephone and fax numbers are printed on the P45. The information entered here is also output on your P35 return, and may be used by Revenue if they have any queries on your end-of-year returns.

See also

[Company Details Window](#)

## Paypath Tab

*Paypath* (also known as Electronic Money Transfer, or EMT) is the system by which funds are transferred electronically from your company bank account to your employees' bank accounts. This is done using your electronic banking software, or by Internet banking.

To set up Paypath, you need to:

- specify the necessary details in the Paypath tab of the Company Details window, such as the name of the Paypath file.
- enter your employees' bank information in the Employee Details window

Field name	Requirement
Company	The licensed company. You can alter this, if necessary, but if you do so, you will need to specify a licence number, which you must obtain from your Micropay Professional supplier.
Bank Code	You can use the drop-down list button to select from a list of the bank codes currently stored in the system. To add a new one, see <a href="#">Setting Up Bank Details</a> .
Bank Acc.	The number of the bank account from which payments are drawn.

Field name	Requirement
Volume Serial No.	The company's Volume Serial Number for Paypath. This comprises six characters. It is used by your bank as an identifier. The code must be agreed with your bank prior to use.
Owner ID	Your Paypath owner identification code. Your company will be assigned this six-digit reference when your bank approves the processing of wages/salaries via Paypath.
User Short Name	Your company's Paypath short name. This is used for reporting and processing in cases in which there is insufficient room to display your full company name. It appears in each employee's bank statement to identify the salary amount.
Paypath File	Your company's Paypath file name, issued to you by your bank. This can include a full or relative path to the file.  (Enter a temporary file name, such as C:BANKFL.001, if you are <a href="#">merging paypath files</a> .)
Deduction No.	The deduction you have set up for <a href="#">Interim Paypath</a> amounts.
Enable Credit Union Transfer	You can use this checkbox to enable Paypath transactions in which the employee uses a credit union account.

See also

[Company Details Window](#)

### Misc. Tab

The Company Details window's **Misc** tab contains miscellaneous information about your payroll.

You can set the default standard hours applied to employees, although this value may be superseded by the employee profile or the employee record.

Only the pay methods selected in this tab will be applicable to employee details.

Field name	Requirement
Company Name	The licensed name appears here. If you alter it, you will be prompted to provide a licence number. You must obtain this from your supplier.
Pay Method section	This section contains several checkboxes that enable you to specify which methods will be used. These are Paypath, Giro, Cheque, Cash and Split Pay. The method corresponding to a deselected checkbox is unavailable in the Pay Method field of an employee's master record.
Use 50 Notes	This checkbox enables you to indicate that 50 notes can be included in cash-paid employees' pay packets. If left unchecked, the largest denomination note used will be 20.
Special PRSI for Tax Exempt employees	Indicates whether special PRSI applies for tax-exempt employees. This option can be used only with the approval of the Dept. of Social Protection.
Avg. Hourly Rate	The rate code that signifies the average hourly rate.
Avg. No. of Weeks	The number of periods over which the average rate is calculated. This can be from 0 to 13 periods.

Field name	Requirement
Round Nett Pay To	The nearest value to which Nett pay is rounded. This only applies to cash-paid employees. The value entered specifies a number of cents. For example, entering 50 rounds the nett pay to the nearest 50c.
Maximum/Minimum Nett Pay	Maximum/minimum nett pay per period for ALL employees in the payroll. It can be overridden at employee level in the Employee Details window. Employees are not limited to maximum nett pay, but the presence of pay in excess of this value triggers a warning in the Control Summary report.
Standard Hours	<p>The default standard number of hours worked per period. Standard hours may also be defined at employee profile level or employee level.</p> <p>(Employee profiles are not available in <a href="#">Micropay Professional Lite</a>.)</p> <p>The standard hours value is the default that appears for hourly-paid employees when processing timesheets. You can change it if necessary.</p> <p>To use the Standard Hours setting, you must set it up as the first entry in your list of payment types in the Payments window.</p>
Nett to Gross Type	<p>The system facilitates two types of Nett to Gross Pay:</p> <ul style="list-style-type: none"> <li>Total, in which employees receive no payments processed other than their nett pay amount</li> <li>Extra, in which employees may receive payments in addition to their nett pay amount</li> </ul> <p>The nett pay amount may be entered on the employee master record (if fixed), or may be entered on the employee's timesheet record for each period. A timesheet can use either Total or Extra, but not both.</p>
Nett to Gross Elm.	The list number in the Payments table of the payment relevant to the Nett To Gross amount. This is required even if your Nett to Gross Type is Total. The payment type should be 'Variable'. The payment will hold the calculated gross value of the Nett to Gross calculation.
Audit Retention	<p>The number of periods (up to a maximum of 99) you want to retain information for audit purposes. If you want to store audit information indefinitely, leave this field as zero. Sage Ireland recommends a small (non-zero) value to avoid unnecessarily large backups.</p> <p>Sage Ireland recommends setting the Audit Retention to one or two periods (three at the most) to avoid overloading the system with data and impairing its performance. If it is set to zero, or left blank, the system will hold all audit information.</p>
Control Summary by	<p>Determines whether the Control Summary is produced by cost centre, by department, or neither of these.</p> <p><b>Note:</b> Cost centres are not available in <a href="#">Micropay Professional Lite</a>.</p>

Field name	Requirement
Pension Remittance Notification	<p>Selecting this checkbox enables the text specified in the associated field to be displayed on the employee's payslip under certain circumstances (see <a href="#">How do I set up pensions?</a>). The notification message is approved by the Irish Pension Board.</p> <p>A typical remittance notification is:</p> <p>'Pens dedts will be remitted within 21 days of end month'.</p>
Hide Pension Contribution Popup	<p>When this checkbox is deselected, you can double-click a pension deduction in the Timesheet Entry window and enter (for the current period) a simple monetary amount or percentage of pensionable pay.</p> <p>When this checkbox is selected, this popup is not available.</p>

See also

[Company Details Window](#)

**Note:** Employee profiles are not available in [Micropay Professional Lite](#).

### Split/User-Defined Tab

Employees are usually paid by a single method. However, there may be situations in which an employee's pay must be split between two or more pay methods.

You can modify the employee details master record to define split nett pay, specifying the relevant payment method for each pay subdivision.

You define a formula that tells the application how much to pay using each method (see [Formulae](#)).

**Note:** Payment formulae are not available in [Micropay Professional Lite](#).

If you have several employees requiring split nett pay, and the calculation method is the same in each case, you can use the **Split/User Defined** tab in the Company Details window to set up a default formula for all these employees.

For details about setting up employee split nett pay details, see [Split Tab](#).

In this tab you can also define the default names of the Memo, Date and Value fields in the [Employee Details Window's User-Defined Tab](#).

Field name	Requirement
Company Name	The licensed name appears here. If you alter it, you will be prompted to provide a licence number. You must obtain this from your supplier.
Default Calculation	A formula that determines the way in which employee pay will be split for multiple pay methods.
Holidayable	Specifies whether split nett pay is applicable during holiday pay periods.
Memo descriptions	Memo field name in the <a href="#">Employee Details Window's User-Defined Tab</a> . Supports up to nine characters of free-format text.
Date descriptions	Date field name in the <a href="#">User-Defined Tab</a> of the <a href="#">Employee Details Window</a> . Supports up to nine characters of free-format text.



Field name	Requirement
Value descriptions	Value field name in the <a href="#">User-Defined Tab</a> of the <a href="#">Employee Details Window</a> .
Mon. Value	Specifies whether the relevant <a href="#">User-Defined Tab</a> 's Value field represents a monetary value.

See also

[Company Details Window](#)

## BIK Tab

The BIK tab enables you to specify benefit-in-kind shortfall transfer settings.

Field name	Requirement
Enable BIK Shortfall Transfers	By default, the <b>Enable BIK Shortfall Transfers</b> checkbox is deselected. Selecting the checkbox enable the other controls in the dialog box.
Transfer Balance From Deduction	The From Deduction drop-down list box enables you to select a deductions with a reducing balance.
Transfer Balance To BIK Payment	The To BIK Payment drop-down list box contains only payments marked Gross BIK and not holidayable.
Reminder in Period	The Reminder in Period field can specify a period, or it can be set to 'None'.
Restrict To Period Select- ed Above	The Restrict To Period drop-down list box enables you to select a period until which the Transfer Balance To BIK option in the Timesheet Entry window will be disabled. When the selected period arrives, a reminder is displayed.

See also

[Company Details Window](#)

## Email Tab

The **Email** tab enables you to activate Micropay Professional's e-mail functionality in the current payroll.

When it is enabled, you can:

- set up employees to receive payslips by e-mail (as PDF attachments)
- distribute Micropay Professional reports to colleagues by e-mail (as PDF attachments or Excel attachments)

Field name	Description
Use Email Feature	You select this checkbox to enable Micropay Professional's e-mail functionality.
Show Message Before Sending Payslip(s)	You select this checkbox to specify that you wish to be able to pre-view each payslip e-mail message before sending it. Your mail client opens, enabling you to view and edit the message, and then send it manually.
Request Read Receipt	You select this checkbox to specify that you wish to receive an automatic read-receipt message from the mail recipient to confirm that they have actually received and opened the mail.

Field name	Description
PDF Password	This field is where you specify a password that configures Micropay Professional so that PDF-format payslips are encrypted.

To enable this feature, you need to be using a MAPI (Messaging Application Programming Interface) e-mail program such as Microsoft Outlook.

See also

[Company Details Window](#)

## Employee Tab

The Employee tab enables you to specify whether employee codes should automatically be generated for the payroll, and what the minimum employee code length should be.

If you are using numeric employee numbers only, you should enter a value in the Minimum Employee Code Length field.

If you do not specify a code length, you must specify the full employee code, including superfluous zeroes. If you specify a code length, you can omit superfluous zeroes from the code.

For example, suppose that the Minimum Employee Code Length is 3. This means that you can identify the employee who has code 001 by typing 1.

The **Automatically Create New Employee Code** checkbox enables you to direct Micropay Professional to automatically enter an unused employee code number whenever you are creating a new employee.

If this checkbox is deselected, you'll need to specify the new employee's code manually.

See [Creating a New Employee](#).

See also

[Company Details Window](#)

## Holidays tab

The **Holidays** tab enables you to set up payroll-level holiday settings. These include the start and finish date of the holiday year, and the default holiday accrual method. (This can be changed at employee level if necessary.)

To apply the default accrual method to all employees in the payroll, click the **Apply accrual settings to all employees** button.

For more information about Holiday Tracking, see [Holiday Accrual and Processing](#).

## CSO Tab

The CSO tab enables you to activate the [CSO Reporting](#) feature.

To activate CSO Reporting, select the **Use CSO Reporting Feature** checkbox. Specify the company's CBR number in the CSO CBR Number field.

## Why are my CSO Reporting fields inactive?

CSO Reporting features will be disabled throughout the application until you provide a CSO CBR number in the Company Details window's **CSO** tab.

See also

[Company Details Window](#)

[Setting Up the Payroll System](#)

## P30/CC124

The CC124 report (P30) shows the calculated PAYE and PRSI totals for each tax return period, or for each quarter.

It is initially blank when you are setting up a payroll.

When you run an End of Period (see [End of Period](#)), it incorporates the totals for the current period.

The **Payroll - P30/CC124** menu option enables you to review the PAYE and PRSI totals, and to record (for reference purposes only) the:

- date of payment
- receipt number
- receipt date for submission of tax returns

The CC124 is automatically updated whenever you run an End of Period. So if you make a manual adjustment to an employee's details, the CC124 will be updated, and the change registers in the current month's CC124 figures.

## Reviewing and changing the CC124

1. Select the **Payroll - P30/CC124** menu option to open the P30/CC124 window.

The details calculated for each tax return period in the year (according to the calendar year) are displayed. Micropay Professional calculates these figures automatically.

2. Complete the details of payments sent and receipts, as necessary.

Field Name	Requirement
PAYE	PAYE total for the relevant calendar month
USC	The amount of <a href="#">Universal Social Charge (USC)</a> deducted from employees' pay in the relevant month.
Total PAYE	The sum of the income tax and USC amounts deducted from employees' pay in the relevant month.  (The USC amount is treated as an extra PAYE amount.)
PRSI	PRSI employer and employee total for the relevant month
Parking Levy	Parking Levy amount paid by the employee in the relevant month.
Total PRSI	The sum of PRSI and Parking Levy amounts in the relevant month.
Total PAYE + Total PRSI	The sum of the Total PAYE and Total PRSI amounts for the relevant month
Date Paid	The date on which the tax return values were paid
Receipt No.	The number of the receipt associated with the tax return period
Receipt Date	The date of the receipt associated with the tax return period

## Setting up Paypath details

1. Select **Change Main Company/Payroll Details** in the navigation pane's Payroll section. Alternatively, select the **Company/Payroll - Company/Payroll Details** menu option.
2. Open the Paypath tab.
3. Enter the relevant Paypath information.
4. Open the Employee Details window by doing one of the following:
  - click **Edit Employees** in the desktop's process map
  - click **Edit Employees** in the navigation pane's Pay Run view
  - select the **Processing - Employee Details** menu option
  - click **Emp Details**
5. Specify the relevant employee details.
6. Each Paypath-paid employee must have the correct pay method selected in the Employee Details window. You use the Paypath Register report to confirm that your settings are correct. (See [Creating a Paypath File](#).)

Click the Paypath **Create Disk** button to create the Paypath disk.

7. The Create Disk - Paypath dialog box displays. Only the date and the disk number can be edited.
8. Insert a floppy disk into the drive, if relevant.
9. Click **Create**.

The disk can be forwarded to your bank/financial institution using electronic banking software or Internet banking.

Contact your bank for further information on how to send the file to them.

## Setting the Pay Method

1. Open the Employee Details window by doing one of the following:
  - click **Edit Employees** in the desktop's process map
  - click **Edit Employees** in the navigation pane's Pay Run view
  - select the **Processing - Employee Details** menu option
  - click **Emp Details**
2. Enter the employee number.
3. Ensure that the employee's bank details are specified correctly.
4. In the Pay/YTD tab's Pay Method drop-down list, select **Paypath**.
5. Print the Paypath Register when you have set up all the relevant Paypath information, and processed timesheets.

The register includes a list of employees paid by Paypath in the current period. The report shows each employee's number, department, cost centre, name, bank sort code, bank account code and Paypath amount.

The report is available only for the current period, so you should print it before setting the next period.

### Printing the Paypath Register

1. Click **Other Reports** in the desktop's process map.

Alternatively, do one of the following:

- click **Other Reports** in the navigation pane's Pay Run section
  - click the **Reports** button in the Task Bar
  - select the **Reports - Payroll Reports** menu option
2. Open the Payroll Reports window's Payments tab.
  3. Select **Paypath Register**, and then preview and print it.

**Note:** Cost centres are not available in [Micropay Professional Lite](#).

## How do I set up pensions?

The following topics provide a step-by-step guide to using pensions in Micropay Professional:

[Setting up a Pension Link](#)

[Setting up Pension Deductions](#)

[What is a Pension Provider File?](#)

[Pension Remittance Notification](#)

[Construction Workers Pensions](#)

[Pensions at Payroll Year End](#)

See also

[Setting Up Deductions](#)

## Setting up a Pension Link

A pension link is a record containing information about a pension scheme, including the pension provider and the pension type.

There are a number of pension types:

- 'traditional' pension schemes
  - Personal Retirement Savings Account (PRSA) schemes
  - Retirement Annuity Contract (RAC) schemes
  - Construction Workers Pension Schemes (CWPS)
1. To set up a pension link, begin by logging in as ADMIN.  
  
The default [password](#) is PASS, but this may have been changed on your system.
  2. Select **Manage Pension Providers** in the navigation pane's Configuration section.  
  
Alternatively, select the **Tables - Pension Link** menu option.
  3. Create a new pension link, or open an existing one:  
To set up a new pension link in the Pension Link window, specify the link number you want to use. If the number is already used, the relevant link details are displayed. Otherwise, you are prompted to confirm that you want to create a new pension link. To make changes to an existing pension link, specify the link number in the Pension Link window and click **Find**, or browse to it in the Link field. Save the changes you make.

4. In the Type drop-down list box, specify whether the link is a **Pension**, **PRSA**, **PRSA (Excl ER Inc Levy)**, **RAC** or **CWPS**.
5. Enter the reference code supplied by the pension provider. For [Construction Workers Pensions](#), enter the Construction Industry Employer Number.
6. Enter a description of the pension provider.
7. The **File Overdue Warning** checkbox enables you to set up a reminder mechanism.

When you are setting a new period, the mechanism informs you whether you have generated a pension file for the previous pay period.

8. In the File Name field, specify the pension link used for electronic pension contributions.

The Pension Contribution Transfer file includes all pension deductions linked to this pension scheme in this payroll frequency.

To generate a Pension Contribution Transfer file for several payroll frequencies (all linked to the same pension scheme), you need to use a Consolidation Company. See [Consolidation Companies](#).

9. The Last Issue field displays the last date on which the pension file was sent.
10. Click **Save**.

You have set up a pension link.

What do I do next?

Set up the pension deductions you need so that you can subtract pension contributions from an employee's pay.

Every pension deduction must be attached to a pension link. Otherwise, pension totals listed in the P35 Return will be incorrect.

See [Setting up Pension Deductions](#)

## Setting up Pension Deductions

Each pension deduction in your system must be a [gross deduction](#).

In addition, it must be associated with a [pension link](#), which contains information about the relevant pension scheme.

Otherwise, the P35 Return will be incorrect because it will omit pension amounts.

In addition, PRSI will not be applied to the employee pension contribution.

1. To associate a pension deduction with a pension link, begin by [Logging in as an ordinary user](#).
2. Select the **Company/Payroll - Deductions** menu option.
3. The Deductions window opens. Locate the relevant pension deduction.

For each employee you can specify a standard pension contribution amount, or a percentage of pensionable pay.

You can adjust the pension amount in the Timesheet Entry screen when you are preparing the employee's timesheet in the current period.

4. In the deduction's Pension cell, select the relevant pension link in the drop-down list.
5. Click **OK**.

When every pension deduction has a pension link, the system can begin subtracting pension contributions from employee pay.

See also

[How do I set up pensions?](#)

[What is a Pension Provider File?](#)

[Pension Remittance Notification](#)

[Construction Workers Pensions](#)

[Pensions at Payroll Year End](#)

[How do I set up pensions?Setting Up Deductions](#)

### What is a Pension Provider File?

A Pension Provider File is a report generated in the payroll system (covering all relevant payrolls) that contains information about [pension deductions](#) associated with a particular [pension provider](#) (a company that operates a pension scheme).

You should generate the Pension Provider File between the end of one pay period and the end of another.

Pension Provider File data is cleared at Start of Period.

**Note:** All payrolls in a consolidation company should have EOP status.

The file-overdue warning mechanism (if enabled) alerts you at the start of a new period if a Pension Provider file has not been generated, or if there are any outstanding pension transfers.

1. To generate a pension provider file, begin by clicking **Process Pension** in the desktop process map.
2. The Pension Contributions window displays.

- The Process Date is the Run Date used by both the paper and the electronic version.
- The File Name is the name specified in the Pension Link screen.

3. Select the pension scheme for which you want to generate the file.

An 'Incomplete' pension link lacks a reference code or a Pension Provider name. You must provide the missing information before you can produce the Pension Provider file.

4. In a consolidation company, the **Consolidate** enables you to merge the contents of these files for all payrolls:
  - Employee Details File
  - Payroll Deductions File
  - Employee Deductions File

Suppose that a pension scheme is associated with deduction number 1 for Payroll A, and with deduction number 4 for Payroll B. Payrolls A and B can't be merged unless the Pension Link number is the same for both payrolls.

5. If you are not using a consolidation company, click **Remit** to create the file. A message confirms that the Pension file has been generated.

Sage Ireland recommends that you print and check the Pension Provider Contribution File Report before you generate the file.

6. Click **OK**. The Process Date will now become the Last Issue Date.
7. A preview of the Control Sheet is displayed. This details the amount to be forwarded with the file, or to be collected by direct debit on receipt of the file.

See also

[How do I set up pensions?](#)

## Pension Remittance Notification

You use the Pension Remittance Notification function to notify employees that a particular pension deduction will be remitted on their next payslip.

You can access this by opening in the Company Details window's **Misc** tab.

The remittance notification is distributed if the following conditions are satisfied:

- You have opened the Pension Contributions window (by clicking **Process Pension** in the desktop process map), and then clicked **Remit**. This generates the pension file.
- You have made pension deductions on behalf of the relevant employee since the last time the **Remit** button was clicked.

If the employee does not receive a payslip, you must arrange written notification for them of remittances made in that particular month.

An employee may not receive a payslip in the following circumstances:

### Leavers

You can notify leavers in whatever manner suits your payroll. The Employee Payslip Note can be used if the Pension Notification message is not due to appear on the payslips in the pay period the employee is leaving.

### Suspended Employees

You can notify suspended employees in whatever manner suits your payroll. The Employee Payslip Note can be used if the Pension Notification message is not due to appear on the payslips in the pay period the employee is suspended.

### Negative Net Pay

You must arrange an alternative method of notification, since the employee will not receive a payslip.

### Employee on holidays (weekly and fortnightly only)

If employees receive pay in advance of their holidays, and will not receive their payslip in the period in which notification would normally appear, you should arrange an advance notification. This notification should state that the deductions will be remitted within 21 days following the end of the month in which the deduction was made.

You can prepare the notification in whatever manner suits your payroll. Sage recommends Micropay Professional's Employee Payslip Notes option.

You should not word the notification in the future tense, because this could lead to the message being incorrect in the payslip on which it appears.

See also

[How do I set up pensions?](#)

## Pensions at Payroll Year End

You must include information about pensions on your 2010 P35 submission.

### Adjusting pension amounts

The Revenue Commissioners require that P35 submissions should include payroll totals for Retirement Ben-



efit Schemes (Pensions), PRSAs, RACs and CWPS schemes.

When you are creating the P35 to ROS file, these totals are displayed. They are derived from the data contained in Micropay Professional.

However, for each pension type there may have been amounts contributed outside of normal payroll processing. If there are such amounts, you must adjust the payroll totals accordingly. The P35 Pension Adjustments screen enables you to do this.

You can enter adjusted amounts for each of the figures, making it possible to take non-payroll amounts into account.

See also: [P35 to ROS submission](#).

What should I call the P35 to ROS file?

When you are ready to save your P35 to ROS file, the application suggests a default file name. This takes the form:

*[tax year]-[last four digits of the company registration number].P35*

So a typical example of a P35 file name would be:

10-4567T.P35

A second file with the same name but a different extension - .MON - is also created.

Do not submit this file.

What are pension links?

A pension link is an association between a payroll deduction and a pension scheme.

Pension links enable you to ensure that pension contributions are included on the P35.

You can also use a pension link to ensure that employer contributions to an occupational pension scheme or a PRSA are displayed on the employee's payslip. This makes it easier for the employee to keep track of exactly how much has been paid into the scheme.

In addition, pension links enable you to set up pension contribution amounts to be transmitted electronically to the pension provider. This process is similar to the Paypath facility.

The Pension Link is shared by all payrolls that you operate, so that you can have contributions from different payrolls all going into the same pension scheme.

How do I create a pension link?

You may need to set up a pension link for a particular pension deduction.

1. To set up a pension link, log into Micropay Professional as the administrator (username: ADMIN, default [password](#): PASS).
2. Select the **Tables - Pension Link** menu option. The Pension Link window is displayed.
3. Specify the Link ID and the Description, and then click **Find**.
4. If the link does not already exist, the application prompts you to confirm that you want to create a new link. Click **Yes** to proceed.
5. Specify any other relevant details.
  - If you are creating a link solely for the purpose of including the pension contribution amounts in the P35, then it is necessary only to provide a Link ID, a description and the link type (Pension, PRSA, RAC or CWPS).
  - If the pension link will be used as a fully valid pension scheme, you need to specify all relevant details in the Pension Link window. Your pension provider will supply you with the relevant information if you will be submitting electronic pension files.

6. Click **Save**.

When the pension link has been created, it can be attached to deductions as appropriate. This ensures that the relevant details appear on the P35.

The following information can be specified in the Pension Link window.

Field	Description
Link *	A unique number assigned to every pension link. (Maximum: 200 links)
Description*	Identifies the pension link, which facilitates the assignment of a deduction to the link.
Reference Code *	Assigned by pension providers to identify pension files submitted electronically.
Type	The scheme can be a Pension, PRSA, RAC or CWPS.
Name *, Address, Email	Contact information associated with the pension provider.
File Overdue Warning	Enables a reminder (displayed when you set a new period) that a pension file is due. Works in conjunction with Issue Frequency.
File Name	The location and name of the electronic pension file, such as A:\pension1.pen.
Issue Frequency	Period over which Pension Report balances are accumulated. Determines how often you are reminded to create a pension file.
Last Issue	The date on which you last created a pension file.

**\* = Mandatory field when creating a Pension Contribution file**

How do I attach a pension link to a pension deduction?

If a pension link has been set up, but has not been attached to the appropriate deduction, attach the link before creating your P35.

1. Select **Company/Payroll - Deductions**.
2. The Deductions window opens. Click in the **Pension** cell corresponding to the deduction you want to amend. This enables a drop-down menu.
3. Select the pension link you want to attach to the deduction.
4. Click **OK**.

What do I check on the P35 Plain Report?

Check the following on the P35 Plain Report:

- Are all employees (including leavers) listed in the report?
- Do the totals on the report match those on your last control summary? See [Payroll Year End Reports](#).
- Does more than one payroll have a particular Tax Registration number? If so, you should use a consolidation company. For more information, see [Consolidation Company](#)

The Revenue Commissioners recommend that you keep a copy of the P35 Plain Report for future reference.

See also

[How do I set up pensions?](#)

[Construction Workers Pensions](#)

## Construction Workers Pensions

Micropay Professional provides the option of processing Construction Workers Pension Schemes (CWPS) in payroll. You must manually enable this functionality and then set it up appropriately.

Key CWPS tasks include:

[Setting up a CWPS Pension Link](#)

[Enabling the Construction Workers Pension Feature](#)

[Setting up CWPS deductions](#)

[Assigning an Employee to a CWPS Category](#)

[Setting up the CWPS calendar](#)

[Generating a CWPS Report and Return](#)

### Enabling the Construction Workers Pension Feature

1. Begin by selecting the **Payroll - Construction Workers Pension** menu option.
2. The CWPS Settings window is displayed with the General tab open. Select the **Use Construction Pension Feature** checkbox to enable the CWPS functionality.
3. Specify the Construction Industry Employer Number. This is provided by your Construction Worker Pension Scheme.
4. Click **OK** to save the information you have entered.

What do I do next?

[Setting up CWPS deductions](#)

See also

[Construction Workers Pensions](#)

### Setting up CWPS deductions

You must set up manually the Construction Workers Pension Scheme deductions you require to process the relevant employees' payroll. We suggest that you call these **CWPS Gross**, **CWPS Nett** and **CWPS AVC**, but you can specify whatever names you wish. You specify the weeks for which you should deduct CWPS amounts from the payslip in the [Timesheet Entry: Data Entry tab](#).

1. Select **Edit Deductions** in the navigation pane's Payroll view.  
  
Alternatively, select the **Payroll - Deductions** menu option.
2. The Deductions window opens. This contains a list of the existing deductions set up in the payroll. Scroll down to the next available line.
3. Type *CWPS Gross*, or another suitable name, in the Title cell.
4. Select **Gross** in the Type drop-down list on the same line.
5. Select the relevant CWPS pension in the Pension drop-down list on the same line.
6. Go to the next available line.
7. Type *CWPS Nett*, or another suitable name, in the Title cell.
8. Select **Nett** in the Type drop-down list on the same line.
9. Select the relevant CWPS pension in the Pension drop-down list on the same line.

10. If the scheme involves additional voluntary contributions (AVCs), go to the next available line.
11. Type *CWPS AVC*, or another suitable name, in the Title cell.
12. Select **Gross** in the Type drop-down list on the same line.
13. Select the relevant CWPS pension in the Pension drop-down list on the same line.
14. Select **Yes** in the AVC cell on the same line.
15. Click **OK** to save the new deductions you have set up.

What do I do next?

[Assigning an Employee to a CWPS Category](#)

See also

[Construction Workers Pensions](#)

### Assigning an Employee to a CWPS Category

For each employee in the CWPS scheme, you need to assign a CWPS category. This specifies the broad construction activity category to which the employee belongs.

1. Begin by clicking **Edit Employees** in the navigation pane's Pay Run view, or the process map's **Edit Employees** icon.

Alternatively, select the **Processing - Employee Details** menu option.

2. The Employee Details window opens. Open the relevant employee's record.
3. Click the **Deductions** tab.
4. Select the category in the CWPS Category field.

A number of fields in the Employee Details record now become mandatory:

- PPS Number
- Address 1
- County
- Start Date
- Date of Birth

The pay profile of the employee (see [Employee Profiles](#)) must include the deductions associated with the CWPS pensions on the system. There must be a gross deduction and a nett deduction associated with the CWPS pension in the profile.

5. Enter the CWPS membership number.
6. The CWPS deductions are added to the list of deductions in the grid, with the CWPS standard weekly amounts specified. If the payroll's pay frequency is not weekly, the amounts deducted on the timesheet will be adjusted accordingly.
7. Click **Save**.

What do I do next?

[Setting up the CWPS calendar](#)

See also

[CWPS Contribution Categories and Rates](#)

Employee profiles are not available in [Micropay Professional Lite](#).

## CWPS Contribution Categories and Rates

When you enable the CWPS feature, six standard contribution categories are set up by default. These are:

- Builder Rate (BLD)
- Pension Only (BSC)
- Electrical Rate (ELT)
- Pension Only no DIS (POC)
- Pension/Sick Pay (SPB)
- Sick Pay Only (SPY)

Each category has a set of contribution standard rates set up by default.

See also

[Construction Workers Pensions](#)

## Setting up the CWPS calendar

To view the CWPS year calendar (which may start and end on different dates to the tax or financial year calendar), open the CWPS Settings window by [Logging in as an ordinary user](#) and selecting **Payroll - Construction Workers Pensions**. Then open the **Calendar** tab. This specifies:

- the start and end date of each week of the year
- the month each week belongs to
- the number of weeks in the month

You can use this default calendar, or you can create your own by clicking **Create New Calendar** and following the instructions that are displayed on screen.

## Start and End Dates

The start date of a CWPS year must always be a Monday.

Each CWPS Scheme month ends on the last Friday in a calendar month.

Each CWPS year ends on the last Friday of the year. So there may be 52 or 53 weeks in a CWPS year

## Example

The 2011 CWPS Scheme will commence on Monday 3rd January 2011.

The week commencing Monday 27th December 2010 is in fact week 53 of the 2010 Scheme year because each scheme month ends on the last Friday in a calendar month.

What do I do next?

[Generating a CWPS Report and Return](#)

See also

[CWPS Contribution Categories and Rates](#)

[Construction Workers Pensions](#)

## Generating a CWPS Report and Return

You can generate a report that shows a breakdown of CWPS contributions.

1. Click the **Other Reports** icon in the navigation pane's Pay Run view.
2. Select the **CWPS Report** radio button in the Payroll Reports window's Payroll tab.
3. You can click the **Pension Contrib** button to create the CWPS pension provider file. After you have generated this file, you need to upload it to:

[the CWPS website](#)

4. Click the **Preview** button or the **Print** button, as appropriate, to generate the report.

What do I do next?

[Clearing the CWPS history](#)

See also

[Construction Workers Pensions](#)

[Generating a Standard Report](#)

## Clearing the CWPS history

When the CWPS year ends, you must clear the Construction Workers Pension Scheme (CWPS) history from employee details records. The CWPS will inform you in advance when the new year is to begin.

Select the **Year End - New Construction Pension Year** menu option to clear the CWPS history.

The clear-down procedure also sets up a CWPS calendar for the new CWPS year.

See also

[Construction Workers Pensions](#)

[Financial Year End](#)

## Enabling the JLC Feature

Micropay Professional's **JLC Feature** enables you to comply with the statutory minimum rates of hourly pay for workers in the 'Retail, Grocery and Allied Trades' category.

To view an interactive demonstration of this feature, [click here](#).

These rates are agreed by Joint Labour Committees (JLCs) and are contained in Employment Regulation Orders made by the Labour Court.

First you need to enable and configure the JLC Feature.

This topic explains how you can enable and disable the feature for the current payroll.

The JLC Feature requires a change to your licence before you can activate it. Contact Support for more information.

## Enabling the JLC Feature for the entire payroll

1. Select the **Company/Payroll - JLC Rates of Pay Compliance**.
2. The JLC Settings window opens.

The table below explains each piece of information you need to provide.

Item	Description
Use JLC Minimum Rates of Compliance Feature	<p>Select this checkbox to enable the JLC Feature for the payroll you are currently logged into.</p> <p>The remainder of the window becomes active so that you can configure default JLC settings and enable employees.</p>
Turn on this feature for all new employees	If this checkbox is selected, any new employee created in the payroll from now on will be enabled for the JLC Feature.
Select Default Industry	<p>Each industry category defined by a JLC agreement has a separate set of employment categories and minimum hourly wage requirements.</p> <p>In the <b>Select Industry</b> drop-down list, specify the default industry category for all JLC-enabled employees in the current payroll.</p>
Select Default Class of Worker	<p>Each industry category contains several classes of worker.</p> <p>In the <b>Default class of worker</b> drop-down list, specify the default class for all JLC-enabled employees in the payroll.</p>
JLC Batch Employee Setup	<p>Click this button to <a href="#">apply JLC settings to a batch of <b>existing</b> employees in the payroll.</a></p> <p>(You can also <a href="#">enable and disable the feature for individual employees</a> in the payroll.)</p>

- Click **OK** to enable the feature and apply the settings you have specified.

See also

[Enabling the JLC Feature for an individual employee](#)

[JLC Rates for Retail, Grocery and Allied Trades](#)

[JLC Employee Batch Setup](#)

**Note:** The JLC feature is not available in [Micropay Professional Lite](#).

### JLC Employee Batch Setup

The Joint Labour Committee (JLC) Employee Batch Setup screen provides a quick way of enabling a batch of employees for the [JLC Feature](#), and applying JLC settings to these employees.

You can save JLC information even if some of it is missing. However, it's important to be aware that a minimum JLC hourly rate is applied to any employee with incomplete JLC information.

1. Select the **Company/Payroll - JLC Rates of Pay Compliance**.
2. The JLC Settings window opens. Click the **JLC Employee Batch Setup** button.
3. The Joint Labour Committee (JLC) Employee Batch Setup screen opens. This lists the employees in the payroll.

#### JLC Batch Setup Information

The following information is contained in the Batch Setup screen.

Setting	Description
Use JLC	Select this checkbox to add the relevant employee to the batch you want to enable for the JLC Feature. The system will assess the information currently specified for the employee. Based on this information, the Employee Details window's <a href="#">JLC tab</a> will show the recommended JLC rate.  If the employee's JLC information is incomplete, they are assigned a minimum JLC hourly rate.
Empl Code	The employee code. This field is not editable.
Name	The employee's name. This field is not editable.
Dept	The department to which the employee belongs. This field is not editable.
Cost	The cost centre to which the employee belongs. This field is not editable.  <b>Note:</b> Cost centres are not available in <a href="#">Micropay Professional Lite</a> .
Birth Date	The employee's date of birth.
Start Date	The date on which the employee commenced this employment.
Industry	The JLC Industry to which the employee belongs.
Class of Worker	The JLC Class of Worker to which the employee belongs (within the relevant JLC Industry).
Prev Yr Exp	The number of years of experience the employee has from previous employments since turning 18.

4. In the **Use JLC** column, select the employees whom you wish to enable for the JLC Feature.
5. Ensure that the information for each employee is correct.
6. Click **Save** when you are done.

You have enabled the JLC feature for a batch of employees.

Note: You can save JLC information in this tab even if some of it is missing. However, it is important to be aware that a minimum JLC hourly rate is applied to any employee with incomplete JLC information.

See also

[Enabling the JLC Feature](#)

[Employee Details - JLC Tab](#)

[JLC Rates: Retail, Grocery and Allied Trades](#)



The JLC feature is not available in [Micropay Professional Lite](#).

### Employee Details - JLC Tab

This tab enables you to:

- enable or disable the [JLC Feature](#) for a particular employee
- apply JLC settings to the employee

**Note:** You can save JLC information in this tab even if some of it is missing. However, it is important to be aware that a minimum JLC hourly rate is applied to any employee with incomplete JLC information.

Item	Description
Include Employee in JLC	Select this checkbox to enable the JLC feature for this employee.  (The employee may already have been <a href="#">enabled by default at payroll level</a> .)
Industry	Each industry category defined by a JLC agreement has a separate set of employment categories and minimum hourly wage requirements.  Here you specify the industry category to which this employee belongs.
Class of Worker	Each industry category contains several classes of worker.  Here you can specify the class to which this employee belongs.
Date of Birth	The employee's date of birth. The employee details record may already contain a date of birth for the employee.  If you update this field, the Date of Birth field in the <a href="#">Tax/PRSI tab</a> is also updated.
Start Date	The employee's start date in this employment. The employee details record may already contain a start date for the employee.  If you update this field, the Start Date field in the <a href="#">Personnel tab</a> is also updated.
Years' experience in previous employments	Here you can specify the number of years' experience the employee gained in previous employments since turning 18.
JLC Hourly Rate	Based on the information you provided in the previous fields (or in the <a href="#">JLC Batch Setup screen</a> ), the system automatically displays the recommended JLC Hourly Rate in this field.  This field is also displayed on the <a href="#">Payments tab</a> .

See also

[Enabling the JLC Feature](#)

[JLC Employee Batch Setup](#)

[JLC Rates for Retail, Grocery and Allied Trades](#)

The JLC feature is not available in [Micropay Professional Lite](#).

### JLC Rates: Retail, Grocery and Allied Trades

Below are the current Joint Labor Committee (JLC) statutory minimum rates of remuneration for **Retail, Gro-**

**cery and Allied Trades** workers.

For more comprehensive information about JLC rates, [click here](#).

(a) General Sales Assistant and (c) Clerical Worker	From October 25, 2010		From 1st January 2011 (1.25%)		From 1st June 2011 (1.25%)	
	Per Hour	Per Week	Per Hour	Per Week	Per Hour	Per Week
Under Age 18	€ 6.56	€ 255.84	€ 6.64	€ 258.96	€ 6.72	€ 262.08
Job Entrant:	€ 7.49	€ 292.11	€ 7.58	€ 295.62	€ 7.67	€ 299.13
First year after date of first employment over age 18						
<b>Second year after date of first employment over age 18</b>	€ 8.43	€ 328.77	€ 8.54	€ 333.06	€ 8.65	€ 337.35
Experienced Adult Worker	€ 9.36	€ 365.04	€ 9.48	€ 369.72	€ 9.60	€ 374.40
Point 1						
Experienced Adult Worker	€ 9.46	€ 368.94	€ 9.58	€ 373.62	€ 9.70	€ 378.30
Point 2						
Experienced Adult Worker	€ 9.66	€ 376.74	€ 9.78	€ 381.42	€ 9.90	€ 386.10
Point 3						

**Note:** Progression up the scale will be on the anniversary of the commencement of employment

(b) General Ancillary Worker	From October 25, 2010		From 1 January, 2011 (1.25%)		From 1 June, 2011 (1.25%)	
	Per Hour	Per Week	Per Hour	Per Week	Per Hour	Per Week
<b>Under Age 18</b>	€ 6.56	€ 255.84	€ 6.64	€ 258.96	€ 6.72	€ 262.08
Job entrant:	€ 7.49	€ 292.11	€ 7.58	€ 295.62	€ 7.67	€ 299.13
First year after date of first employment over age 18						
<b>Second year after date of first employment over age 18</b>	€ 8.43	€ 328.77	€ 8.54	€ 333.06	€ 8.65	€ 337.35
Experienced Adult Worker	€ 9.36	€ 365.04	€ 9.48	€ 369.72	€ 9.60	€ 374.40
(d) Post of Responsibility 7.5% differential over the maximum point of the General Sales Assistant Scale	€ 10.38	€ 404.82	€ 10.51	€ 409.89	€ 10.64	€ 414.96

See also

[Enabling the JLC Feature](#)

[Employee Details - JLC Tab](#)

The JLC feature is not available in [Micropay Professional Lite](#).

## Benefit in Kind (BIK)

### Introduction

Benefit in Kind (BIK) is any employee remuneration not part of the normal pay processed through the payroll.

BIK is included on the payslip for the purposes of calculating Tax and PRSI, without actually paying the BIK amount to the employee. This is known as *notional pay*.

Tax and PRSI is calculated on **Actual Pay + Notional Pay**, but the employee receives actual pay only through payroll. It is assumed that the employee received the BIK outside of the payroll, such as through private use of a company car.

BIK can either be set up as:

#### Gross BIK

This is the most common type of BIK payment, and has the most straightforward effect on an employee's payslip.

The employee pays tax and PRSI on the amount of benefit specified as Gross BIK.

The employee's nett pay is reduced as a result of the gross BIK amount.

#### Nett BIK

You use Nett BIK to give the employee the full value of the BIK. The employer pays tax and PRSI on the BIK for the employee. The employee's nett amount is entered on the payslip, and is automatically grossed back up by the program.

Click the timesheet's **Payslip** button to view this amount on the payslip. The employee's Nett Pay remains the same as it was before the Nett BIK was entered.

Nett BIK can't be used when Nett To Gross pay is on the same timesheet.

Only certain benefits can be grossed up. For further details, refer to the Revenue Commissioners' Guide, or the Employer's Guide to the New Arrangements for Deducting PAYE & PRSI from Certain Benefits.

### Setting up BIK

1. Select **Edit Payments** in the navigation pane's Payroll section. Alternatively, select the **Payroll - Payments** menu option.
2. Select an available line, and enter a suitable title for the BIK payment (up to ten characters).
3. In the Type drop-down list, select either **Gross BIK** or **Nett BIK**.

**Note:** Rate and Factor have no effect on BIK.

4. Select **Taxable** and **PRSIable**.
5. If the BIK payment recurs in each pay period, and you want it to automatically increase when an employee goes on holidays, then select **Hol'able**.

**Note:** If BIK will not be recorded for the time an employee is on holidays, then leave **Hol'able** deselected.

6. **Pens** and **Average** should be left deselected, and the **Formula** field should be left empty.
7. Click **OK**.

### Recording BIK

If a fixed amount of BIK is to be recorded on an employee's payslip each pay period, then this can be entered as a Standard Amount within Employee Details.

This will automatically be included on the employee's timesheet each pay period until the standard amount is removed from the employee record.

If the BIK amount varies or if it does not occur each pay period then it is easier to enter it on Timesheet Entry as and when it is needed.

#### Setting a Standard BIK Amount in Employee Details

1. Open the Employee Details window by doing one of the following:
  - click **Edit Employees** in the desktop's process map
  - click **Edit Employees** in the navigation pane's Pay Run view
  - select the **Processing - Employee Details** menu option
  - click **Emp Details**
2. Select the relevant employee.
3. Click the **Payments** tab, and locate the BIK payment in the list of payments.
4. Enter the amount in the Std.Amount column.
5. Click **Save**.

**Note:** If a timesheet has already been saved for the employee in the current period, this BIK payment appears when the timesheet has been deleted and re-saved, or when the next period is set.

**Note:** New fields in Employee Details show the BIK values, so that a BIK Report can be printed. The BIK Year-To-Date value is shown in the Pay/YTD section. The periodic BIK values - BIK Tax and BIK PRSI - are shown in the ETP section.

#### Setting a Variable BIK Amount in Timesheet Entry

1. Open the Employee Details window by doing one of the following:
  - click **Edit Employees** in the desktop's process map
  - click **Edit Employees** in the navigation pane's Pay Run view
  - select the **Processing - Employee Details** menu option
  - click **Emp Details**
2. Select the relevant employee.
3. Click the **Payments** tab, and locate the BIK payment in the list of payments.
4. Enter the amount of the BIK in the Hours TD column, or the Value TD column.
5. Click **Save**.

**Note:** If a timesheet has already been saved for the employee in the current period, this BIK payment will not appear on it until the timesheet has been deleted and re-saved, or until the next period is set.

See also

[BIK Recalculation](#)

[Processing a BIK Recalculation](#)

[Benefit in Kind Rollover](#)

[Recording Medical Insurance BIK](#)

## BIK Recalculation

The BIK Recalculation feature enables you to recalculate tax and PRSI from previous pay periods.

You need to do this when an incorrect amount of BIK has been processed in one or more pay periods.

It does not actually change any values in the employee's records. It is used for reporting purposes only. You use this facility to recalculate the pay periods. Then you print the BIK Recalculation report and refer to Social Welfare and your local tax office to determine the best way of dealing with the recalculated values. You make any necessary amendments to the employee's details manually.

The BIK Recalculation facility recalculates:

- tax
- PRSI Code
- employee PRSI
- employer PRSI
- tax and PRSI for pay periods subsequent to the last one in which an incorrect BIK amount was processed

To carry out BIK recalculation, the payroll's status must be 'S' or 'P' (start of pay period, or end of pay period).

**Note:** BIK Recalculation is used for Gross BIK only (not **Nett BIK**). In the case of Nett BIK, you must calculate the Gross amount manually, and use this figure for recalculation.

### Gross BIK

This is the most common type of BIK payment, and has the most straightforward effect on an employee's payslip.

The employee pays tax and PRSI on the amount of benefit specified as Gross BIK.

The employee's nett pay is reduced as a result of the gross BIK amount.

### Nett BIK

You use Nett BIK to give the employee the full value of the BIK. The employer pays tax and PRSI on the BIK for the employee. The employee's nett amount is entered on the payslip, and is automatically grossed back up by the program.

Click the timesheet's **Payslip** button to view this amount on the payslip. The employee's Nett Pay remains the same as it was before the Nett BIK was entered.

Nett BIK can't be used when Nett To Gross pay is on the same timesheet.

Only certain benefits can be grossed up. For further details, refer to the Revenue Commissioners' Guide, or the Employer's Guide to the New Arrangements for Deducting PAYE & PRSI from Certain Benefits.

See also

[Processing a BIK Recalculation](#).

## Processing a BIK Recalculation

For introductory information, see [BIK Recalculation](#).

1. Select **Processing - BIK Recalculation**.
2. Select the relevant employee.
3. The window lists the pay periods the employee has been paid in this tax year. Only the New BIK TP figure can be changed.

Click the relevant pay period.

4. Enter the New BIK TP amount.
5. Click **Recalculate** to recalculate the employee's Tax, PRSI (employee and employer) and the PRSI code.

The subsequent pay periods are also recalculated, and all the new values are displayed in the New Calculation section.

Following recalculation, if you change the New BIK Amount value, the New Calculation section prompts you to click **Recalculate** again.

6. Click **Report** to view a report detailing the employee's existing amounts and the recalculated amounts.

### Benefit in Kind Rollover

BIK Rollover is the amount of BIK Tax and PRSI paid by the employer on behalf of an employee - when the employee's pay in that period can't cover those amounts - that has not been recouped from the employee as of 31st March the following tax year.

It is the responsibility of the employer to recoup tax and PRSI paid on the employee's behalf during the course of the year.

Any amount not recouped in this way becomes a BIK Rollover amount for that employee on their next payslip.

#### Revenue Guidelines

- Tax and PRSI arising from a BIK notional amount must be returned to Revenue in the correct month by the employer.
- If the employee can't pay the Tax and PRSI in a given month, the employer must do so on their behalf.
- The employee can pay the employer that amount back over the course of the year, as long as it's before March 31st, with zero interest and without incurring further BIK.

If by March 31st the employer still hasn't recouped the full amount, they are considered to have paid that on behalf of the employee, and that is considered BIK for the employee in the next pay period.

#### Setting up BIK Rollover

1. Select **Change Main Company/Payroll Details** in the navigation pane's Payroll section. Alternatively, select the **Company/Payroll - Company/Payroll Details** menu option.
2. Open the BIK tab, and select **Enable BIK Shortfall Transfer**.  
This checkbox relates only to a deduction used to recoup tax and PRSI payments for BIK from the preceding tax year.

You should use a reducing-balance deduction to recoup BIK tax and PRSI for a specific year, and define a new deduction for similar recouping activities in the next year.

There is a three-month year-overlap from 1st January to 31st March, during which you may need to recoup BIK tax and PRSI for two separate years. You should use a different deduction for each year.

3. Select the relevant deduction in the From Deduction drop-down list.
4. In the To BIK Payment drop-down list, select the BIK payment to which the amount should be transferred.

The payment should not be marked **Holidayable**, and should have no factor.

5. The Reminder in Period drop-down list enables you to specify which is the BIK Tax/PRSI shortfall transfer period. When you set this pay period, the application will display a message reminding you of this.
6. The Restrict to Period Selected Above checkbox enables you to restrict the BIK Transfer option within the Timesheet Entry window to the period selected in the Reminder in Period drop-down list.
7. Click **OK** to save your changes.

#### Processing BIK Rollover

1. Click **Enter Time and Pay** in the desktop's process map.

Alternatively, do one of the following:

- click **Enter Time and Pay** in the navigation pane's Pay Run section
  - select the **Processing - Timesheet Entry** menu option
  - click the **Timesheets** button in the Task Bar
2. The Timesheet Entry window opens. Specify the relevant employee.
  3. Click **Transfer Balance to BIK**. (See [Timesheet Entry: Data Entry tab.](#))

Micropay Professional will mark the deduction as one whose This Year Balance should be reduced to zero when saving the timesheet.

The BIK Payment you selected in the Company Details window will be added to the timesheet, if this has not already occurred.

The amount for the BIK Payment selected in the Company/Payroll Details screen will be increased by the This Year Balance amount.

See also

[Benefit in Kind \(BIK\)](#)

### Recording Medical Insurance BIK

You must record medical insurance Benefit in Kind (BIK) for Payroll Year End reporting purposes.

So, before you start processing payroll, you should associate the relevant payments in Micropay Professional with the BIK Type **Medical Insurance**.

1. Select the **Company/Payroll - Payments** menu option.
2. For each relevant payment, select the **Medical Ins** BIK Type.
3. Click **OK**.

In addition, you must record any Medical Insurance BIK amounts reimbursed to the employer. To do this, open each relevant Employee Details record by selecting **Processing - Employee Details**, and enter the yearly reimbursement value relating to that employee.

See also

[Benefit in Kind \(BIK\)](#)

### Disability Benefit

Disability benefit can be claimed by any employee who is unable to work due to illness or disability for a period

of three consecutive days or longer.

Disability payments made to the employee commence on the fourth day of absence.

A week's disability benefit consists of payment for six days: Monday through to Saturday. This means that if an employee is absent from work for one week, they receive benefit only for three days.

### Qualifying for disability benefit

To qualify for disability benefit, the employee or employer must submit an application to the Department of Social Protection. A doctor certifies the application.

When an employee qualifies for Disability Benefit, the Department confirms in writing to the Employer the amount of Disability Benefit and the commencement date of payment.

### Taxing disability benefit

Disability benefit is non-taxable for the first 36 days or six weeks, but payments received thereafter are taxable.

When the employee claims for more than one period of absence (of more than 3 consecutive days), the period of time of the non-taxable disability payments may be increased. You should contact the Department of Social Welfare to determine the employee's precise situation.

You should also bear in mind that the relevant legislation may be subject to change.

### Receiving disability benefit

You should stipulate on the application form whether the employer or the employee should receive the disability payments from the Department of Social Welfare.

The employee usually keeps the cheque when they are not receiving sick pay from the employer.

The employer usually keeps the cheque when the employee is receiving sick pay from the employer.

See also

[Setting up Disability Payments](#)

[Disability Payment Cases](#)

### Setting up Disability Payments

Click **Edit Payments** in the navigation pane's Payroll view, or select the **Payroll - Payments** menu option to create disability payments.

(See [Setting Up Payments](#).)

There are two types of disability in Micropay Professional:

- Disability
- Paid Disability

All disability types are non-PRSI-able.

The following examples show how disability payments are commonly defined. You can specify payment names that suit your payroll's particular requirements.

#### Example 1

**DB ER NT** (Disability Employer Non-Taxable) has the pay type Paid Disability. It is used when the EMPLOYER receives the disability cheque and the employee is paid by the company.



The employer should record the Social Welfare Payments for the first six weeks as **non-taxable**.

DB ER NT must be set up and used when the **EMPLOYER** keeps the cheque and is paying normal salary to the employee.

Payments after six weeks are taxable and recorded as DB ER TAX.

### Example 2

**DB ER TX** (Disability Employer Taxable) has the pay type Paid Disability. It is used when the EMPLOYER receives the disability cheque, and the employee is PAID by the company.

The employer should record the Social Welfare Payments received after the six weeks period as **taxable**.

DB ER TAX must be set up and used when the **EMPLOYER** keeps the cheque and is paying normal salary to the employee.

Payments after six weeks are taxable and recorded as DB ER TAX.

### Example 3

**DB EE** (Disability Employee) has the pay type Disability. It is used when the **EMPLOYEE** keeps the cheque, and either is not paid or receives sick pay (a portion of normal pay) from the company.

The employer must record only the taxable portion of cheques received - that is, any portion after six weeks.

See also

[Disability Benefit](#)

## Disability Payment Cases

These cases use the disability payments described in [Setting up Disability Payments](#).

Employer receives disability cheque, and the employee is paid by the company (DB ER NT)

- The employee is out sick for less than six weeks, and therefore all the disability received is non-taxable.
- The EMPLOYER keeps the cheque (136.00) and pays normal salary.
- The system automatically adjusts the salary accordingly, and deducts the appropriate tax.

PAYSLIP

EMP. NAME ➤ Flynn, Pauline		FREQUENCY ➤ W		PPS NUMBER ➤ 3446281B	
EMP. NUMBER ➤ 004		DEPT ➤ ACCT	COST ➤ DUB	PAY PERIOD ➤ 15	PAYMENT DATE ➤ 15/04/2006

PAYMENT DETAILS				DEDUCTION DETAILS			
DESCRIPTION	T/N	HOURS	VALUE	DESCRIPTION	T/N	THIS PERIOD	BALANCE
Salary	Y		1064.00	PAYE		255.50	3926.53
DB ER NT	N		136.00	PRSI		53.20	809.20

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CUMULATIVE DETAILS		TAX/PRSI DETAILS		COMMENTS	
GROSS PAY	16664.00	TAX CODE	N	EMPER PRSI PEI	0.00
NON-TAX DEDS	480.00	EMER ST. PER		EMPER PRSI TD	0.00
TAXABLE PAY	16184.00	TAX CREDIT	56.00	BK YTD	0.00
TAX CREDIT	840.00	PAY REL CODE			
STD. CUT OFF	9230.70	TOTAL INS WK	S1 14		
TAX PAID	3926.53				

<b>SUMMARY OF PAY</b>
<b>GROSS PAY</b>
1064.00
<b>TOTAL DEDS</b>
308.70
<b>NON-TAX ADJS.</b>
136.00
B 0.00
<b>ROUNDING</b>
0.00
0.00
<b>NETT PAY</b>
891.30
<b>PAY METHOD</b>
Cheque

Employer receives disability cheque, and the employee is paid by the company (DB ER TX)

- The employee is absent for more than six weeks and therefore the disability is taxable.
- The EMPLOYER keeps the cheque (136.00) and pays NORMAL SALARY.
- The system adjusts the salary accordingly and deducts the appropriate tax.

PAYSLIP

EMP. NAME		Flynn, Pauline		FREQUENCY		W		PPS NUMBER		3446281B	
EMP. NUMBER		004		DEPT		ACCT		COST		DUB	
				PAY PERIOD		15		PAYMENT DATE		15/04/2005	

PAYMENT DETAILS				DEDUCTION DETAILS			
DESCRIPTION	T/N	HOURS	VALUE	DESCRIPTION	T/N	THIS PERIOD	BALANCE
Salary	Y		1064.00	PAYE		312.62	3983.65
DB ER TX	Y		136.00	PRSI		53.20	809.20

Micropay Professional

CUMULATIVE DETAILS		TAX/PRSI DETAILS		COMMENTS	
GROSS PAY	16800.00	TAX CODE	N	EMPER PRSI PEF	0.00
NON-TAX DEDS	480.00	EMER ST. PER		EMPER PRSI TD	0.00
TAXABLE PAY	16320.00	TAX CREDIT	56.00	BIK YTD	0.00
TAX CREDIT	840.00	PAY REL CODE			
STD. CUT OFF	9230.70	TOTAL INS WK	S1 14		
TAX PAID	3983.65				

<b>SUMMARY OF PAY</b>
<b>GROSS PAY</b>
1200.00
<b>TOTAL DEDS</b>
365.82
<b>NON-TAX ADJS.</b>
0.00
B 0.00
<b>ROUNDING</b>
0.00
0.00
<b>NETT PAY</b>
834.18
<b>PAY METHOD</b>
Cheque

Employer receives disability cheque, and the employee is paid by the company (DB ER NT and DB ER TX)

- In the example below, the EMPLOYER keeps the cheque, and pays normal salary.
- The disability cheques total to 408.00, but are divided into two 'Taxable' (DB ER TAX = 272) and one 'Non-Taxable' (DB ER NT = 136) disability payments.
- Taxable and non-taxable cheques can be recorded in the same period, provided that there is enough gross pay to cover the tax liability. The system adjusts the salary accordingly, and deducts the appropriate tax.

PAYSLIP

EMP NAME → Flynn, Pauline		FREQUENCY → W		PPS NUMBER → 3446281B	
EMP NUMBER → 004		DEPT → ACCT		PAYMENT DATE → 15/04/2005	
COST → DUB		PAY PERIOD → 15			

PAYMENT DETAILS				DEDUCTION DETAILS			SUMMARY OF PAY
DESCRIPTION	TN	HOURS	VALUE	DESCRIPTION	TN	THIS PERIOD	BALANCE
Salary	Y		792.00	PAYE		255.50	3926.53
DB ER NT	N		136.00	PRSI		39.60	795.60
DB ER TX	Y		272.00				
							<b>GROSS PAY</b>
							1064.00
							<b>TOTAL DEDS</b>
							295.10
							<b>NON-TAX ADJS</b>
							136.00
							B 0.00
							<b>ROUNDING</b>
							0.00
							0.00
							<b>NETT PAY</b>
							904.90
							<b>PAY METHOD</b>
							Cheque

CUMULATIVE DETAILS		TAX/PRSI DETAILS		COMMENTS	
GROSS PAY	16664.00	TAX CODE	N	EMPER PRSI PEI	0.00
NON-TAX DEDS	480.00	EMER ST PER		EMPER PRSI TD	0.00
TAXABLE PAY	16184.00	TAX CREDIT	56.00	BK YTD	0.00
TAX CREDIT	840.00	PAY REL CODE	S1		
STD CUT OFF	9230.70	TOTAL INS WK	14		
TAX PAID	3926.53				

Employee keeps the cheque, and is paid an additional sum by the company (Sickpay)

- The EMPLOYEE keeps the disability cheque (136.00), and is also paid sick pay (500.00).
- For the first six weeks, the additional pay/sick pay they are to receive is included.

PAYSLIP

EMP. NAME		Flynn, Pauline		FREQUENCY		W		PPS NUMBER		3446281B	
EMP. NUMBER		004		DEPT		ACCT		COST		DUB	
				PAY PERIOD		15		PAYMENT DATE		15/04/2005	

PAYMENT DETAILS				DEDUCTION DETAILS			
DESCRIPTION	TN	HOURS	VALUE	DESCRIPTION	TN	THIS PERIOD	BALANCE
Sickpay	Y		500.00	PAYE		18.62	3689.65
				PRSI		25.00	781.00

Micropay Professional

CUMULATIVE DETAILS		TAX/PRSI DETAILS		COMMENTS	
GROSS PAY	16100.00	TAX CODE	N	EMP'ER PRSI PEF	0.00
NON-TAX.DEDS	480.00	EMER ST. PER		EMP'ER PRSI TD	0.00
TAXABLE PAY	15620.00	TAX CREDIT	56.00	BIK YTD	0.00
TAX CREDIT	840.00	PAY REL CODE	S1		
STD CUT OFF	9230.70	TOTAL INS WK	14		
TAX PAID	3689.65				

<b>SUMMARY OF PAY</b>	
<b>GROSS PAY</b>	
500.00	
<b>TOTAL DEDS</b>	
43.62	
<b>NON-TAX ADJS</b>	
0.00	
B	0.00
<b>ROUNDING</b>	
0.00	
	0.00
<b>NETT PAY</b>	
456.38	
<b>PAY METHOD</b>	
Cheque	

Employee keeps the cheque and is paid an additional sum by the company (DB EE and Sickpay)

- The employee keeps the disability cheque (136.00), and is also paid sick pay (500.00)
- After six weeks, the taxable portion of disability is recorded through the payroll.

PAYSLIP

EMP. NAME	Flynn, Pauline	FREQUENCY	W	PPS NUMBER	3446281B
EMP NUMBER	004	DEPT	ACCT	COST	DUB
		PAY PERIOD	15	PAYMENT DATE	15/04/2005

PAYMENT DETAILS				DEDUCTION DETAILS			
DESCRIPTION	T/N	HOURS	VALUE	DESCRIPTION	T/N	THIS PERIOD	BALANCE
DB EE	Y		136.00	PAYE		75.74	3746.77
Sickpay	Y		500.00	PRSI		25.00	781.00

Micropay Professional

CUMULATIVE DETAILS		TAX/PRSI DETAILS		COMMENTS	
GROSS PAY	16236.00	TAX CODE	N	EMP'ER PRSI PEF	0.00
NON-TAX.DEDS	480.00	EMER ST. PER		EMP'ER PRSI TD	0.00
TAXABLE PAY	15756.00	TAX CREDIT	56.00	BIK YTD	0.00
TAX CREDIT	840.00	PAY REL CODE	S1		
STD.CUT OFF	9230.70	TOTAL INS WK	14		
TAX PAID	3746.77				

SUMMARY OF PAY
GROSS PAY
636.00
TOTAL DEDS
100.74
NON-TAX ADJS.
-136.00
B 0.00
ROUNDING
0.00
0.00
NETT PAY
399.26
PAY METHOD
Cheque

Employee keeps the cheque and is NOT PAID by the company (DB EE)

- Where an EMPLOYEE keeps the disability cheque, and is NOT paid anything by the company, no timesheets are saved during the period of absence.
- The employer must keep a record of the number of weeks the employee is in receipt of disability benefit to identify the amount, if any, of disability benefit that is taxable.

EMP NAME		Flynn, Pauline		FREQUENCY		W		PPS NUMBER		3446281B	
EMP NUMBER		004		DEPT		ACCT		COST		DUB	
				PAY PERIOD		15		PAYMENT DATE		15/04/2005	

PAYMENT DETAILS				DEDUCTION DETAILS				SUMMARY OF PAY	
DESCRIPTION	TN	HOURS	VALUE	DESCRIPTION	TN	THIS PERIOD	BALANCE		
Salary	Y		1200.00	PAYE		369.74	4040.77	GROSS PAY	
DB EE	Y		136.00	PRSI		60.00	816.00		1336.00
								TOTAL DEDS	429.74
								NON-TAX ADJS.	-136.00
								B	0.00
								ROUNDING	0.00
									0.00

CUMULATIVE DETAILS		TAX/PRSI DETAILS		COMMENTS	
GROSS PAY	16936.00	TAX CODE	N	EMPER PRSI PER	0.00
NON-TAX.DEDS	480.00	EMER ST. PER		EMPER PRSI TD	0.00
TAXABLE PAY	16456.00	TAX CREDIT	56.00	BIK YTD	0.00
TAX CREDIT	840.00	PAY REL CODE	S1		
STD.CUT OFF	9230.70	TOTAL INS WK	14		
TAX PAID	4040.77				

NETT PAY	770.26
PAY METHOD	Cheque

- Only when the employee is being paid again can the company begin to record the taxable portion of the cheques.
- Enter the employee's normal salary along with the portion of disability cheques. The disability cheques may be posted over a number of periods.

**Note:** When you are recording disability cheques, if there is insufficient gross pay to cover the tax bill, you will be prevented from saving the timesheet. This is because the net pay will be a negative amount. The disability cheque amounts must then be posted over a number of periods.

See also

[Disability Benefit](#)

## Employee Profiles

An *employee profile* is a set of payments and deductions assigned to one or more employees.

You assign an employee profile to an employee in the Employee Details window's **Payments** tab.

If no employee profile is associated with a particular employee, all payments and all deductions set up at payroll level will be displayed on the employee's timesheet.

If a profile is associated with the employee, only the payments and deductions belonging to the profile appear on the employee's timesheet.

### Example

Suppose that you have a percentage-based pension deduction that is not applicable to all staff.

You need to set up two employee profiles to deal with this situation.

One profile should include the pension deduction, and the other should exclude it.

## Standard Hours in Employee Profiles

In addition to payments and deductions, each profile can hold a default number of standard hours.

If no standard hours are specified, the payroll default standard hours will be used. In either case, the specified standard hours can be overridden in the Employee Details window.

See also

[Setting up an employee profile](#)

**Note:** Employee profiles are not available in [Micropay Professional Lite](#).

## Setting up an employee profile

1. Select the **Company/Payroll - Employee Profile Details** menu option.
2. The Employee Profiles window opens. Use this window to specify the payments and deductions that belong in the profile.
3. The optional Std. Hours field enables you to specify the number of standard hours associated with the profile.
4. Before adding any more information, click **Save** to store the employee profile.

Field Name	Requirement
Code	The code that identifies the profile. You can use the browse button to select from a list of existing profiles. You can use up to four alphanumeric characters.
Description	A description for the profile, up to 19 characters in length. It should specify the type of employee or employment terms for which the profile is defined.
Std. Hours	The number of hours in the standard working week for employees associated with the profile. If none is specified, the standard hours will be taken from the Company/Payroll Details record for standard hours (see Miscellaneous Details section earlier in this chapter).
Selections	This checkbox indicates which payments and deductions are included in the profile.

See also

[Employee Profiles](#)

**Note:** Employee profiles are not available in [Micropay Professional Lite](#).

## Job Codes and Location Codes

Job codes and location codes are used for payroll job analysis. Codes can be assigned to an employee in the Employee Details window's [Costing Tab](#).

1. Select **Manage Job Codes** or **Manage Location Codes**, as appropriate, in the navigation pane's Payroll section.

Alternatively, select the **Payroll - Job Codes** menu option, or the **Payroll - Location Codes** menu option.

A window displays containing a list of all current job codes or location codes.



2. To add a new job code or location code, click the **Add** button.
3. Complete the fields as necessary.
4. Click **OK**.

Field Name	Requirement
Code	The four-character alphanumeric code for the job or location record.
Description	The job description or location name.

See also

[P30/CC124](#)

**Note:** Job codes and location codes are not available in [Micropay Professional Lite](#).

## Cost Analysis Details

The **Cost Analysis Details** feature enables you to review and edit payment and deduction values associated with departments and cost centres.

This is necessary only when you need to perform a mid-year setup.

### Working with Cost Analysis Details

1. Select **View Cost Analysis Details** in the navigation pane's Payroll section.

Alternatively, select the **Company/Payroll - Cost Analysis Details** menu option.

2. You can access a list of all existing departments and cost centres by clicking the browse button beside the Department field or the Cost Centre fields, or by clicking one of these fields and pressing the **F2** key.
3. In the Cost Analysis Details window, review the payments and deductions information and make any necessary changes (changes are not possible in [Micropay Professional Lite](#)).
  - Click **Save** to store the details in the window.
  - Click **Ignore** to abandon the changes you have made.
  - Click **Cancel** to exit the screen. The program will prompt you to confirm that you want to abandon any unsaved changes.

**Note:** Editing the information displayed in the Cost Analysis Details window will also change the values on the Cost Analysis Report.

Field Name	Requirement
Department	The ID of the relevant department
Cost centre	The ID of the relevant cost centre concerned. <b>Note:</b> Cost centres are not available in <a href="#">Micropay Professional Lite</a> .
PRSI T.P.	The value of PRSI This Period
PRSI T.M.	The value of PRSI This Month
PRSI T.Y.	The value of PRSI This Year
Elm	The payment or deduction code, as appropriate

Field Name	Requirement
Hours T.P./T.M./T.Y.	The hours corresponding to the payment for This Period (TP), This Month (TM) or This Year (TY)
ValueT.P./T.M./T.Y.	The value corresponding to the payment or deduction for This Period (TP), This Month (TM) or This Year (TY)

See also

[P30/CC124](#)

**Note:** You can't edit cost analysis details if you are using [Micropay Professional Lite](#). In addition, cost centres are not available in [Micropay Professional Lite](#).

## Working with the Payroll Calendar

You use the Payroll Calendar functionality to set up the tax year calendar. Calendar information is used to control each period's payroll processing. It specifies dates for

- pay
- cheque
- giro
- Electronic Money Transfer (Paypath)

In the case of weekly payroll, there are either 52 or 53 calendar periods. In the case of monthly payroll, there are 12 periods.

When you set a period (see the Setting a Pay Period chapter), the pay-period dates default to those in the calendar. Any entries you make will be validated against the calendar.

### Defining the payroll calendar

1. Select **Enter Calendar Details** in the navigation pane's Payroll section. Alternatively, select the **Payroll - Calendar** menu option.
2. The Calendar window opens. In the **Calendar Details** tab, enter the relevant information in each column.
3. Click **Save**.

Field Name	Requirement
Period	The period number relating to each of the pay periods in the tax year.
Ins Wks	The number of insurable weeks for the specified period. (Minimum = 1, maximum = 13.)
Cost Month	This checkbox enables you to indicate whether the period relates to the start of a new cost month. In a cost month, the new pay period starts a new month for cost analysis.
Pay Date	The date on which payment is to be made to employees.
Cheq. Date (Cheque date)	The date on which payment is to be made to employees paid by cheque in the specified period.
Giro Date	The date on which payment is to be made to employees paid by giro (Credit Transfer) in the specified period.

Field Name	Requirement
EMT Date	The date on which payment is to be made to employees paid by EMT (Paypath) in the specified period.
Noml. Period (Nominal Period)	The relative period for nominal analysis purposes. Cost analysis year-end clear-down occurs in the period following this.
Cost Analysis Year End	A period number for the cost analysis year end. When the period number in the Set Period window exceeds the value specified here by one, the cost analysis year end clear-down will take place (see also the Setting a Pay Period chapter).

## Setting up a New Calendar

You use the New Calendar tab (generally at the beginning of the tax year) to set up a new calendar of dates.

For monthly, bi-monthly and quarterly payrolls, you must indicate which days are valid pay days.

You can also specify in which period the cost analysis should be cleared for a new financial year.

1. To set up a new calendar, select **Enter Calendar Details** in the navigation pane's Payroll section.
2. Open the Calendar window's **New Calendar** tab.
3. Complete the fields as appropriate.
4. Click **Update** if you want to update the current calendar with the settings you have specified.
5. Click **Save**.

Field Name	Requirement
Pay Date	The first pay date in the current tax year.
Cheque Date	The first date on which payment is to be made to employees paid by cheque.
Giro Date	The first date on which payment is to be made to employees paid by giro (credit transfer).
EMT Date	The first date on which payment is to be made to employees paid by Paypath.
Valid Pay Days	The checkboxes in this section indicate which days of the week are valid pay days. If the frequency is M (monthly), B (bi-monthly) or Q (quarterly), the system expects at least one valid pay day. If the frequency is M (monthly) or Q (quarterly), the last valid day of the month can be selected. If the Pay Date entered is not the same day as the one specified here, a warning is displayed.
Nominal Start	The calendar month in which the nominal period allocation starts.
No. of days between Pay Date and...	The fields in this section enable you to specify the number of days between the actual pay date and the date on which cheques, giros and Paypath should be processed. A cheque date, for example, should be set a few days before the pay date to ensure that cheques clear and employees are paid at the right time.

See also

To learn about how to start using Micropay Professional to process payroll, see [Setting Up the Payroll System](#).

## Payroll Notepad

The Payroll Notepad enables you to create payroll notes for reference purposes. A payroll note can contain

one or both of the following elements:

- an **onscreen note** that will open automatically when you set a particular pay period
- a **payslip note** that will be included in the payslips of this payroll's employees

(This can be overridden for a specific employee by setting up an [employee note](#).)

### Setting up a payroll note

To set up a new or existing payroll note, follow these steps.

1. There are a number of ways you can open the Payroll Notepad.
  - Click the **Notepad** button in the main toolbar.
  - Select **View Notepad** in the navigation pane's Company/Payroll view.
  - Select the **Company/Payroll - Notepad** menu option.
  - Open the [Timesheet Entry](#) window and click the **Notepad** button without selecting an employee.
2. The Notepad - Payroll window opens. Click **New** to create a new note, or **Browse Notes** to select an existing note that you wish to edit.
3. Complete the fields as appropriate. The table below explains the function of each item in the window.
4. Click **Save**.

You have set up a payroll note.

## The 'Notepad - Payroll' window

Item	Description
Date of this note	The date when the onscreen note was created. The field defaults to today's date.
Browse Notes	<p>This button enables you to open a list of the payroll notes that have already been set up in this payroll.</p> <p>To open one of these notes for further editing, simply click it.</p>
Summary of note	A title or brief summary of the contents of the onscreen note.
Note	The main body of the onscreen note.
Display a reminder	Selecting this checkbox activates a reminder of the relevant onscreen note in the pay period(s) specified in this window.
Display payslip message	<p>Select this checkbox to activate the field in which you can type a payslip note.</p> <p>The payslip note will be displayed on the payslips of all this payroll's employees in the specified pay periods.</p> <p>This payroll-wide payslip note can be overridden for a specific employee using an <a href="#">employee note</a>.</p>
From Period	<p>Here you specify the pay period in which the note should be activated.</p> <p>The <b>onscreen note</b> will display automatically after you have set this pay period, and the <b>payslip note</b> will be included in this period's payslips (except in cases in which it is overridden by an <a href="#">employee note</a>).</p> <p>Use the following format to specify the pay period:</p> <p style="text-align: center;"><b><i>Period/Year</i></b></p> <p>For example, entering <b>05/2011</b> specifies that the note should display in period 5 of the 2011 tax year.</p>
and for the next... periods	<p>The number of periods for which the note should remain active.</p> <p>For example, if you enter <b>05/2011</b> in the 'From Period' field, and <b>3</b> in this field, the note will be active in periods 5, 6, 7 and 8 of tax year 2011.</p> <p>In these periods, the <b>onscreen note</b> will display automatically after you have set the pay period, and the <b>payslip note</b> will be included in the payslips (except in cases in which it is overridden by an <a href="#">employee note</a>).</p>
Delete this Note	If you need to delete the note that is currently open, click the <b>Delete this Note</b> button.
New	Click this button to create a new note.
Save	Click this button to save your changes to the note that is currently open.

Item	Description
Close	Click this button to close the Notepad - Payroll window without saving your changes.

See also

[Employee Notepad](#)

## Hourly Rates

You can define hourly rate codes in your payroll. Micropay Professional supports up to four rates that can be assigned at employee level in the Employee Details window's **Payments** tab.

Any other rates defined in your payroll apply globally to the whole payroll.

### Maintaining hourly rates

1. Select **Change Hourly Rates** in the navigation pane's Payroll section. Alternatively, select the **Payroll - Hourly Rates** menu option.
2. To add a new rate, click the next blank line and complete the fields as necessary.

Rates 1 to 4 are normally assigned at employee level in the Employee Details window.

If the rate is not set up at employee level, or if the rate is 0, payroll-level hourly rates 1 to 4 are applied.

3. Choose **OK**.

Field Name	Description
Rate	<p>The hourly rate corresponding to the predefined ID.</p> <p>The ID is used to implement the rate, either through a pay formula or through the employee hourly rate code in the Employee File Maintenance window.</p> <p>This field can contain up to seven digits.</p>

See also

[P30/CC124](#)

## Cheque Formatter

**Cheques purchased from Sage Ireland are formatted for you. If you have any queries about them, contact Sage Support.**

If you want to print cheques using Micropay Professional, you can use the Cheque Formatter to define the layout of the cheque stationery. The cheque formatter supports the following cheque formats:

- Standard Cheques
- Text Cheques
- Cheques
- Cheques/Payslips

You need to specify the line and column position at which each item to be included in the cheque design should begin printing. You can also control the length of each item in the cheque design.

Filler characters can be used to pad out values on cheques - this helps prevent fraudulent alterations to the printed cheques. You can specify the character to use as a filler (typically an asterisk) - any unused space in the relevant field will be filled using this character.

### Changing the cheque layout

1. Select **Change Cheque Format** in the navigation pane's Payroll section. Alternatively, select the **Payroll - Cheque Format** menu option.
2. The Cheque Format window opens, with the **Standard Text** tab displayed. To amend an item in the cheque layout, click the relevant field, and complete the fields as necessary.
3. If you want to use a filler, select the **Filler** check box, and enter the filler character in the box provided.
4. Choose **OK** to store the cheque layout.

Field Name	Requirement
Description	The name of the payment on the cheque.
Line	The line number on which the cheque printing will commence. For example, if the cheques are to be printed beneath the payslip, with the cheque value printing on line 10 of the cheque, and the payslip being 36 lines in length, then the line value to be entered will be 36 plus 10 - that is, line 46.
Col. (Column)	The column within which to begin printing the current field.
Len. (Length)	The length of the payment, in characters, to be printed in the current field. For example, a field containing a date in the format dd/mm/yy would be set to 8.
Ext. (Extends)	The number of lines to move down before continuing a payment that does not fit on the line specified in the Line field. Suppose that you have designed a cheque that displays a 20-character message, starting at column 70 on the relevant line, and that your printer is only 80 characters wide. If you enter 1 in this field, the remaining characters will print on line 8, again commencing at column 70.
Use Filler/Filler Character	The Use Filler checkbox enables you to specify whether a filler character is to be used for padding out the cheque value when the full length of the field is not used. If this option is selected, you use the Filler Character field to specify the filler character, such as an asterisk.
User Text/Payslip Cheque	The User Text/Payslip Cheque tab enables you to specify any free-format text you want included on the cheque. In the tab you can define the line and column position, length and extension for the text.
Payslip/Cheque section	<p>This section of the User Text/Payslip Cheque tab enables you to design a combined payslip/cheque. You use the Print Cheque field to specify the positioning, relative to the payslip, of the cheque.</p> <p>If you specify the 'To the right' value in the Print Cheque field, you specify the position, expressed in hundredths of an inch from the left of the payslip, where the cheque prints.</p>

See also

[P30/CC124](#)

## Employee Details

Employee details are generally specified as part of your initial setup procedure, but you can create new employee details and amend existing ones throughout the tax year.

During the course of a tax year you may need to add a new employee who is transferring from another employment. In such a case, you must include relevant P45 information on their employee details record.

### Before you proceed

**Some of the actions you may need to perform before setting up employee details include:**

- Completing the details relating to the Company Payroll, including Paypath information.
- Defining the payments for each of the pay types relevant to the payroll's employees, as well as applicable voluntary deductions and hourly rates
- Creating employee profiles: groups of payments and deductions assigned to each type of employee or employee group.
- Setting up department and cost centre codes, and job and location codes.
- Amending the P30/CC124 and cost analysis details, if applicable.
- Setting up the payroll calendar, defining the dates for pay periods, cheques and Paypath.
- Setting up a [payroll notepad](#), including details that may printed on payslips.
- Using the cheque formatter to define the layout of the cheque for printing (if you are paying employees by cheque).

### See also

[Creating a New Employee](#)

[How do I delete an employee?](#)

[How do I change an existing employee's details?](#)

[Employee Details Window](#)

[Common Employee Procedures](#)

**Note:** Employee profiles, cost centres, job codes and location codes are not available in [Micropay Professional Lite](#).

## About Employee Details

An Employee Details record stores both *static* and *variable* data for an employee.

Static data is information that generally remains constant throughout the tax year, such as the employee number, name, address, and the PRSI code.

Variable data is information that is automatically updated by the system when you process a pay period. This type of data includes gross pay, tax paid, PRSI contributions and all values associated with an employees pay and voluntary deductions.

The employee details are organised on various tabs on the Employee Details window. The details can be completed in any order you want, but you can't save the employee record until all compulsory fields have been completed.



Employees may be paid at different frequencies (such as weekly and monthly) in your organisation. Make sure that the employees are organised into payrolls that correspond to their respective pay frequencies.

### ETP Checker

Micropay Professional checks that the employee's gross pay, tax, PRSI (employee and employer) and insurable weeks are the same as those in the ETP details record.

If they differ, a warning is displayed to this effect. The warning does not prevent you from saving the employee record.

See [ETP \(Earnings, Tax and PRSI\) Tab](#).

### Date Entries

When you are entering a date in a date field, you can click the arrow button alongside the field to access the associated pop-up calendar. You can use this calendar to navigate through months and years, and then double-click a particular day to update the date field with that date.

Alternatively, you can type the date directly in the field using the dd/mm/yyyy format.

See also

[Employee Details](#)

## Creating a New Employee

Your [Micropay Professional software licence](#) entitles you to the use of a certain number of companies, and a certain number of employees in each of those companies.

For example, if you are licensed for 32 employees per company, you can set up 32 employees in each company. But any additional employees you set up in a company may involve paying an additional charge to upgrade your licence.

1. Click **Edit Employees** in the desktop process map.
2. The [Employee Details Window](#) opens. Click **New**.
3. The New Employee window opens. This prompts you to enter a set of initial employee details.
4. Click **Next**.

If the system finds employee records that match the details you have entered, the Matching Employee Records window opens. This contains a list of the employee records that match the details you have entered. Review the information to determine whether one of the listed records relates to the employee you are setting up in the system. If so, select the record and click **Next**.

If the selected record includes a Finish Date, the employee had a previous spell of employment with the company. Use the Reinstatement wizard to reinstate the employee manually. For more information, see [How do I reinstate an employee?](#)

5. If you have selected the **Automatically Create a New Employee Code** checkbox in the Company Details window's **Employee** tab, an unused number is automatically entered in the Employee Code field. You can change this if necessary. Otherwise, specify one.
6. Add the following mandatory information to the new employee record:
  - Surname
  - Pay Type
  - Pay Method

- Tax Status
  - PRSI Code
7. Add all other relevant information if it is available.
  8. Click **Save**.

See also

[How do I change an existing employee's details?](#)

[Employee Details Window](#)

## How do I change an existing employee's details?

1. Open the Employee Details window by doing one of the following:
  - click **Edit Employees** in the desktop's process map
  - click **Edit Employees** in the navigation pane's Pay Run view
  - select the **Processing - Employee Details** menu option
  - click **Emp Details**
2. To locate the employee in a complete employee list, you click the browse button beside the Emp No field, and then you click the relevant employee in the employee list that displays.
3. You can also conduct a search for an employee based on information about them that you know. To search for an employee, click the **Search** button to open the Search dialog box and run a search for the employee on the basis of one of these search criteria:

Surname  
Employee Code  
PPS Number  
Department

A list of matching employees displays in the Search Results pane. To open the record you require, you double-click the employee, or you select the employee and click **Open Selected Employee**.

4. Edit the employee's information as necessary, and then click **Save**.

**Note:** You use the arrow buttons in the bottom right-hand corner to scroll through existing employee records.

5. Click **Cancel** to exit the Employee Details screen.

See also

[Creating a New Employee](#)

[Employee Details Window](#)

## Transferring Employees Between Payrolls

Whenever an employee's pay frequency changes, you need to transfer the employee's information to the new frequency. You should only do this at the beginning of the month. This helps to prevent any overlapping in the allocation of tax credits and insurance weeks.

For example, halfway through a month, an employee on a weekly payroll will probably have received two weeks of tax credits. Transferring them to a monthly payroll provides them with a full month of tax credit. This causes their tax to decrease for that month, and then increase the following month, before finally settling at a regular amount. However, it can have implications for the P35 to ROS submission procedure.

1. Print out the Earnings Tax & PRSI report for that employee. Use the information in this report to set up the employee in the new frequency. Select **Reports - Payroll Reports**.
2. Open the **Employee** tab, and select the **Earnings Tax & PRSI**.
3. Enter that employee's number in both of the From and To range boxes and click **Print**.
4. Note down the Tax Credit and Std. Rate Cut-off in the employee's Employee Details record.
5. Set up the employee in their new payroll following the [Mid-Year Employee Setup](#) procedure. Remember that the employee is moving from one frequency to another, so period values such as payments, deductions, Tax Credit and Standard Rate Cut off will have to be converted to the new pay frequency.
6. The next time that **End Of Period** is run in the new frequency, the P30\CC124 will be automatically updated to include this employee's total Tax and PRSI. You should pay particular attention to the values here to make sure that it has updated correctly. After setting up the employee the Control Summary Brought Forward and Carried Forward figures will update to include these new details, e.g. Gross Pay, Tax & PRSI will increase.
7. To avoid duplication on the P35 at the End Of Year it is important to delete the employee from the previous frequency, since all of their cumulatives have been transferred to the new payroll. This will need to be done while the payroll they are to be removed from is on status 'Start of Period'. (That is, having just set a new period and before any timesheets are saved).
8. To delete an employee record, see [How do I delete an employee?](#)
9. Once the employee is removed, the P30 and Control Summary for the previous payroll will be updated in a similar fashion, e.g. Gross Pay, Tax & PRSI will decrease.

## Employee Details Window

The Employee Details window is organised into a number of tabs, each of which focuses on a different aspect of employee information. These tabs are:

[Personnel Tab](#)

[Tax/PRSI Tab](#)

[Pay/YTD Tab](#)

[Holidays Tab](#)

[Absence Tab](#)

[Payments Tab](#)

[Deductions Tab](#)

[ETP \(Earnings, Tax and PRSI\) Tab](#)

[Split Tab](#)

[Costing Tab](#)

[User-Defined Tab](#)

[CSO Details Tab](#)

[JLC Tab](#)

### Personnel Tab

The Employee Details window's Personnel tab enables you to enter general information about the employee, such as name, address, and bank details.

Attaching an Employee Photo

If you want to attach a photo of the employee in the Personnel tab, you need to store the image as a BMP graphics file in the relevant data directory. The file name must match the relevant employee code. For example, a photo of employee 001 must be called 001.BMP.

The image, if correctly named and stored, is automatically displayed when the employee record is retrieved.

There is no facility to browse to the image file, or to select it.

Field Name	Requirement
Emp.No (Employee Number)	A unique identity code assigned to each employee. If you want to generate a new record, click <b>New</b> . To locate an existing employee, click <b>Search</b> or click the browse button and select the employee in the list.
Surname	The employee's surname.
First Name	The employee's first name(s).
Address	The employee's home address.  If you haven't got the employee's PPS number, you must include their home address and date of birth on the P35.  <b>Note:</b> Press <b>Tab</b> to move to the next line when you are entering the address.
Post Code	If the employee's postal address includes a post code, specify it here.
County	The county in which the employee resides.
E-mail Address	This field enables you to specify the employee's e-mail address. If Micropay Professional's payslip e-mail functionality is enabled, this is the address to which the employee's electronic payslip is sent.
Telephone	The employee's land-line phone number.
Mobile	The employee's mobile phone number.
Gender	A gender selection. Click on the <b>Male</b> or <b>Female</b> radio button as required.
Director	A checkbox that enables you to specify whether the employee is a director of the company.
Sort Code	The employee's bank sort code. This is required if the employee is paid by Paypath. Use the drop-down list button to select an existing bank sort code. See also the Setting Up Bank Details section of the Getting Started chapter.
Account Code	The employee's bank account number. This is required if the employee is paid by Paypath.
Account Name	The employee's bank account name. This is required if the employee is paid by Paypath. By default, the employee's first name(s) and surname are displayed here, and may be amended.
Cr Union A/c	The employee's Credit Union Account, into which wages will be paid, if applicable.
Salary Rev. Date	A salary review date for reference purposes. You may use it for personnel reporting.
Start Date	A start date for reference purposes. This date is required for year end reporting if the employee commenced work during the current tax year.

Field Name	Requirement
Max Nett Pay	The maximum nett pay allowed for this employee in a given period. This value supersedes the value entered on the Company/Payroll Details screen. Employees are not limited to this maximum nett pay, but if their pay should exceed this value, a warning will be printed on the Control Summary Report. See also <a href="#">Misc. Tab</a> .
Min Nett Pay	The minimum nett pay allowed for this employee in a given period. This value supersedes the value entered on the Company/Payroll Details screen. Employees are not limited to this minimum nett pay, but if their pay is less than this value, a warning will be printed on the Control Summary Report. See also <a href="#">Misc. Tab</a> .
Photo	You can display a BMP image of the employee in this box by naming the file according to this syntax: ' <i>employee_number.bmp</i> ', and then placing it in the payroll's directory at your Micropay Professional installation location.

See also

[Employee Details Window](#)

### Tax/PRSI Tab

Use the Employee Details window's **Tax/PRSI** tab to specify the employee's PAYE and PRSI information.

Field Name	Description
Tax Status	The employee's tax status. Use the drop-down list button to select the tax status code. This will be one of the following: <b>Normal</b> , <b>Emergency</b> , <b>Week 1</b> or <b>X Exempt</b> . If you choose <b>Emergency</b> or <b>X Exempt</b> , the system automatically clears any details that may be in the Std Rate Cut-Off and Tax Credit fields.
Marginal Relief Rate	<p>Some employees are entitled to claim tax exemption if their total income is less than the relevant exemption limit.</p> <p>A Tax Credit certificate is issued to the employer in the normal way, but if the employee subsequently earns income above the exemption limit, tax is chargeable at the marginal rate.</p> <p>So in this case you need to select the <b>Marginal Relief Rate</b> checkbox in the <b>Tax/PRSI</b> tab.</p> <p>This field is enabled when the employee's Tax Status is either Normal or Week1.</p> <p>For more detailed information about the Marginal Relief Rate, go to <a href="http://www.revenue.ie/leaflets/it8.pdf">http://www.revenue.ie/leaflets/it8.pdf</a>.</p>
Std Rate Cut-off	The standard rate cut-off indicates the taxable earnings limit up to which tax is deducted at the standard income-tax rate. When the employee's gross taxable pay exceeds this amount, tax will be deducted at the marginal income-tax rate. The Std. Rate Cut-Off is a period figure, i.e. NOT an annual figure. You must specify a value in this field, although the value can be 0 if necessary.
Tax Credit	This is the amount by which an employee's tax liability should be reduced. This is a period figure and NOT an annual figure.

Field Name	Description
Emergency Start Period	The period in which this employee commenced paying tax at the emergency rate. This will be automatically updated when a timesheet has been processed for the employee.
Deceased	In the event of the death of the employee, you need to select this checkbox, and specify a Finish Date and Finish Period. This removes the deceased employee from the payroll.
Finish Date	The date on which the employee ceased employment with the company. If the employee left in the current tax year, the date is required for year-end reporting. This field is automatically updated upon running the End of Period (EOP), provided you specified that the employee has left when you entered their timesheet details.
Finish Period	<p>The number of the pay period in which the employee left. This field can be used for two distinct purposes:</p> <p>(1) to indicate that the employee has left the company.</p> <p>(2) to indicate that you want to suspend entry of timesheet details for the employee.</p> <p>See <a href="#">Finish Period: Leavers and Suspensions</a> to see how to assign a finish period to an employee who is leaving, and to an employee who is 'suspended'.</p>
Department	The department code for cost analysis. Click the drop-down list button to locate a department code already set up. You can also create a new department by entering a code that does not already exist on the system. You are prompted at this stage to confirm that you want to create a new department record.
Cost Centre	<p>The cost centre code for cost analysis. Click the drop-down list button to locate a cost centre already set up. You can also create a new cost centre by entering a code that does not already exist on the system. You are prompted at this stage to confirm that you want to create a new cost centre record.</p> <p><b>Note:</b> Cost centres are not available in <a href="#">Micropay Professional Lite</a>.</p>
Payslip Currency	This drop-down list enables you to specify the currency in which the employee will be paid.
PRSI Code	<p>Enter the employee's PRSI Base Code. A1 is the most commonly used code. This will automatically convert to AL, AX or A0 if the earnings are below the A1 threshold.</p> <p><b>Note:</b> Contact the Department of Social Protection if you are in doubt about which code to enter.</p>
Multiple Employment	For employees in PRSI classes A1 or A2 who have more than one employment, the Multiple Employment check box should be selected. The PRSI Lock check box should not be selected. The normal PRSI switching rules apply to the employee's PRSIable pay. If it is found that PRSI should be calculated at J0, Micropay Professional prevents this and PRSI is calculated at class A0 instead, since the 'Multiple Employment' option is selected.

Field Name	Description
PRSI Lock	The Fixed PRSI Code checkbox enables you to specify whether the system should lock the employee's PRSI code, preventing it from automatically switching, as governed by the Dept of Social Welfare. It should normally be deselected, unless the Dept of Social Welfare stipulates otherwise.
Insurable Weeks	The total number of insurable weeks in the current tax year (in this employment only).
PPS number	The employee's PPS (Personal Public Service) number, as specified on the Tax Certificate or P45. The field will accept only valid PPS numbers.  If you haven't got the employee's PPS number, you must include their home address and date of birth on the P35.
Mother's Maiden Name	The employee's mother's maiden name.  This is required (if available and applicable) along with the employee's home address and date of birth when you are submitting a form P35L/T.
Date of Birth	The employee's date of birth.  If you haven't got the employee's PPS number, you must include their home address and date of birth on the P35.

See also

[Finish Period: Leavers and Suspensions](#)

[Employee Details Window](#)

## Finish Period: Leavers and Suspensions

You assign a finish period to an employee who is leaving, and to an employee who is 'suspended'. Each situation requires a distinct approach in the Employee Details window's [Tax/PRSI Tab](#).

### For a Leaver

If you have indicated in the timesheet that the relevant employee has left (by selecting **Yes** in the timesheet's Leaving TP field), when you run the End of Period (EOP) the finish period is automatically updated in the Employee Details window's Tax/PRSI tab. You must also enter a finish date. Both are required to produce a P45 for an employee who has left. Similarly, if you specify a finish date, you must also specify the finish period.

At the end of the year, employees with a leaving period set between 1 and 53 are automatically deleted from the file, and will not go forward into the new tax year.

### For a 'Suspended' Employee

If you have indicated in the timesheet that the employee is suspended (by selecting **Suspend** in the Leaving TP field), when you run the End of Period the finish period is automatically updated in the Employee Details window's Tax/PRSI tab.

In this context, the term *suspended* means that you want to temporarily cease timesheet entry for the relevant employee. This option is used, for instance, in the case of maternity leave during which the employee will be absent for a number of weeks, making it necessary to suppress their timesheet details.

Finish period 99 signifies that the employee is suspended.

**Note:** In contrast to the case of an employee who is leaving, you don't need to specify a finish date when the

finish period is 99.

The timesheet entry process ignores suspended employees. However, their information is automatically carried forward into the new tax year. To reactivate a suspended employee, you delete the finish period 99 in the Employee Details window's Tax/PRSI tab.

See also

[Tax/PRSI Tab](#)

## Pay/YTD Tab

You use the Employee Details window's Pay/YTD tab to complete the gross-pay-to-date information for employees added to the system part way through the tax year. If you are creating employee details at the start of a new tax year, there is no need to complete these details, since they will be gathered automatically by the program.

## Setting up an employee for e-mailed payslips

If e-mail functionality is enabled for the current Company Payroll, you can set up the employee for electronic payslips on this tabbed page by selecting the **Use Email Payslips** checkbox.

The Payslip PIN field generates a PIN code that enables the employee to open and read their encrypted PDF-format electronic payslip.

If you delete this PIN, the employee's electronic payslip will not be protected with encryption.

If you choose to use PIN-based security, you can e-mail the PIN to the employee by clicking the **Email PIN** button.

**Note:** Previous employment figures are only relevant if an employee has joined during the current tax year.

**Note:** The pay type and pay method fields must be completed. Choose from the drop-down lists.

Field Name	Description
Pay Type	The pay type that indicates whether the employee is paid on an Hourly or Salaried basis. Use the drop-down list button to select from the list.
Empl. Type (Employment Type)	The employee's current employment status. Use the drop-down list button to select one of these options: <b>Casual</b> , <b>Permanent</b> or <b>Temporary</b> .
Pay Method	The method by which the employee is paid. Use the drop-down list button to select from <b>Cash</b> , <b>Cheque</b> , <b>Paypath</b> or <b>Split</b> .
Paid to Period	The last period in which the employee was paid. This field is auto-updated when the payroll is processed, and should only be amended on the advice of your Support Centre.



Field Name	Description
Nett to Gross	<p>An employer uses a nett-to-gross payment to pay an employee a specific amount of nett pay. You enter the nett amount in the employee record or in the timesheet, and the system automatically calculates the associated PAYE, PRSI and other amounts, and thus determines the corresponding gross amount of pay.</p> <p>Micropay Professional supports two kinds of nett-to-gross pay:</p> <p>Total – The employee is paid a specific amount of nett pay the pay period. They are not paid any other payments in the pay period.</p> <p>Extra – The employee is paid an extra nett amount in the pay period, in addition to the other payments they are paid.</p> <p>In each case, Micropay Professional calculates the gross value automatically.</p> <p>For more information, see <a href="#">Nett-to-Gross Payments</a>.</p>
Rounding	The carried-forward rounding value, which is updated after running the End of Period procedure. This only applies to cash paid employees. See also <a href="#">Misc. Tab</a> .
Disability	The total amount of taxable disability benefit accumulated for the employee for the current tax year. This is automatically updated when the payroll is processed. This field is cleared automatically when the Clear YTD Totals function is run.
Use Email Payslips	You select this checkbox to set the employee up for e-mailed payslips. When you select the checkbox, a PIN code is displayed in the Payslip PIN field. This is the code the employee needs to be able to open the payslip they receive by e-mail. At the same time, the <b>Email PIN</b> button is activated. By clicking this button, you can e-mail the PIN to the employee.
Prev. (P45), Gross Pay/Tax Paid	The gross pay paid to the employee, and the tax deducted from the employee in the current tax year in previous employment, as stated on the employee's P45. The values entered update the year-to-date totals automatically.
This Employment, Gross Pay/Tax Paid	The gross pay paid to the employee, and the tax deducted from the employee in the current tax year in this current employment. The values entered update the year-to-date totals automatically.
YTD Totals	The sum of the two values above: (Prev. (P45), Gross Pay/Tax Paid) + (This Employment, Gross Pay/Tax Paid)
Universal Social Charge: Year to Date	<p>This section displays the employee's gross income to date, and the amount deducted to date from their gross income for the Universal Social Charge (USC).</p> <p>The <b>Show Details</b> button displays a breakdown of the USC calculations.</p>
PRSI this emp, Employee/Employer	The total PRSI contributions paid by employee and employer in the current tax year for this employment only. (P45 PRSI details are never entered).

Field Name	Description
Non-Tax Deds Financial Yr., Employee/Employer	The total pension contributions paid by employee and employer in the current financial year.
Non-Tax Deds Tax Yr., Employee/Employer	The total pension contributions paid by employee and employer in the current tax year.
Non-Tax Deds. from Start, Employee/Employer	The total pension contributions paid by employee and employer since the employee commenced pensionable employment.
BIK Tax Year to Date	Cumulative of all taxable BIK recorded this Tax Year
Employee Medical Insurance	Amount of medical insurance included as notional pay for this employee this Tax Year
Additional Med Ins Contribution	Additional medical insurance BIK amount contributed by the employee
Total Medical Insurance	Sum of the two fields above: (Employee Medical Insurance) + (Additional Med Ins Contribution)

See also

[Employee Details Window](#)

## Holidays Tab

The Employee Details window's **Holidays** tab enables you to specify holiday settings specific to a particular employee.

For example, you can override the default holiday accrual method set at payroll level.

You can also provide information such as the number of:

- holidays brought forward from the previous holiday year
- working days in the week
- Hours per Working Day

The Hours per Working Day value is also contained in the [CSO Details tab](#). Changing it in one tab also automatically changes it in the other.

(You need to specify this value only if you use the [Holiday and Absence Processing feature](#) of this software.)

The **Show Holiday Breakdown** button enables you to display the details of the calculation that determines the employee's current Holidays Due This Year value.

See also

- For detailed information about holiday processing in Micropay Professional, see [Holiday Accrual and Processing](#).
- [Employee Details Window](#)

## Absence Tab

You use the Employee Details window's **Absence** tab to set up the annual entitlements for employee absence. The program determines the number of days taken using the absence records specified during timesheet entry. Note that the Absence Details are used for reference and reporting purposes only, and are not used to calculate holiday pay.

The employee code, names, department codes and cost centre codes are copied from the first tab on this part of the employee record screen.

You can amend the details (other than the code) if required. See [Personnel Tab](#) for field details.

The program automatically displays the absence data entered on the timesheet.

Field Name	Description
B/Forward	The number of days brought forward from the previous year for holiday, sickness (certified and uncertified) and other absences. This is automatically updated when the Clear Absence routine is run.
Entitlement	The number of days entitlement in this year for holiday, sickness (certified and uncertified) and other absences.
Taken	The number of days taken in this year for holiday, sickness (certified and uncertified) and other absences as entered on timesheets or manually updated here.
Memo Fields	These fields can be used for any user-specific note-taking requirements. The default settings are specified in the Company/Payroll Details setup (see <a href="#">Company/Payroll Details</a> ).

Cost centres are not available in [Micropay Professional Lite](#).

See also

[Employee Details Window](#)

## Payments Tab

You use the Employee Details window's Payments tab to specify the payments applicable to the employee.

The payments displayed here are based on the payments table set up for the Company Payroll. See [Setting Up Payments](#).

If you have already defined employee profiles (see [Employee Profiles](#)), you can select a profile table, which determines the default payments applicable.

The employee code, names, department and cost centre codes are copied from the **Personnel** tab. You can amend the details (other than the code) if required.

Use the drop-down list button to select an employee profile. If no profile is specified, all payments and deductions will be displayed on the employee's timesheet. See [Employee Profiles](#).

Field Name	Requirement
Profile	<p>The optional employee profile code for this employee, as defined in the Employee Profile Details window. You can create a unique set of payments (and deductions, displayed in the Deductions tab) for each employee, as required, or amend an existing profile. If you want to select a profile, use the drop-down list button to choose from a list.</p> <p>Any payments/deductions that are part of the profile will appear on the screen.</p> <p>If you are using formulae that do not apply to all employees, you must use profiles to distinguish between those to whom the formulae are applied, and those to whom they are not.</p> <p><b>Note:</b> Payment formulae are not available in <a href="#">Micropay Professional Lite</a>.</p>

Field Name	Requirement
Std. Hours	<p>The employee's standard number of working hours in a week.</p> <p>The Std Hours will appear automatically on the timesheet if the employee's payment type is set to Hourly (H), and the employee profile includes 'Basic' pay. This will override the Standard Hours set up in the employee profile or at payroll level.</p> <p>In the case of Hourly-paid employees, this value is the same as the <b>Contracted Hours</b> value in the <a href="#">CSO Details tab</a>.</p> <p>Changing the value in one of these tabs also changes it in the other.</p> <p>However, in the case of Salary employees these are separate values.</p>
H. Code	Enter the code for the hourly rates. You define these using the <b>Payroll - Hourly Rates</b> menu option.
Rates 1 to 4	<p>The employee's hourly rates. You can enter up to four rates, with rate 1 normally being the basic rate. Multiple payments may be based on one hourly rate. These rates tie in with the rate number entered against payments.</p> <p><b>Note:</b> If the <a href="#">JLC Feature is enabled</a> for this employee and one or more of these hourly rates is not compliant with the relevant JLC Hourly Rate (see below), the system will display a warning. However, you can still continue to use these rates.</p>
JLC Hourly Rate	This field displays the <a href="#">JLC Hourly Rate</a> that applies to the employee based in the information you have specified in the JLC tab.
Payments table	<p>This pane enables you to enter payment details.</p> <p>The Std Amount column enables you to specify default payment values. Leave any blank that do not apply. Values can only be entered if the payment is setup as Fixed.</p> <p>The Hours TD (To Date) column enables you to specify the cumulative hours for each payment, up to the end of the previous period. These values are accumulated until the user selects to clear them down under the Financial Year End menu.</p> <p>The Value TD (To Date) column enables you to specify the cumulative value for each payment, up to the end of the previous period. These values are accumulated until the user selects to clear them down under the Financial Year End menu.</p>
Interim Paypath Amount	Enter an interim value to be paid to the employee mid-way during a pay period. It can be used for monthly-paid employees only.

See also

[Employee Details Window](#)

**Note:** The JLC Feature, employee profiles and cost centres are not available in [Micropay Professional Lite](#).

## Deductions Tab

You use the Employee Details window's **Deductions** tab to specify the deductions applicable to the employee.

The deductions displayed here are based on the payments and deductions tables set up for the payroll. (See [Setting Up Deductions](#).)

If you have already defined [Employee Profiles](#), you can select a profile table, which determines the default payments and deductions applicable.

The employee code, names, department and cost centre codes are copied from the [Personnel Tab](#).

You can amend the details (other than the code) if required.

Item	Description
Construction Workers Pension Scheme	<p>The Construction Worker's Pension Scheme section enables you to specify the employee's CWPS category. This determines which CWPS contribution rates apply to the employee.</p> <p>(These fields may be disabled. For information about how to enable the CWPS feature, see <a href="#">Construction Workers Pensions</a>.)</p> <p>Click the <b>Edit CWPS Year Details</b> button to display a list of the CWPS contribution amounts processed for the employee in the CWPS year. You can make changes to the information here if necessary. Employee and employer contributions are recorded, as well as AVC amounts.</p>
Deductions table:  Std E'e Amt	<p>The <b>Std E'e Amt</b> column enables you to specify standard amounts for employee deductions. For "<a href="#">Pension</a>", "<a href="#">PRSA</a>" or "<a href="#">RBS</a>" <a href="#">deductions</a>, you can enter a standard amount or a percentage of pensionable pay.</p> <p>The field is not editable if the deduction is associated with a CWPS pension.</p> <p>If there is an <a href="#">Employee Formula</a> associated with the deduction, the standard amount is overridden by the formula.</p>
Deductions table:  E'r Contrib	<p>The <b>E'r Contrib</b> column enables you to specify a standard amount or a percentage of pensionable pay for employer "<a href="#">Pension</a>" or "<a href="#">PRSA</a>" <a href="#">contributions</a>.</p> <p>The column is not editable if the deduction is associated with any other type of pension or is not associated with a pension.</p> <p>If there is an <a href="#">Employer Formula</a> associated with the pension, the standard amount is overridden by the formula.</p>
Deductions table:  Balance and Total columns	<p>The various Balance and Total columns enable you to specify the balance and total for both employee and employer deductions with accumulating or reducing balances. (See <a href="#">Setting Up Deductions</a> for more information.)</p> <p>The Balance should be maintained as the running total for the current payroll financial year, and the Total should be the running total of how much the employee or employer has paid since it was set up.</p> <p>The Total Tax Year Balances for both the employer and employee are also recorded by Micropay Professional.</p> <p>The Reference column enables you to specify deduction reference information, such as VHI membership numbers.</p>

Item	Description
PRD Status	<p>This drop-down list enables you to specify whether the employee's PRD Status with respect to PRD is:</p> <ul style="list-style-type: none"> <li>▪ <b>Do not deduct</b></li> </ul> <p>This signifies that although PRD is enabled in this payroll, the employee is not subject to PRD deductions.</p> <ul style="list-style-type: none"> <li>▪ <b>Week 1</b></li> </ul> <p>This signifies that the employee is subject to PRD deductions calculated on a Week 1 basis.</p> <p>This is applicable when the employee has joined a Public Service organisation during the year and has declared that this is their main employment, but has yet to supply a valid PRD45 from previous employment.</p> <p>It can also be applied when the employee has significantly underpaid PRD, and an agreement has been reached to recoup the underpayment in this way.</p> <ul style="list-style-type: none"> <li>▪ <b>Cumulative</b></li> </ul> <p>This signifies that the employee is subject to PRD deductions calculated on a cumulative basis.</p> <p>This is applicable when the employee has supplied the PRD45 from any previous main or subsidiary employments in the current tax year, and the details have been included on the employee's salary history.</p>
Subsidiary Employment	Select this checkbox when the employee's main employment is elsewhere, and this is a subsidiary employment.
PRD Pay YTD column	<p>These fields may be disabled. If so, click here to learn <a href="#">how to enable PRD processing</a> in this payroll.</p> <ul style="list-style-type: none"> <li>▪ The <b>Prev (PRD 45)</b> field specifies the total amount of the employee's pay earned in previous employment this year subject to the <a href="#">Pension-Related Deduction (PRD)</a>. This value is taken from the employee's PRD45 form from their previous employment, if one exists.</li> <li>▪ The <b>This Employment</b> field specifies the total amount of the employee's pay to date this year earned in this employment subject to the PRD. This value is taken from the <b>ETP</b> tab, where it is broken down into the amounts relating to each pay period.</li> <li>▪ The <b>YTD Totals</b> field sums the above two values.</li> </ul>
Deduction YTD column	<ul style="list-style-type: none"> <li>▪ The <b>Prev (PRD45)</b> field specifies the total amount of PRD deducted from the employee's PRDable pay earned this year in previous employment . This value is derived from the employee's PRD45 from their previous employment, if one exists.</li> <li>▪ The <b>This Employment</b> field specifies the total amount of PRD deducted from the employee's PRDable pay earned to date this year in this employment .</li> <li>▪ The <b>YTD Totals</b> field sums the above two values.</li> </ul>
Parking Levy	<p>This panel specifies the following values:</p> <ul style="list-style-type: none"> <li>▪ the standard Parking Levy amount to be applied in each pay period for the employee</li> <li>▪ the total Parking Levy amount paid by the employee in the year to date</li> </ul>

**Note:** Cost centres, employee profiles and formulae are not available in [Micropay Professional Lite](#).

See also

[Employee Details Window](#)

[Construction Workers Pensions](#)

### ETP (Earnings, Tax and PRSI) Tab

You use the Employee Details window's ETP tab to enter and review the following information (based on the manual Tax Deduction Card) for each employee per period:

- gross pay
- tax
- PRSI (employer)
- PRSI (employee)
- PRSI code
- insurable weeks
- absence details

The tab shows one line per period for the employee, and is updated automatically by the system when you run the End of Period procedure. You can scroll across the tab to view all the fields.

If the Marginal Relief Rate applied to the employee in the relevant period, the **Marginal** checkbox in this tab is selected automatically.

This information contained in the tab can be printed in an Earnings Tax & PRSI report, which you can access in the Payroll Reports window. The file is cleared down when you clear year-to-date totals (see [Payroll Year End FAQs](#)).

Field name	Description
Period	The pay period to which the figures belong.
Period Date	The run date in the current period.
Type	The payroll run type (N=normal, B=bonus).
Gross	The employee's gross pay per period, excluding pension.
Tax	The employee's tax paid per period. A negative figure indicates a tax refund.
PRSIable	The amount of the employee's pay that is subject to PRSI
PRSI Eee (Employee)	The employee's PRSI contribution per period.
PRSI Eer (Employer)	The employer's PRSI contribution per period.
PRSI Code	The employee's PRSI class per period.
PRSI Base	The employee's PRSI Base Code per period.
Ins Wks	The number of insurable weeks per period.
Hours	The total hours worked per period.
Left	Specifies whether an employee left your employment in the relevant period. If set to Y, the employee left in this period. If blank or set to N, the employee is currently in your employment. If you have indicated on the employee's timesheet that they are leaving, this field is automatically updated when the End of Period is processed.

Field name	Description
Hols (Holidays)	Specifies the number of holiday days taken in this period. If you have entered holidays on the employee's timesheet, this value is automatically updated when the End of Period is processed.
C.Sick (Certified)	Shows the number of certified sick days taken in this period. If you have entered certified sick days on the employee's timesheet, this value is automatically updated when the End of Period is processed.
U.Sick (Uncertified)	Shows the number of uncertified sick days taken in this period. If you have entered uncertified sick days on the employee's timesheet, this value is automatically updated when the End of Period is processed.
Others	Shows the number of other days leave taken in this period. This is automatically updated when the End of Period is processed, if you have entered leave for 'Others' on the employee's timesheet.
Days	Days worked per period. You must select the Days Worked checkboxes in the Timesheet Entry window corresponding to the days of the week on which the employee actually worked. The information you specify is displayed here.
BIK Amount	The amount of BIK due.
BIK Tax	The tax value due on the Benefit in Kind amount.
BIK PRSI Eee	This value represents the employee's PRSI contribution towards the Benefit in Kind amount.
BIK PRSI Eer	This value represents the employer's contribution towards the Benefit in Kind amount.
Tax Status	The Tax Status for the pay period.
PPS No	The employee's PPS No.
Emerg	The emergency Start Period of the employee.
TCR Wks	Tax Credit Rate
SRCOP TP	Standard Rate Cut-Off this period.
Tax Credit TP	Tax Credit this period.
Ins TY	The number of Insurable Weeks this year.
PRSIable TY	PRSIable pay this year.
Taxable TY	Taxable pay this year.
Tax Paid TY	Tax paid this year.
BIK TY	BIK paid this year
Marginal	This checkbox is selected automatically after the employee's timesheet is saved <b>IF</b> the marginal rate applied to the employee in the pay period. (End Of Period must be run to update values for the current period).
PRSI Lock	This checkbox indicates that the employee's Base code was 'locked' - that is, prevented from automatically switching based on Pay (for the pay period).
Multi Empl	If set to 'Y', this field indicates that the employee had more than one employment in the relevant pay period in question. This option can only be selected for employees with base classes A1 or A2. It prevents the employee's PRSI class from switching to J0.



Field name	Description
Co Ins	The number of Insurable Weeks set for the company in the relevant pay period. This value is recorded because the user may have amended the employee's number of insurable weeks, and this effects the calculation.
Gross Income	<p>The employee's Gross Income in the relevant pay period.</p> <p>The Universal Social Charge (USC) is deducted from your gross income:</p> <ul style="list-style-type: none"> <li>AFTER relief amounts for certain capital allowances</li> <li>BEFORE relief for losses or pension contributions</li> </ul>
USC @ Rate 1	The amount of the employee's income in the relevant pay period that is subject to the Universal Social Charge (USC) at Rate 1.
USC @ Rate 2	The amount of the employee's income in the relevant pay period that is subject to the Universal Social Charge (USC) at Rate 2.
USC @ Rate 3	The amount of the employee's income in the relevant pay period that is subject to the Universal Social Charge (USC) at Rate 3.
USC Adjust	If you have adjusted the Universal Social Charge (USC) amount calculated by the system, the adjustment value is specified here. For more information, see <a href="#">Timesheet Entry: Override Tab</a> .
USC EOY Refund	End-of-year refund of Universal Social Charge (USC) due to the employee.
BIK USC TP	The extra amount of Universal Social Charge (USC) paid due to the employee receiving BIK.

Field name	Description
PRD Status	<p><b>Do not deduct</b></p> <p>This signifies that although PRD is enabled in this payroll, the employee is not subject to PRD deductions in the relevant period.</p> <p><b>Week 1</b></p> <p>This signifies that the employee is subject to PRD deductions calculated on a Week 1 basis in the relevant period.</p> <p>This is applicable when the employee has joined a Public Service organisation during the year and has declared that this is their main employment, but has yet to supply a valid PRD45 from previous employment.</p> <p>It can also be applied when the employee has significantly underpaid PRD, and an agreement has been reached to recoup the underpayment in this way.</p> <p><b>Cumulative</b></p> <p>This signifies that the employee is subject to PRD deductions calculated on a cumulative basis in the relevant period.</p> <p>This is applicable when the employee has supplied the PRD45 from any previous main or subsidiary employments in the current tax year, and the details have been included on the employee's salary history.</p>
Subsidiary	<p>This checkbox is selected when the employee is in subsidiary employment in this payroll i.e. has his main employment elsewhere. If the <b>Subsidiary</b> checkbox is selected, PRD is calculated at the highest rate (currently 10.5%)</p>
PRD Pay	<p>This field specifies the total amount of the employee's pay subject to the Pension-Related Deduction, commonly known as the Public Sector Pension Levy. For more information, see <a href="#">Pension-Related Deduction (PRD)</a></p>
PRD	<p>This field specifies the total amount of the employee's pay subject to the Pension-Related Deduction.</p>
PRD Adjust	<p>This specifies the amount of any manual adjustment of the employee's PRD deduction in the current period.</p>
PRD Refund	<p>Amount of PRD refunded to the employee in the relevant period.</p>
PRD Pay TY	<p>Total amount of the employee's pay subject to the Pension-Related Deduction so far this year.</p>
Total PRD TY	<p>Total amount of Pension-Related Deduction paid by the employee so far this year.</p>

Field name	Description
Parking Levy TP	The Parking Levy amount paid by the employee in the relevant period.

See also

[Employee Details Window](#)

## Split Tab

You use the Employee Details window's Split tab to define methods of pay for employees who are to be paid using more than one method. The employee's pay method must be set to **S** (Split) in the Pay/YTD tab, and **Split Pay** must be selected in the Company Details window's [Misc. Tab](#).

You need to specify the pay methods involved. If these include payment by Paypath, you must also enter the relevant bank details.

The way in which split nett pay is calculated depends on the formula you enter. This involves arithmetic functions and references to any of the relevant fields in the system. A default formula for split nett pay can be set up in the Company Details window. Any formula specified in the Employee Details window will override the default.

**Note:** A formula can also be a fixed amount. For example, entering 100 in the formula field will pay the employee 100 to the pay method specified.

You can specify up to three formulae for different pay methods. If you specify just one formula, the balance of the nett pay will be paid using the second pay method.

For more information about creating formulae, see [Setting Up Payments](#).

**Note:** Payment formulae are not available in [Micropay Professional Lite](#).

Up to three split nett pay methods can be assigned to each employee. If you specify a payment method, but leave the corresponding Formula field blank, the balance of the employee's pay not paid by the preceding method(s) is paid by this payment method. For example, the first 100 might be paid to an AIB account, and the balance to a Bank of Ireland account.

Field Name	Description
Holidayable	This field enables you to specify how split pay is handled for holidays. There are three options available: The default is the Split option specified in the Company/Payroll Details screen. You can override this by specifying either the value Yes or the value No. Holidayable split pay is multiplied by the number of holiday weeks when pay is calculated. By default, the Holidayable option for all employees is set to <b>Payroll Default</b> .
Title	A title that identifies the split nett payment.
Formula	An arithmetic formula (or a numeric value) that specifies how much of the employee's pay is apportioned to the relevant pay method.
Method	The pay method for the split nett payment. Use the drop-down list button to select from a list of options.
Bank Code	For Paypath payments, the bank sort code. Use the drop-down list button to select from the bank file.
A/C Code	For payments by Paypath, the employee's bank account number.
A/C Name	For payments by Paypath, the employee's bank account name.

Field Name	Description
Cr Union A/C	The employee's first split Credit Union main account, followed by the second and third. These boxes are only available if the <b>Enable Credit Union Transfer</b> option is ticked within the <b>Paypath</b> tab of the Company/Payroll Details screen.

See also

[Employee Details Window](#)

## Costing Tab

The **Costing** tab in the Employee Details window is used to define costing details for each employee.

You can:

- Attribute percentage cost allocations to departments and cost centres. These form the basis of cost analysis.
- View the average hourly rate details for the employee.
- Specify a job code and a location code.

Field Name	Description
Cost Allocations table	To access a list of departments or cost centres, select the Dept or Cost field, respectively, and then press <b>F2</b> . Alternatively, you can double-click the field. Select the department or cost centre (if available) you require. In the % field you specify a percentage allocation for each. The percentages entered must equal 100%. These are used to determine the allocation of costs generated from this employee. In the case of a salaried employee, you can delete an entry in the allocations list by pressing <b>F5</b> .
Job Code	Use the drop-down list to choose the job code applicable to this employee. Job codes are maintained using the <b>Payroll - Job Codes</b> menu option.
Location Code	Use the drop-down list to choose the location code applicable to this employee. Location Codes are maintained using the <b>Payroll - Location Codes</b> menu option.
Avg. Hourly Rate Details	The hours and values are maintained automatically for the employee on the basis of calculated average hourly rates.

See also

[Employee Details Window](#)

**Note:** Cost allocations, cost centres, job and location codes are not available in [Micropay Professional Lite](#).

## User-Defined Tab

The Memo, Date and Value fields in the Employee Details window's **User-Defined** tab can be used make notes or store values relating to the relevant employee. This is particularly useful if you need to record values used in formulae.

The default names of these fields are specified in Company Details window (see [Company Details Window](#)).

(This tab is not available in [Micropay Professional Lite](#).)

See also

[Employee Details Window](#)

### CSO Details Tab

This tab enables you to specify information relating to the employee that is required for the [Earnings, Hours and Employment Cost Survey](#) report and the [National Employment Survey](#) report.

The **Exclude Employee from CSO Reports** checkbox enables you to exclude this particular employee from the report.

For more information on the fields you need to set in this tab, follow the steps in the [CSO Reporting](#) topic.

### Why are my CSO Reporting fields inactive?

CSO Reporting features will be disabled throughout the application until you provide a CSO CBR number in the Company Details window's **CSO** tab.

See also

[Employee Details Window](#)

### Employee Details - JLC Tab

This tab enables you to:

- enable or disable the [JLC Feature](#) for a particular employee
- apply JLC settings to the employee

**Note:** You can save JLC information in this tab even if some of it is missing. However, it is important to be aware that a minimum JLC hourly rate is applied to any employee with incomplete JLC information.

Item	Description
Include Employee in JLC	Select this checkbox to enable the JLC feature for this employee.  (The employee may already have been <a href="#">enabled by default at payroll level</a> .)
Industry	Each industry category defined by a JLC agreement has a separate set of employment categories and minimum hourly wage requirements.  Here you specify the industry category to which this employee belongs.
Class of Worker	Each industry category contains several classes of worker.  Here you can specify the class to which this employee belongs.
Date of Birth	The employee's date of birth. The employee details record may already contain a date of birth for the employee.  If you update this field, the Date of Birth field in the <a href="#">Tax/PRSI</a> tab is also updated.
Start Date	The employee's start date in this employment. The employee details record may already contain a start date for the employee.  If you update this field, the Start Date field in the <a href="#">Personnel</a> tab is also updated.
Years' experience in previous employments	Here you can specify the number of years' experience the employee gained in previous employments since turning 18.

Item	Description
JLC Hourly Rate	Based on the information you provided in the previous fields (or in the <a href="#">JLC Batch Setup screen</a> ), the system automatically displays the recommended JLC Hourly Rate in this field.  This field is also displayed on the <a href="#">Payments tab</a> .

See also

[Enabling the JLC Feature](#)

[JLC Employee Batch Setup](#)

[JLC Rates for Retail, Grocery and Allied Trades](#)

The JLC feature is not available in [Micropay Professional Lite](#).

## Common Employee Procedures

Some of the most common Micropay Professional procedures that involve working with employee data include:

[How do I delete an employee?](#)

[Working with Payslips](#)

[Using the Employee Notepad](#)

[Mid-Year Employee Setup](#)

[How do I set up an employee during the course of the tax year?](#)

[How do I mark an employee as a leaver?](#)

[How do I reinstate an employee?](#)

[Employee Cumulative Values: Example](#)

### How do I delete an employee?

You can remove an employee from your payroll records permanently. You may need to delete an employee when:

- the employee is set up on the system, but subsequently opts not to start working for the company
- the employee has moved to a different pay frequency (that is, their pay will be processed from now on in a different payroll), making it necessary to remove them from the current payroll
- the employee has accidentally been set up twice on the system, making it necessary to remove one of the employee records

Generally, you should not delete an employee for any reason other than those above. You should not delete an employee when they leave the company, because you may need to reinstate them later. (See [How do I reinstate an employee?](#))

1. Click the **Delete Employees** icon in the navigation pane's Payroll view.

Alternatively, select the **Processing - Delete Employees** menu option.

2. The Delete Employees window opens. This contains a list of the employees currently in the payroll. Select the employee(s) you want to delete. Hold down the **Shift** key if you need to select several con-

secutive employees in the list. Hold down the **Ctrl** key if you need to select non-consecutive employees.

The **Select All** button enables you to select all employees in the list for deletion.

You can click the **Employee Details Report** button to preview and print the standard payroll report that contains details about the employee(s) currently selected. You can also create a PDF copy of this report, and save it or e-mail it to colleagues.

3. To delete the selected employee(s), click **Delete**.
4. Enter the administrator (ADMIN) [password](#), and click **Delete Employee(s)**.
5. You are reminded that it is highly advisable to back up your payroll before deleting an employee.

Click **No** to close the dialogue box and then click the **Backup** button to back up the payroll.

Alternatively, click **Yes** if you have already backed up the payroll, and want to continue with the deletion process.

6. The selected employee(s) is deleted from the system, and is no longer displayed in the list. If you have mistakenly deleted an employee, use your payroll backup (see [Restoring a Backup](#)) to restore the employee record.

See also

[Employee Details](#)

## Working with Payslips

You can access an employee's payslip details for previous pay periods in the current tax year. When you have accessed it, you can print it or generate a PDF version of it. In addition, if the relevant employee is set up for e-mailed payslips (see [Pay/YTD Tab](#)), you can e-mail the historic payslip to the employee.

When you run the End of Period process, the employee's current payslip is finalised with current information and saved in the payslip archive.

The payslip history archives payslips for a year up to the current date.

## Accessing and using a historical payslip

1. Open the Employee Details window by doing one of the following:
  - click **Edit Employees** in the desktop's process map
  - click **Edit Employees** in the navigation pane's Pay Run view
  - select the **Processing - Employee Details** menu option
  - click **Emp Details**
2. Click **Payslip**. The employee's payslip from the previous period is displayed. (You can use the arrow buttons in the bottom right-hand corner in the Payslip window to browse through the payslips for other periods. Alternatively, you can click the middle arrow button in the bottom right-hand corner to display a list of available payslips.)
3. You can print or e-mail the payslip, or generate a PDF version of it.
  - To print the payslip, in the payslip window, select **File - Print Slip**.
  - To e-mail the payslip to the employee to whom it relates, select **File - Email Slip**. An e-mail with a standard message is generated, and the payslip is attached to it in PDF format.
  - To generate a PDF version of the payslip at a location you can specify, select **File - Export to PDF**.

4. Press **Esc**, or select **File - Exit**, to close the payslip preview window and return to the employee record screen.

See also

[Common Employee Procedures](#)

[Employee Details](#)

### Using the Employee Notepad

The Employee Notepad enables you to create employee notes for reference purposes. An employee note can contain one or both of the following elements:

- an **onscreen note** that will open automatically when you open the employee details record or the employee's [Timesheet Entry](#) screen
- a **payslip note** that will be included on the employee's payslip(s) in the relevant pay period(s)

(This payslip note overrides [the one set up for all the employees in the payroll.](#))

### Setting up an employee note

To set up a new or existing employee note, follow these steps.

1. There are a number of ways you can open the Employee Notepad.
  - Open the relevant employee's Employee Details record, and click the **Notepad** button.
  - Open the [Timesheet Entry](#) window, select an employee, and click the **Notepad** button.
2. The Notepad -Employee window opens. Click **New** to create a new note, or **Browse Notes** to select an existing note that you wish to edit.
3. Complete the fields as appropriate. The table below explains the function of each item in the window.
4. Click **Save**.

You have set up an employee note.



## The 'Notepad - Employee' window

Item	Description
Date of this note	The date when the onscreen note was created. The field defaults to today's date.
Browse Notes	<p>This button enables you to open a list of the employee notes that have already been set up for this employee.</p> <p>To open one of these notes for further editing, simply click it.</p>
Summary of note	A title or brief summary of the contents of the onscreen note.
Note	The main body of the onscreen note.
Display a reminder	Selecting this checkbox activates a reminder of the relevant onscreen note that displays whenever you open the employee details record or <a href="#">Timesheet Entry</a> window in the relevant pay period(s).
Display payslip message	<p>Select this checkbox to activate the field in which you can type a payslip note.</p> <p>The payslip note will be displayed on the employee's payslips in the specified pay periods.</p> <p>This note overrides any corresponding <a href="#">payroll note</a>.</p>
From Period	<p>Here you specify the pay period in which the note should be activated.</p> <p>The <b>onscreen note</b> will display automatically in the relevant pay period(s) displays whenever you open the employee details record or <a href="#">Timesheet Entry</a> window.</p> <p>The <b>payslip note</b> will be included in this employee's payslip(s) in the relevant pay period(s).</p> <p>Use the following format to specify the pay period:</p> <p style="text-align: center;"><b><i>Period/Year</i></b></p> <p>For example, entering <b>05/2011</b> specifies that the note should display in period 5 of the 2011 tax year.</p>
and for the next... periods	<p>The number of periods for which the note should remain active.</p> <p>For example, if you enter <b>05/2011</b> in the 'From Period' field, and <b>3</b> in this field, the note will be active in periods 5, 6, 7 and 8 of tax year 2011.</p> <p>In these periods, the <b>onscreen note</b> will display automatically whenever you open the employee details record or <a href="#">Timesheet Entry</a> window.</p> <p>The <b>payslip note</b> will be included in this employee's payslips in the relevant pay periods.</p>
Delete this Note	If you need to delete the note that is currently open, click the <b>Delete this Note</b> button.
New	Click this button to create a new note.

Item	Description
Save	Click this button to save your changes to the note that is currently open.
Close	Click this button to close the Notepad - Employee window without saving your changes.

See also

[Payroll Notepad](#)

## Mid-Year Employee Setup

Ideally, you set up your electronic payroll system completely at the beginning of the tax year. However, circumstances may dictate that the payroll has already been processed in a different way during part of the tax year, perhaps manually or using different payroll software.

You need to decide how the existing payroll information will be transferred to Micropay Professional. One approach is to process all of the previous pay periods during the tax year individually from the beginning of the tax year. This may not be a practical approach if the number of employees, or the number of periods, is large.

Generally, a better approach is to carry out the Mid-Year Employee Setup Procedure. This involves specifying relevant year-to-date or cumulative amounts for each employee. These values automatically update the ETP tab in the [Employee Details](#) window.

[How do I set up an employee during the course of the tax year?](#)

[Employee Cumulative Values: Example](#)

See also

[Common Employee Procedures](#)

[Employee Details](#)

To learn about how to start using Micropay Professional to process payroll, see [Setting Up the Payroll System](#).

## How do I set up an employee during the course of the tax year?

### Step 1: Information Gathering

You begin the procedure by gathering all required information, and deciding the period to which the cumulative figures will apply. This determines which period will be the first to be processed in Micropay Professional.

Once you have completed this stage of the process, you can begin setting up employee information in the Employee Details window's various tabs.

### Step 2: Personnel Tab

The basic information on the **Personnel** tab, such as address and salary review date, can be entered now or at another time.

Certain information is mandatory for the Mid-Year Setup procedure, however. This includes the employee's name and, if the employee is paid by Paypath, the employee's bank details.

**Note:** If you specify a bank sort code not already stored in the system, you are prompted to also provide an associated name. The sort code is then stored automatically on the system for future use.

Although it is not mandatory, most users also enter the employee's start date at this stage.

### Step 3: Tax/PRSI Tab

In the Employee Details window's **Tax/PRSI** tab, you specify:

- **Tax Status:** For most employees this is set to **Normal**, but there will be exceptions, such as when a new employee is on emergency tax.
- **Std Rate Cut-Off:** The standard-rate cut-off value for the employee per period. If it is a weekly payroll, you specify the weekly amount here; similarly for other pay frequencies - for example, if it is a monthly payroll, you specify the monthly amount.
- **Tax Credit:** As in the case of the standard-rate cut-off value, you specify the period amount of the tax credit for each employee. For a weekly payroll, you specify a weekly value.
- **PRSI Code:** This is the PRSI base code under which an employee is classed. For the majority of employees, it will be A1; if you are unsure which base code to specify, you should ask the Department of Social Welfare. If your employee is on a PRSI code of AX or A0, the base code is A1.

If you specify the base code A1, the system puts the employee on the appropriate PRSI class based on how much they earn in the period. For example, if you have an employee who is on a base code of A1, and they earn under 287 in a weekly period, the system will automatically put them on a code of A0.

- **Insurable Weeks:** This is the total number of insurable weeks for the employee in the current year (in this employment only).
- **Emergency Start Period:** If you have an employee who started with your company on emergency tax in the current tax year, you should use this field to specify the period in which they started.
- **PPS Number:** The employee's PPS number (previously known as the RSI number). If you do not have this number when entering the employee's details, you can provide it later.

#### Step 4: Pay/YTD Tab

The remainder of the Mid-Year Setup information should be set up on the Pay/YTD tab.

In this section it is important to enter the Pay Type and Pay Method, as you will not be able to save the employee record without entering this information.

The following cumulative values must also be entered in order to run the Mid-Year Setup Procedure successfully:

- **Disability:** If an employee has been paid disability benefit in the current tax year while in your employment, enter the taxable amount paid in this field.
- **BIK YTD:** If an employee has been paid benefit-in-kind in the current tax year while in your employment, enter the notional pay amount paid in this field.
- **Prev P45:** These values are the total gross pay earned and paid while in a previous employment in the current tax year.
- **This Employment:** These values are the total gross pay earned and tax paid in this employment only.
- **YTD Totals:** These values are the total of gross pay earned and tax paid in all employment in the current year. These fields can't be amended - they constitute the sums of the corresponding Prev P45 and This Employment values.
- **PRSI Employee:** This is the total amount of the employee's PRSI contributions for this employment only.
- **PRSI Employer:** This is the total amount of the employer's PRSI contributions for this employment only.
- **Non Tax Deds. this Fin Yr:** If applicable, these fields contain the total employee pension deducted and the total employer's pension contribution this financial year (in your employment only).
- **Non-Tax Deds this Tax Yr:** If applicable, these fields contain the total employee pension deducted and employer's contribution this tax year (in your employment only).

- **Non-Tax Deds from start:** If applicable, these fields contain the total employee pension deducted and employer's contribution for the full term of employment with your company.

When you click **Save**, a dialog box prompts you to confirm that you want to update the employee's ETP/ Tax Deduction card (the ETP tab) for the relevant employee. You click **Yes** to continue. Alternatively, you can click **No** and review the details you have entered.

#### Step 5: Checking the ETP tab

Now you should review the Employee Details window's ETP tab and verify the figures. In particular, you should verify that the system has correctly calculated the following values:

- Insurable Weeks
- Benefit-in-Kind Amount

If an employee had more than one PRSI class in your employment, you must create a new line for each class.

You can also enter the amount of BIK liability - the amount of Tax and PRSI (employee and employer) paid on the BIK amount - if necessary.

When you are happy that the totals are correct, click **Save**.

You need to run this procedure for all of your employees before you can move to the next step.

You don't need to update the P30/CC124 screen, since this will update itself automatically when the EOP (end of period) is run.

#### Step 6: Setting the Period

Now you set the period by clicking **Set Period** in the taskbar or in the process map. For instance, if you have entered details up to and including Period 4, then the first live period should be set to 5.

When you have set the period, you are ready to process timesheets for the current pay period.

Subsequently, timesheet processing automatically updates the employee details Tax Deduction Card and the P30/CC124 automatically.

#### See also

[Common Employee Procedures](#)

#### How do I mark an employee as a leaver?

Once an employee terminates employment with your company, they should be marked as a leaver. You do this in order to

- prevent any payment calculations in error after the employee has left
- generate a P45 report

There are two different ways to mark an employee as a leaver:

- If the employee is due pay when they leave, you should mark them as a leaver on the timesheet.
- If the employee has received all monies due to them, you should mark them as a leaver in the Employee Details window.

#### Marking an employee as a leaver in the timesheet

When an employee is leaving at the end of the current period, and is being paid on that date, you can mark the employee as a leaver in the Timesheet Entry screen when processing their final payment.

After entering the employee's pay details you specify **Yes** in the Timesheet Entry window's TP field. The system, as a result, automatically enters the period run date as the finish date. (For more information, see

[Finish Period: Leavers and Suspensions.](#)) You can, however, specify the date manually in the Date field.

Once the timesheet has been saved with the correct finish date, you end the period in order to print the P45 information.

When the period ends, the employee record updates with the Finish Date and Finish Period. At this stage, the P45 report is available for printing.

Marking an employee as leaver in the Employee Details screen

Sometimes you may not know that an employee is leaving until after they have actually left. In such a situation, there is no payment due to the employee for the current period. As a result you can't mark them as a leaver in the Timesheet Entry window.

Instead, you should:

1. Click **Enter Time and Pay** in the desktop's process map.

Alternatively, do one of the following:

- click **Enter Time and Pay** in the navigation pane's Pay Run section
  - select **Processing - Timesheet Entry**
  - click **Timesheets** in the Task Bar
2. In the Timesheet Entry window, specify the relevant employee.
  3. Delete the employee's timesheet (if it exists).
  4. Open the Employee Details window by doing one of the following:
    - click **Edit Employees** in the desktop's process map
    - click **Edit Employees** in the navigation pane's Pay Run view
    - select the **Processing - Employee Details** menu option
    - click **Emp Details**
  5. Open the Tax/PRSI tab.
  6. Enter the relevant information in the Finish Date and Finish Period fields. (You must fill in both in order for the employee to be marked as a leaver.)
  7. Save the employee details record.

It should now be possible to print P45 details for the employee.

## See also

[Common Employee Procedures](#)

## How do I reinstate an employee?

Reinstating an employee who has left the company returns them to the payroll, so that they will begin to receive payslips again. When their previous spell of employment ended, their employee details record was not destroyed. Reinstating the employee reactivates the record.

Suppose that you are unsure whether an employee needs to be reinstated or set up with a new employee record. Carry out the following steps.

1. Click **Employee Details** in the navigation pane's Payroll view, or click **Edit Employees** in the process map.
2. Alternatively, you can select the **Processing - Employee Details** menu option.

3. The Employee Details window opens. Click **New**.
4. The New Employee dialogue box opens. This prompts you to enter a set of initial employee details. The system will use these details to determine whether the employee is already set up in the system. Click **Next**.
5. If the system finds employee records that match the details you have entered, the Matching Employee Records window opens. Review the information it contains to determine whether one of the matching records relates to the employee you are setting up. If so, select the record and click **Next**.

If the selected record includes a Finish Date, the employee had a previous spell of employment in the company. The Reinstate Leaver window opens.

**Note:** You can also open this window directly, without going through the New Employee process, by selecting the **Processing - Reinstate Leaver** menu option, or by clicking **Reinstate Leaver** in the navigation pane's Employees view. However, in this case the window lists all records in the system that have a Finish Date. Select the employee(s) you wish to reinstate.

6. If you have the employee's current P45, set their Tax Status to **Week 1**. Otherwise, ensure that it's set to **Emergency**. Also specify their Standard Rate Cut-Off Point and number of Tax Credits in the current tax year.
7. Click the **Next** button.
8. A summary is displayed of the information that will be in the reinstated employee's record. If this information is correct, click **Next**. (Otherwise, click **Back**, and make the necessary changes.)

The relevant employee(s) is now reinstated.

### See also

[Common Employee Procedures](#)

### Employee Cumulative Values: Example

Suppose that you have an employee who was paid for a total of three weekly periods during the current year:

- € 500 gross pay per week
- € 100 tax per week
- employee PRSI = € 30 per week
- employer PRSI = € 60 per week

Taking these values as a starting point, if you decide to enter cumulative figures during the Mid-Year Employee Setup process, you specify the following:

- gross pay for three weeks = € 1500
- tax for three weeks = € 300
- employee PRSI for three weeks = € 90
- employer PRSI for three weeks = € 180

You also need to record the number of insurance weeks the employee has accumulated in your company during the current year. In this case, that value is 3.

### See also

[Common Employee Procedures](#)

## Holiday Accrual and Processing

The following topics provide comprehensive information on how to set up your system to track and process holidays in Micropay Professional.

- [Overview](#)
- [Entering holiday settings for the entire payroll](#)
- [Entering holiday settings for an employee](#)
- [How do I process an employee's holidays?](#)
- [Holiday Year Cleardown and Roll Forward](#)
- [How do I pay employees for a company holiday?](#)

### Overview

Setting up holiday tracking in Micropay Professional involves several steps. The information you **MUST** specify includes the following:

#### 1) Company Details window, Holidays tab

- default accrual method
- standard holiday entitlement
- holidays as % of hours
- default total hours/working day
- holiday payment
- default total working days/week

For details, see [Entering Payroll Holiday Settings](#).

#### 2) Employee Details window, Holidays tab

- Employee accrual method
- holidays brought forward
- employee total working days/week
- employee hours adjustment this period
- annual pay (determines Pay per Week and Pay per Day values)

For details, see [Entering Employee-Level Holiday Settings](#).

#### 3) Timesheet Entry window, Holidays/Absence tab

- holiday days/hours taken this period
- hours worked adjustment, if applicable
- number of holiday periods, if applicable

For details, see [How do I Process an Employee's Holidays?](#)

[See also](#)

[Holiday Processing](#)

## Entering Payroll Holiday Settings

The steps below explain how you set up holiday settings for the entire payroll.

You can subsequently override certain settings for particular employees, if necessary.

1. Select the **Company/Payroll - Company/Payroll Details** menu option.
2. Click the **Holidays** tab.
3. Specify the holiday year Start Date and End Date.

The statutory leave year is 1st April to 31st March. However, you can define a different leave year if necessary, provided that this leave year is used consistently.

If you change the holiday year start date or end date, and the system detects existing holiday information within the bounds of the new dates, you need to specify what to do with the information. See [Holiday Year Start and End: Things to watch out for](#).

4. In the 'Default accrual method for all employees' drop-down list, select the appropriate holiday accrual method. This specifies how the system will calculate the number of holiday days the employee is entitled to at any point during the holiday year. For more information, see [Specifying a Holiday Accrual Method](#).
5. Next, specify other default holiday values:

Field	Description
Holiday payment (Days)	This is the payment the system will use for holiday pay when it is <a href="#">calculated on the basis of days</a> . (Only Fixed payments or Variable payments can be specified for this purpose.)
Holiday payment (Hours)	This is the payment the system will use for holiday pay when it is <a href="#">calculated on the basis of hours</a> . (Only Hourly payments can be specified for this purpose.)
Accrue Holidays at	This value is used in the calculation of holiday accrual if the employee's accrual method is <b>As a percentage of hours worked</b> . The default value is 8%.
Default Accrual Method	Here you select one of the three holiday accrual methods as the payroll's default method.  This accrual method will be applied to all employees in the payroll by default.  However, you can <a href="#">apply a different accrual method to a particular employee</a> if necessary.
Standard Entitlement	This field provides you with the option of specifying a standard number of holidays per year for all employees. This value is used if the employee's accrual method is <b>Based on a standard number of holidays per year</b> .  The value can be <a href="#">overridden at employee level</a> if necessary.
Total Hours in a working day	This field enables you to specify a default value for 'Total Hours in a Working Day' for all employees in the payroll.  This value can be <a href="#">overridden at employee level</a> if necessary.
Total number of working days per week	This field enables you to specify a default value for 'Total number of working days per week' for all employees in the payroll.  This value can be <a href="#">overridden at employee level</a> if necessary.



6. To apply the current accrual settings to all employees in the payroll, click the **Apply accrual settings to all employees** button, and then click **Yes** on the confirmation screen.
7. Click **OK** to save your changes.

See also

[Holiday Processing](#)

### Holiday Year Start and End: Things to watch out for

Suppose that you change the holiday year start date or end date in the Company Details window's **Holidays** tab (see [Entering Payroll Holiday Settings](#)).

If the system detects existing holiday records within the bounds of the new dates, you must specify what to do with the information.

**Note:** Holiday records constitute the information contained in the Employee Details window's Edit Holiday Year Details dialogue box. (See Setting Up Holiday Accrual Details.)

#### Changing to an earlier start date

If you change the start date to a date earlier than the current start date, the system checks for holiday records after the new start date.

If it detects holiday records after the new start date, you are prompted to specify whether to keep the records or remove them. If you do not remove the information, it will be included in holiday accrual calculations.

#### Changing to a later start date

If you change the start date to a date later than the current start date, the system checks for holiday records before the new start date.

If it detects holiday records before the new start date, they must be removed from the system.

#### Changing to an earlier finish date

If you change the finish date to a date earlier than the existing finish date, the system checks for holiday records after the new finish date.

If it detects records after the new finish date, you are prompted to specify whether to remove the records. If you do not remove the information, it will appear in subsequent holiday years.

See also

[Holiday Processing](#)

### Specifying a Holiday Accrual Method

A holiday accrual method is a way of calculating how many holidays an employee is entitled to on a particular day during the holiday year.

Micropay Professional supports three accrual methods:

- [Standard number of holidays per year](#)
- [Percentage of hours worked in the holiday year](#)
- [One third of a working week per month](#)

You can make one of these the [default accrual method for all the employees in the payroll](#).

And then for a particular employee you can [override the default accrual method with another accrual method](#).

If more than one accrual method is applicable, apply the method that provides the greatest entitlement.

In the last holiday period, if the employee has worked all 52 weeks, their holiday entitlement is capped at 25 days. If it exceeds 24 days, it is rounded up to 25.

See also

[Holiday Processing](#)

### Standard number of holidays per year

In this accrual method the employee is allocated a standard number of holidays for the holiday year.

Formulae used in this accrual method

If the employee leaves the company during the year, their holiday entitlement on the leaving date is determined as follows:

$$\text{Rate} = (\text{Total Annual Holiday Entitlement}/52) \times \text{Number of Weeks Worked to Date}$$

If the employee has not received their full entitlement by the leaving date, they are allocated the remainder at that stage on the same pro-rata basis.

The number of holidays due up to the current period is calculated according to the following formula:

$$((\text{Holiday entitlement}/52) \times \text{Number of Weeks worked to date}) + \text{Holidays Brought Forward} + \text{Holiday Adjustment (+/-)} - \text{Holidays Taken}$$

#### Example:

The employee is entitled to 25 holiday days during the holiday year. The employee leaves the company after working 21 weeks.

Entitlement per week: **25 / 52 = 0.48 days per week**

Entitlement for 21 weeks: **0.48 X 21 = 10.08 days**

Setting up an employee for this accrual method

1. Open the Employee Details window by selecting the **Processing - Employee Details** menu option.
2. Open the employee details record's **Holidays** tab.
3. Select **Based on a standard number of holidays per year** in the Accrual Method drop-down list.
4. Specify the necessary values:

Value	Description
Holidays B/F from last year (days)	Number of holiday days the employee has left over from the previous holiday year, and is bringing forward into this holiday year (increasing their total holiday entitlement).
Holiday entitlement per year (days)	Total number of holiday days due to the employee in the current holiday year.
Less holiday days taken	Number of holiday days taken so far in the current holiday year. The 'Total holiday pay due This Year (Days)' value and the 'Holidays due up to current period (days)' value can be amended only on the Edit Holiday Year Details screen.
Holiday Adjustment (+/- days)	Number of days the 'total holidays due' value should be adjusted up or down, for whatever reason. The default is zero. It might be used, for example, to grant an employee a bonus holiday.

Value	Description
Hours adjustment each period (+/-)	This field enables you to adjust the number of hours worked in the pay period for the purposes of holiday calculation. The hours for which the employee is paid in the pay period depends on the hourly payments on the timesheet that are set up to be included in holiday accrual calculations. The adjustment value is useful when you want to track the holidays due to salaried employees on the basis of hours.
Total holiday pay due	Amount of holiday pay due to the employee in the current period. This is determined by multiplying the number of holidays taken by the amount of pay due to the employee per day in the period. The Annual Pay value and the Number of Working Days Per Week value must be specified to determine the total holiday pay due.
Holiday pay received YTD	Total amount of holiday pay received by the employee in the current holiday year.
Holidays due up to current period (days)	The number of days from the total annual entitlement to which the employee is currently entitled. This value is calculated on the basis of the accrual formula specified in the Accrual Formulae section. By clicking the <b>Show Details</b> button, you can obtain a breakdown of how this calculation was performed.

Amending the employee's holiday year details

The Employee Details record's **Holidays** tab contains a button called **Edit Holiday Year Details**. This button enables you to display a summary of the employee's holiday history in the current holiday year.

You can add new holiday information in the Edit Holiday Year window, which updates the relevant Employee Details record.

You can also amend the existing holiday year details.

## See also

[Holiday Processing](#)

## Percentage of hours worked in the holiday year

In this accrual method, holiday entitlement is calculated as a percentage of hours worked. (8% is the default value.)

Formulae used in this accrual method

The holiday entitlement is determined as follows:

*Holiday Hours Accrued This Period = (Hours Worked This Period +/- Hours Worked Adjustment) X 8%*

*Holiday Hours Accrued to Date = Hours Worked to Date X 8%*

*Holiday Days Accrued To Date = Holiday Hours Accrued to Date / Total Number of Hours in a Working Day*

*Holidays Due = Holiday Days Accrued to Date + Holidays Brought Forward - Holidays Taken to Date*

If an employee gets paid a salary, and this accrual method is used, the user must enter the hours worked this pay period in the timesheet's **Hours Worked Adjustment** field.

A standard amount can be entered in the Employee Details window. This will be brought into the timesheet entry screen if the value changes from period to period.

Setting up an employee for this accrual method

1. Open the Employee Details window by selecting the **Processing - Employee Details** menu option.
2. Open the employee details record's **Holidays** tab.
3. Select **As a percentage of hours worked** in the Accrual Method drop-down list.

## 4. Specify the necessary values:

Field	Description
Holidays B/F from last year (days)	Number of holiday days the employee has left over from the previous holiday year, and is bringing forward into this holiday year (increasing their total holiday entitlement).
Holidays accrued(days)	Total number of holiday days currently accrued by the employee. This is calculated on the basis of the formulae in the Accrual Formulae section above.
Less holidays taken (days)	Number of holiday days taken so far in the current holiday year. The 'Total holiday pay due This Year (Days)' value and the 'Holidays due up to current period (days)' value can be amended only on the Edit Holiday Year Details screen.
Holiday Adjustment (+/- days)	Number of days the 'total holidays due' value should be adjusted up or down, for whatever reason. The default is zero.
Total holidays due this year (days)	The sum of the brought-forward and accrued-this-year values, less the days-taken value. See the accrual formulae specified in the Accrual Formulae section.
Hours adjustment each period (+/-)	<p>This field enables you to adjust the number of hours worked in the pay period for the purposes of holiday calculation.</p> <p>The hours for which the employee is paid in the pay period depends on the hourly payments on the timesheet that are set up to be included in holiday accrual calculations.</p> <p>The adjustment value is useful when you want to track the holidays due to salaried employees on the basis of hours.</p>
Total holiday pay due	<p>Amount of holiday pay due to the employee in the holiday year. The system determines this according to this formula:</p> $\text{Total holiday pay due} = (\text{Number of Holidays Due this Year}) \times (\text{Pay Due to the Employee per Day this Period})$ <p>For this value to be determined, you need to specify the Annual Pay value and the Number of Working Days Per Week value.</p>
Holiday pay received YTD	Total amount of holiday pay received by the employee so far in the current holiday year.

5. By clicking the **Show Holiday Breakdown** button, you can obtain a breakdown of how this calculation was performed in terms of both hours and days.

## Amending the employee's holiday year details

The Employee Details record's Holidays tab contains a button called **Edit Holiday Year Details**. This button enables you to display a summary of the employee's holiday history in the current holiday year.

You can add new holiday information in the Edit Holiday Year window, which updates the relevant Employee Details record. You can also amend the holiday year details already contained in the window.

## See also

### [Holiday Processing](#)

## One third of a working week per month

In this accrual method, the employee's holiday entitlement is defined as one third of a working week for every month worked.

Formulae used in this accrual method

This method requires that the employee works at least 117 hours in the month.

If this is the case, in the last pay period of the month, the **Employee has worked at least 117 hours...** field in the Timesheet's **Holidays/Absence** tab is set to **Yes**.

In the case of monthly employees, this field is always set to **Yes**.

You must set it to **No** if the employee has not worked 117 hours in the calendar month.

The employee's holiday entitlement is determined as follows:

$$\text{Holidays Due} = \text{Days Accrued} + \text{Holidays Brought Forward} - \text{Holidays Taken to Date} \pm \text{Holiday Adjustment}$$

Setting up an employee for this accrual method

1. Open the Employee Details window by selecting the **Processing - Employee Details** menu option.
2. Open the employee details record's **Holidays** tab.
3. Select **One third of a working week per calendar month** in the Accrual Method drop-down list.
4. Specify the necessary values:

Holidays B/F from last year (days)	Number of holiday days the employee has left over from the previous holiday year, and is bringing forward into this holiday year (increasing their total holiday entitlement).
Holidays accrued(days)	Total number of holiday days currently accrued by the employee. This is calculated on the basis of the formulae in the Accrual Formulae section.
Less holidays taken (days)	Number of holiday days taken so far in the current holiday year. The 'Total holiday pay due This Year (Days)' value and the 'Holidays due up to current period (days)' value can be amended only on the Edit Holiday Year Details screen
Holiday Adjustment (+/- days)	Number of days the 'total holidays due' value should be adjusted up or down, for whatever reason. The default is zero. This value is useful when you want to track the holidays due to salaried employees on the basis of hours.
Total holidays due this year (days)	The sum of the brought-forward and accrued-this-year values, less the days-taken value. See the accrual formulae specified in the Accrual Formulae section.
Hours adjustment each period (+/-)	<p>This field enables you to adjust the number of hours worked in the pay period for the purposes of holiday calculation.</p> <p>The number of hours for which the employee is paid depends on which hourly payments on the timesheet are set up to be included in holiday accrual calculations.</p> <p>The adjustment value is useful when you want to track the holidays due to salaried employees on the basis of hours.</p>

Total holiday pay due	<p>Amount of holiday pay due to the employee in the holiday year.</p> <p>This is determined by multiplying the number of holidays due in the year by the amount of pay due to the employee per day in the period.</p> <p>This option requires the Annual Pay value to be entered, and also the Number of Working Days Per Week value.</p>
Holiday pay received YTD	Total amount of holiday pay received by the employee in the current holiday year.

#### Holiday Year Details

The Employee Details record's **Holidays** tab contains a button called **Edit Holiday Year Details**. This button enables you to display a summary of the employee's holiday history in the current holiday year.

You can add new holiday information in the Edit Holiday Year window, which updates the relevant Employee Details record. You can also amend the holiday year details already contained in the window.

#### See also

[Holiday Processing](#)

## Entering Employee-Level Holiday Settings

You need to configure an employee's holiday settings in their Employee Details record.

1. Open the Employee Details window by selecting the **Processing - Employee Details** menu option.
2. Specify the relevant employee.
3. Open the **Holiday** tab.
4. You can accept the default [Specifying a Holiday Accrual Method](#) specified in the Company Details window, or you can change it as necessary.
5. You can also view and edit other holiday details, such as the holidays brought-forward value and the employee's annual holiday entitlement. For details, see [Specifying a Holiday Accrual Method](#).
6. Check that the Payment Method is the one you require. When the accrual method is 'As a percentage of hours worked', you can calculate holiday pay based on days taken or hours taken. For more information, see [How do I process an employee's holidays?](#).
7. Click **Save** to save the changes you make.

With the employee's holiday settings in place, you can begin [recording and processing holidays in the employee's timesheet](#).

#### See also

[Holiday Processing](#)

## How do I process an employee's holidays?

The approach you take to processing an employee's holidays depends on the nature of the situation.

The employee will be away for one or more full pay periods

You can use this processing method when an employee is taking one or more full pay periods as holidays.

The method ensures that the employee is allocated tax credits and insurance weeks for the periods they will be absent.

**Note:** This method is available only in Weekly and Fortnightly payrolls.

1. Click the **Enter Time and Pay** button on the main desktop.

2. Select the relevant employee's timesheet.
3. Ensure that the **Data Entry** tab is open.
4. Specify the relevant employee payment amounts for this period.
5. In the **Hol Periods** field, enter the number of periods that the employee will be on holiday.

(The employee will receive their holiday pay for this time in advance. The application automatically allocates insurance weeks and tax credits for the holiday weeks.)

6. Press the **Enter** key.

Micropay Professional automatically calculates how much extra pay the employee should receive, and adds it to the employee's normal wage. This extra amount is **not** marked as holiday pay on the payslip.

All the 'holidayable' payment amounts you have used in the timesheet are now increased by the following value:

$$(\text{Payment Amount This Period}) \times (\text{Number of Holiday Periods})$$

Make sure to also record the holiday time taken by the employee in these pay periods by clicking **Edit Holiday Year Details** in the Employee Details record's **Holidays** tab.

### Holidayable Pay

If you want a particular payment to be paid to the employee as holiday pay, you need to mark it as **Holidayable** in the Payments window. Payments that are not paid as holiday pay should never be marked **Holidayable**.

In general, only standard payments are **Holidayable**. Payments such as Overtime should not be marked **Holidayable**, because they should not be paid to the employee when they are on holiday.

See [Overview of Timesheet Entry](#) for more information about processing holidays on a timesheet.

The employee is taking one or more holiday days in the current pay period

1. Select **Change Main Company/Payroll Details** in the navigation pane's Payroll section. Alternatively, select the **Company/Payroll - Company/Payroll Details** menu option.
2. In the Holiday Payment drop-down list, select the relevant payment. Only Fixed and Variable payments are included in the list.
3. Open the relevant Employee Details record.
4. In the **Holidays** tab, specify the employee's Annual Pay.
5. Ensure that the correct [holiday accrual method](#) is assigned to the employee.
6. In the Payment Method field, select either **Pay Based on a Number of Days Taken in a Period** or **Pay Based on a Number of Hours Taken in a Period**.

The latter option is available only if the employee's holiday accrual method is **As a percentage of hours worked**.

7. Open the Timesheet Entry window's **Holiday/Absence** tab.
8. In the 'Holidays taken this period (Days)' field, enter the number of days the employee is taking as holidays in this period.
9. Click **Payslip**. You will see that an extra payment is added to the employee's payslip. This is a holiday pay amount for the number of days you have specified.

### Holidayable Pay

To prevent the holiday payment from being made twice, the Salary payment should not be marked **Holidayable**.

However, other payments that the employee should receive each period, such as a standard allowance, should be marked **Holidayable**.

In addition, standard deductions, such as Pensions, should still be marked **Holidayable**.

I only want to track holidays. I don't want to process holiday pay.

1. Open the Timesheet Entry window's **Holiday/Absence** tab.
2. In the 'Holidays taken this period (Days)' field, enter the number of days the employee is taking as holidays in this period.
3. Ensure that none of the payments set up in Micropay Professional are **Holidayable**.

The holidays you have recorded will be tracked by the system, but no holiday payments will be added to the employee's timesheet.

See also

[Holiday Processing](#)

### Calculating Holiday Pay by Days or by Hours

When your [holiday accrual method](#) is **As a Percentage of Hours Worked**, you can set up the system to calculate holiday pay either on the basis of holiday hours or holiday days.

To do so, carry out these steps:

#### Step 1. Company Details window's Holidays tab

1. In the two **Holiday Payment** fields, specify
  - the payment to use when paying employees for holiday time measured in days
  - the payment to use when paying employees for holiday time measured in hours
2. Select the holiday accrual method **As a percentage of hours worked**.

For more detailed information about this tab, see [Entering Payroll Holiday Settings](#).

#### Step 2. Employee Details window's Holidays tab

1. For each employee who should be paid by hour or by day, ensure that the employee's accrual method is **'As a percentage of hours worked'**.
2. In the Payment Method drop-down list, select one of these options:
  - **Pay based on a number of hours taken in a period**
  - **Pay based on a number of days taken in a period**
  - **Do not automatically pay Holiday Pay in a period**

See also [Entering Employee-Level Holiday Settings](#).

To prevent the employee from receiving holiday pay when you record holiday time taken, select **Do not automatically pay Holiday Pay in a period**. This option is useful when you want to use the system to track



holidays but not to pay holiday pay automatically.

### Step 3. Employee timesheets

The holiday pay method specified in the Employee Details record is selected in the **Holidays/Absence** tab by default. You can change this manually for this pay period if necessary.

Also in the **Holidays/Absence** tab, enter the number of holiday hours or holidays taken in the period.

For more detailed information about processing holidays in timesheets, see [How do I Process an Employee's Holidays?](#).

See also

[Holiday Processing](#)

### Setting up Holiday Deductions

To be able to [pay an employee for holiday time taken](#), you need to configure deductions so that they are processed correctly.

1. Select the **Payroll - Deductions** menu option to open the Deductions window.
2. Select or deselect **Holidayable** for each deduction, as appropriate.
  - The employee should continue to contribute to their pension while they are on holiday, so the Pension deduction should be marked **Holidayable**.
  - On the other hand, a deduction such as Advance is not deducted in every pay period, so it should not be marked **Holidayable**.
  - If a deduction involves a formula that uses the employee's pay amount, the deduction should never be marked **Holidayable**. For example, suppose that the employee contributes an Additional Voluntary Contribution (AVC) of 5% to their pension. A formula is used to calculate the relevant amount. If the AVC deduction were marked **Holidayable**, the formula would calculate the AVC based on *normal pay* + *holiday pay*, and deduct this from both the normal week and the holiday week, leading to an AVC amount twice what it should be.

See also

[Holiday Processing](#)

### Holiday Year Cleardown and Roll Forward

The holiday year must be cleared down when it reaches its end.

If necessary, outstanding holidays must be rolled forward.

These actions set the Holidays Accrued to Date value to 0, and bring forward any outstanding holidays into the new leave year.

**Note:** You must end the final pay period of the holiday year before clearing the holiday year.

#### Automatic prompting

You can configure the system to automatically prompt you when it is time to clear down the holiday year.

The prompt occurs when you set a pay period run date (see [How do I set a pay period?](#)) that is the same as, or later than, the holiday year-end date. You are provided with a range of holiday roll-forward options.

#### Holiday values

The Holidays Due value equals the number of holidays brought forward.

If necessary, you can adjust the Holidays Due value upwards or downwards to re-zero it.

The following values are automatically set to zero:

- Holiday Weeks Accrued To Date
- Holiday Days Accrued To Date
- Holidays Taken to date
- Holiday Entitlement
- Holiday Hours Accrued To Date
- Hours worked to Date
- Holidays Brought Forward from Last Year
- Holiday Pay Due
- Number of Weeks worked to date

#### Clearing down holidays

To clear down holidays, open the Roll Forward Holiday and Absence Year dialogue box by clicking **Roll Forward Holidays and Absence** in the navigation pane's Financial Year End section.

Alternatively, select the **Year End - Holidays and Absence - Roll Forward Holiday and Absence Year** menu option.

This provides you with access to three clear-down options:

- **Carry forward employee holidays due into next holiday year**

Selecting this option specified that the employee's holiday balance (positive or negative) at the end of the holiday year should be added to the holiday balance at the beginning of the new holiday year.

For the accrual methods **Calculate holidays as 8% of hours worked** and **Calculate holidays as 1/3 of a working week**, the Holidays Brought Forward value for the new holiday year is equal to the balance of Total Holidays Due at the end of the holiday year.

For the accrual method **Standard Holiday Entitlement for the holiday year**, the Holidays Brought Forward is equal to the Holidays Due value up to the current period.

- **Set employee's holiday adjustment to zero**

This option resets the employee's Holiday Adjustment (+/-) value to zero.

- **Set up the payroll's next holiday year start and end dates**

By selecting this option, you prompt the system to automatically set up the start and end dates of the new calendar year on the basis of the dates of the calendar year currently ending.

[See also](#)

[Holiday Processing](#)

## How do I pay employees for a company holiday?

If the entire company is closing down for a holiday period, and you want to pay all employees holiday pay, you can process the normal week along with the holiday weeks.

So, for instance, if the whole company has a two-week holiday, you set the number of insurance weeks to 3.

This equates to:

- three tax credits
- three fixed payment amounts, if these are marked as **Holid'able** in the Payments window

- three deduction amounts, if these are marked as **Holid'able** in the Deductions window

In a case in which some employees are going on holiday, and others are not, you should not change the number of insurable weeks. Instead, you should enter the holidays on each individual employee's timesheet.

For more information, see [Setting Up Payments](#) and [Setting Up Deductions](#).

See also

[Holiday Processing](#)

## Setting a Pay Period

You use the Start of Period process to initialise your payroll files for the new pay period. As well as confirming the period number and dates, this process also clears the timesheet file, preparing the system for the new payroll run.

**Note:** The Start of Period function increments the period number, and should run just once in each period.

### Before you proceed...

Some of the actions you may need to perform before setting a pay period include the following:

- Finish and back up your previous payroll period's data.
- Before a bonus run, ensure that you have completed your normal run for the period.
- Create a new record for each employee starting in this pay period.
- Specify the employee's details, including tax and PRSI codes.
- Specify each employee's pay type and pay method, and bank details if relevant.
- During a payroll setup part-way through the tax year, enter employee year-to-date figures.
- Specify any applicable brought-forward absence totals.
- Define employee profiles.
- If an employee is to be paid by more than one method, enter the necessary split nett pay details and the formula.

### Important topics

[Payroll Run: Recommended Steps](#)

[How do I set a pay period?](#)

[How do I carry out a bonus run?](#)

[What is a new cost month?](#)

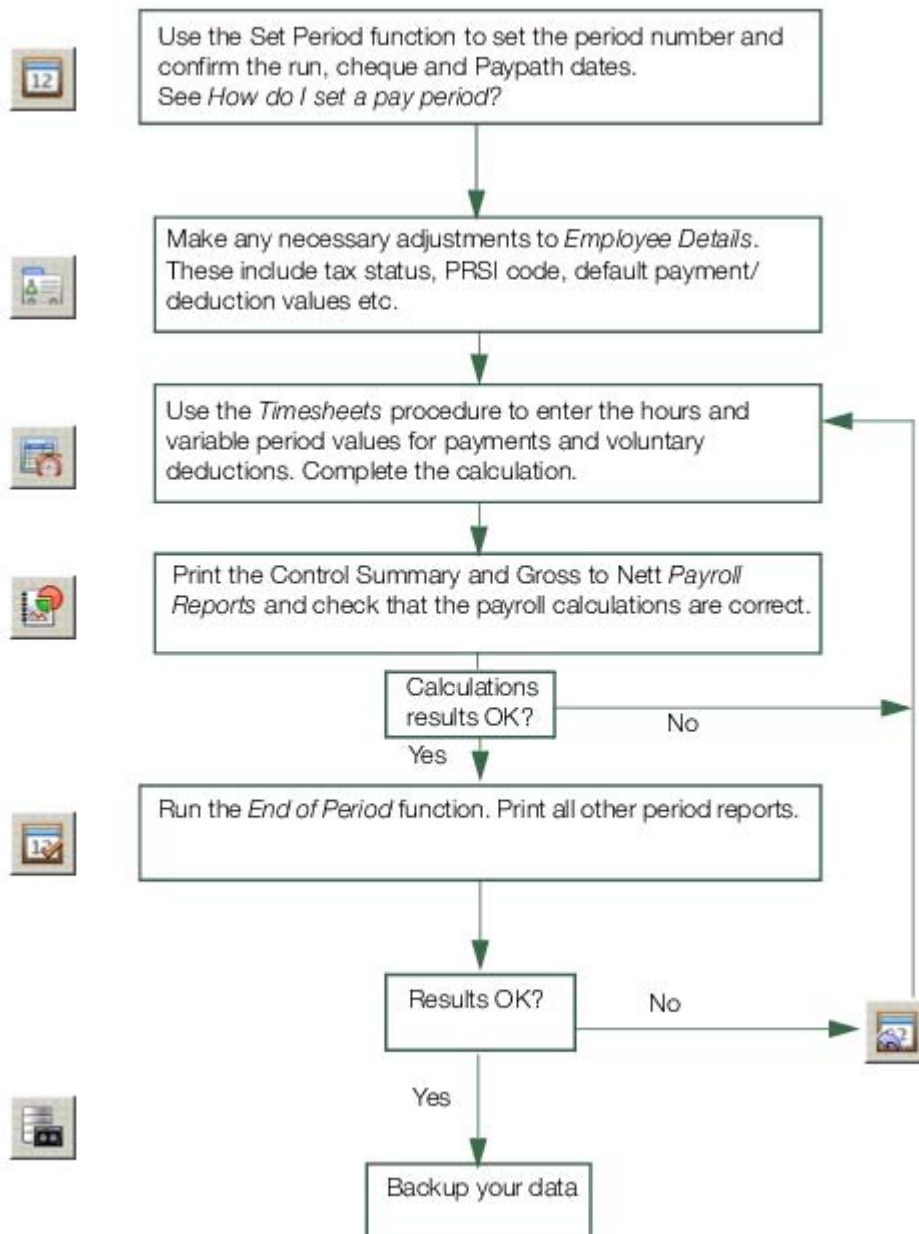
[Extra Pay Period](#)

### See also

To learn about how to start using Micropay Professional to process payroll, see [Setting Up the Payroll System](#).

**Note:** Employee profiles are not available in [Micropay Professional Lite](#).

## Payroll Run: Recommended Steps



See also

[Setting a Pay Period](#)

## How do I set a pay period?

**Before** setting the pay period, ensure that:

- the status indicator is set to 'P' (or blank if you are just beginning to use the system)
- you have printed all the standard reports required for the current period.

**After** setting the pay period, and before entering timesheet information, you should

- set up any new employees
- carry out any changes to existing employees

You can rewind the End of Period function if you discover errors. To be doubly safe, you should also regularly generate backups of your data.

#### Setting a New Pay Period (This is the Drop-down text)

1. Click **Set Period** in the desktop's process map.

Alternatively, do one of the following:

- click **Set Period** in the navigation pane's Pay Run section
- select the **Processing - Set Period** menu option
- click the **Set Period** button in the Task Bar

**Note:** If you have selected the **Create File Remainder** option in the Pension Link window, you will be reminded of any outstanding pension file transfers.

2. The New Period to Process value defaults to the current period. Change the period number to the next in sequence. Press **Tab** to see the new dates displayed. Check that the dates displayed are correct for the current period.
3. If you are starting a new cost month, select the **New Cost Month** checkbox.
4. If you are carrying out a bonus run, select the **Bonus Run** checkbox.
5. Choose **OK** to set the period dates.

The previous Pay Period Payroll data will be archived after you set a new pay period. This archived data can be accessed at a later date for historical reports, or to continue processing the payroll from the archived period. (See Period Archive.)

Field name	Description
New Period to Process	The number of the payroll period to be processed. The system will reject invalid period numbers. For example, entering period 13 on a monthly payroll would result in an error message.
Ins. Weeks (Insurable Weeks)	The number of insurable weeks. A default value is entered if a payroll calendar has been set up (see <a href="#">Payroll Calendar</a> ). This typically is 1 for weekly payroll, 2 for fortnightly payroll, or 4 for 4-Weekly payroll. If the company is closing down for holidays and you want to pay weekly paid employees a holiday week, you should enter 2 in this field. This automates the holiday pay calculation procedures.
Nominal Period	The nominal period to which this payroll period belongs. If you are using the calendar, this will appear automatically.
Run Date	The date of the payroll run. A default value is entered if a payroll calendar has been set up (see <a href="#">Payroll Calendar</a> ). The run date is printed on payslips and reports for the current pay period, and can be amended here if necessary.
Cheque Date	The cheque date for the current payroll run. A default value is entered if a payroll calendar has been set up (see <a href="#">Payroll Calendar</a> ). The date is printed on cheques and cheque reports for the current pay period.

Field name	Description
Giro Date	The giro date for the current payroll run. A default value is entered if a payroll calendar has been set up (see <a href="#">Payroll Calendar</a> ). The date is printed on giros and giro reports for the current pay period.
EMT Date (Paypath)	<p>The Paypath date for the current payroll run. A default value is entered if a payroll calendar has been set up (see <a href="#">Payroll Calendar</a>). This will be the date of the Paypath file generated for the current pay period.</p> <p>The Paypath date to appear on the Paypath file should be the processing date on which the amount is lodged to the employee's Bank Account. For example, if you are processing a weekly payroll on a Wednesday to facilitate payment to employee bank accounts by Friday, the EMT date may need to be set to Friday. You should check with your bank to determine the EMT day suitable to your circumstances.</p>
Bonus Run	<p>This checkbox enables you to indicate whether you want to process a bonus run. It should be deselected for a normal run. The facility should only be used where you want to produce two payslips in a single tax period.</p> <p>Note: The bonus run option should NOT be processed until after the normal run is complete for the period.</p>
New Cost Month	This checkbox enables you to indicate whether the new period is also a new cost month. If the checkbox is selected, the system will clear down the This Month values from the Cost Analysis Report, and begin accumulating them again from the current period.
CWPS Week From	<p>This field specifies the first week for which CWPS deductions are made in the period. Check your CWPS calendar to ensure that the correct date is specified. See <a href="#">Setting up the CWPS calendar</a> for more information.</p> <p>(The Construction Workers Pension Scheme feature must be enabled.)</p>
CWPS Week To	<p>This field specifies the last week for which CWPS deductions are made in the period. Check your CWPS calendar to ensure that the correct date is specified. See <a href="#">Setting up the CWPS calendar</a> for more information.</p> <p>(The Construction Workers Pension Scheme feature must be enabled.)</p>

See also

To learn about how to start using Micropay Professional to process payroll, see [Setting Up the Payroll System](#).

[Setting a Pay Period](#)

## How do I carry out a bonus run?

After the normal payroll period is complete, you have the option of performing a bonus run. This enables you to process a second payment run in the period.

Although you can include bonus payments in a normal pay run, using a second run ensures that the employee is able to see clearly the gross amount of the bonus and the PAYE/PRSI applicable. This information is printed

on a second payslip.

All fixed payments, tax credits and voluntary deductions are ignored in a bonus run payroll, and no other normal payroll increments take place. You can use a bonus run to make, for example, a redundancy payment to an employee.

You **MUST** carry out your normal payroll run before you perform the bonus run.

1. Carry out your normal payroll run for the period, including all timesheet processing and calculations.
2. Print any [Payroll Reports](#) you require that relate to the normal run.
3. Generate a payroll backup. See [Payroll Backup and Restore](#)
4. Run the [End of Period](#) procedure, selecting the **Bonus Run** checkbox in the Set Period window, and leaving the period number unchanged.
5. Use the [Timesheets](#) function to enter the bonus amounts (double-click on the first payment line, or press **F2**, to display a list of all defined payroll payments).
6. Print any [Payroll Reports](#) applicable to the bonus run.

A bonus run report is treated by Micropay Professional as a new period. For this reason, it is recommended that you print the Control Summary and Cost Analysis reports. See also [Payroll Reports](#).

All allowances are given in a Normal Run - they are never given in a Bonus Run.

During a Bonus Run, a '**B**' appears after the period number on the status bar at the bottom of the screen.

See also

[Setting a Pay Period](#)

## What is a new cost month?

The payroll calendar can be used to define the start of each new cost month. You usually set up a cost month when the calendar is created at the start of the new tax year.

To set a period as a new cost month, you carry out these steps:

1. Select **Set Period** in the navigation pane's Pay Run section or in the desktop's process map. Alternatively, click the **Set Period** button, or select **Processing - Set Period**.
2. In the Set Period window, select the **New Cost Month** checkbox.

Since the period is flagged as a new cost month, the system clears down the 'This Month' values from the cost analysis report, so that they can begin accumulating again from the current period.

See also

[Setting a Pay Period](#)

## Extra Pay Period

What is an extra pay period?

Week 53 occurs in a weekly payroll when there are 53 pay days in the tax year. There are normally 52 pay periods in a weekly payroll, but in some years the dates fall in a way that gives rise to an 'extra' pay period'.

An extra pay period can also occur in fortnightly and four-weekly pay frequencies:

- Fortnightly payrolls normally have 26 pay periods, but can occasionally have 27.
- Four-weekly payrolls normally have 13 pay periods, but can occasionally have 14.

Employees are entitled to tax credits for the extra pay period, but only on a Week 1 basis.



This means that the employee receives more than the year's total tax credits. The Inspector of Taxes will take this into consideration when issuing the next year's tax credits.

Do I have an extra pay period?

After you have fully completed Week 52 (or Fortnight 26, or Four-Weekly Period 13), check the date on which the next payday occurs.

If the next payday falls on the 31st December, you have an extra pay period.

If the next payday occurs on or after the 1st January, you DO NOT have an extra pay period. This pay period must be processed as Period 1 of the new tax year.

Incorrect processing of an extra pay period may result in inaccurate returns for that tax year.

Only the date of payment (not the date of work) determines whether a pay period is 'extra' in the current year. So if you have a pay date of 03/01/2011, this must be processed as Period 1 of 2011, regardless of when the actual work for this period was done.

My employees are on holiday over the Christmas period. Should I run a Week 53 to ensure they get their holiday pay before their holiday begins?

Generally, the answer to this question is 'No'. You only run a Week 53 when there is an extra pay period to be processed in the tax year, regardless of any other circumstances.

If the pay date for the holiday week falls in January rather than December, the holiday week is not an extra pay period, and must be processed as a normal week in period 1 of the new tax year.

If Week 1 of the new year is a holiday week, and you still want to pay your employees for this week in advance of their holidays, carry out the following steps:

- complete the current tax year
- run the Payroll Year End in full
- set Period 1 of the new year

This can be done at any time after you have installed the Payroll Year End Update.

How do I set Week 53?

You don't need to treat Week 53 any differently to any other pay period.

1. To check whether you have an extra pay period in the tax year, open the payroll calendar by selecting **Payroll - Calendar**.

For more information, see [Working with the Payroll Calendar](#).

2. If there is an extra pay period, set it in the usual way.

For more information, see [Payroll Run: Recommended Steps](#).

The employee's whose tax is normally calculated on a Normal cumulative basis is calculated on a Week 1 basis in an extra pay period.

## Timesheets

You use Micropay Professional's timesheet functionality to process the employee's payments and deductions in each period. Timesheets enable you to specify hours and other values that change from one period to another.

When there are no changes from one period to another, payroll can be calculated automatically for salaried employees.

Timesheets can also be used to record absences, leavers and suspended employees.

### Important Timesheet Entry Topics

[Overview of Timesheet Entry](#)

[Timesheet Errors and Warnings](#)

[Timesheet Entry: Import Mode](#)

[Batch Timesheet Entry](#)

### Before you proceed

- Make sure your payroll calendar has been created.
- Set the pay period number and check the run dates.
- Use the **New Cost Month** option if you want to clear the monthly cost analysis figures. If you select this option, the calendar will clear the values by default.
- To include a bonus run, select **Bonus Run** after processing normal payroll in the pay period.

## Overview of Timesheet Entry

An employee's timesheet contains information about payments, deductions, income tax and holidays relating to the current period.

By completing an employee's timesheet you can produce their payslip.

This topic provides an overview of the Timesheet Entry process.

1. Click **Enter Time and Pay** in the desktop's process map.
2. The Timesheet Entry window opens. This enables you to select a [timesheet entry mode](#).
3. Click **Continue**.

If your system integrates with Sage PeopleLink...

If your Micropay Professional system integrates with Sage PeopleLink (see [Licensing Sage PeopleLink](#)), the Timesheets Awaiting Acceptance window opens.

This provides you with a list of timesheets submitted by team supervisors.

Check the information these contain, and for each timesheet carry out one of the following actions:

<b>Later</b>	This option specifies that you want to hold the relevant timesheet for processing later.
<b>Accept</b>	This option specifies that you want to accept the submitted timesheet. The relevant timesheet is saved as soon as you accept the details. Of course, you can still make changes to the details if necessary.
<b>Reject</b>	This option specifies that you are rejecting the submitted timesheet. It is sent back to the supervisor for revision.

<b>Disregard</b>	This option specifies that you wish to proceed and process the relevant timesheet, but you do not intend to use the information submitted by the supervisor.
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4. Check the timesheet information that is displayed.
5. When you have confirmed that the timesheet information is valid, save the timesheet(s) and generate the relevant payslip(s).

See also

[Timesheet Entry: Random Mode](#)

[Timesheet Entry: Sequential Mode](#)

[Timesheet Entry: Automatic Mode](#)

[Timesheet Entry: Import Mode](#)

[Timesheet Entry: Batch Mode](#)




## Timesheet Errors and Warnings

The system carries out a series of checks on timesheet data.

If it detects any abnormalities, it displays appropriate messages in the [Timesheet Entry](#) screen and in the employee's payslip.


The Automatic Timesheets, [Batch Timesheet Entry](#) and [Timesheet Import](#) windows also displays these messages.


There are three types of timesheet message you may encounter:


Message Type	Icon	Definition
Error Message		A timesheet error messages signifies an issue serious enough for the system to prevent you saving the timesheet until it is resolved.
Warning message		A timesheet warning message signifies that the system has detected an issue you may need to address.  You can still save the timesheet. However, it may be advisable to address the cause of the warning first.
Info Message		Timesheet info messages are intended to provide you with information you may find useful.  You can still save the timesheet. They do NOT indicate issues that may affect the validity of the timesheet.

### Timesheet Error Messages

A timesheet with any of the following error messages cannot be saved until the error is resolved.

Error Message	Meaning
	
Nett pay is a negative amount	The sum of the PAYE, PRSI and <a href="#">USC</a> deductions (also PRD if applicable) in the current pay period are greater than the total payment values.  As a result the nett pay value is negative, and the timesheet cannot be saved.


Error Message 	Meaning
Disability pay exceeds normal pay	<p>Paid Disability payments are deducted from the main payment value.</p> <p>However, in this case the main payment value is lower than the Paid Disability value, and as a result the timesheet cannot be processed.</p>
Formula not set up correctly	A payment or deduction formula seems to contain invalid fields or values.
Holiday payment not set	<p>No holiday payment has been set up in the <b>Company Details - Holidays</b> tab.</p> <p>Because of this it's not possible to process holiday pay using the Holiday and Absence Tracking feature.</p>
PRSI code <u>XX</u> no longer valid	A PRSI code previously applied to the employee is no longer in the PRSI Table.
Already paid up to period <u>X</u>	<p>The employee has already been paid up to pay period X.</p> <p>The most likely reason is that the employee has received holiday pay in advance.</p>
This employee has already left.	The employee was marked as a leaver in a previous pay period.
PRSI code <u>XX</u> improperly defined	A PRSI code that applies to the employee has no rates or earning bands associated with it in the PRSI Table.
Nett to Gross payment not set	<p>The Nett to Gross feature must reference a specific payment in the <b>Company Details - Misc</b> tab.</p> <p>No payment is currently referenced there.</p>
Error calculating Payment <u>X</u>	A payment cannot be calculated, probably because a value referenced in an associated formula is not set in the current timesheet.
Error calculating Deduction <u>X</u>	A deduction cannot be calculated, probably because a value referenced in an associated formula is not set in the current timesheet.
Timesheet not calculated	Timesheet not calculated.
No payments/refunds on timesheet	There are no payment values on the current timesheet, and no refunds are due. Therefore the timesheet cannot be saved.
Employee is suspended	The employee is currently suspended and cannot be paid in the current pay period.
Employee holiday info missing	Holiday pay can't be processed for the employee because the information on the employee details record's <b>Holidays</b> tab is incomplete.
EE holiday Hourly Rate not set	<p>The payment associated with the ' % of Hours Worked' accrual method references a specific Hourly Rate field.</p> <p>The current employee has no rate value in that field.</p>


Error Message 	Meaning
Year's USC a negative amount	<p>The <a href="#">USC</a> total for the tax year is a negative value.</p> <p>Because of this, the timesheet cannot be saved.</p> <p>The USC total was probably manually overridden.</p>
Timesheet data not imported	<p>There was a problem with the Timesheet Import data for the specified employee.</p> <p>As a result their timesheet has not been saved.</p>


## Timesheet Warning Messages


A timesheet that has warnings associated with it can still be saved.

However, it may be advisable to address the cause of the warning first.

Warning Message 	Meaning
Tax refund paid this period	<p>The employee is receiving a refund of previous tax deductions in the current pay period.</p> <p>This usually occurs because of a change in the employee's tax allowances, or a reduction in their gross pay in the current period.</p>
Pens Contrib > X % of Gross Pay TD	<p>The total pension / PRSA contributions for the current year are greater than the allowed percentage of the employee's annual gross pay.</p> <p>(The allowed percentage is determined by the employee's age.)</p>
Employee Std Rate Cut-Off not set	<p>The employee has not been assigned a Standard Rate Cut-Off value.</p> <p>All of their Gross Pay will be subject to tax at the higher tax rate.</p>
Nett to Gross EE can't have Nett BIK	<p>The employee is being paid on a Nett to Gross basis.</p> <p>However, there is also a Nett BIK payment on the current timesheet.</p> <p>Nett BIK cannot be processed for employees paid on a Nett to Gross basis.</p>
EE maximum Nett Pay exceeded	<p>The employee's Nett Pay in the current pay period exceeds the maximum value specified on the Employee Details record or in the Company/Payroll Details record.</p>
Nett Pay below EE minimum	<p>The employee's Nett Pay in the current pay period is lower than the minimum value specified in the Employee Details record or in the Company/Payroll Details record.</p>
Ins.Weeks TP reduced to 0	<p>There are no payment values on the current timesheet.</p> <p>Because of this the employee's number of insurable weeks is set to zero in the current pay period.</p>
Reducing deduction exceeded balance	<p>The balance for a deduction set up with the 'Reducing' balance type has been exceeded.</p>
Zero Pay	<p>There are no payment values and no refunds due on the current timesheet.</p>
Rate(s) below JLC Rate of x.xx	<p>One or more payment rates on the current timesheet is below the recommended JLC rate for the employee.</p> <p>The JLC feature is not available in <a href="#">Micropay Professional Lite</a>.</p>

Warning Message 	Meaning
PRD refund not calc.	<p>A recalculation of the current employees PRD contributions is not possible.</p> <p>This is usually due to the employee not having the full 52 insurable weeks in their current employment.</p>
USC refund paid	<p>A recalculation of the current employee's <b>USC</b> contributions is not possible.</p> <p>This is usually due to the employee not having the full 52 insurable weeks in their current employment.</p>
Nett to Gross value estimated	<p>The system had to estimate the employees Nett to Gross payment amount.</p> <p>Other payments are affecting the Nett to Gross calculation.</p>
Parking Levy paid exceeds € x	<p>The amount of Parking Levy the employee is set to pay in this period will increase their annual total to more than the amount they are liable for in the full year.</p>
No table cut-off specified	<p>There is no Standard Rate Cut-Off Amount specified for the employee.</p>


Warning Message	Meaning
 <p>Cannot recalc EOY Health Levy</p>	<p>This warning message applies to 2010 payrolls only. Budget 2011 abolished the Health Levy.</p> <p>This error is displayed in the following cases:</p> <ul style="list-style-type: none"> <li>When you save a timesheet with the <b>Health Levy</b> recalculation checkbox selected, but a PRSI Override has been carried out in the current period.</li> </ul> <p>The recalculation cannot be carried out in this pay period for the employee when this is the case.</p> <p>However, if there is a subsequent pay period in the tax year, the system will attempt to carry out the recalculation again in that period.</p> <p>The Control Summary will include the following additional information:</p> <p>"PRSI has been overridden this period."</p> <ul style="list-style-type: none"> <li>When you save a timesheet with the <b>Health Levy</b> recalculation checkbox selected, but a PRSI override was carried out in one or more previous pay periods in the tax year.</li> </ul> <p>The Health Levy recalculation cannot be carried out for the employee when this is the case.</p> <p>The Control Summary will include the following additional information:</p> <p>"The system has determined that in one or more previous pay periods PRSI totals may have been overridden."</p> <ul style="list-style-type: none"> <li>When you save a timesheet with the <b>Health Levy</b> recalculation checkbox selected, but the employee was set up in the system during the year through the Mid-Year Employee Setup process.</li> </ul> <p>The Health Levy recalculation cannot be carried out for the employee when this is the case.</p> <p>The Control Summary will include the following additional information:</p> <p>"A mid-year setup was completed for this employee."</p> <p>The employee can apply for a refund to:</p> <p style="text-align: center;">Department of Social Protection PRSI Refunds Oisín House Pearce Street Dublin 2</p>

Warning Message 	Meaning
Cannot recalc EOY Income Levy	<p>This warning message applies to 2010 payrolls only. Budget 2011 abolished the Income Levy.</p> <p>The message is displayed when you save a timesheet with the <b>Income Levy</b> recalculation checkbox selected, but a PRSI Override has been carried out in the current period.</p> <p>The recalculation cannot be carried out in this pay period for the employee when this is the case.</p> <p>However, if there is a subsequent pay period in the tax year, the system will attempt to carry out the recalculation again in that period.</p> <p>The Control Summary will include the following additional information:</p> <p>"PRSI has been overridden this period."</p>
Cannot recalc EOY PRD	<p>This error is displayed when you save a timesheet with the <b>PRD</b> recalculation checkbox selected, but a PRSI Override has been carried out in the current period.</p> <p>The recalculation cannot be carried out in this pay period for the employee when this is the case.</p> <p>However, if there is a subsequent pay period in the tax year, the system will attempt to carry out the recalculation again in that period.</p> <p>The Control Summary will include the following additional information:</p> <p>"PRSI has been overridden this period."</p>


#### Timesheet Info Messages

Timesheet info messages are intended to provide you with information you may find useful.

They do NOT indicate issues that may affect the validity of the timesheet.

Info Message 	Meaning
Employee PPS no. not set	<p>The Employee Details record contains no PPS number.</p> <p>Without this number the employee's tax may be calculated at the higher rate.</p>
Starting in this period	<p>The employee is starting in this employment in the current pay period.</p>
PRSI rate locked to base code	<p>The employee's PRSI is locked to their current PRSI base code.</p> <p>All PRSI deductions will be calculated at the base code, regardless of their PRSIable pay amount for the current pay period.</p> <p>This setting should only be selected when recommended by the Dept of Social Protection.</p>
Multiple Employments	<p>This employee has multiple employments.</p> <p>This precludes any entitlement to PRSI allowances for this employment.</p>
Leaving this Period	<p>A finish date and a finish period (the current period) has been entered for the employee on the timesheet, or in the Employee Details window.</p>



Info Message 	Meaning
PAYE value overridden	The user has adjusted the PAYE value on the current timesheet using the PAYE Override functionality.
Employee PRSI overridden	The user has adjusted the Employee PRSI value on the current timesheet using the PRSI Override functionality.
Employer PRSI overridden	The user has adjusted the Employer PRSI value on the current timesheet using the PRSI Override functionality.
Negative Employee PRSI	The Employee PRSI is showing a negative value in the current pay period. This usually occurs as a result of an Employee PRSI override
Negative Employer PRSI	The Employer PRSI is showing a negative value in the current pay period. This usually occurs as a result of an Employer PRSI override
Starting and leaving this period	The employee is starting in this employment in the current pay period, and will also be leaving this employment in the current pay period.
Employee suspended this period.	The employee has been flagged to be suspended from the current pay period. If you need to pay them in this period, you must undo the suspension.
On holidays to period X	The employee is being paid up until Period X in this timesheet. The Timesheet Entry screen will not subsequently make the employee available for processing until Period X+1.

See also

[Overview of Timesheet Entry](#)

## Timesheet Entry Modes

The [Timesheet Entry](#) window enables you to select a timesheet entry mode. The following modes are available:

- [Timesheet Entry: Random Mode](#)
- [Timesheet Entry: Sequential Mode](#)
- [Timesheet Entry: Automatic Mode](#)
- [Timesheet Entry: Import Mode](#)
- [Timesheet Entry: Batch Mode](#)

### Timesheet Entry: Random Mode

In Random timesheet entry mode, the Timesheet Entry window opens with no employee selected.

You need to select an employee manually.

1. Click **Enter Time and Pay** in the desktop's process map.
2. The Timesheet Entry window opens. Select the **Random** radio button.
3. Click **Continue**.
4. The 'Timesheet Entry - Random' window opens. This contains a number of tabs:

[Timesheet Entry: Data Entry tab](#)

[Timesheet Entry: Override tab](#)

[Timesheet Entry: Holidays/Absence tab](#)

[Timesheet Entry: Multi Timesheet tab](#)

The window may display [errors and warnings](#) you need to address.

5. Select an employee's timesheet to process.
6. Check the information specified in the tabs, and make any changes that are necessary.
7. Click **Payslip** to generate the employee's full payslip based on the information entered in this window.
8. Click **Save** to save the current employee's payslip values.

You have processed timesheets in Random mode.

**Note:** If an employee is not being paid for the current period, you should not save a timesheet for them.

See also

[Overview of Timesheet Entry](#)

[Timesheet Entry: Sequential Mode](#)

[Timesheet Entry: Automatic Mode](#)

[Timesheet Entry: Import Mode](#)

[Timesheet Entry: Batch Mode](#)

### Timesheet Entry: Sequential Mode

In Sequential timesheet entry mode, you can specify a range of employees whose timesheets you want to process.

1. Click **Enter Time and Pay** in the desktop's process map.
2. The Timesheet Entry window opens. Select the **Sequential** radio button.
3. Use the Sequence panel to specify a range of employees whose timesheets you wish to work with.
4. Click **Continue**.
5. The 'Timesheet Entry - Sequential' window opens. This contains a number of tabs:

[Timesheet Entry: Data Entry tab](#)

[Timesheet Entry: Override tab](#)

[Timesheet Entry: Holidays/Absence tab](#)

[Timesheet Entry: Multi Timesheet tab](#)

The window may display [errors and warnings](#) you need to address.

6. Check the information specified in these tabs, and make any changes that are necessary.
7. Click **Payslip** to generate the employee's payslip based on the information entered in this window.

You have processed timesheets in Sequential mode.

**Note:** If an employee is not being paid for the current period, you should not save a timesheet for them.

See also

[Overview of Timesheet Entry](#)

[Timesheet Entry: Random Mode](#)

[Timesheet Entry: Automatic Mode](#)

[Timesheet Entry: Import Mode](#)

[Timesheet Entry: Batch Mode](#)

### Timesheet Entry: Automatic Mode

Automatic Timesheet Entry provides a way of processing a multiple timesheets together based on payroll information that is already specified in the relevant employees' [Employee Details records](#).

Typically, this is payroll information that remains constant from period to period.

1. Click **Enter Time and Pay** in the desktop's process map.
2. The Timesheet Entry window opens. Select the **Automatic** radio button.
3. If necessary, use the Sequence panel to specify a range of employees whose timesheets you wish to work with. Leaving these fields blank signifies you want to process all employees in the payroll.
4. Click **Continue**.
5. The Timesheet - Automatic summary screen is displayed. This lists all relevant employees along with key payroll information. Employees with [error messages](#) are displayed first.

You can't save an employee's timesheet until any associated errors have been resolved.

However, you can save timesheets with warning messages.

6. Click **Save Timesheets** to process all valid timesheets in the list.

You have carried out automatic timesheet processing for a list of employees.

See also

[Overview of Timesheet Entry](#)

[Timesheet Entry: Random Mode](#)

[Timesheet Entry: Sequential Mode](#)

[Timesheet Entry: Import Mode](#)

[Timesheet Entry: Batch Mode](#)

### Timesheet Entry: Import Mode

Micropay Professional enables you to import hours and values into employee timesheets.

The timesheet import file must be a correctly structured \*.CSV file.

You can import either a single timesheet or a group of timesheets.

1. Click **Enter Time and Pay** in the desktop's process map.
2. The Timesheet Entry window opens. Select **Import**.
3. The File Location field becomes active. Use this field to specify the location of the timesheet import file.

- Click **Continue**.
- The Timesheet - Import summary screen is displayed. This lists the data that will be imported.

The Timesheet - Import window may display [errors and warnings](#) you need to address.

Timesheets with error messages will not be imported.

- Click **Print** to print a list of the data to be imported.
- Click **OK** to import the timesheets.

You have imported a set of hours and values into timesheets.

See also

[Overview of Timesheet Entry](#)

[Timesheet Entry: Random Mode](#)

[Timesheet Entry: Sequential Mode](#)

[Timesheet Entry: Automatic Mode](#)

[Timesheet Entry: Batch Mode](#)

### Batch Timesheet Entry

The Batch Timesheet Entry feature provides an efficient way of managing and processing timesheet information for a group of employees. The Batch Entry window is a spreadsheet-style editable summary of key employee pay information in the current pay period.

The Batch Timesheet Entry window may display [errors and warnings](#) you need to address.

- Click **Batch Time and Pay** in the navigation pane's Pay Run view.

Alternatively, select the **Processing - Batch Time and Pay** menu option.

- The Batch Time and Pay window opens. By default, all employees are listed in the window.

### Can I control who is included in the batch of employees?

Yes. You can use the filter fields at the top of the screen to select a set of employees to include in the batch. For example, you might want to display only employees belonging to a certain department.

Employees listed

Sequence

Department


From

COR

To

COR

Change

Status		Employee			Payment(s)					
Alert	Saved	Empl. No	Name	Dept	Basic	Time+1/2	Double	HolidayHrs	Salary	
	N	0003	Fagan, Willie	COR					6965.00	
	N	0004	McDonnell, Kerrie	COR					32000.00	
	N	0006	Finegan, Eoin	COR					2986.00	
	N	0007	Fennell, Leisha	COR					3698.00	
	N	0009	Power, Jefferson	COR					11765.00	
	N	0010	Coyle, Mary	COR					37523.00	
	N	0011	Montgomerie, Margaret	COR					2156.00	
	N	0001	Flood, Bob	COR					3124.56	

- The information relating to each employee in the list is organised into columns. For more information,

see [Employee batch columns](#).

4. Select an employee in the list by clicking the relevant line. The right-hand pane displays a summary of the employee's payroll information. It also displays any alert or error messages. All flagged errors must be resolved before you can save an timesheet.
5. You can make changes to the employee's pay by entering payment and deduction amounts in the relevant columns. Some cells are not editable.
6. To make changes to other timesheet information, such as holiday weeks and tax credits, click the **Detailed Timesheet** button. The Timesheet Entry window opens, displaying the employee's full timesheet details.
7. You can specify which payments and deductions are displayed in the window by clicking the **Select Pay/Deds** button and making the necessary selections.
8. To prevent the selected employee's timesheet from being processed in the batch in the current period, select the **Do not pay this period** checkbox.
9. To restore the payroll information to the default timesheet values, click the **Reset to Std Amounts** button.
10. When you are ready to save timesheets for the employees, creating their payslips, click the **Save Valid Timesheets** button.

### Important Notes

- The **Save Valid Timesheets** button saves the timesheets of all employees currently displayed in the Batch Time and Pay grid, not just the currently highlighted employee.
- The **Save Valid Timesheets** button does not save timesheets for employees currently not displayed in the grid.
- Previously saved timesheets will automatically be recalculated using the latest employee details whenever you open the Batch Time and Pay window. So by making a change in an Employee Details record, you may unintentionally change the employee's timesheet details and cause a recalculation when you open the Batch Time and Pay window. *This does not occur in normal [Overview of Timesheet Entry](#).*

These recalculated values will overwrite the original timesheet values when you click the **Save Valid Timesheets** button.

- Batch Time and Pay cannot be used to process a bonus run. (See [How do I carry out a bonus run?](#))

See also

[Overview of Timesheet Entry](#)

[Timesheet Entry: Random Mode](#)

[Timesheet Entry: Sequential Mode](#)

[Timesheet Entry: Automatic Mode](#)

[Timesheet Entry: Import Mode](#)

### Employee batch columns

Status		Employee				
Alert	Saved	Empl. No	Name	Basic	Time + 1/2	Double

#### Alert column

The Alert column indicates whether any errors or warning messages are associated with the currently selected employee. These messages are listed in the Messages section in the lower right-hand side of the win-

dow. See [Timesheet Errors and Warnings](#) for more information.



This symbol signifies that there is at least one error message associated with the employee, and possibly alert messages also. You can't save the timesheet of an employee while an error message is associated with it. Make the necessary changes to the timesheet first.



This symbol signifies that there are warnings associated with the employee. Warnings do not prevent you from saving the relevant timesheets.



This symbol signifies that there are information messages associated with the employee, such as 'You have elected not to pay the employee this period.'

#### Saved column

This column specifies whether the relevant employee's timesheet has been saved in the current period. Saving the timesheet creates the employee's payslip.

The column to the right of the Saved column contains a pencil icon if the selected employee's data has been edited in this window.

#### Empl. No column

This specifies the employee's ID code.

#### Name column

This specifies the employee's name in the form in which it will appear on the payslip.

#### Basic, Time + 1/2, etc columns

These columns list the payment and deduction amounts associated with each employee in the current period. You can control which payments and deductions are displayed in the window by clicking the **Select Pay/Deds** button at the bottom of the screen and making the necessary changes.

Grey cells in this column are non-editable because they are not part of the relevant [Employee Profiles](#).

(Employee profiles are not available in [Micropay Professional Lite](#).)

#### See also

[Batch Timesheet Entry](#)

## Timesheet Entry Window

The Timesheet Entry window contains a number of tabs:

- [Timesheet Entry: Data Entry tab](#)
- [Timesheet Entry: Override tab](#)
- [Timesheet Entry: Holidays/Absence tab](#)
- [Timesheet Entry: Multi Timesheet tab](#)

### Timesheet Entry: Data Entry tab

When you select either Sequential or Random timesheet entry mode, the Timesheet Entry window opens with the **Data Entry** tab open by default. (See also [Overview of Timesheet Entry](#).)

The **Data Entry** tab displays values based on the information contained in the Payments and Deductions tabs in the employee's master record. (See [Employee Details](#) for information about the employee master record.)

The tab may display [errors and warnings](#) you need to address.

Enter the hours or values that apply to this period only. Standard values are displayed as defaults, but can be overridden.

If an employee is leaving in the current period or is being suspended, select the appropriate option in the Leaving drop-down list. See also [Leavers/Suspended Employees](#).

The **Transfer Balance to BIK** button will allow you process a BIK Rollover on the employee's timesheet. (See [Benefit in Kind Rollover](#).)

If the Construction Worker's Pension Schemes feature is enabled (see [Construction Workers Pensions](#)), you can also use the **Deduction CWPS for weeks** section of the window to set the weeks for which CWPS contributions will be deducted in the timesheet. Generally, the weeks you specify should match the number of weeks in the pay period.

#### Data Entry fields

Field	Description
Employee	<p>When you are using Random mode, you use this field to specify the employee code. You can use the drop-down list button to choose an employee record from a list.</p> <p>Note: You can't create a timesheet for an employee who does not already have an employee record set up. Neither can you create a timesheet for an employee who has been marked as a leaver.</p> <p>The employee's name, department and cost centre codes are displayed in the Timesheet Entry window, but can't be amended in the window.</p>
PRSI Code	The employee's current PRSI class. You can amend this code here if necessary. Doing so updates the employee's record when End of Period has been run.
Tax Status	The employee's tax status. You can amend this code here if necessary. Doing so updates the employee's record when End of Period has been run.
Tax Credit	The employee's current period tax credit amount. You can amend the value if necessary. Doing so updates the employee's record when End of Period has been run.

Field	Description
Pay Element: Hrs/ Val (Hours/Value)	<p>The hours or value for the selected payment.</p> <p><b>Note:</b> If you are using standard hours, the number of hours is displayed automatically.</p> <p>Defaults are also shown for any fixed payments.</p> <p>(These defaults can be overridden in the timesheet without affecting the standard amounts on the employee record.)</p> <ul style="list-style-type: none"> <li>If the employee's pay type is <b>Salary</b>, the Contracted Hours on the CSO Details tab will be transferred into the <b>Contract Hrs</b> column in the CSO History for that period.</li> </ul> <p>If a Salary employee had a Std Hours value in the <a href="#">Payments</a> tab in Micropay Professional v10.1, this was transferred to the Contracted Hours field in the <b>CSO Details</b> tab when your payroll schema updated to v10.2. This Contracted Hours value is now recorded as the CSO History's Contracted Hours in the period.</p> <ul style="list-style-type: none"> <li>If the employee's pay type is <b>Hourly</b>, the value that is recorded as the pay period CSO History's Contracted Hours is equal to the total of all Hourly payments with the CSO type <b>Regular</b> that are processed in the pay period.</li> </ul> <p>Std Hours in this case refers to the number of <b>Regular</b> hours the employee normally works. It appears as the number of hours in the first Hourly payment on the employee's timesheet.</p> <p>If an Hourly employee has a Std Hours value set in the <b>Payments</b> tab, this is automatically reflected in the Contracted Hours field in the <b>CSO Detailstab</b>. A change in one of these is always reflected in the other.</p>
Pay Element: Rate	<p>The rate of pay (if applicable) per hour or unit. These rates are entered on the employee record, while the payments are assigned a rate code on the payments table. Payments that have a rate code assigned to them show the default rate. You can overwrite the current rate value for this pay period without affecting the rate entry on the employee record.</p>
Pay Element: Amount	<p>The amount of this payment. The program automatically calculates this by multiplying the value in the rate column by the value in the hours column.</p>
Deduction: E'e Value	<p>The Employee value for the selected deduction in the current period.</p> <p>If the deduction is associated with a pension (other than a CWPS pension), you can double-click the field to open the Deduction Details window.</p> <p>Here you can make adjustments to the Employee Standard Amount and Employer Standard Amount, expressing these either as simple monetary values or a percentage of pensionable pay.</p> <p>If a formula has been assigned to the relevant deduction for the employee, this formula overrides any standard values you specify here.</p>



Field	Description
Deduction: E'r Contrib	<p>The Employer value for the selected deduction in the current period.</p> <p>The deduction must be associated with a Pension or PRSA. Otherwise the field is blank and uneditable.</p> <p>Double-click the field to open the Deduction Details window.</p> <p>Here you can make adjustments to the Employee Standard Amount and Employer Standard Amount, expressing these either as simple monetary values or a percentage of pensionable pay.</p> <p>If a formula has been assigned to the relevant deduction for the employee, this formula overrides any standard values you specify here.</p>
Hol. Periods	<p>The number of holiday periods taken by the employee. This applies only to weekly and fortnightly employees.</p> <p>If an employee is being paid this week, and is going on holiday for two periods, enter 2 in the field.</p> <p>This triggers corresponding changes in the Tax Credits, Fixed Allowances, Deductions and Insur Weeks fields. You can still make changes to these fields if necessary.</p>
Tax Credits	The number of tax credits. This field is normally set to 1, but if you need to give the employee more than one tax credit, enter the required number here.
Fixed Paymts	The number of fixed payments. This field is normally set to 1, but if you need to give the employee more than one fixed payment value, enter the number required here. It is important to remember that a fixed payment is multiplied by this value only when the fixed payment is holidayable.
Deductions	The number of fixed deductions. This field is normally set to 1, but if you need to give the employee more than one deduction value, enter the number required here. It is important to remember that a deduction is multiplied by this value only when the deduction is holidayable.
Insur. Weeks (Insurable Weeks)	<p>The number of insurable weeks - this is normally the same value as that entered in the Start of Period screen (see Setting a Pay Period ). If a weekly paid employee is taking holidays, the number will be 1 plus the number of holiday weeks. If you are running a monthly payroll, and an employee starts or leaves in mid-month, you may only want to give the employee 2 insurable weeks.</p> <p>Note: The Insurable Weeks figure will default to 1 if you are running an extra pay period for a weekly payroll (such as week 53) , 2 if running a fortnightly payroll, and 4 for a 4-Weekly payroll.</p> <p>If you enter 0 insurable weeks, this removes the employee entitlement to receive a PRSI-free allowance for the extra pay period.</p> <p>Employees are entitled to their period tax credit on a week 1 basis for an extra pay period. So employees will receive the benefit of more than the year's total tax credits. But the amount will be recovered from the employee on review by the Inspector of Taxes.</p>

Field	Description
Nett to Gross	<p>The value for Nett to Gross calculations. The default value is that in the employee's master record. If none is specified in the record, you can specify the value here.</p> <p>You can also override the default one by changing it here. This field will not be active unless you have set up Nett to Gross Type and Nett to Gross Payment in the Company Details window.</p> <p>You must designate a payment in the Payments table to hold the gross value calculated from the specified nett figure. (See <a href="#">Setting up Payments.</a>)</p>
Leaving TP/Date (Leaving This Period)	<p>These fields enable you to specify whether the employee is leaving this period, or is being suspended in this period. A drop-down list enables you to select the value you require:</p> <ul style="list-style-type: none"> <li>▪ Yes</li> <li>▪ No</li> <li>▪ Suspend</li> </ul> <p>You can also specify the date on which the employee is leaving in the box provided, or accept the default of the current period's run date.</p> <p>Note: These fields should be used only when the relevant employee is to be paid for the current period. Otherwise you should make the appropriate entries in the Employee Details record.</p>
Parking Levy	<p>This field specifies the amount of Parking Levy that will be applied to the employee on their current payslip. The default value is based on the standard Parking Levy period amount specified in the Employee Details record. The value is editable.</p>
Deduct CWPS for Weeks	<p>If the Construction Worker's Pension Scheme feature is enabled (see <a href="#">Construction Workers Pensions</a>), this section is displayed. Use it to specify for which weeks CWPS deductions are made in the timesheet.</p>
Payslip Summary	<p>This pane provides a summary of the information that will be shown on the employee's payslip, based on the payment, deduction and other timesheet values you have provided for this employee in this pay period.</p>
Errors and Warnings	<p>This pane provides information about the alerts (signified by icons in the Alerts column) that may be associated with values entered on the timesheet.</p>

See also

[Overview of Timesheet Entry](#)

### Leavers/Suspended Employees

If an employee is being paid in the current period, and is also leaving in the current period, you need to access their timesheet and flag them as a leaver. You do this by selecting **Yes** in the Leaving TP drop-down list box.

You can suspend an employees from pay in the current period by selecting the **Suspend** option in the Leaving TP drop-down list box.

In either case, you use the Date field to specify the date of departure or suspension.

If an employee is leaving, or is suspended in the current period, but is not being paid in the current period, you should make the necessary adjustments to their Employee Details record before processing their timesheet.

## See also

[Timesheet Entry: Data Entry tab](#)

## PRD Recalculation for Leavers

A public service employee's total PRD liability for the year should be recalculated in their final timesheet when they:

- are liable for the Pension-Related Deduction (PRD)
- are leaving their current public sector employment
- do not intend to change to a different public sector employment

The recalculation determines whether circumstances have led to the employee overpaying or underpaying PRD in the current tax year.

(The employee must also sign a declaration stating that they do not intend to take up another public service employment during the current tax year.)

### How do I carry out the PRD recalculation for leavers?

To carry out the recalculation for an individual leaving the public sector, follow these steps in the employee's final pay period:

1. Select **Processing - Timesheet Entry**.
2. The Timesheet Entry screen opens. Select the relevant employee.
3. Ensure that the timesheet's **Data Entry** tab is open.
4. To mark the employee as a leaver, select **Yes** in the Leaving TP drop-down list.
5. The **Recalculations This Period: PRD** checkbox is now enabled. Select it to specify that the balancing PRD recalculation should be carried out for the employee.
6. Save the timesheet as normal.

The employee's PRD liability is recalculated in their final timesheet, and any PRD overpayment is refunded to the employee. Any underpayment is reported on the Control Summary report. You should make appropriate arrangements with the employee to recoup the underpayment of PRD.

**Note:** It is unlikely that someone leaving, retiring or resigning from the Public Service in mid-year would have an underpayment of PRD.

## Timesheet Entry: Override tab

The Override fields enable you to override PAYE, PRSI, Pension-Related Deduction (PRD) and Universal Social Charge (USC) calculations for the employee.

This tab may display [errors and warnings](#) you need to address.

Use the **+/-** drop-down list box to specify the adjustment amount in each case, or alternatively type the value that should replace the calculated value.

In the case of PRSI, you can override the employee and employer values separately.

Field name	Description
+/-	Select <b>+</b> to add the amount to the calculated value.
	Select <b>-</b> to deduct the amount from the calculated value.
	Select <b>0</b> to set the value deducted this period to zero. Then enter a new value to replace the calculated value.

Field name	Description
Value	The value of the adjustment.
Payslip Summary	This pane provides a summary of the information that will be shown on the employee's payslip, based on the payment, deduction and other timesheet values you have provided for this employee in this pay period.
Errors and Warnings	This pane provides information about the alerts (signified by icons in the Alerts column) that may be associated with values entered on the timesheet.

See also

[Overview of Timesheet Entry](#)

### Timesheet Entry: Multi Timesheet tab

The **Multi Timesheet** tab enables you to use multi-timesheets to split an employee's pay costs over a number of departments and cost centres.

All details from the single timesheet are transferred to the multi-timesheet.

You can delete the timesheet to revert back to single-entry mode.

You can access a list of payments, departments or cost centres, by clicking an appropriate field in the table and pressing **F2**.

By pressing **F6** you can insert a blank line. This enables you to enter multiple instances of a single payment.

The tab may display [errors and warnings](#) you need to address.

Field name	Description
Dept	Specify the department associated with a particular payment.
Cost	Specify the cost code associated with a particular payment.
Hrs/Val	Specify the number of hours or the value applicable to the chosen department/cost centre for the payment.
Rate	Specify the pay rate that applies to the corresponding payment.
Payslip Summary	This pane provides a summary of the information that will be shown on the employee's payslip, based on the payment, deduction and other timesheet values you have provided for this employee in this pay period.
Errors and Warnings	This pane provides information about the alerts (signified by icons in the Alerts column) that may be associated with values entered on the timesheet.

The Timesheet Entry window's **Multi Timesheet** tab is not available if you are using [Micropay Professional Lite](#). In addition, cost centres are not available in Micropay Professional Lite.

See also

[Overview of Timesheet Entry](#)

### Timesheet Entry: Holidays/Absence tab

The Timesheet Entry window's **Holidays/Absence** tab enables you to record 'This Period' details of the employee's holidays, certified sickness, uncertified sickness and other leave.

The tab may display [errors and warnings](#) you need to address.

**Note:** Even if you have already run the timesheets in Automatic mode, you can still process recent absences by processing the relevant timesheets in Random mode.

For detailed information about holiday processing, see [Holiday Accrual and Processing](#).

Payslip Summary	This pane provides a summary of the information that will be shown on the employee's payslip, based on the payment, deduction and other timesheet values you have provided for this employee in this pay period.
Errors and Warnings	This pane provides information about the alerts (signified by icons in the Alerts column) that may be associated with values entered on the timesheet.

If your system integrates with Sage PeopleLink...

If your system integrates with Sage PeopleLink and this employee is licensed appropriately (see [Licensing Sage PeopleLink](#)), you can click the **Get Info from PeopleLink** button in the **Holidays/Absence** tab to obtain the employee's current-period absence information. The information retrieved is displayed in the Holidays Taken this Period (Days) field.

- The **Details** button displays a breakdown of the retrieved information.
- To open an employee's notepad, click **Notepad**.
- Click **Delete** to delete a timesheet saved previously this period.
- Click **Save** to store the details of the current employee and create their timesheet for the pay period.
- Click **Payslip** to display a preview of the employee's payslip. Verify that the details are correct.

See also

[Overview of Timesheet Entry](#)

## Timesheet Entry FAQs

The following are questions frequently asked about Timesheet Entry.

[How do I create an employee's payslip?](#)

[How can I preview the employee's payslip?](#)

### How do I create an employee's payslip?

After you have checked an employee's pay information in the Timesheet Entry window (see [Overview of Timesheet Entry](#)), and viewed the preview payslip, verifying that everything is in order, you are ready to create the employee's payslip. To do this (in Random, Sequential or Import mode), click **Payslip** in the Timesheet Entry window.

**Note:** The process in Automatic mode is different.

[Batch Timesheet Entry](#) offers a very efficient way of processing timesheets for multiple employees.

See also

[Overview of Timesheet Entry](#)

### How can I preview the employee's payslip?

To calculate the period's pay and deductions after you have entered and saved all necessary details in the Timesheet Entry window, click **Payslip**. A preview of the employee's payslip is displayed.

Click **Close** or press **Esc** to clear the preview from the screen.

If you are happy with the information contained in the preview payslip, click **Payslip** to create the employee's payslip.

See also

[Overview of Timesheet Entry](#)

## Payroll Reports

Micropay Professional provides a wide range of standard payroll reports. The Report Writer utility facilitates the creation of custom reports.

The Advanced Report Writer application facilitates the creation of more complex custom reports.

Predefined reports are available that deal with:

- the payroll as a whole
- employee details
- payments

These are arranged in three tabs in the Reports window. Each tab lists the reports available as radio button choices.

### Before you proceed

Some of the actions you may need to perform before you generate a payroll report include:

- Run [Set Period](#), and make sure that employee records and the payroll's payments and deductions are up to date.
- If most employees are paid by a fixed amount each period, run the [timesheets in Automatic mode](#).
- In the case of employees whose hours or values have changed in the current period, run timesheets in either Random or Sequential mode.
- If any absence is to be recorded, enter these on the [Holidays/Absence tab](#) of the Timesheet Entry window.
- If an employee is being suspended, or is leaving in the current period, make sure you have indicated this on the timesheet.
- Use the **Payslip** button to preview employee payslips.

### Important Topics

[What are payroll standard reports?](#)

[How do I use sequences and ranges in reports?](#)

[How do I generate a batch of payroll reports?](#)

[Generating a Standard Report](#)

[Viewing and Printing Payslips](#)

[Assigning Cheque Numbers](#)

[Creating a Paypath File](#)

[P45, P46 and P30 ROS Integration](#)

[Micropay Professional Standard Reports](#)

**Note:** The Advanced Report Writer is not available with [Micropay Professional Lite](#).

## What are payroll standard reports?

Micropay Professional enables you to generate a wide range of standard reports, which are organised into three categories: Payroll, Employee and Payments.

Several reports can be launched directly from the desktop's process map. These include:

- Control Summary
- Payslips
- Gross-to-Nett

You can print a report, e-mail it to a colleague, or generate a PDF or a Microsoft Excel version of it. In particular, you can generate a current payslip and send it to the relevant employee by e-mail, as long as the employee is suitably configured (see [Pay/YTD Tab](#)).

The Payroll Reports window contains a list of standard reports, along with various options associated with each report. These enable you to control what content is displayed in the report.

### Example

Suppose that you select the **Cost Analysis** radio button, indicating that you want to generate a cost analysis report.

You can use the associated **Summ** checkbox to specify that you want to generate a summary cost analysis report, rather than a detailed one. Some reports, such as Payments and Deductions, have additional options that display in the List box.

Let's say you select the **Deductions** radio button. The List box displays a list of the deduction types defined on your system. You can select the deduction types you want to include in the report.

To include current-period leavers with status Calculated or End of Period in a Payments report or a Deductions report, you select the **Leavers** checkbox. Deselecting the checkbox excludes leavers from the report. Leavers from all the previous periods are excluded from the report automatically.

See also

[Payroll Reports](#)

**Note:** The Payments and Deductions reports are not available in [Micropay Professional Lite](#).

## Generating a Standard Report

1. Click **Other Reports** in the desktop's process map.

Alternatively, do one of the following:

- click **Other Reports** in the navigation pane's Pay Run section
  - click the **Reports** button in the Task Bar
  - select the **Reports - Payroll Reports** menu option
2. Click the appropriate tab (see [Micropay Professional Standard Reports](#)). Each one contains a different standard report category.
  3. Select the radio button for the report you want to generate.
  4. If you want to batch print, select the relevant **Batch** checkboxes. The Batched Reports box displays a list of the reports you have specified should be batched.



A *batch* consists of multiple reports from one or more report categories. See also [How do I generate a batch of payroll reports?](#).

5. Some reports require special stationery, so in the course of a batch-print you may need to change the printer stationery. Select the **Pause** checkbox next to a report if the stationery must be changed after it is printed.
6. If necessary, specify a sequence type and define the range. (Range options are available for selected record types only on some reports.)
7. Associated with some reports are List items. Select the items to be included in the report.
8. In the case of the P30/CC124 report and the P45 Details report, the Payroll Reports window's **P30 to ROS** or **P45 to ROS** buttons, respectively, become active. These enable you to send the associated files directly to Revenue using the Revenue Online Service.
9. To preview the report, click **Preview**.
10. To specify printer settings, click **Setup**.

In the Output Options section of the Printer Setup dialogue box, you can specify one of three output settings:

**High Quality:** Prints reports to the best-possible print quality, but provides a slow output rate on some printer types.

**Draft Quality:** Prints reports to a lower print quality, but provides a more rapid output rate on some printer types. This is the recommended setting for payslips when you are printing on continuous pre-printed stationery.

**Direct Print:** Bypasses the driver and writes directly to your dot-matrix printer (not suitable for other printer types). This provides the fastest output rate, but can lead to issues such as incorrect alignment and other form-feeding problems, and is generally the least reliable option.

**Note:** For the fastest possible direct-print output rate, you need to click **Options** in the Printer Setup dialogue box and configure the dot-matrix printer for draft-quality output.

11. To print the selected report, click **Print**.
12. To print a list of batched reports, click **Print Batch**.
13. To save a list of batched reports, click **Save Batch**.
14. You can send a report as an e-mail attachment by clicking the **eMail** button:

In the case of payslips, each employee specified in the range (these should be set up to receive electronic payslips), is sent an e-mail containing a standard e-mail message with an attached PDF version of their current payslip.

In the case of all other standard reports, your mail client opens, containing an e-mail message with an attached PDF version of the report. You need to specify the recipient's address and send the mail manually.

15. You can export a report to a particular location as a PDF file by clicking the **PDF** button. (You need Adobe Acrobat 4.0 or higher to open this.)

The PDF payslip file is automatically saved in the payroll's Export folder at your Micropay Professional installation location.

In the case of all other standard reports, you are prompted to specify an export location. By default, the application suggests the payroll's Export folder at your Micropay Professional installation location. When you have saved the PDF file, you are provided with the option of viewing it.

Because you can't make changes to an exported PDF report, if you need to edit the file or enable others to do so, you should instead export the report as a Microsoft Excel file.

16. You can export certain reports to a particular location as a Microsoft Excel file by clicking the **Excel** button. These reports are Gross to Nett, Payments, Deductions, Cost Analysis, Timesheet Audit and Earnings Tax & PRSI. (You need Microsoft Excel 97 or higher to open this.)

The Excel payslip file is automatically saved in the payroll's Export folder at your Micropay Professional installation location.

In the case of all other standard reports, you are prompted to specify an export location. By default, the application suggests the payroll's Export folder at your Micropay Professional installation location. When you have saved the Excel file, you are provided with the option of viewing it.

**Note:** The default PDF or Excel file name follows this syntax:

**[report name][pay date].[xls]/[pdf]**

17. Click **Close** to exit the Reports Print screen.

[See also](#)

[Payroll Reports](#)

## How do I use sequences and ranges in reports?

Micropay Professional provides a choice of print sequences or range options for some reports, such as the Gross to Nett report and the Payments report. These options enable you to control what records are included in the report. They are displayed in the Payroll Reports window's Sequence box when the relevant report radio button is selected.

The sequence options enable you to select records for inclusion in the report based on a range. You can specify an employee code range, for example, or a name range.

Suppose that you want to specify a name range in a Payments report. To do so, you should carry out these steps:

1. Select **Other Reports** in the navigation pane's Pay Run section.
2. Click the **Payments** tab.
3. Select **Employee Name** in the Sequence box.
4. Enter the From and To values in the relevant fields.

If the From field is left blank, the first record on file is chosen by default.

Similarly, if the To box is left blank, the last record on file is chosen by default.

If both boxes are blank, or no sequence option is selected, all records are included in the report.

[See also](#)

[Generating a Standard Report](#)

[Payroll Reports](#)

## How do I generate a batch of payroll reports?

Each report has a corresponding **Batch** checkbox. This enables you to specify that the report should be printed as part of a batch process. You can select multiple reports as part of a batch process and print them together, rather than one at a time. This may be useful where you always print a certain set of reports after each payroll calculation.

Since some reports, such as the Payslips report, require special stationery. You will need to be able to pause the batch print job to change stationery in the printer at the appropriate point. The relevant report's **Pause**

checkbox enables you to do this.

When you select a report for batch printing, it is added to the Batched Reports box.

You don't have to print the batch straight away. The **Save Batch** button enables you to store the selections and print them later.

See also

[Generating a Standard Report](#)

[Payroll Reports](#)

## Viewing and Printing Payslips

A payslip is a standard Micropay Professional payroll report. As such, you can view or print one or more payslips by selecting the **Reports - Payroll Reports** menu option and selecting the **Payslips** radio button in the Employee tabbed page. For more information about this approach, see [Generating a Standard Report](#).

However, a more direct way to view or print payslips is to use the process map:

1. Click the process map's **View/Print Payslips** menu option. The Payslips Report Settings window opens.
2. Define the relevant employee range by specifying:
  - the relevant employee attribute
  - the first value in the range
  - the last value in the range
3. If you want to exclude payslips from printing that will be e-mailed to employees anyway, select the **Exclude employees who get e-mail payslips** checkbox.
4. Click **Preview** to view the payslips on your monitor.
5. If you want to specify print settings, click **Setup**.

In the Output Options section of the Printer Setup dialogue box, you specify one of three output settings:

**High Quality:** Prints reports to the best-possible print quality, but provides a slow output rate on some printer types.

**Draft Quality:** Prints reports to a lower print quality, but provides a more rapid output rate on some printer types. This is the recommended setting for payslips when you are printing on continuous pre-printed stationery.

**Direct Print:** Bypasses the driver and writes directly to your dot-matrix printer (not suitable for other printer types). This provides the fastest output rate, but can lead to issues such as incorrect alignment and other form-feeding problems, and is generally the least reliable option.

6. To print the payslips, click **Print**.
7. You can send a report as an e-mail attachment by clicking the **eMail** button.

Each employee specified in the range (these should be set up to receive electronic payslips) is sent an e-mail containing a standard e-mail message with an attached PDF version of their current payslip.

8. You can export a payslip to a particular location as a PDF file by clicking the **PDF** button. (You need Adobe Acrobat 4.0 or higher to open this.)

The PDF payslip file is automatically saved in the payroll's Export folder at your Micropay Professional in-

stallation location.

9. Click **Cancel** to close the Payslips Report Settings window.

See also

[Payroll Reports](#)

## Assigning Cheque Numbers

When you carry out a cheque run, all cheques in the batch are stored, awaiting assignment of cheque numbers. Since the cheque numbers are a pre-printed part of the stationery, you don't generate a list of which cheque numbers were used in a batch print job until after the job is complete. Then you can assign the cheque numbers to the corresponding cheques in Micropay Professional.

How to assign cheque numbers

1. The Cheque Numbers screen displays automatically after cheques are printed. You can also access this screen by clicking **Cheque Numbers** in the Payroll Reports screen's **Payments** tab. (See [Generating a Standard Report](#).)
2. In the Cheque Numbers screen, enter the start and end cheque numbers. These define the range for cheques in the batch.
3. Then click **Assign**.
4. A report of the cheque number assignments displays. You can print this report by clicking **Print**.
5. If the batch of cheques must be cancelled, you select the **Cancelled** checkbox.
6. Click **Ignore** if you need to abandon the changes you've just made.
7. Click **Save** to exit the cheque numbers screen.

**Note:** If you want to enter cheque numbers at a later stage in the current run, or to edit the original cheque number assigned, you can select **Cheque Numbers** on the Payments tab.

Processing previously assigned numbers

The number-assignment process cycles through the list of employees paid by cheque, assigning cheque numbers sequentially in the range you specify as it goes.

If you try to assign a cheque number that has already been assigned, a dialog box displays that prompts you to confirm that you want to overwrite the cheque with that number already on the system.

You can respond to the message by clicking either **Yes**, **No** or **Cancel**.

- If you click **Yes**, the existing cheque is overwritten. You are prompted to specify whether similar previously assigned cheque numbers should be overwritten.
- If you click **No**, the relevant cheque number is skipped in this cheque run. You are prompted to specify whether similar previously assigned cheque numbers in this run should also be skipped.
- If you click **Cancel**, the number-assignment process stops.

See also

[Payroll Reports](#)

## Creating a Paypath File

### Introduction

Paypath (also known as Electronic Money Transfer, or EMT) is the system by which funds are transferred electronically from your company bank account to your employees' bank accounts.

This is done by creating a Paypath file (see below) and then using your electronic banking software or Internet banking.

To set up Paypath, you need to:

- specify the necessary details in the Company Details **Paypath** tab
- enter your employees' bank information in the Employee Details window

For more information, see [Setting up Paypath details](#).

## Creating a Paypath file

1. Click the **Process Paypath** icon in the desktop's process map.
2. The Process Paypath window opens. Select the **Paypath** radio button.
3. You can **Preview** or **Print** the report before creating the Paypath file.
4. Click **Create File**. The program displays a dialog box in which you can complete the Paypath file details.

**Note:** Any changes you make here are also added automatically to the Company Details window.

3. Ensure that the correct save location is specified in the Paypath File field.
4. Click **Create** to create the Paypath file.

Field name	Description
Bank Code	The bank's sort code.
Bank Account	The name of the relevant bank account.
Volume Serial No.	Your company's volume serial number for Paypath.
Owner ID	Your Paypath owner identification code.
Company short Name	Your company's Paypath short name.
Paypath File	The name and location of the Paypath file. You can browse to this if necessary.
EMT Date	The default value in the Date field is the Paypath date as defined in the payroll calendar and confirmed in the Set Period window. If you need to, you can specify a different date.
File No.	The file number. Unless your bank specifies otherwise, you normally assign the number 1.

You can also carry out Paypath processing by opening the Reports window's **Payments** tab.

For details about using this approach, see [Generating a Standard Report](#).

## Merging Paypath files

1. Create the temporary Paypath files you intend to merge following the procedure above.

Specify a temporary filename for each Paypath file in the **Paypath** tab of the Company Details window. For example, to merge two payrolls you might use the file names *BANKFL.001* and *BANKFL.002*.

2. Click the process map's **Process Paypath** icon.
3. Select the **Paypath** radio button.
4. Click **Merge Files**.

5. The program displays a dialog box in which you can specify the files to be merged. Browse to each relevant file location and click **Add**.
6. In the Merge Paypath Files To field, specify the location where the new merged file will be created.
7. Click **Merge**.

**Note:** An alternative to merging Paypath files is to consolidate the relevant payrolls and create a single Paypath file for the consolidation company. (See [Consolidation Companies](#).)

See also

[Payroll Reports](#)

## Interim Paypath

The Interim Paypath feature enables you to advance a portion of their nett pay to an employee who is paid through Paypath before the end of the pay period.

The amount of the advance the appears as an Interim Paypath deduction on their timesheet.

To use the Interim Paypath feature, carry out the following steps:

Step 1: Define a new deduction

1. Select the **Company/Payroll Details - Deductions** menu option.
2. In the next available line in the Deductions window, define a new deduction with the following specifications:
  - its name is **Interim PP**
  - its type is **Nett**
  - its balance type is **Reducing**
  - it is **non-holidayable**

Step 2: Assign the deduction to Interim Paypath

1. Select the **Company/Payroll - Company/Payroll Details** menu option.
2. Open the **Paypath** tab in the Company Details window.
3. In the Deduction No field, specify the deduction you want to use for Interim Paypath amounts - i.e. the **Interim PP** deduction you defined above.

Step 3: Specify the Interim Paypath amount

1. Select the **Processing - Employee Details** menu option.
2. Open the relevant employee record.
3. Click the [Payments Tab](#).
4. In the Interim Paypath Amount field, enter the amount of the employee's nett pay that you want to advance to them.
5. Ensure the employee's Pay Method is set to **Paypath**.

Step 4: Create and use an Interim Paypath file

1. Click the process map's **Process Paypath** icon.
2. In the dialogue box that displays, select the **Interim Paypath** radio button.
3. Specify the employee(s) to whom you wish to advance money.
4. Click **Create File**.

5. Specify the relevant bank information, if necessary. Any changes you make are also written to the [Company/Payroll Details](#).

Field name	Description
Bank Code	The bank's sort code.
Bank Account	The name of the relevant bank account.
Volume Serial No.	Your company's volume serial number for Paypath.
Owner ID	Your Paypath owner identification code.
Company short Name	Your company's Paypath short name.
Paypath File	The name and location of the Paypath file. You can browse to this if necessary.
EMT Date	The default value in the Date field is the Paypath date as defined in the payroll calendar and confirmed in the Set Period window. If you need to, you can specify a different date.
File No.	Unless your bank specifies otherwise, you normally assign the number 1.

6. Click **Create**.
7. The Create Disk - Interim Paypath dialog box displays. It contains information specified in the Company Details window. Only the Date and Disk Number can be modified in the dialog box.
8. Once the file is generated, a message displays that specifies Paypath debit and credit details. Click **OK**.
9. Use the Interim Paypath file to advance the relevant amount to the employee's account.

**Note:** This amount will be deducted from nett pay automatically when the timesheet for this period is saved.

See also

[Rewinding a payment](#)

[Payroll Reports](#)

## Rewinding a payment

When you select the Interim Paypath radio button in the Process Paypath window (see [Interim Paypath](#)), the **Rewind Payment** button becomes available. This should be used with great care. It undoes the last [Interim Paypath](#) that was processed.

For example, suppose that two interim Paypath disks are created, the first one for 250, and the second one for 300. When you click **Rewind Payment**, the latest Interim Paypath payment is undone. 300 is removed from the timesheet deduction field.

See also

[Payroll Reports](#)

## P45, P46 and P30 ROS Integration

Registered Revenue Online Service (ROS) customers can submit their P45, P46 and P30 returns at:

[www.ros.ie](http://www.ros.ie)

The site contains information about become a registered ROS customer. Your registration will usually be processed in a few weeks.

The Payroll Reports window enables you to generate P30 (monthly or quarterly) and P45 returns automatically in for form of ROS-compliant files. These files can then be submitted to Revenue by uploading them to the ROS website.

The P30 to ROS file includes [Universal Social Charge \(USC\)](#) amounts where appropriate.

Creating a P30/CC124-to-ROS file

1. Click **Other Reports** in the desktop's process map.

Alternatively, do one of the following:

- click **Other Reports** in the navigation pane's Pay Run section
  - click the **Reports** button in the Task Bar
  - select the **Reports - Payroll Reports** menu option
2. In the **Payroll** tab, select the **P30/CC124** option.
  3. Click **P30 to ROS**.
  4. Specify whether you wish to produce a monthly or a quarterly P30. Whichever type you select will be the default type the next time you log into Micropay Professional. Make sure that you have agreed with Revenue which return type you are going to use.

**Note:** The next time you open this dialogue box, the return type and the next period are entered automatically.

5. Select the month or quarter for which the P30 return should be generated.
6. Once you have made your selection, click **OK**.
7. The ROS P30 Save As screen displays. A default filename is displayed in a format that includes the period month and the last five characters in the company registration number (for instance, *JAN4567T*).

P30 ROS output is stored in the following folder:

*<application folder>\<company>\ROS\P30.*

8. Click **Save** to save the on-line ROS P30 file in the specified folder.
9. Micropay Professional displays a report listing all the information contained in the file. You should print a hard copy of this report for future reference.
10. When you have closed the report, click **Cancel** to close the Reports window.
11. You can now upload the ROS P30 file to Revenue by browsing to the folder where the P30 file is saved and submitting the file via the ROS website.

Once the P30 file has been submitted, if you make any further changes, you must submit them to Revenue in paper form.

Creating a P45 to ROS file

The 'Tax This Empl. Refunded' item in the P45 ROS file specifies whether a refund of tax was made to the employee.

1. Click **Other Reports** in the desktop's process map.

Alternatively, do one of the following:

- click **Other Reports** in the navigation pane's Pay Run section



- click the **Reports** button in the Task Bar
  - select the **Reports - Payroll Reports** menu option
2. Open the Employee tab.
  3. Select the **P45 Details** option.
  4. Click **P45 to ROS**.
  5. The R45 ROS Return screen opens. Select the Pay Period setting you require - either the **Current Period** or **All Periods**.
  6. Click **Proceed**.
  7. The ROS P45 Save As screen will be displayed. A default filename will be displayed in the following format: *1234567T* (the company registration number). A default folder will also be selected - ROS - which is located under the folder where the company data is stored. Make appropriate changes, if necessary.

**Note:** ROS will not accept a P45 return in which the employee's finish date is later than the date on which they receive the P45 return. The system will warn you if this is the case, but will not prevent you from creating the P45 return file. You should not submit the return until after the employee's finish date.

8. Click **OK** to save the on-line ROS P45 file into the specified folder. You will now return to the Reports screen. Click **Cancel** to close this.
9. You can now upload this ROS P45 file to Revenue by browsing to the folder where the P45 file is saved and submitting the file via the ROS website.

#### Creating a P45 (Part 3) to ROS file

1. Click **Other Reports** in the desktop's process map.

Alternatively, do one of the following:

- click **Other Reports** in the navigation pane's Pay Run section
  - click the **Reports** button in the Task Bar
  - select the **Reports - Payroll Reports** menu option
2. Open the Employee tab.
  3. Select the **P45 Details** option.
  4. Click the **P45 (Part 3) to ROS** button.
  5. The Create R45 ROS (Part 3) Return screen displays. Choose the employees you want to include in the P45 (Part 3) Return by selecting the relevant radio button. Click **Next**.
  6. A list of employees displays. The **Include** column enables you to select the employees you want to include in the P45 (Part 3) to ROS file.
  7. You must enter each selected employee's Current Employment and Previous Employment information. The following pieces of information are mandatory:
    - Current Employment Start Date
    - Most Recent Previous Employment Start Date
    - Most Recent Previous Employment Finish Date
    - Most Recent Previous Employer's Tax Registration Number

If the system detects any discrepancies or errors in an employee's information, the employee is flagged. Explanatory information is displayed in the left-hand pane about the alerts relating to the currently selected employee. You must resolve these issues before proceeding.

8. Click **Next**.
9. Specify the location where the P45 (Part 3) to ROS file should be saved, and click **Create**.
10. The Monitor displays summary information about the file that was created. Click **View Monitor** to open the file in plain text format.
11. Selecting the **Open folder containing P45 ROS (Part 3) File** checkbox ensures that when you click **Done**, the folder containing the file opens.
12. Click **Done** to close the window.

#### Creating a P46 to ROS file

1. Click **Other Reports** in the desktop's process map.

Alternatively, do one of the following:

- click **Other Reports** in the navigation pane's Pay Run section
  - click the **Reports** button in the Task Bar
  - select the **Reports - Payroll Reports** menu option
2. Open the **Employee** tab.
  3. Select the **P45 Details/P46** option.
  4. Click the **P46 to ROS** button.
  5. The Create P46 Return screen opens. Choose which group of employees you want to include in the P46 Return by selecting the relevant radio button.
  6. Click **Next**.
  7. A list of employees displays. The checkboxes in the **Include** column enable you to select the employees you want to include in the P46 file.
  8. You must ensure that the necessary information is provided for each employee.
  9. If the system detects any discrepancies or errors in an employee's information, the employee is flagged. Explanatory information is displayed in the left-hand pane about the alerts relating to the currently selected employee. You must resolve these issues before proceeding.
  10. Click **Next**.
  11. Specify the location where the P46 file should be saved, and click **Create**.
  12. The Monitor displays summary information about the P46 ROS file that was created. Click **View Monitor** to open the full monitor file in plain-text format.
  13. Selecting the **Open folder containing P46 ROS File** checkbox ensures that when you click **Done**, the folder containing the file opens.
  14. Click **Done** to close the window.

See also

[Payroll Reports](#)

## Micropay Professional Standard Reports

The standard reports available in Micropay Professional are organised into the following categories:

[Payroll Reports](#)

[Employee Reports](#)

[Payment Reports](#)

## [Company Reports](#)

### Payroll Reports

These reports are available in the Payroll Reports window's **Payroll** tab. See [Generating a Standard Report](#).

- **Control Summary** - Provides an overview of the current payroll run for control and auditing purposes. This report should be printed and checked after each payroll run. You can access it directly by clicking **View Control Summary** on the desktop's process map.

It is also useful report to run it immediately after timesheet entry to check the accuracy of the payroll.

The cumulative-control-totals-brought-forward figures should match the previous period's carried-forward values. The report includes a reminder to make this check. Calculation exceptions are included in the report with a corresponding value.

The report includes [Universal Social Charge \(USC\)](#) amounts where appropriate.

- **Gross to Nett** - Provides a summary of the payslip details for each employee processed during the current payroll run. Run the report after timesheet entry in the current period. To do so, click **View Gross to Nett** in the desktop's process map, and specify the relevant employee range.

The report includes [Universal Social Charge \(USC\)](#) amounts where appropriate.

- **Payments** - Prints a report on the value of specific employee payments in the current period, as well as this-year balances. The report can be printed after timesheet entry in the current period.

This report is not available in [Micropay Professional Lite](#).

- **Deductions** - Prints a report on the value of specific voluntary employee deductions in the current period, as well as this-year balances. This can be printed after timesheet entry in the current period. The report includes the employer's contribution for the period and the this-year balance.

This report is not available in [Micropay Professional Lite](#).

- **CWPS** - Prints a report providing details of the payroll's [Construction Workers Pensions](#) schemes.
- **P30/CC124** - Reports on the calculated PAYE and PRSI totals for each tax return period, or for each quarter. Print this report after the End of Period function has been run if you want to include the current period's figures. See also the [End of Period](#).

The report includes Universal Social Charge (USC) amounts where appropriate. (For more information about the USC, see [Universal Social Charge \(USC\)](#).)

- **PRD30** - A report produced monthly that provides the total Pension-Related Deduction (PRD) taken from the payroll, and the number of relevant persons from whom it was deducted for that employment, office or position during a particular month. This report is available only when the [PRD feature is enabled](#).
- **Cash Dissection** - Provides a coinage analysis for cash-paid employees. Run this report after timesheet entry. Note that you can specify the highest denomination permissible in the Company Details window (50 or 20 only).
- **Company Audit** - Provides a report of changes made to records that may affect payroll calculation. The report includes all mandatory fields. It is available for the number of periods specified in the Audit Retention field in the Company Details window (see [Company Details Window](#)).
- **Cost Analysis** - Reports on payroll costs by department and cost centre. (However, cost centres are not available in [Micropay Professional Lite](#).) Run the End of Period function first to include the current period figures. The report represents the total cost of the employee/cost centre, not just for the hours worked, but also for all payments and all employer contributions including PRSI.
- **Departmental Time Analysis** - Reports on all 'hours' payments as defined in the pay table for the current period only. Run this report after having completed the End of Period. At the extreme right of the report is a column titled 'Cost', which displays the total cost value per employee.

See also

[Micropay Professional Standard Reports](#)

## Employee Reports

These reports are available in the Payroll Reports window's **Employee** tab. See [Generating a Standard Report](#).

- **Payslips**

Prints or e-mails (depending on the selection you make in the List box) the payslips for each employee processed during the current period. This should be run after you save all the timesheets for the current period. You will need special stationery for payslips. You can display a preview of employee payslips by clicking **Payslip** in the Timesheet Entry window.

If you want to exclude payslips from printing that will be [e-mailed to employees](#) anyway, select the **Exclude employees who get e-mail payslips** checkbox.

The payslip includes [Universal Social Charge \(USC\)](#) amounts where appropriate.

For more information about payslips, see [Viewing and Printing Payslips](#).

- **Record Cards**

Provides a hard copy of the employee's master record. An employee record card can be produced at any time but, to include the current period's figures, it should be printed after the End of Period option is processed. This requires pre-printed stationery.

- **Earnings Tax & PRSI - (Also known as the Tax Deduction Card.)**

Provides a breakdown of the gross pay, tax paid and PRSI payments for each employee per pay period during the current year. If you want the current pay period's figures included, run this report after completing the End of Period function.

The report includes [Universal Social Charge \(USC\)](#) amounts where appropriate.

- **Employee Audit**

Shows the changes made to the employee details. The report includes fields that have been altered in a way that affects an employee's pay. Such information includes tax and PRSI codes, gross pay, tax paid and all mandatory fields. This is available for the number of periods specified in the Audit Retention field in the Company Details window (see [Company Details Window](#)).

- **P45 Details/P46**

Provides P45 details for any employees marked as leavers. If the **TP Only** ('This Period Only') box is selected, employees who left in the current period will be included. If **TP Only** box is left deselected, all leavers in the current tax year will print. Run this report after the End of Period function has been completed. This report provides the information necessary to complete a P45 but is not a substitute for the official form itself. The employer's telephone and fax number are also included. You can also create a P45 ROS file, which can be uploaded directly to ROS via the website, [www.ros.ie](http://www.ros.ie).

The official Form P45 enables you to document any refund of tax from a previous employment made to the employee. In particular, Section 5 of the form includes a 'refund' checkbox. The Micropay Professional version of the P45 also displays this information by specifying either 'Refund: Yes' or 'Refund: No' in Section 5.

- **USC Cessation Cert**

The Certificate of Cessation details a leaving employee's Universal Social Charge (USC) breakdown (see [Universal Social Charge \(USC\)](#)) for the year. It shows the amount of Gross Income the employee

has earned during their **most recent** period of employment with this company, and also the total USC amount they have paid during that period of employment.

Any employee who leaves the company should be provided with a Certificate of Cessation along with their P45. The Cert is printed on plain printer paper.

The system reminds you automatically after you have printed the P45 that you also need to print the Certificate of Cessation.

- **PRD45**

This report contains the employee's Pension-Related Deduction (PRD) amount from previous employments in the relevant year. It also contains the total PRD amount for the employee in the current year.

- **Labels**

Prints employee names and addresses on label stationery. This can be printed with the employee code to the right of the name and address. Label stationery will be required for this report.

- **Absence Report**

Provides details of absence recorded on the Attendance tab of the Timesheet Entry window. If you want to include absence records for the current period, run this report after completing the End of Period function.

- **Holidays**

Provides holiday details relating to one or more employees, including accrual method, number of holidays brought forward, entitlement, number of days taken, adjustment value, and number of days due. If the accrual method is *One Third of a Week Per Calendar Month*, you can specify whether the holiday values should be expressed in terms of hours, days, or both.

- **Timesheet Forms**

Prints a data entry sheet that can be used to complete timesheets for hourly-paid employees. Optionally, by selecting the **Fixed** checkbox, you can include fixed payments on the report.

- **Timesheet Audit**

Prints a hard copy of the data entered on the timesheets - for this reason, it should be generated after completing the current period's timesheets. You can optionally include fixed payments by selecting the **Fixed** check box against this report.

- **Employee Details**

Prints a hard copy of the data entered in the Employee Details window. The report includes [Universal Social Charge \(USC\)](#) amounts where appropriate.

- **Employee (leaver) Pension Levy Report**

This report is similar to the Certificate of Cessation, but relates to the Pension-Related Deduction (see [Pension-Related Deduction \(PRD\)](#)).

- **Employee End of Year Pension Levy Report**

This report is designed to provide a summary of the employee's Pension-Related Deduction payments (see [Pension-Related Deduction \(PRD\)](#)) at Payroll Year End.

- **JLC Report**

This report shows [JLC](#)-related information. There are four optional sections in the report:

- Part 1 - Employees with incomplete JLC information
- Part 2 - Employees below the recommended JLC rate
- Part 3 - Employees compliant with JLC
- Part 4 - Employees not enabled for JLC

The JLC feature is not available in [Micropay Professional Lite](#).

See also

[Micropay Professional Standard Reports](#)

## Payment Reports

These reports are available in the Payroll Reports window's **Payments** tab. See [Generating a Standard Report](#).

- **Cheques** - Prints cheques for employees paid by cheque in the current period. You should run this report after having completed the timesheets for the current period. You will need cheque stationery for this report. The layout of cheques can be controlled using the Cheque Formatter (see [Cheque Formatter](#)).

After printing the cheques, the Cheque Numbers window displays. Here you can record the cheque numbers used for the current batch of cheques. A *Batch Register* can then be printed. This lists employees included in the current cheque run, and the cheque numbers assigned to them.

- **Cheque Register** - Lists all employees paid by cheque this pay period, along with the corresponding cheque numbers (if assigned) and cheque values. This report can be printed after you have completed the timesheets for the current period.
- **Paypath Register** - Prints a list of employees paid by Paypath in the current pay period. For each employee, the report shows the
  - employee number
  - department
  - cost centre
  - name
  - bank sort code
  - bank account code
  - Paypath amount

This report can be printed when you have completed timesheets for the current period.

- **Credit Transfer Forms** - Prints giros for employees paid by this method. Should be run after you have completed the timesheets for the current period. The report requires special giro stationery.
- **Credit Transfer Register** - Prints a list of employees paid by giro in the current period. For each employee, the report shows the
  - employee number
  - department
  - cost centre
  - name
  - bank sort code
  - bank account code
  - branch name

- giro amount

This report can be printed after timesheets have been completed for the current period.

- **Interim Paypath Register** - Prints a list of interim payments made to employees through Paypath.

See also

[Micropay Professional Standard Reports](#)

## Company Reports

- **CSO Earnings, Hours and Costs**

Prints a quarterly breakdown of payroll data for the Central Statistics Office of number of persons employed, total wages and salaries, total hours paid, total number of paid hours not worked, employer pension contributions, employer social security contributions, cost of benefits, and total subsidies and refunds received.

- **CSO NES (Part D)**

The Central Statistics Office's annual National Employment Survey (NES) Part D report is designed to compile statistical employment information from businesses of more than three employees. If your business has been selected to participate in the survey, you must return the NES report to the CSO at the end of the calendar year.

See also

[Micropay Professional Standard Reports](#)

[Step 6: Generating the CSO Earnings, Hours and Employment Costs Report](#)

[CSO National Employment Survey](#)

## CSO Reporting

Micropay Professional enables you to generate a report suitable for submission to the Central Statistics Office (CSO) for the quarterly **Earnings, Hours and Employment Cost Survey**. Micropay Professional also gathers information required by the **National Employment Survey** (NES) report.

If the CSO has selected your company for participation in either of these surveys, you should enable CSO Reporting in the payroll in Micropay Professional. It's essential to set up your payroll completely for CSO reporting at the beginning of the calendar year, before you begin processing payroll for 2010. If you leave this task until later, it may be difficult to set up the payroll retrospectively.

### Setting up CSO Reporting

[Step 1: Enabling CSO Reporting](#)

[Step 2: Setting up Payments for CSO Reporting](#)

[Step 3: Recording Paid Contracted Hours](#)

[Step 4: Recording Holiday, Absence and Other Hours](#)

[Step 5: Recording CSO Information](#)

[Why have I been asked to fill in CSO details for previous periods?](#)

[Step 6: Generating the CSO Earnings, Hours and Employment Costs Report](#)

## National Employment Survey

### [CSO National Employment Survey](#)

#### Step 1: Enabling CSO Reporting

1. In the navigation pane's Payroll view, click the **Change Main Company/Payroll Details** icon.

Alternatively, select the **Company/Payroll - Company/Payroll Details** menu option.

2. In the Company Details window, open the **CSO** tab.
3. Select the **Use CSO Reporting Feature** checkbox.
4. Type the company's CSO CBR number.
5. Click **OK**.

Micropay Professional's CSO Reporting feature is now enabled.

What do I do next?

#### [Step 2: Setting up Payments for CSO Reporting](#)

#### Step 2: Setting up Payments for CSO Reporting

All payments must be set up for CSO reporting.

1. In the navigation pane's Payroll view, click the **Edit Payments** option. Alternatively, select the **Payroll - Payments** menu option.
  - For each payment that is a redundancy payment, select **Redundancy** the Type column.
  - For each payment that is a benefit in kind, specify the BIK type in the BIK Type column.
  - For all payments that have been set up, specify in the CSO Type column whether the payment is regular pay, overtime pay or irregular pay.
  - In the NES Type column, select **Shift**, **Bonus** or **Commission** for any relevant payment.
2. Click **OK**.

A payment's NES Type can be Shift only if its Payment Type is Fixed, Variable or Hourly.

A payment's NES Type can be Bonus only if its Payment Type is Fixed or Variable.

A payment's NES Type can be Commission only if its Payment Type is Fixed or Variable.

Common CSO payment settings

Use this table as a guide to the CSO settings you would specify for some commonly used payments.

Payment	CSO Type	NES Type
<b>Salary</b>	Regular Pay	None
<b>Basic</b>	Regular Pay	None
<b>Holiday Pay/Hours</b>	Irregular Pay	None
<b>Time + 1/2</b>	Overtime	None
<b>Bonus</b>	Irregular Pay	Bonus (If Payment Type is Fixed or Variable.)
<b>Commission</b>	Irregular Pay	Commission (If Payment Type is Fixed or Variable.)
<b>Expenses</b>	Not Relevant	None



Payment	CSO Type	NES Type
<b>Subsistence</b>	Irregular Pay	None
<b>Mileage</b>	Not Relevant	None
<b>Night Shift</b>	Regular	Shift

What do I do next?

[Step 3: Recording Paid Contracted Hours](#)

See also

[Setting Up Payments](#)

### Step 3: Recording Paid Contracted Hours

It is necessary to record an employee's paid contracted hours for CSO reporting purposes.

The employee's Pay Type determines how you do this.

1. In the navigation pane's Employee view, click **Employee Details**.
2. Open the relevant employee details record in the Employee Details window.
3. Click the **Pay/YTD** tab.
4. Set the **Pay Type**.

- If the employee's pay type is **Salary**, the Contracted Hours on the [CSO Details tab](#) will be transferred into the **Contract Hrs** column in the CSO History for that period.

If a Salary employee had a Std Hours value in the [Payments tab](#) in Micropay Professional v10.1, this was transferred to the Contracted Hours field in the **CSO Details** tab when your payroll schema updated to v10.2. This Contracted Hours value is now recorded as the CSO History's Contracted Hours in the period.

- If the employee's pay type is **Hourly**, the value that is recorded as the pay period CSO History's Contracted Hours is equal to the total of all Hourly payments with the CSO type **Regular** that are processed in the pay period.

Std Hours in this case refers to the number of **Regular** hours the employee normally works. It appears as the number of hours in the first Hourly payment on the employee's timesheet.

If an Hourly employee has a Std Hours value set in the **Payments** tab, this is automatically reflected in the Contracted Hours field in the **CSO Details** tab. A change in one of these is always reflected in the other.

What do I do next?

[Step 4: Recording Holiday, Absence and Other Hours](#)

See also

[Setting Up Employees](#)

### Step 4: Recording Holiday, Absence and Other Hours

You need to record Paid Hours Not Worked for CSO reporting purposes. This can be done using Micropay Professional's [Holiday and Absence Tracking](#) feature.

In order to do this, you need to set an Hours per Working Day value in the Employee Details window's **CSO Details** tab.

1. In the navigation pane's Employee view, click **Employee Details**.
2. Open the relevant employee details record in the Employee Details window.
3. Click the **CSO Details** tab.
4. If you are using the [Holiday and Absence Tracking feature](#), set the **Hours per Working Day** value.

You can also set the Hours per Working Day value in the [Holidays tab](#). Changing the value in one tab also automatically changes it in the other.

This value is required for CSO reporting only if you use the [Holiday and Absence Tracking](#) feature of this software.

5. You may also need to set the Contracted Hours value.

What do I do next?

[Step 5: Recording CSO Information](#)

See also

[Setting Up Employees](#)

## Step 5: Recording CSO Information

You need to record occupation and employment data for each employee. This information can be changed in each pay period. The information is compiled in the Employee Details record period by period.

1. In the navigation pane's Pay Run view, click the **Edit Employees** icon.  
  
Alternatively, select the **Processing - Employee Details** menu option.
2. In the Employee Details window, open the [CSO Details Tab](#).
3. In the Employment Information section of the tab specify the following information:
  - Select an occupation status by clicking the **Browse** button beside the Occupation Status field.
  - Select the employee's employment contract type in the Type of Employment Contract drop-down list.
  - In the Employment Basis drop-down list, select either **Full Time** or **Part Time**.
  - In the CSO Occupation Category drop-down list, specify the employee's occupation category.
4. You may be prompted by the system to fill in missing CSO details for previous pay periods. You can do this by typing directly in the cells in the CSO History pane.

Alternatively, if the details you specified in the Employment Information section apply to ALL previous periods, click **Fill Blank History** to automatically fill in the CSO History pane.

5. Click **Save** to save the information you have specified for the employee.

Once this information is set up, the data required for the quarterly CSO Earnings Hours and Employment Costs survey and the National Employment Survey will be recorded in each pay period in the Employee Details window's [CSO Details Tab](#). The data is described in this table.

CSO Details tab information

Column	Description
Period	The pay period to which this line of the CSO history grid relates.

Column	Description
Type	<p>'N' signifies that this line relates to a normal payroll run. See also <a href="#">How do I set a pay period?</a></p> <p>'B' signifies that this line relates to a bonus payroll run. See also <a href="#">How do I carry out a bonus run?</a></p>
Period Date	Run Date from Set Period
Empl Basis	The employment basis of the employee in the current period. This information is derived from the Employment Basis field in the Employee Details window's CSO Details tab. The basis can be <b>Full-Time</b> or <b>Part-Time</b> .
Contr Category	The employee's employment contract category in the current period. This information is derived from the Type of Employment Contract field in the Employee Details window's CSO Details tab.
Occ Category	The employee's CSO Occupation Category in the current period. This information is derived from the CSO Occupation Category field in the Employee Details window's CSO Details tab.
Occ Status	The employee's occupation status code in the current period. This is specified in the Occupation Status field in the Employee Details window's CSO Details tab.
Regular Pay	Sum of all payments that the employee was paid in the period that are marked as <b>Regular</b> in the Payments window's CSO Type column. (See also <a href="#">Setting Up Payments.</a> )
Overtime	Sum of all payments that the employee was paid in the period that are marked as <b>Overtime</b> in the Payments window's CSO Type column. (See also <a href="#">Setting Up Payments.</a> )
Irregular pay	Sum of all payments that the employee was paid in the period that are marked as <b>Irregular</b> in the Payments window's CSO Type column. (See also <a href="#">Setting Up Payments.</a> )
Other Pay	Sum of all payments that the employee was paid in the period that do not have a CSO Type in the Payments screen. (See also <a href="#">Setting Up Payments.</a> )
Contract Hrs	The Std. Hrs value in the Employee Details window's Payments tab.
Overtime Hrs	Sum of all hours for payments to the employee in the period marked as <b>Overtime</b> in the Payments window's CSO Type column.
Holiday Hrs	(Holiday Days Taken this Period) * (Total Number of Hours in a Working Day this Period)
Sick Hours	(Sick Days - certified and uncertified - in the Timesheet in this Period) * (Total Number of Hours in a Working Day this Period)
Other Hrs	(Other Days Taken this Period) * (Total Number of Hours in a Working Day this Period)
ER Pension	Amount of pension contribution paid for the employee by the employer in the current period.
ER PRSI	Amount of PRSI paid for the employee by the employer in the current period.

Column	Description
Redundancy	Sum of all Payments paid to the employee in the period marked as <b>Redundancy</b> in the Payments window's Type column. (See also <a href="#">Setting Up Payments.</a> )
BIK Comp Car	Sum of all BIK Payments paid to the employee in the period marked as <b>Comp. Car</b> in the Payments window's BIK Type column. (See also <a href="#">Setting Up Payments.</a> )
BIK Med Ins	Sum of all BIK Payments paid to the employee in the period marked as <b>Medical Ins</b> in the Payments window's BIK Type column. (See also <a href="#">Setting Up Payments.</a> )
Staff Hse	Sum of all BIK Payments paid to the employee in the period marked as <b>Staff House</b> in the Payments window's BIK Type column. (See also <a href="#">Setting Up Payments.</a> )
BIK Other	Sum of all BIK Payments paid to the employee in the period marked as <b>Other</b> in the Payments window's BIK Type column. (See also <a href="#">Setting Up Payments.</a> )
Soc Refunds	Sum of all taxable and non-taxable disability payments paid to the employee in the period, where the employee gives the cheque to the employer.
PRSI Code	The employee's PRSI Base Code. This piece of information is required for the National Employment Survey.
Std Hrs/Day	The standard number of working hours in the day for the employee. This piece of information is required for the National Employment Survey, but is mandatory only when CSO Reporting has been enabled. (See <a href="#">Step 1: Enabling CSO Reporting.</a> )
Shift	The amount of money paid to the employee in the pay period through payments classified as <b>Shift</b> in the Payments window's NES Type column. See <a href="#">Step 2: Setting up Payments for CSO Reporting.</a> This piece of information is required for the National Employment Survey.
Bonus/Comm	The sum of the amounts of money paid to the employee in the pay period through payments classified as <b>Bonus or Commission</b> in the Payments window's NES Type column. See <a href="#">Step 2: Setting up Payments for CSO Reporting.</a> This piece of information is required for the National Employment Survey.

What do I do next?

[Step 6: Generating the CSO Earnings, Hours and Employment Costs Report](#)

See also

[CSO National Employment Survey](#)

### Why have I been asked to fill in CSO details for previous periods?

The system may lack CSO information from previous pay periods. This information is contained in the table in the Employee Details window's CSO Details tab.

If the table lacks information from previous pay periods, you may be alerted to provide the information.

If the details specified in the employee's Employment Information section (above the table) apply to all previous pay periods in the tax year, click Fill Blank History to complete the table automatically.

Otherwise, you can type the information directly into the table for each period.

See also

[Step 5: Recording CSO Information](#)

## Step 6: Generating the CSO Earnings, Hours and Employment Costs Report

The quarterly CSO Earnings, Hours and Employment Costs Survey (EHECS) report is a standard payroll report.

Even though you generate this report within a particular payroll (see also [Generating a Standard Report](#)), the report includes data from all CSO-enabled payrolls that belong to the same Registered Company as this one. (This is to comply with CSO requirements.)

You can submit the report to the Central Statistics Office in two ways:

- You can send a paper copy of the report to the Central Statistics Office. (This topic explains how.)
- However, the recommended approach is to [submit an electronic version](#) of the report (in XML format). This has a number of advantages:
  - It eliminates the need for laborious transcribing of information onto paper forms.
  - The electronic submission contains more comprehensive information.
  - It's easier for the CSO to extract the required information from an electronic data file, which means they're less likely to need to contact you.

**Note:** You can exclude an employee from the report by selecting the **Exclude Employee from CSO Reports** checkbox in the Employee Details window's [CSO Details Tab](#).

## Generating the Paper Version of the CSO EHECS Report

1. Click **Other Reports** in the navigation pane's Pay Run view, or **Other Reports** in the desktop process map.

Alternatively, select the **Reports - Payroll Reports** menu option.

2. In the Payroll Reports window's **Company** tab, select the **CSO Earnings Hrs & Costs** radio button.
3. To generate a paper copy of the report, click **Print**.
4. In the dialogue box that opens, specify the quarter of the year for which you want to generate the report, and then click **OK**.
5. The Payroll Summary screen opens. This provides a list of the payrolls that will be included in the report. It includes all payrolls associated with the same licensed company as the current payroll, excluding those for which CSO reporting is disabled. A payroll will also be excluded from the report if no pay period has been completed in it in the current year.
6. Click **Continue**.
7. The Company Reports window opens. Here you must enter the [password](#) of each payroll you wish to include in the report.
8. Click **Continue** to generate the report.
9. The report displays onscreen, or is printed, as appropriate.

Paper submissions must be made on official CSO stationery, which contains sections relating to values not recorded in the payroll system. The information in the report you have generated should be transcribed to the official CSO stationery before submission.

10. The final page(s) of the report may indicate employees or payments that are not correctly categorised. These must be correctly categorised before the EHECS report is submitted to the CSO.

The report is organised into several parts, which are detailed here.

See also

[Generating the XML version of the EHECS report](#)

[What EHECS data is not entered automatically in the XML file](#)

[CSO Reporting](#)

[Generating a Standard Report](#)

### About the Earnings, Hours and Employment Costs Survey

The report is organised into several parts.

#### Part 1 - Number of Persons Employed

Item	Description
Number of Full Time Employees employed at the first day of the quarter in each of these CSO Categories:	A count of the employees in each CSO category who have a history record for any type of pay (Regular Pay, Overtime or Bonus) in the employee CSO history for the first pay period of the quarter.
Managers, Administrators, Professionals and Associate Professionals	Excludes any employees who were on the payroll and received no wages at the first pay date of the quarter.
Clerical, Sales & Service Workers	Apprentices are excluded from this count.
Production, Transport Workers, Craft and Trade Persons, and Other Manual Workers	

Item	Description
<p>Number of Full Time Employees, in each of the CSO Categories:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Production, Transport Workers, Craft and Trade Persons, and Other Manual Workers</p> <p>at the last day of the quarter</p>	<p>A count of the Full Time employees in these CSO categories who have CSO history for any type of pay (Regular Pay, Overtime or Bonus) for the last pay period of the quarter.</p> <p>Excludes any employees on the payroll that received no wages for the last period of the quarter.</p> <p>Also excludes Apprentices.</p>
<p>Number of Full Time Employees hired during the quarter in each of these CSO Categories:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Production, Transport Workers, Craft and Trade Persons, and Other Manual Workers</p>	<p>A count of the Full Time employees in these CSO categories who have a start date that is within the reporting quarter.</p> <p>Apprentices are excluded from this count.</p>

Item	Description
<p>Number of Part Time employees at the first day of the quarter in each of these CSO Categories:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Production, Transport Workers, Craft and Trade Persons, and Other Manual Workers</p>	<p>A count of the Part Time employees in these categories who have a history record for any type of pay (Regular Pay, Overtime, Bonus), in the employee CSO history for the first pay period of the quarter.</p> <p>Excludes any employees who were on the payroll and received no wages at the first pay date of the quarter.</p> <p>Apprentices are excluded from this count.</p>
<p>Number of Part Time at the last day of the quarter in each of these CSO Categories:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Production, Transport Workers, Craft and Trade Persons, and Other Manual Workers</p>	<p>A count of the Part Time employees in these CSO categories who have a history record with any type of pay (Regular Pay, Overtime, Bonus) for the last pay period of the quarter.</p> <p>Excludes any employees on the payroll that received no wages for the last period of the quarter.</p> <p>Apprentices are excluded from this count.</p>



Item	Description
<p>Number of Part Time hired during the quarter (if started during the quarter) in each of these CSO Categories:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Production, Transport Workers, Craft and Trade Persons, and Other Manual Workers</p>	<p>A count of the Part Time employees in these CSO categories who have a start date that is within the reporting quarter.</p> <p>Apprentices are excluded from this count.</p>
<p>Average number of apprentices engaged in the business during the quarter in each of the CSO categories:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Production, Transport Workers, Craft and Trade Persons, and Other Manual Workers</p>	<p>This is calculated by summing the number of apprentices in these CSO Categories paid at each pay period during the quarter (i.e. who have a history record for any type of Pay - Regular, Overtime, Bonus) and dividing this total by the number of Pay Periods in the quarter</p> <p>e.g. if all apprentices are paid weekly and it is a 13 week, add the total number of apprentices on the pay roll each week and divide this total by 13.</p>
Average number of other persons engaged	Those who are not paid a definite wage or salary. Examples of such individuals include proprietors, unpaid family members and unpaid voluntary workers.
Job vacancies	<p>The number of job vacancies (post that are newly created, unoccupied or about to become vacant, which the employer intends to fill immediately or in the near future) in your organisation at end of the quarter.</p> <p>For the purpose of this survey, job vacancies that are open only to candidates from within the enterprise should be excluded.</p>

Item	Description
National Minimum Wage	<p>The National Minimum Wage Act 2000 became law on 1st April 2000. You are asked to indicate the number of employees in receipt of € 8.65 per hour or less at the end of the quarter. The National Minimum Wage Rate does not apply to:</p> <ul style="list-style-type: none"> <li>▪ Close relatives of the employer, such as a spouse, father, mother, son, daughter, brother or sister</li> <li>▪ Apprentices, other than apprentice hairdressers</li> <li>▪ Trainees</li> </ul>

## Part 2 - Total Wages and Salaries

Item	Description
<p>Regular Wages and Salaries for Full Time employees in these CSO categories:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Production, Transport Workers, Craft and Trade Persons, Other Manual Workers</p>	<p>A sum of the Regular Wages and Salaries in the employee's CSO History for all pay periods in the reporting quarter for Full Time employees in these CSO categories (not including Apprentices).</p>
<p>Overtime Pay for Full Time employees in these CSO categories:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Production, Transport Workers, Craft and Trade Persons, Other Manual Workers</p>	<p>A sum of the Overtime Pay in the employee's CSO History for all pay periods in the reporting quarter for Full Time employees in these CSO categories (not including Apprentices).</p>

Item	Description
<p>Irregular bonuses and Allowances for Full Time employees in these CSO categories:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Production, Transport Workers, Craft and Trade Persons, Other Manual Workers</p>	<p>A sum of the Irregular bonuses and Allowances in the employee's CSO History for all pay periods in the reporting quarter for Full Time Employees, in these CSO Categories. (Not including apprentices.)</p>
<p>Regular Wages and Salaries for Part Time employees in these CSO categories:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Production, Transport Workers, Craft and Trade Persons, Other Manual Workers</p>	<p>A sum of the Regular Wages and Salaries in the employee's CSO History for all pay periods in the reporting quarter for Part Time Employees, in these CSO Categories. (Not including apprentices.)</p>
<p>Overtime Pay for Part Time employees in these CSO categories:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Production, Transport Workers, Craft and Trade Persons, Other Manual Workers</p>	<p>A sum of the Overtime Pay in the employee's CSO History for all pay periods in the reporting quarter for Part Time Employees, in these CSO Categories. (Not including apprentices.)</p>

Item	Description
<p>Irregular bonuses and Allowances for Part Time employees in these categories:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Production, Transport Workers, Craft and Trade Persons, Other Manual Workers</p>	<p>A sum of the Irregular bonuses and Allowances in the employee's CSO History for all pay periods in the reporting quarter for Part Time Employees, in these CSO Categories. (Not including apprentices.)</p>
<p>Total wages and salaries for Apprentices in these CSO categories:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Production, Transport Workers, Craft and Trade Persons, Other Manual Workers</p>	<p>A sum of all pay (Regular Wages and Salaries, Overtime and Irregular Bonuses and Allowances) in the employee's CSO History for all pay periods in the reporting quarter for Apprentice Employees, in these CSO Categories.</p>

## Part 3 - Total Hours Paid

Item	Description
<p>Paid Contracted Hours for employees in these CSO categories:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Production, Transport Workers, Craft and Trade Persons, Other Manual Workers</p>	<p>A sum of the Paid Contracted Hours the employee's CSO History for all pay periods in the reporting quarter for Full-time Employees (Excluding Apprentices) in these CSO Categories.</p>
<p>Paid Overtime Hours for employees (excluding apprentices) in these CSO categories:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Production, Transport Workers, Craft and Trade Persons, Other Manual Workers</p>	<p>A sum of the Overtime Hours the employee's CSO History for all pay periods in the reporting quarter for Full-time Employees (Excluding Apprentices), in these CSO Categories.</p>

Item	Description
<p>Paid Contracted Hours for Part time employees in these CSO categories:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Production, Transport Workers, Craft and Trade Persons, Other Manual Workers</p>	<p>A sum of the Paid Contracted Hours the employee's CSO History for all pay periods in the reporting quarter for Part-time Employees (Excluding Apprentices), in these CSO Categories:</p>
<p>Paid Overtime Hours for Part Time Employees (excluding apprentices) in these CSO Categories:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Production, Transport Workers, Craft and Trade Persons, Other Manual Workers</p>	<p>A sum of the Overtime Hours the employee's CSO History for all pay periods in the reporting quarter for Part-time Employees (Excluding Apprentices), in these CSO Categories.</p>

Item	Description
<p>Paid Contracted Hours for Apprentices in the following CSO categories:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Production, Transport Workers, Craft and Trade Persons, Other Manual Workers</p>	<p>A sum of the Paid Contracted Hours in the employee's CSO History for all pay periods in the reporting quarter for Apprentices, in these CSO Categories.</p>
<p>Paid Overtime Hours for Apprentices, in these CSO Categories:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Production, Transport Workers, Craft and Trade Persons, Other Manual Workers</p>	<p>A sum of the Overtime Hours in the employee's CSO History for all pay periods in the reporting quarter for Apprentices, in these CSO Categories.</p>

## Part 4 - Total Number of Paid Hours not worked

Item	Description
<p>Annual Leave and Bank Holidays for Full Time employees in these CSO categories:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Transport Workers, Craft and Trade Persons, Other Manual Workers</p>	<p>A sum of the Holiday Hours in the employee's CSO History for all pay periods in the reporting quarter for full-time employees, in these CSO Categories. (Not including apprentices.)</p>
<p>Maternity Leave Full Time Employees in these CSO categories:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Transport Workers, Craft and Trade Persons, Other Manual Workers</p>	<p>Total number of hours in the quarter that were paid but not worked due to maternity leave taken by full time employees in these CSO categories. This total should exclude any unpaid leave.</p>
<p>Sick Leave for Full time employees in the category:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Transport Workers, Craft and Trade Persons, Other Manual Workers</p>	<p>A sum of the Sick Hours in the employee's CSO History for all pay periods in the reporting quarter for Full time employees, in these CSO Categories. (Not including apprentices.)</p>



Item	Description
<p>Other Leave for Full time employees in the CSO categories:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Transport Workers, Craft and Trade Persons, Other Manual Workers</p>	<p>A sum of the Other Hours in the employee's CSO History for all pay periods in the reporting quarter for Full time employees in these CSO categories. (Not including apprentices.)</p>
<p>Annual Leave and Bank Holidays for Part Time employees in the CSO categories:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Transport Workers, Craft and Trade Persons, Other Manual Workers</p>	<p>A sum of the Holiday Hours in the employee's CSO History for all pay periods in the reporting quarter for part-time employees in these CSO categories. (Not including apprentices.)</p>
<p>Maternity Leave Part-Time employees in the CSO categories:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Transport Workers, Craft and Trade Persons, Other Manual Workers</p>	<p>Total number of hours in the quarter that were paid but not worked due to maternity leave taken by part-time employees in these CSO categories. This total should exclude any unpaid leave.</p>

Item	Description
<p>Sick Leave Part time employees in these categories:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Transport Workers, Craft and Trade Persons, Other Manual Workers</p>	<p>A sum of the Sick Hours in the employee's CSO History for all pay periods in the reporting quarter for part-time employees in these CSO categories. (Not including apprentices.)</p>
<p>Other Leave Part time employees in the category:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Transport Workers, Craft and Trade Persons, Other Manual Workers</p>	<p>A sum of the Other Hours in the employee's CSO History for all pay periods in the reporting quarter for part-time employees, in these CSO categories. (Not including apprentices.)</p>
<p>Total number of hours paid but not worked by apprentices in these categories:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Transport Workers, Craft and Trade Persons, Other Manual Workers</p>	<p>A sum of the Holiday Hours, Sick Hours and Other Hours in the employee's CSO History for all pay periods in the reporting quarter for Apprentices, in these CSO Categories. (Not including apprentices.)</p>

## Part 5 - Employer's Pension Contributions

Item	Description
Employer's Contributions to Pensions for all employees, including Apprentices, for employees in the category:	A sum of the Employer's Contributions to Pensions in the employee's CSO History for all pay periods in the reporting quarter for all Employees (including Apprentices), in the CSO Category: Managers, Administrators, Professionals and Associate Professionals
Managers, Administrators, Professionals and Associate Professionals	
Clerical, Sales & Service Workers	
Production, Transport Workers, Craft and Trade Persons, Other Manual Workers	

## Part 6 - Employer's Liability Insurance

The total of the employer's liability insurance paid during the quarter.

If you have a combined insurance policy you must include just the portion of the premium that relates to employer's liability.

If the employer's liability insurance is paid by an annual premium, this amount should be entered only in the quarter in which it is paid.

If this insurance is paid in more than one instalment, enter the actual amount paid during the quarter.

## Part 7 - Total Employer's Social Security Contributions

Item	Description
Employers PRSI for all Employees (excluding Apprentices) in the CSO Category:	A sum of the Employer's PRSI in the employee's CSO History for all pay periods in the reporting quarter for all Employees (excluding Apprentices) in these CSO Categories.
Managers, Administrators, Professionals and Associate Professionals	
Clerical, Sales & Service Workers	
Production, Transport Workers, Craft and Trade Persons, Other Manual Workers	

Item	Description
<p>Income continuance insurance for all Employees (excluding Apprentices), in these CSO Categories:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Production, Transport Workers, Craft and Trade Persons, Other Manual Workers</p>	<p>The total cost to the employer of income continuance insurance for all full time and part time employees in these CSO categories.</p> <p>The actual cost to the employer is required here. Exclude any amounts that are refunded to the employer through, for example, deductions from employees' wages.</p>
<p>Redundancy for all Employees (excluding Apprentices) in these CSO categories:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Production, Transport Workers, Craft and Trade Persons, Other Manual Workers</p>	<p>A sum of the Redundancy Pay in the employee's CSO History for all pay periods in the reporting quarter for all Employees (excluding Apprentices) in these CSO Categories.</p>

Item	Description
<p>Other employee related payments for all Employees (excluding Apprentices) in these CSO Categories:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Production, Transport Workers, Craft and Trade Persons, Other Manual Workers</p>	<p>The total cost to the employer of other employee-related payments to all full time and part time employees in these CSO categories.</p>
<p>Total Social Contributions for Apprentices in the CSO Categories:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Production, Transport Workers, Craft and Trade Persons, Other Manual Workers</p>	<p>A sum of the Redundancy Pay and Employer PRSI in the employee's CSO History for all pay periods in the reporting quarter for all Apprentices in these CSO Categories.</p>

## Part 8 - Total Cost to the Employer of Benefits Provided to Employees (excluding Apprentices)

Item	Description
<p>Private use of company cars for all employees excluding apprentices in the CSO Categories:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Production, Transport Workers, Craft and Trade Persons</p> <p>Craft, Other Manual Workers</p>	<p>A sum of the Comp Car BIK amounts in the employee's CSO History for all pay periods in the reporting quarter for all employees excluding Apprentices in these CSO Categories.</p>
<p>Stocks and Shares for all employees excluding apprentices in the CSO Categories:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Production, Transport Workers, Craft and Trade Persons, Other Manual Workers</p>	<p>The total cost to the employer of stock options and share purchase schemes provided to all full time and part time employees in these CSO categories during the quarter.</p> <p>The actual cost to the employer is required here. Exclude any amounts refunded to the employer through, for example, deductions from employees' wages.</p>

Item	Description
<p>Voluntary Sickness Insurance for all employees excluding apprentices in the CSO Categories:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Production, Transport Workers, Craft and Trade Persons, Other Manual Workers</p>	<p>A sum of the Medical Insurance BIK amounts in the employee's CSO History for all pay periods in the reporting quarter for all employees excluding Apprentices in these CSO Categories.</p>
<p>Staff Housing for all employees excluding apprentices in the CSO Categories:</p> <p>Managers, Administrators, Professionals and Associate Professionals</p> <p>Clerical, Sales &amp; Service Workers</p> <p>Production, Transport Workers, Craft and Trade Persons Craft, Other Manual Workers</p>	<p>A sum of the Staff Housing BIK amounts in the employee's CSO History for all pay periods in the reporting quarter for all employees excluding Apprentices in these CSO Categories.</p>

Item	Description
Other free or subsidised benefits for all employees excluding apprentices in the CSO Categories:	A sum of the Other BIK amounts in the employee's CSO History for all pay periods in the reporting quarter for all employees excluding Apprentices in these CSO categories.
Managers, Administrators, Professionals and Associate Professionals	
Clerical, Sales & Service Workers	
Production, Transport Workers, Craft and Trade Persons, Other Manual Workers	

#### Part 9 - Total Other Labour Costs for All Employees

The total cost to the employer of any other labour-related expenditure for the quarter:

- Training Costs
  - Expenditure on training services and facilities
  - Expenditure on participation in courses
  - Fees of instructors from outside the enterprise
  - Expenditure on teaching aids and tools used for training
  - Sums paid by the enterprise to training organisations
- Other Expenditure
  - Recruitment and relocation costs (Amounts paid to recruitment agencies, expenditure on job advertisements in the media, travel expenses paid to candidates called for interview, installation allowances paid to newly recruited staff, etc.)
  - Uniforms/working clothes provided by the employer
  - Recruitment costs
  - Relocation costs (sums paid to employees to cover relocation expenses, etc.)

**Note:** Do not include staff or apprentice/trainee wages, or administration costs such as office expenses.

#### Part 10 - Total Subsidies and Refunds Received

Item	Description
Training Subsidies for all employees (including apprentices) in all CSO Categories	Total amount of training subsidy received/receivable for the quarter, such as FAS subsidies.



Item	Description
Other subsidies for all employees (including apprentices) in all CSO Categories	Total amount of any employment subsidy received/receivable for the quarter, such as IDA employment subsidies.
Refunds from Social Welfare for all employees (including apprentices) in all CSO Categories	A sum of the Refunds from Social Welfare in the employee's CSO History for all pay periods in the reporting quarter, for all employees, including Apprentices, in all CSO Categories.

**See also**

[Generating the XML version of the EHECS report](#)

[What EHECS data is not entered automatically in the XML file](#)

[CSO Reporting](#)

[Generating a Standard Report](#)

**Generating the XML Version of the EHECS Report**

You can submit the EHECS report to the Central Statistics Office (CSO) by:

- posting the [paper version \(on official CSO stationery\)](#)
- uploading the electronic XML version on the CSO web site (see below)

To submit the report electronically, you need an online CSO account.

Contact the CSO for information on how to set up an online account. This enables you to use the 'CSO Secure Deposit Box' for XML file submission.

The CSO's contact numbers are:

- LowCall: 1890 313 414 (ROI)
- 0870-8760256 (UK/NI)

**Some Information is System-Generated**

Some of the information required to complete the EHECS report is contained in the payroll system, and will be entered in the electronic version of the report automatically when you are generating it.

However, other items of information are not contained in the payroll system and will have to be determined by you and entered manually. [Click here for more information.](#)

**Note:** You can also edit the system-generated information, if necessary.

**Preparation**

To generate the electronic version of the EHECS report, we recommend that you begin by gathering together [all the necessary information](#).

Some of the information is not managed in the Payroll system, and so is [not included in the report automatically](#).

Then print out the [paper version of the report](#) and review the figures.

### Generating the data file

Finally, carry out these steps:

1. Click **Other Reports** in the navigation pane's Pay Run view, or **Other Reports** in the desktop process map.

Alternatively, select the **Reports - Payroll Reports** menu option.

2. In the Payroll Reports window's **Company** tab, click the **Create EHECS Data File** button.
3. The Payroll Summary window opens. This lists the payrolls that will be included in the report, and reminds you that all the company's payrolls must be included.

Click **Continue**.

4. The Company Reports window opens. Here you must select each payroll that you want to include in the report. (Again, all the company's payrolls must be included in the report you submit to the CSO.) Click the **Include** checkbox of each relevant payroll.
5. Enter the password of each selected payroll.
6. Click **Continue**.
7. The EHECS report wizard opens. The first page reminds you that [some items of information are entered in the report automatically, whereas you'll need to determine and enter other values manually](#). You can print a summary of the information not automatically generated by clicking **Print Table**.
8. Click **Next**.
9. Select the relevant reporting quarter.
10. Select the type of return you wish to submit. There are two options:

- Original Return
- Amended Return

### Include ALL data in an Amended Return

An amended EHECS return submitted after a previous submission for that quarter **MUST** contain all the unamended information from the original submission as well as any information that has been amended.

This is because the latest version of an EHECS return replaces previous versions of that quarter's return. The latest return (identified by the date in the file name) will overwrite all previous returns for that quarter when it is uploaded on the CSO web site.

### Example:

Suppose that a payroll manager decides to return the XML file with just the payroll-related data for Quarter 1 2007. The payroll manager subsequently receives additional non-payroll data, and now needs to submit an amended return. This amended return must include both the payroll-related data submitted on the original return **AND** the non-payroll related data.

If it only contains amended data, the latest return will overwrite all the payroll data contained on the original return, and the payroll data will then be read into the CSO system as zeroes.

11. Click **Next**.
12. You may also need to specify the Minimum Wage rate that applied in the quarter for which you are generating the report.
13. Parts 1 and 2 of the report are displayed. Add and edit information as necessary. Every field must contain a value, even if the value is **0**.

The **Override system-generated values** button enables you to edit the information entered automatically

by the payroll .

14. When you have entered all the necessary information, click **Next**.
15. Repeat the process for each page of the wizard in turn until all ten parts of the report are complete.
16. Click **Next**.
17. The next page in the wizard prompts you to provide contact information and any comments that you think will help the CSO staff to interpret the data you are submitting.

Sage strongly recommends that you make use of the Comments facility. The comments will help the CSO to interpret your data, and so should help them to avoid the need to contact you with follow-up queries.

18. Click **Next** when you have completed this page.
19. If the system detects any discrepancies in the information you have entered, the next page displays a validation report summarising the discrepancies. You can view detailed information if necessary. Because you should resolve these issues before you submit the report to the CSO, you can't proceed at this stage unless you acknowledge that you are aware of the discrepancies. Select the **I understand...** checkbox to do so.
20. Click **Next** to generate the XML file. The file can be saved in the specified location, or you can **Browse** to your own location.

Each Registered Company licensed in the payroll system has its own sub-folder in the main Micropay Professional directory. Within this sub-folder, the XML file is stored in CSO\EHECS.

The XML file is named by the payroll system according to the following scheme:

**CBR\_Yr\_Qtr\_DDMMYYYY\_HHMMSS.XML**

where

- CBR = The enterprise number or the employer submitting the file.
- Yr = The four-digit year that the data contained in the XML file relates to.
- Qtr = The quarter of the year that the data contained in the XML file relates to.
- DDMMYYYY = The date that the XML file was created.
- HHMMSS = The time that the XML file was created (using a 24 hour clock).

A log file is generated for each XML file you generate. This log records details of any system-generated values you amended during the wizard process.

21. Click **Create**.
22. The final page of the wizard confirms that you have generated the XML version of the report. Click **Done** to close the wizard.

**Note:** At this stage you can print a paper copy of the report for your records by clicking **Print Report (for your records)**. Bear in mind, however, that this is not an official report that you can send to the CSO.

### What EHECS data is not entered automatically in the XML file?

Certain information is not recorded in the payroll system, and so must be determined by you and entered manually when you are [generating the XML file](#).

The report is divided into [ten parts](#). The items not entered automatically by the system are detailed below:

Part 1 – Number of Persons Employed

- National Minimum Wage

The National Minimum Wage Act 2000 became law on 1st April 2000. You are asked to indicate the number of employees in receipt of € 8.65 per hour or less at the end of the quarter. The National Minimum Wage Rate does not apply to:

- Close relatives of the employer, such as a spouse, father, mother, son, daughter, brother or sister
- Apprentices, other than apprentice hairdressers
- Trainees
- Job Vacancies at End of Quarter

You are asked to indicate the number of job vacancies in your organisation as at end of the quarter. A is defined as a post (newly created, unoccupied or about to become vacant) which the employer intends to fill either immediately or in the near future. For the purpose of this survey, job vacancies that are to candidates from within the enterprise should be excluded.

#### Part 4 – Total Number of Paid Hours Not Worked

Depending on whether you record absence and leave information in the payroll system, the following items **may or may not** be automatically entered in the XML file. They include paid absences during the quarter for full-time employees, part-time employees and apprentices/trainees.

- Annual Leave (Full-Time Employees)
- Annual Leave (Part-Time Employees)
- Maternity Leave (Full-Time Employees)
- Maternity Leave (Part-Time Employees)
- Sick Leave (Full-Time Employees)
- Sick Leave (Part-Time Employees)
- Other Leave (Full-Time Employees)
- Other Leave (Part-Time Employees)
- All Leave for Apprentices

#### Part 5 – Employer's Pension Contributions

- Employer's Pension Contributions (not accounted for through payroll)

This refers to the employer's contribution only for all employees, including apprentices/trainees. Do not include the employee contribution.

#### Part 6 – Employer's Liability Insurance

- Employer's Liability Insurance

Please note that if you have a combined insurance policy you must only include the portion of the premium that relates to employer's liability.

If the employer's liability insurance is paid by an annual premium, then this amount should be entered only in the quarter in which it is paid.

If this insurance is paid in more than one instalment, then the amount to be entered is the actual amount paid during the quarter.

#### Part 7 – Total Employer's Social Security Contributions for ALL EMPLOYEES

- Income Continuance Insurance
- Other Employee Related Payments (such as Study Grants)

- Total Social Security Contributions (Apprentices)

If possible, the figures for redundancy payments should be net of any rebates paid or payable by the Department of Enterprise, Trade and Employment.

However, if only the gross amount of redundancy payments can be provided in Part 7, then the rebates from the Department of Enterprise, Trade and Employment must be included under Part 10 "Refunds from Dept. of Social Protection/ Dept. of Enterprise, Trade & Employment".

A breakdown of figures is not required for apprentices/trainees, only total employer's social security contributions.

#### Part 8 – Total Cost to the Employer for Benefits Provided to Employees

- Stock Options and Share Schemes

Part 8 as a whole refers to the total net cost of all goods and services made available to employees (excluding apprentices/trainees) by the employer.

General rule: The amount to be entered is the cost to the employer of providing the benefit, less any amount contributed by the employee. If the benefit is taxable (i.e. a benefit in kind), then the amount of 'notional pay' calculated for the purpose of making returns to the Revenue Commissioners may be entered as the cost to the employer.

These costs mainly consist of:

- Private use of company cars (not the value or cost of the car)
- Stock options and Share purchase schemes: The cost of Stock options should be calculated as the difference between the market price of the shares on the vesting date and the price charged to employees. **This value will not be generated by the system when you're creating the XML file.**
- Voluntary sickness insurance (VHI, Quinn Healthcare, etc.)
- Staff housing
- Other free or subsidised benefits (e.g. parking, meals, mobile phone, canteen, creche, free or discounted company products, preferential loans, sports & recreational facilities, professional subscriptions, etc.)

#### Part 9 – Total Other Labour Costs for ALL EMPLOYEES

- Training Costs

These include expenditure on training services and facilities, expenditure on participation in courses, the fees of instructors from outside the enterprise, expenditure on teaching aids and tools used for training, sums paid by the enterprise to training organisations, etc. Do not include apprentices'/ trainees' wages.

- Other Expenditure (e.g. Recruitment Costs)

This includes:

- Recruitment costs (these are the sums paid to recruitment agencies, expenditure on job advertisements in the media, travel expenses paid to candidates called for interview, installation allowances paid to newly recruited staff, etc. It does not include administration running costs (office expenses, staff wages, etc.)
- Relocation costs (sums paid to employees to cover relocation expenses, etc.)
- Working clothes provided by the employer

#### Part 10 – Total Subsidies and Refunds Received for ALL EMPLOYEES

- Training Subsidies (such as FAS)
- Other Subsidies (such as IDA employment Subsidies)
- Refunds from Social Welfare (such as Sick and Maternity Benefits)

Subsidies received are all amounts received intended to refund part or all of the cost of wages and salaries and training costs (e.g. FAS, etc).

**Refunds from Department of Social & Family Affairs:** This is the amount received/receivable by the employer from the Department of Social & Family Affairs to refund part or all of the cost of the wages and salaries of employees on paid sick leave or maternity leave etc. These refunds should only be entered in Part 10 if the amount received/receivable from the Department is included under Regular Wages & Salaries in Part 2.

**Refunds from Department of Enterprise, Trade & Employment:** This is the rebate received/receivable from the Department of Enterprise, Trade & Employment in respect of statutory redundancy payments. These refunds should only be entered in Part 10 if the amount received/receivable from the Department is included under Redundancy Payments in Part 7.

[Click here](#) for the official CSO document.

### CSO National Employment Survey

The Central Statistics Office's annual National Employment Survey (NES) report is designed to compile statistical employment information from businesses of more than three employees. If your business has been selected to participate in the survey, you must return the NES report to the CSO at the end of the calendar year.

The report must cover all payrolls belonging to the current company.

There are two ways to complete the survey:

- You can post a paper copy of the report to the CSO. (This topic explains how.)
- However, the **recommended approach** is to [generate an electronic version of the NES](#), which you can then upload to the CSO website. This has a number of advantages:
  - It eliminates the need for laborious transcribing of information onto paper forms.
  - The electronic submission contains more comprehensive information.
  - You can re-open and edit a CSO NES data file you created previously.
  - It's easier for the CSO to extract the required information from an electronic data file, which means they're less likely to need to contact you.

### Generating the paper version of the NES report

1. Click the **Other Reports** icon in the desktop process map.

Alternatively, click **Reports and Payslips** in the navigation pane's Pay Run view, or select the **Reports - Payroll Reports** menu option.

2. The Payroll Reports window opens. In the **Company** tab, select the **CSO NES (Part D)** checkbox.
3. Click **Print** or **Preview**, as appropriate.

Alternatively, click the **PDF** button to generate a PDF version of the report.

4. The CSO NES Report Settings window opens. Here you specify the month that the report should cover, and the sampling fraction (the number of randomly selected employees whose data will be used for the report's data).

5. Click **OK** to continue.
6. The Payroll Summary screen opens. This provides a list of the payrolls that will be included in the report. This includes all payrolls associated with the same company as the current payroll, excluding those for which CSO reporting is disabled. A payroll will also be excluded from the report if no pay period has been completed in it in the current year.
7. Click **Continue**.
8. The Company Reports window opens. Here you must enter the [password](#) of each payroll you wish to include in the report.
9. Click **Continue** to generate the report.

The report is printed or displayed onscreen, as appropriate.

See also

[CSO Reporting](#)

### Generating the XML Version of the CSO NES Report

You can submit the NES report to the Central Statistics Office (CSO) by:

- posting the [paper version \(on official CSO stationery\)](#)
- uploading the electronic XML version on the CSO web site (see below)

To submit the report electronically, you need an online CSO account.

Contact the CSO for information on how to set up an online account. This enables you to use the 'CSO Secure Deposit Box' for XML file submission.

The CSO's contact numbers are:

- LoCall: 1890 313 414 (ROI)
- 0870-8760256 (UK/NI)

### Generating the XML file

1. Click **Other Reports** in the navigation pane's Pay Run view.
2. In the Payroll Reports window's **Company** tab, click the **Create NES (Part D) Data File** button.

You are presented with a sequence of screens that guide you through the process of generating the CSO NES data file:

- [Payroll Summary screen](#)
- [Company Reports screen](#)
- [Select Return Type](#)
- [NES Settings](#)
- [PART D1 - Annual Values](#)
- [PART D2 - Reference Period Values](#)
- [Employee Addresses](#)
- [Declaration](#)
- [Create Data File](#)

### Payroll Summary screen

The first stage in [generating the XML Version of the CSO NES Report](#) is to review the information in the Payroll Summary window.

This lists the payrolls that will be included in the report, and reminds you that all the company's payrolls must be included.

If there are any issues that need to be addressed before the report can be generated, they will be outlined here.

Click **Continue** to proceed to [Company Reports](#).

### See also

- [Select Return Type](#)
- [NES Settings](#)
- [PART D1 - Annual Values](#)
- [PART D2 - Reference Period Values](#)
- [Employee Addresses](#)
- [Declaration](#)
- [Create Data File](#)

### Company Reports screen

The second stage in [generating the XML Version of the CSO NES Report](#) is to select the payrolls you want to include.

1. In the Company Reports window, select the **Include** checkbox of each relevant payroll.
2. Provide a [password](#) for each payroll that requires one.
3. Click **Continue** to proceed to [Select Return Type](#).

### See also

- [Payroll Summary screen](#)
- [NES Settings](#)
- [PART D1 - Annual Values](#)
- [PART D2 - Reference Period Values](#)
- [Employee Addresses](#)
- [Declaration](#)
- [Create Data File](#)

### Select Return Type

The third stage in [generating the XML Version of the CSO NES Report](#) is to select the return type:

- Select **Original** if you are creating an NES return for the relevant quarter for the first time.
- Select **Amended** if you need to revise a return you have already created.

Click **Next** to proceed.

If you selected **Amended** above, the system now prompts you to select the NES file you created previously.

Otherwise, the report wizard moves on to [NES Settings](#).



### See also

- [Payroll Summary screen](#)
- [Company Reports screen](#)
- [PART D1 - Annual Values](#)
- [PART D2 - Reference Period Values](#)
- [Employee Addresses](#)
- [Declaration](#)
- [Create Data File](#)

### NES Settings

The fourth stage in [generating the XML Version of the CSO NES Report](#) is to select the report's Reference Month and Sampling Fraction.

Generally, the Reference Month is **October**.

#### Are you generating the report for the correct year?

Make sure you're generating the NES report for the right tax year. [Click here](#) for more information.

The Sampling Fraction is the number of randomly selected employees who will be included in the report.

A portion of the NES survey must be completed by the selected employees by hand. Select the **Click this box to send the forms...** checkbox if you want the CSO to send the form to each relevant employee's home. Otherwise the forms will be sent to the company address.

Click **Next** to proceed to [PART D1 - Annual Values](#).

### See also

- [Payroll Summary screen](#)
- [Company Reports screen](#)
- [Select Return Type](#)
- [PART D2 - Reference Period Values](#)
- [Employee Addresses](#)
- [Declaration](#)
- [Create Data File](#)

#### Am I generating the NES return for the right year?

To [generate an NES return](#) for a particular tax year, you need to be logged into that tax year in Micropay Professional.

For example, to [generate an NES XML file](#) for 2011, you need to be logged into Micropay Professional 2010.

To do this, carry out one of the following steps:

- Double-click the **Micropay Professional 2010** shortcut icon on your desktop.
- In your Windows **Start** menu, select **All Programs - Micropay Professional - 2010 - Micropay Professional**.

### Part D1 - Annual Values

The fifth stage in [generating the XML Version of the CSO NES Report](#) is to check and make any necessary adjustments to the system-generated annual values that will be added to the NES report.

These annual values relate to the sampled employees, and cover the entire tax year.

1. Check whether the information is correct.
2. If there are any issues with the employee data that prevent the report wizard from proceeding, they will be outlined on this screen. The system performs a validation check on the values, and will alert you to any possible discrepancies.
3. Select the **Override System Values** checkbox if you need to make any changes to the values.
4. Click **Next** to proceed to [PART D2 - Reference Period Values](#).

Annual values in the NES electronic file

Field	Description
<b>Code</b>	The employee's Works Number in the payroll system.
<b>Name</b>	The employee's full name.
<b>PPS Number</b>	The employee's Personal Public Service number.
<b>Annual Earnings</b>	Total gross annual earnings including notional pay for the relevant year.
<b>Irregular Bonuses</b>	Total <b>irregular</b> bonuses, allowances and commissions included in Gross Earnings in the year, rounded to the nearest Euro.
<b>Benefit in Kind</b>	Notional pay included in Gross Earnings.
<b>No. of Weeks</b>	Number of weeks to which the Gross Earnings relate.
<b>Paid Holidays</b>	Number of paid hours of annual leave entitlement for the relevant year.  This information is entered automatically by the system if you use the <a href="#">Holiday Accrual and Processing</a> feature. Otherwise you'll need to enter the information manually.
<b>Other Absence</b>	Number of paid hours of all other absences for the relevant year.  This information is entered automatically by the system if you use the <a href="#">Holiday Accrual and Processing</a> feature. Otherwise you'll need to enter the information manually.

#### See also

- [Payroll Summary](#) screen
- [Company Reports](#) screen
- [Select Return Type](#)
- [NES Settings](#)
- [Employee Addresses](#)
- [Declaration](#)
- [Create Data File](#)

#### Part D2 - Reference Period Values

The sixth stage in [generating the XML Version of the CSO NES Report](#) is to check and make any necessary adjustments to the system-generated Reference Period values that will be added to the NES report.

These annual values relate to the sampled employees, and cover the specified Reference Period.

The wizard displays a table containing information relating to the specified **reference period** for the sampled employees.

If there are any issues with the employee data that prevent the report wizard from proceeding, they will be

outlined on this screen. The system performs a validation check on the values, and will alert you to any possible discrepancies.

1. Check whether the information is correct.
2. Select the **Override System Values** checkbox if you need to make any changes.
3. Click **Next** to proceed to [Employee Addresses](#).

Reference month values in the NES electronic file

Field	Description
<b>Code</b>	A code signifying the length of time associated with the reference month for pay values. It is included in the NES electronic file, but is not available for edit in the wizard: <ul style="list-style-type: none"> <li>▪ 1 = 4 weeks or less</li> <li>▪ 2 = Monthly</li> <li>▪ 3 = 5 weeks</li> <li>▪ 4 = 6 weeks</li> </ul>
<b>PPS Number</b>	The employee's Personal Public Service number.
<b>Gross Earnings</b>	Total gross earnings in the reference month.
<b>Overtime Earnings</b>	Overtime earnings included in Gross Earnings.
<b>Shift Allowance</b>	Shift allowances included in Gross Earnings.
<b>Total Commission</b>	Total gross <b>regular</b> shift pay, commissions and bonuses included in Gross Earnings in the reference period, rounded to the nearest Euro.
<b>Contracted Hours</b>	Total paid contracted hours in the reference month.
<b>Overtime Hours</b>	Total paid overtime hours in the reference month.

#### See also

- [Payroll Summary screen](#)
- [Company Reports screen](#)
- [Select Return Type](#)
- [NES Settings](#)
- [PART D1 - Annual Values](#)
- [Declaration](#)
- [Create Data File](#)

#### Employee Addresses

This stage takes place only if you selected the **Click this box to send the forms...** in [NES Settings](#).

The seventh stage in [generating the XML Version of the CSO NES Report](#) is to check that the system's information relating to the sampled employees is correct.

Make any changes that are necessary, and then click **Next** to proceed to [Declaration](#).

If the system detects any discrepancies in the information you have entered, a validation report displays. This summarises the discrepancies.

You should resolve these issues before you submit the report to the CSO.

You can't proceed at this stage unless you acknowledge that you are aware of the discrepancies. Select the **I understand...** checkbox to do so.

#### See also

- [Payroll Summary screen](#)
- [Company Reports screen](#)
- [Select Return Type](#)
- [NES Settings](#)
- [PART D1 - Annual Values](#)
- [PART D2 - Reference Period Values](#)
- [Create Data File](#)

#### Declaration to CSO

The eighth stage in [generating the XML Version of the CSO NES Report](#) is to make a legal declaration that the NES return is complete and correct to the best of your knowledge.

The Declaration to CSO page opens. Check that the information in this page is correct, and make any changes that are necessary.

Sage strongly recommends that you make use of the Comments pane. Provide any comments that will help the CSO to interpret your data. This lessens the chance of their needing to contact you with follow-up queries.

Click **Next** to proceed to [Create Data File](#).

#### See also

- [Payroll Summary screen](#)
- [Company Reports screen](#)
- [Select Return Type](#)
- [NES Settings](#)
- [PART D1 - Annual Values](#)
- [PART D2 - Reference Period Values](#)
- [Employee Addresses](#)

#### Create Data File

The ninth stage in [generating the XML Version of the CSO NES Report](#) is to check that the correct folder is specified for your CSO NES data file, and then to create the file.

1. In the Create Data File screen, ensure that the correct location is specified for the NES file.
2. **Browse** to a different location if necessary.
3. When you are ready to create the data file, click **Create**.

A log file is generated for each CSO NES data file you generate.

4. The final page of the wizard confirms that you have generated the XML version of the NES report. Click **Done** to close the wizard.

You have generated the XML version of the CSO NES return, which you can now upload on the CSO web site.

**Note:** At this stage you can print a paper copy of the report for your records by clicking **Print Report (for your records)**. Bear in mind, however, that this is not an official report that you can send to the CSO.

**See also**

- [Payroll Summary screen](#)
- [Company Reports screen](#)
- [Select Return Type](#)
- [NES Settings](#)
- [PART D1 - Annual Values](#)
- [PART D2 - Reference Period Values](#)
- [Employee Addresses](#)
- [Declaration](#)

## End of Period

The End of Period function updates the following files with current-period details:

- employee details
- cost analysis
- ETP
- CC124

### Before you proceed

Some of the actions you may need to perform before ending a pay period include:

- Complete the timesheets, and then run the Control Summary and Gross to Nett reports.
- Generate the Paypath file.
- Print any reports required for the period, such as cheques. Note that most reports won't include the current period's figures unless they are printed after the EOP function has been run.
- Having printed cheques, use the Cheque Numbers function to assign the start and end cheque numbers that were used.

### Important Topics

[Posting End of Period Values](#)

[Rewinding the End of Period](#)

## Posting End of Period Values

1. Click **End of Period** in the desktop's process map.

Alternatively, do one of the following:

- select **End of Period** in the navigation pane's Pay Run section
- select the **Processing - End of Period** menu option
- click **EOP** on the Task Bar

2. You are prompted to confirm that you want to end the period. Click **OK** to proceed.

If you have already run the End of Period function in the current period, the **End of Period** option is greyed out. At this stage, the status bar at the bottom of the screen displays the status indicator **P**, signifying that the period has been ended.

See also

[End of Period](#)

## Rewinding the End of Period

Having run the End of Period function, you may detect errors in the processed pay period data. If so, you must *rewind* the End of Period process and correct the errors before ending the period again. This involves rolling back all update procedures, and resetting all files to their pre-End of Period state. You can then make corrections as necessary and re-run the payroll.

Timesheet details are unaffected by a period rewind, so you don't need to re-enter timesheet information already completed for the period. You can rewind only the current pay period. You can't rewind previous ones.

**Note:** You should rewind the End of Period function only when it is absolutely necessary, since rewinding introduces a slight risk of data corruption.

1. Select the **Processing - Period Rewind** menu option, or click **Rewind** on the toolbar.
2. Confirm that you want to continue with the rewind by clicking **OK**.

See also

[End of Period](#)

## Payroll Year End FAQs

This is a reference guide to accompany the Payroll Year End electronic user guide, which is on your Payroll Year End Update CD. Here you'll find answers to a range of questions you may have about Payroll Year End tasks.

### Payroll Year End 2010 Process

[Payroll Year End Overview](#)

[How is Payroll Year End 2011 different to previous years?](#)

[How do I switch between Tax Year 2010 and Tax Year 2011?](#)

### Tax Year 2010 and Tax Year 2011

[How do I switch between Tax Year 2010 and Tax Year 2011?](#)

[How do I launch the 2010 tax year?](#)

[How do I launch the 2011 tax year?](#)

[How do I log into a payroll in 2011?](#)

[2010 Login Screen](#)

[2011 Login Screen](#)

[‘My payrolls are not listed in the 2011 Login screen.’](#)

[How do I set up Tax Year 2011?](#)

[Tax Year End Reports in Tax Year 2011](#)

### Installing the Payroll Year End 2010 Update

[Running the Payroll Year End Update](#)

### Extra Pay Period

[Extra Pay Period](#)

### Revenue Commissioners' Recommendations

[The Feb 15th, 2011 submission deadline](#)

[What checks do the Revenue Commissioners recommend I carry out in my payroll data?](#)

[Are there any special requirements for a P35 to ROS submission?](#)

### Pensions at Payroll Year End

[Pensions at Payroll Year End](#)

[Payroll Year End Reports](#)

### Tax Year End Reports

[Payroll Year End Reports](#)

[P35 Plain Report](#)

[P35 Disk](#)



[P35 to ROS submission](#)

[How do I generate a PRC1 report?](#)

[How do I generate P60s?](#)

[How do I generate a PRD35?](#)

[How do I generate a PRD60?](#)

## Consolidation

[Consolidation Company](#)

## Financial Year End

[Financial Year End](#)

## Medical Insurance BIK

[Recording Medical Insurance BIK](#)

## Tax Year 2010 Data

[Tax Credit Import](#)

[Tax Credit Import Report](#)

## Payroll Year End Overview

For comprehensive guidance on carrying out the Payroll Year End process, refer to the **Payroll Year End user guide** by selecting the **Year End - Tax - Print User Guide** menu option.

You can also access the electronic version of this guide on your PYE CD.

You may also wish to print this [Useful Contact Information](#) sheet.

The Payroll Year End process has **five distinct parts**:

Part 1: Running the Payroll Year End Update

1. First, take a **full system backup** so that you can return to your starting point in the event of a serious problem. For more information, see [Payroll Backup and Restore](#)
2. Insert the Payroll Year End Update CD into your CD ROM drive and **install the update**. See also [Running the Payroll Year End Update](#).

When this is complete, you'll notice that in your Windows **Start - All Programs** menu, Micropay Professional now has a new launch option for Tax Year 2011.

For more information, see [How do I switch between Tax Year 2010 and Tax Year 2011?](#)

Tax Year 2011 does not actually exist yet - you'll create that in Part 4.

Part 2: Completing 2010 Payroll Processing

1. **Process the final pay period** in 2010 in the normal way.  
The system checks each employee's Income Levy, Health Levy and (if applicable) PRD amounts for the year, and incorporates any necessary refunds in the employee's final payslip in 2010. For more information, [click here](#).
2. Check the information in the **Company Details window**, and in all **Employee Details records**, and make any necessary changes.
3. Generate the **Control Summary report**, and check that the information it contains is correct.

4. Generate the **P30/CC124**, and check that the information it contains is correct.
5. Generate an **Earnings, Tax and PRSI** report for the payroll's employees, and check that the information it contains is correct.

#### Part 3: Payroll Year End Procedures

Now that you have finished processing payroll for the year, you are ready to carry out Payroll Year End procedures. This involves generating statutory Payroll Year End reports.

**Note:** The **Payroll Year End Reports** option is available only when the payroll has the status *End of Period*.

1. The first Payroll Year End report is your **P35 return**, which must be submitted online. The system checks for errors when it is generating the report. You must correct all errors before generating a final P35 submission.

See also:

[P35 Plain Report](#)

[P35 Disk](#)

[P35 to ROS submission](#)

2. Generate a PRD35 report for the company if the employees in the relevant payroll are subject to the Pension-Related Deduction, commonly known as the 'Pension Levy'.
3. Generate the following Payroll Year End certificates for each employee:

- \* Income Levy Certificate

- \* PRD 60 (if the employees in the relevant payroll are subject to the Pension-Related Deduction, commonly known as the 'Pension Levy')

4. Generate the **PRC1**, if necessary. The application checks for errors when it is generating the report, and displays a list of any it detects. Correct these errors and generate the report again.

See also: [How do I generate a PRC1 report?](#)

5. Generate **P60s** for the payroll's employees. The application checks for errors when it is generating the P60s, and displays a list of any it detects. Correct these errors and generate the P60s again.

See also: [Payroll Year End Reports](#).

#### Part 4: Start of Tax Year 2011

1. Begin Part 4 by **setting up Tax Year 2010**. When you do this, all active employees are transferred into the new year. Remember: you can do this only when you have processed the final pay period of 2010.

The Set up Tax Year 2011 option is available only when the payroll has the status *End of Period*.

2. **Import 2011 tax credit information** for your employees.
3. Update the **PAYE and PRSI information** on your system.

#### Part 5: Financial/Holiday Year End

Finally, **clear financial year balances** as necessary.

## Financial Year End

The Financial Year End may coincide with the Tax Year End, but it does not have to.

Sp Financial Year End tasks should be carried out whenever is appropriate for your company.

How do I clear cost analysis?

Clear Cost Analysis involves clearing totals accumulated for the Financial Year To Date.

1. Select **Clear Cost Analysis** in the navigation pane's **Financial Year End** view.
2. The program prompts you to confirm that the cost analysis is to be cleared.
3. Click **OK** to carry out the clear down.

How do I clear payments?

You use the Clear Payments function to clear selected payment balances accumulated in the financial year. For example, you may want to reset a payment used to calculate holiday pay.

1. Select **Clear Payments** in the navigation pane's **Financial Year End** end.
2. The Clear Payments window opens. This contains a table showing the payments that can be cleared.
3. Select the checkboxes, as appropriate, corresponding to each payment you want to clear. For each payment, you can clear hours, values or both.
4. Click **OK** to carry out the clear down.

How do I clear deductions?

You use the Clear Deductions function to clear selected deduction balances accumulated in the Financial Year. For example, you can reset the balance of a deduction relating to subscriptions. You can also clear the pension values in the employee master record, either from the financial year to date or from the start.

1. Select **Clear Deductions** in the navigation pane's **Financial Year End** view.
2. The Clear Deductions window opens. This shows the voluntary deductions that can be cleared. Select the checkboxes corresponding to the deductions to be cleared.

You can choose to clear one or more of the following:

- **Std. Amt.** (amount deducted each period)
  - **Balance** (the total of the deduction accumulated since the last clearance)
  - **All** (the running total of the deduction since it was first introduced - generally, you shouldn't clear this value)
  - **Tax Year Balances**
3. You can also clear the employee pension history by selecting the checkboxes in the Pensions - Employee File section.
  4. Click **OK** to carry out the clear down.

How do I clear down and roll forward holidays and absences at year end?

You use the Clear Holidays and Absence function to clear the absence fields in the employee details records, including holiday, sick (Certified and Uncertified) and other leave.

The brought-forward totals are automatically updated by adding to the current absence balance the absence value brought forward previously, and then deducting days taken.

If an employee has exceeded entitlement, a negative figure is brought forward for the relevant absence type.

For details, see [Holiday Year Cleardown and Roll Forward](#).

1. Select **Roll Forward Holidays and Absence** in the navigation pane's **Financial Year End** view.
2. The program prompts you to confirm that the absence is to be cleared.

3. Click **OK** to carry out the clear down.

How do I clear the CWPS history?

At Financial Year End, or whenever is appropriate, you must clear the Construction Workers Pension Scheme (CWPS) history from employee details records. The clear down procedure also sets up a CWPS calendar for the new year.

Select the **Year End - New Construction Pension Year** menu option.

## How is Payroll Year End 2011 different to previous years?

For a summary of the changes in this release of Micropay Professional, see [Sage Micropay Professional](#).

For an overview of the steps involved in carrying out Payroll Year End, see [Payroll Year End Overview](#).

## Useful Contact Information

You may find it useful to print out this page and use the table as a reference.

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Revenue Commissioners Employers P35 Unit Nenagh Co. Tipperary	Benefit in Kind Enquiries	1890 254 565
	P35 Enquiries	1890 254 565
	Website	<a href="http://revenue.ie">http://revenue.ie</a>
	ROS Helpline	1890 20 11 06
	ROS Website	<a href="http://www.ros.ie/PublisherServlet/home">http://www.ros.ie/PublisherServlet/home</a>
Dept of Social Protection	Information Services	(00353) 1 704 3000
	Website	<a href="http://www.welfare.ie">http://www.welfare.ie</a>

## Levy Recalculations

At the end of the tax year, the system normally recalculates each employee's total liability to each of the following:

- [Health Levy Recalculation](#)
- [Income Levy Recalculation](#)
- [PRD Recalculation](#) (if applicable)

This recalculation checks the accuracy of the levy amounts. If it determines that the employee is entitled to a levy refund, this is incorporated into that pay period's payslip.

## When do the recalculations occur?

The Payroll Year End 2010 Update adds the following checkboxes to the Timesheet Entry window's **Data Entry** tab.

These checkboxes determine whether the recalculation will occur for the relevant levy in the current pay pe-

riod.

Select or deselect the checkboxes as necessary. See the links below for details.

Bear in mind that each recalculation can occur just once for each employee. The relevant checkbox is disabled thereafter.

#### Health Levy Checkbox

The checkbox is **selected automatically** if the recalculation has not already taken place and the employee has at least 52 insurance weeks in the tax year, including the current period.

You can deselect the checkbox if you don't want the recalculation to occur.

#### Income Levy Checkbox

The checkbox is **selected automatically** if the recalculation has not already taken place, and the employee has at least 52 insurance weeks in the tax year, including the current period.

You can deselect the checkbox if you don't want the recalculation to occur.

#### PRD Checkbox

The checkbox is **selected automatically** if the employee is marked as a Public Sector employee, the recalculation has not already taken place, and the employee is paid up to:

- Period 52 if they are paid Weekly (or period 53 if applicable)
- Period 26 if they are paid Fortnightly (or period 27 if applicable)
- Period 12 if they are paid Monthly
- Period 13 if they are paid Four-Weekly (or period 14 if applicable)
- Period 24 if they are paid Bi-Monthly
- Period 4 if they are paid Quarterly

### Health Levy Recalculation

If the employee's PRSable Pay for the tax year is less than € 26,000, the employee is not liable to pay Health Levy.

So if such an employee paid an amount of Health Levy in any pay period of the tax year, they are entitled to a full refund.

To determine the amount of Health Levy to be refunded, the system must recalculate the Health Levy due for each employee in the full tax year.

#### Example 1: Employee not subject to the Health Levy

Suppose that a particular employee's PRSable Pay This Year is less than € 26,000.

This means that he is below the threshold, and so is not subject to the Health Levy.

He belongs to a Weekly payroll in which Period 52 is the pay period when he reaches 52 insurance weeks.

His weekly rates of pay have meant that he has paid the Health Levy in some pay periods, even though he is not subject to the levy. These calculations are outlined below:

**Weeks 1-20:**

Weekly Pay: € 500.01

PRSI and Health Levy is charged at class A1.

Total Health Levy paid for periods 1-20: **€ 400.00**

**Weeks 21 - 35:**

Weekly Pay = € 500.00

PRSI and Health Levy is charged at class AL.

Total Health Levy paid for periods 21-35: **€ 0.00**

**Weeks 36 - 52:**

Weekly Pay: € 352.00

PRSI and Health Levy is charged at class A0.

Total Health Levy paid in periods 36-52: **€ 0.00**

**Employee's Total Health Levy Amount Paid:**

$400.00 + 0.00 + 0.00 = \mathbf{€ 400.00}$

The employee is entitled to **a full refund** of this amount because his annual earnings are € 23484.20.

The employee's Period 52 payslip will contain the following items:

- \* the normal Period 52 Health Levy (in the EE PRSI field)
- \* an additional item representing the full amount of the Health Levy refund received by the employee

If the payroll requires a period 53 in 2010, this will be processed as normal (the Health Levy recalculation will not be carried out again.)

Example 2: Employee incorrectly subjected to higher rate

Suppose that a higher Health Levy rate has been applied to an employee in some pay periods of 2010, but ultimately it emerges that they are liable to a lower rate.

This situation had led to a Health Levy overpayment by the employee in 2010.

The employee is paid Monthly, and their normal pay is € 2200 per month.

However, in pay periods 3 and 8, they received bonuses, and earned € 9000.00 in each of these pay periods

Period	PRSIable Pay	Employee PRSI	Health Levy	Total
1	2200.00	65.96	88.00	153.96
2	2200.00	65.96	88.00	153.96
3	9000.00	337.96	387.47	725.43
4	2200.00	65.96	88.00	153.96
5	2200.00	65.96	88.00	153.96

Period	PRSIable Pay	Employee PRSI	Health Levy	Total
6	2200.00	65.96	88.00	153.96
7	2200.00	65.96	88.00	153.96
8	9000.00	337.96	387.47	725.43
9	2200.00	65.96	88.00	153.96
10	2200.00	65.96	88.00	153.96
11	2200.00	65.96	88.00	153.96
12	2200.00	65.96	88.00	153.96
	<b>40000.00</b>	<b>1335.52</b>	<b>1654.94</b>	<b>2990.46</b>

According to the above details:

- PRSIable Pay for 2010 (including period 12): € 40000
- Health Levy Paid in 2010 (including period 12): € 1654.94

Their Health Levy liability for 2010 is recalculated as follows:

- 4% on income up to € 75,036:  
 $40000.00 \times 4\% = € 1600.00$
- 5% on the balance of their income:  
 $0.00 \times 5\% = € 0.00$

So the employee is due a Health Levy refund: € 1654.94 - € 1600.00 = **€ 54.94**

#### Important Notes

- If the Health Levy recalculation determines that the employee has underpaid Health Levy over the year, the discrepancy will not be highlighted in their payslip. Underpayments will be dealt with directly by the Department of Social Protection.
- Only employees who have been in continuous employment with the company throughout 2010 should be examined to determine if a refund of Health Levy is due to them. Other employees may be entitled to a Health Levy refund, but must apply for it to the Department of Social Protection.

See also

[Recalculations](#)

### Income Levy Recalculation

The [Income Levy](#) recalculation occurs for all employees who have been in continuous employment with you for the tax year.

Micropay Professional will automatically carry out the recalculation when an employee receives 52 insurable weeks. (The recalculation occurs in this pay period only. If there is a subsequent extra pay period, this is processed as normal.)

What if the employee hasn't reached 52 insurable weeks in the year?

You may have some employees who have been employed with you for the full year but do not have 52 insurable weeks.

Suppose that a Weekly employee was in continuous employment with you throughout 2010, but was absent

on unpaid leave for a period of 3 weeks in February 2010. As a result, they had only 49 insurable weeks in 2010. This employee can be included in the Income Levy calculation. To include the employee, select the **Income Levy** checkbox in their timesheet.

Where an employee is in continuous employment with a particular employer throughout the entirety of the year, the employer should make adjustments to Income Levy liabilities when the employee belongs to one of the Income Levy-exempt categories:

- Under-65 minimum threshold not exceeded
- Individuals liable at a lower rate(s)
- Individuals aged 65 or over
- Full medical card holders

Example 1: Under-65 Threshold not exceeded

This means that the employee's Gross Income for the tax year is less than € 15,028, so the employee is exempt from the Income Levy.

If Income Levy was deducted for any pay period in the tax year, a full refund of this amount is due to the employee.

The system determines whether the employee is subject to Income Levy by calculating the Gross Income values for this tax year:

- It sums the existing Gross Income values for each pay period in the Employee Details window's **ETP** tab.
- It adds this value to the employee's Gross Income value in the current pay period to determine the Gross Income This Year value.
- If the Gross Income This Year value is less than € 15,028, then any Income Levy values deducted during the year should be refunded to the employee in this pay period.

Example 2: Over-65 Threshold not exceeded

This means that Gross Income for the tax year is less than € 20,000, and the employee will reach the age of 65 on or before Dec 31, 2010. In this circumstance, the employee is exempt from the Income Levy.

If Income Levy was deducted for any pay period in the tax year, a full refund of this amount is due to the employee.

The system determines whether an employee in the relevant age group is subject to Income Levy by calculating the Gross Income values for this tax year:

- It sums the existing Gross Income values for each pay period in the Employee Details window's **ETP** tab.
- It adds this value to the employee's Gross Income value in the current pay period to determine the Gross Income This Year value.
- If the Gross Income This Year value is less than € 20,000, then any Income Levy values deducted during the year should be refunded to the employee in this pay period.

Example 3: Full Medical Card Holder

Employees with Full Medical Cards are exempt from the Income Levy.

If an employee was in possession of a Full Medical Card at any point during the tax year, they are exempt from the Income Levy for the entire year.

An employee who started the year without a Full Medical Card may have paid Income Levy contributions during the year. So if they subsequently obtained a Full Medical Card, their Income Levy contributions must be refunded to them at the end of the year.



**Example 4: An employee paid Income Levy at a higher rate than they are liable to**

Suppose that a particular employee normally pays Income Levy at a particular rate(s).

Due to an increase in the payments they receive in one or more pay periods, they are temporarily pushed into a higher Income Levy rate.

However, at the end of the year their Gross Income is below the threshold for the higher Income Levy rate to which they were temporarily subject.

Let's look at how the employee's pay broke down per pay period in this example, and how this affected the Income Levy they paid.

Pay Period	Gross Income	Income Levy Rate 1: 2%	Income Levy Rate 2: 4%	Income Levy Rate 3: 6%	Total Income Levy
1	1000	0	0	0	0
2	5000	100	0	0	100
3	10000	125.06	149.88	0	274.94
4	50	0	0	0	0
5	8000	125.06	69.88	0	194.94
6	10000	125.06	149.88	0	274.94
7	15000	125.06	333.16	25.08	483.30
8	15200	125.06	333.16	37.08	495.30
9	15000	125.06	333.16	25.08	483.30
10	16000	125.06	333.16	85.08	543.30
11	12000	125.06	229.88	0	354.94
12	15000	125.06	333.16	25.08	483.30
<b>Total</b>	<b>122,250.00</b>	<b>1225.54</b>	<b>2265.32</b>	<b>197.40</b>	<b>3688.26</b>

As you can see, in some pay periods the employee's Gross Income results in the employee paying Income Levy at a higher rate.

The employee's Gross Income at year end is € 122250.00, and they paid € 3688.26 in Income Levy for the full year.

based on their Gross Income for the full year, their Income Levy liability for the full year is recalculated at the end of the year as follows:

2% on income up to € 75,036:	75036.00 x 2% =	<b>€ 1500.72</b>
4% of the next € 75036 to € 174980:	47214.00 x 4% =	<b>€ 1888.56</b>
6% of the remaining balance:	0 x 6% =	<b>€ 0.00</b>
<b>Total Recalculated Income Levy Liability for the Year</b>		<b><u>€ 3,389.28</u></b>

So the employee is entitled to a refund of:

$$€ 3688.26 - € 3389.28 = € 298.98$$

### Underpayments

If the Income Levy recalculation determines that the employee has underpaid Income Levy over the year, the discrepancy will not be highlighted in their payslip. Underpayments will be dealt with directly by the Revenue Commissioners.

See also

[Recalculations](#)

### PRD Recalculation

If employees in your payroll are subject to the Pension-Related Deduction (PRD), the PRD Recalculation is performed by default for each employee in the pay period in which they reach the final pay period of the tax year. If there is a subsequent extra pay period, this is processed as normal.

You can disable the recalculation if necessary by selecting the **PRD** checkbox in the Timesheet Entry window's **Data Entry** tab.

### Overpayments

Any PRD refund will be incorporated into the normal PRD item in the employee's current payslip, and will be flagged by an explanatory note.

If the employee was liable for a normal PRD amount of € 20 in period 52, the refund amount (say, **€ 51.24**) would be subtracted from this, leaving the current payslip's PRD item with an amount of **-€ 31.24**.

The explanatory note would explain that the employee received a PRD refund of **€ 51.24**.

### Important points to note:

- Previous Employment PRD45 values are taken into account in the PRD Recalculation.
- If this employment is marked as a "subsidiary" employment for the employee, you should deselect the checkbox. In such a case, the employee's main employment should deal with the recalculation and any refund that is due.

Example 1: Monthly employee below the lowest PRD threshold

If an employee's PRDable Pay for the tax year is less than € 15,000, the employee is not liable to pay PRD.

So if such an employee paid an amount of PRD in any pay period of 2010, they are entitled to a full refund.

Let's look at an example of this. Suppose that the employee is paid monthly as follows:

Pay Period	Gross PRDable Pay	PRD Rate 1	PRD Rate 2	PRD Rate 3	Total PRD
1	1250.00	0	0	0	0
2	1250.00	0	0	0	0
3	1250.00	0	0	0	0
4	2000.00	20.83	33.33	0	54.17
5	1250.00	0	0	0	0
6	1250.00	0	0	0	0
7	1250.00	0	0	0	0
8	1100.00	0	0	0	0

Pay Period	Gross PRDable Pay	PRD Rate 1	PRD Rate 2	PRD Rate 3	Total PRD
9	1100.00	0	0	0	0
10	1100.00	0	0	0	0
11	1100.00	0	0	0	0
12	1100.00	0	0	0	0
	<b>15000.00</b>	<b>20.83</b>	<b>33.33</b>	<b>0</b>	<b>54.17</b>

The employee paid PRD in pay period 4: **€ 54.17**

The employee's PRDable earnings for tax year 2010: **€ 15000**

This is below the lowest PRD threshold for 2010, so the employee is due a refund of all PRD paid.

Refund due: **€ 54.17**

Example 2: Monthly employee liable to the lowest PRD rate

Suppose that the employee's PRDable salary for tax year 2010 is € 19000.00, broken down as follows:

Pay Period	Gross PRDable Pay	PRD Rate 1	PRD Rate 2	PRD Rate 3	Total PRD
1	1500.00	12.50	0	0	12.50
2	1500.00	12.50	0	0	12.50
3	1500.00	12.50	0	0	12.50
4	1500.00	12.50	0	0	12.50
5	1500.00	12.50	0	0	12.50
6	2500.00	20.83	83.33	0	104.17
7	1500.00	12.50	0	0	12.50
8	1500.00	12.50	0	0	12.50
9	1500.00	12.50	0	0	12.50
10	1500.00	12.50	0	0	12.50
11	1500.00	12.50	0	0	12.50
12	1500.00	12.50	0	0	12.50
	<b>19000.00</b>	<b>158.33</b>	<b>83.33</b>	<b>0</b>	<b>241.67</b>

Total PRD Paid in 2010: **€ 241.67**

PRD Recalculation:

- Amount of PRDable income above the 5% PRD threshold: € 4000  
 $4000 \times 5\% = € 200.00$
- Amount of PRDable income above the 10% PRD threshold: € 0  
 $0 \times 10\% = € 0.00$
- Amount of PRDable income above the 15% PRD threshold: € 0  
 $0 \times 15\% = € 0.00$

Total Recalculated PRD = **€ 200.00**

So the employee is due a PRD refund of:

241.67 - 200.00 = **€ 41.67**

See also

[Recalculations](#)

### How do I launch the 2010 tax year?

You launch the 2010 tax year to process Tax Year 2010 data, and to generate statutory Tax Year End reports for 2010.

To launch the 2010 tax year (after installing the Payroll Year End update), select the **All Programs - Micropay Professional - 2010 - Micropay Professional** menu option in your Windows **Start** menu.

See also

[How do I switch between Tax Year 2010 and Tax Year 2011?](#)

[How do I log into a payroll in 2011?](#)

[2010 Login Screen](#)

[2011 Login Screen](#)

[‘My payrolls are not listed in the 2011 Login screen.’](#)

[How do I set up Tax Year 2011?](#)

### How do I launch the 2011 tax year?

To launch Micropay Professional 2011, select the **All Programs - Micropay Professional - 2011 - Micropay Professional** menu option in your Windows **Start** menu.

This is the option you use to work with Tax Year 2011 data.

You can have Micropay Professional 2010 and Micropay Professional 2011 open at the same time.

See also

[How do I switch between Tax Year 2010 and Tax Year 2011?](#)

[How do I log into a payroll in 2011?](#)

[2010 Login Screen](#)

[2011 Login Screen](#)

[‘My payrolls are not listed in the 2011 Login screen.’](#)

[How do I set up Tax Year 2011?](#)

### How do I switch between Tax Year 2010 and Tax Year 2011?

After you install the Payroll Year End 2010 update, Micropay Professional has launch options in the **All Programs** menu in Windows (accessible by clicking the **Start** button). One of these is for Tax Year 2010, and another is for Tax Year 2011.

As part of the installation process, you can also create shortcuts to these on your desktop.

Even though there is a 2011 launch option, until you have set up Tax Year 2011 for a particular payroll, you won't be able to log into it.

You log into the 2010 tax year to:

- finish processing 2010 payroll
- generate Payroll Year End 2010 reports
- set up Tax Year 2011

You log into the 2011 tax year to:

- process 2011 payroll
- generate Payroll Year End 2011 or payroll closedown reports

See also

[How do I launch the 2010 tax year?](#)

[How do I launch the 2011 tax year?](#)

[How do I log into a payroll in 2011?](#)

[2010 Login Screen](#)

[2011 Login Screen](#)

[‘My payrolls are not listed in the 2011 Login screen.’](#)

[How do I set up Tax Year 2011?](#)

## Year End menu in Tax Year 2011

When you are logged into a payroll in Tax Year 2011, you can generate statutory reports for **Payroll Year End 2011**, or for payroll closedown, should it occur during 2011.

To do this, select the **Year End - Tax - Tax Year End Reports**.

Generating Payroll Year End Reports for 2010

It's important to be aware that if you need to generate statutory reports for 2010, you must open the payroll in Micropay Professional 2010.

To do this, click your Windows **Start** button.

Select the **All Programs - Micropay Professional - 2010 - Micropay Professional** menu option. Then log into the payroll.

See also

[How do I switch between Tax Year 2010 and Tax Year 2011?](#)

[How do I log into a payroll in 2011?](#)

[2010 Login Screen](#)

[2011 Login Screen](#)

[‘My payrolls are not listed in the 2011 Login screen.’](#)

[How do I set up Tax Year 2011?](#)

## 2010 Login Screen

After you have run the Payroll Year End 2010 update, there are Login screens in Micropay Professional for both 2010 and 2011.

You can have 2010 and 2011 open at the same time.

The 2010 Login screen enables you to:

- log into a payroll's 2010 payroll data
- generate Payroll Year End 2010 reports

The [2011 Login Screen](#) enables you to:

- work with Tax Year 2011 data

To do this, select the **All Programs - Micropay Professional - 2011 - Micropay Professional** menu option in your Windows **Start** menu.

See also

[How do I switch between Tax Year 2010 and Tax Year 2011?](#)

[2011 Login Screen](#)

[Tax Year End Reports in Tax Year 2011](#)

## 2011 Login Screen

After you have run the Payroll Year End 2010 update, there are Login screens in Micropay Professional for both 2010 and 2011. You can have 2010 and 2011 open at the same time.

The 2011 Login screen enables you to log into a payroll's 2011 tax year.

### 2010 Login Screen

You can't generate Payroll Year End 2010 reports when you are logged into 2011 payroll data.

Instead, you must log into the payroll's 2010 tax year.

To work with Tax Year 2010 data, you need to log in using the [2010 Login Screen](#).

To do this, select the **All Programs - Micropay Professional - 2010 - Micropay Professional** menu option in your Windows **Start** menu.

Alternatively, use the **Micropay Professional 2010** desktop shortcut icon.

See also

[How do I switch between Tax Year 2010 and Tax Year 2011?](#)

[2010 Login Screen](#)

['My payrolls are not listed in the 2011 Login screen.'](#)

[Tax Year End Reports in Tax Year 2011](#)

## How do I log into a payroll in 2011?

Before you can log into a payroll in 2011, Tax Year 2011 must have been created for the payroll.

To create the 2011 tax year, in Micropay Professional 2010 select the **Year End - Tax - Tax Year End 2010 - Set up Tax Year 2011** menu option.

Only payrolls for which Tax Year 2011 has been set up will be listed in the 2011 login screen's Payrolls drop-down list.

See also

[How do I switch between Tax Year 2010 and Tax Year 2011?](#)

[2010 Login Screen](#)

[2011 Login Screen](#)

[‘My payrolls are not listed in the 2011 Login screen.’](#)

[How do I set up Tax Year 2011?](#)

### How do I set up Tax Year 2011?

1. To set up Tax Year 2011 for a particular payroll (which transfers the relevant employees into the new year), log into the payroll's 2010 tax year.

For information about how to do this, see [2010 Login Screen](#).

2. Select the **Year End - Tax - Set up 2011 Tax Year** menu option.

This option is available only when the payroll has *End of Period* status.

3. Tax Year 2011 is now set up. You are still logged into the 2010 tax year.

You can continue to work in 2010 if necessary, or you can log into the 2011 tax year.

To do this:

1. Click the **Start** button on your desktop. (You don't need to close down 2010.)
2. Select **All Programs - Micropay Professional - 2011 - Micropay Professional**.
3. Log into the payroll in the normal way.

You are now working in the 2011 tax year. Initially, the payroll has the status **Start of Year**. As yet, Period 1 has yet to be set, and the payroll calendar has yet to be created.

You can switch between the two tax years as necessary by closing Micropay Professional and selecting the relevant menu option in the **Start** menu on your desktop.

See also

[How do I switch between Tax Year 2010 and Tax Year 2011?](#)

[2010 Login Screen](#)

[2011 Login Screen](#)

### ‘My payrolls are not listed in the 2011 Login screen.’

A payroll is not listed in the [2011 Login Screen](#)'s until you have set up Tax Year 2011 for the payroll.

You do this after you have processed the final 2010 pay period.

To set up Tax Year 2011 for the payroll, follow the steps in [How do I set up Tax Year 2011?](#)

See also

[2010 Login Screen](#)

[2011 Login Screen](#)

[How do I switch between Tax Year 2010 and Tax Year 2011?](#)

[Tax Year End Reports in Tax Year 2011](#)

## Tax Year End Reports in Tax Year 2011

When you are working in Tax Year 2011, the **Year End - Tax - Tax Year End Reports** menu option enables you to generate Payroll Year End 2011 reports, NOT Payroll Year End 2010 reports.

This menu option is available only when the payroll has status **End of Period**.

To generate 2010 Payroll Year End reports, you need to switch to the 2010 tax year.

See [How do I switch between Tax Year 2010 and Tax Year 2011?](#).

See also

[2010 Login Screen](#)

[2011 Login Screen](#)

[Payroll Year End Overview](#)

[How do I launch the 2010 tax year?](#)

[How do I launch the 2011 tax year?](#)

[Running the Payroll Year End Update](#)

## Running the Payroll Year End Update

If the Payroll Year End Update CD does not run automatically when you put it in your CD ROM drive, carry out the following steps:

1. Click your Windows desktop's **Start** menu.
2. Select **Run**.
3. Type **D:\IrePYE\_2010.exe** into the Run dialog box, and click **OK**.

(If your CD ROM drive letter is not D, replace D with the appropriate letter).

## How do I install the Budget 2011 Update?

After you set up Tax Year 2011 for a company payroll (see [How do I set up Tax Year 2011?](#)), the company has the following characteristics:

- It has blank status.
- Payroll period 1 has not yet been set.
- The payroll calendar has not yet been set up.

When you attempt to set Period 1 of 2011, the application checks whether you have installed the Budget 2011 update file. This file contains all the necessary Budget 2011 changes.

You should not set Period 1 until the update file has been installed.

Download the file from this location, and then install it. This updates your system with the Budget 2011 changes.

After you have done this, you can set Period 1 of 2011.

See also

[How do I manually update PAYE and PRSI tables?](#)

[How is Payroll Year End 2011 different to previous years?](#)



[How do I switch between Tax Year 2010 and Tax Year 2011?](#)

[‘My payrolls are not listed in the 2011 Login screen.’](#)

## Payroll Year End Reports

You need to print a number of statutory reports at year end:

- **P60s and PRD60s**

Two copies of the P60 are printed per employee. Just a single copy of the PRD60 is printed per employee. (The PRD60 is required only for employees subject to the Pension-Related Deduction.) For more information, see [How do I print P60s](#) and [How do I print PRD60s?](#)

- **P35 and PRD35**

The PRD35 is required only in payrolls in which there are employees subject to the Pension-Related Deduction. For more information, see [How do I prepare a P35 to ROS submission?](#) and [How to I print a PRD35 Report?](#)

- **PRC1 Report**

The PRC1 Report should be submitted to the Revenue Commissioners at the end of the tax year for any employee who has had three or more PRSI classes while in employment with your company during the tax year. For more information, see [How do I generate a PRC1 Report?](#)

The reports offer range selections similar to those available on standard payroll reports. For further information about printing reports, see [Payroll Reports](#).

**Note:** You can print valid P60s on plain paper or using special stationery.

Generating a Tax Year End report

1. Select the **Year End - Tax - Tax Year End Reports** menu option.
2. Select the radio button of the report you want to print. The Sequence box, combined with the From and To fields, enables you to define a range of records to include in the report. You can define a range based on one of the following:
  - Employee Code
  - Employee Name
  - Department
  - Cost Centre
3. To preview the report on screen, click **Preview**.
4. To print the selected report, click **Print**.
 

If you are in a consolidation company (see [Consolidation Companies](#)), you can generate P60s only if all the payrolls in the consolidation company have the same pay frequency. If this is not the case, you'll need to generate P60s within the individual payrolls instead.
5. To specify printer settings, you click **Setup**.

In the Output Options section of the Printer Setup dialogue box, you specify one of three output settings:

- **High Quality:** Prints reports to the best-possible print quality, but provides a slow output rate on some printer types.
- **Draft Quality:** Prints reports to a lower print quality, but provides a more rapid output rate on some printer types. This is the recommended setting for payslips when you are printing on continuous pre-printed stationery.
- **Direct Print:** Bypasses the driver and writes directly to your dot-matrix printer (not suitable for other printer types). This provides the fastest output rate, but can lead to issues such as incorrect alignment and other form-feeding problems, and is generally the least reliable option.

**Note:** For the fastest possible direct-print output rate, you need to click **Options** in the Printer Setup dialogue box and configure the dot-matrix printer for draft-quality output.

6. To change the printer setup for the selected report, click **Setup** and specify the relevant settings.
7. To close the Tax Year End Reports window, click **Cancel**.

### Consolidation Company

If you are running more than one payroll with the same Tax Registration Number, you will probably need to consolidate your payrolls before creating the P35 online submission and other Payroll Year End reports.

This involves setting up a consolidation company. You can then select the payrolls to be consolidated.

1. Log in as ADMIN (user name ADMIN, default [password](#) PASS).
2. Select **Company - Consolidation Setup**.
3. Enter a new unique name for the consolidation company.

For convenience, use a name such as 'CONS' or 'CONSOL' to distinguish the consolidated company from a regular payroll.

4. Select the payrolls to be consolidated.
5. One of the selected payrolls must be the 'default' company. Select the name of this company in the Default Company drop-down list.
6. Click **Create**.
7. Click **Yes** to confirm that you are setting up a new consolidation company.

You have set up the consolidated company.

### Generating a P35

To generate a P35 submission for the consolidated company, carry out the following steps:

1. Log into the consolidated company.
2. Select **Miscellaneous - Consolidate All**.
3. Select **Year End - Tax - Tax Year End Reports**.
4. Select the **via ROS** radio button.
5. Follow the onscreen instructions.

The P35 will cover all the payrolls in the consolidation company.

See also

[P35 to ROS submission](#)

## Revenue Commissioners Requirements

### The Feb 15th, 2011 submission deadline

You must submit the P35 return to the Revenue Commissioners by February 15, 2011. You must also submit the PRD35, if applicable.

Your employees must have received their P60s, Income Levy Certificates and PRD60s (if applicable) by the same date.

### What checks do the Revenue Commissioners recommend I carry out in my payroll data?

- Ensure that a valid Tax Registration number has been entered in the Company Details window.
- Ensure that you use the correct combination of weeks/class. Total Insurable Weeks must be greater than the sum of the Weeks at Second Class, Third Class and Fourth Class.
- Ensure that you enter the Employer Registration Number in the Company Details window.
- If an employee PPS Number is missing, ensure that the employee's Name and Address are specified, or alternatively their Date of Birth.
- Check the recording of Class A0 is correct by ensuring that you have used a zero (A0), and not the letter O (AO).
- Make sure that the P35 includes the payroll totals relating to Pensions, PRSAs, RACs and CWPS schemes. These are required under Section 86 of the Finance Act, 2004.

### Are there any special requirements for a P35 to ROS submission?

You must be a registered ROS (Revenue Online Service) customer to use the P35 to ROS option.

Revenue recommends that you allow up to three weeks for this registration process. You must have a working e-mail address to register with ROS.

Valid Payroll and Employee names can contain letters and any of the following characters / & . ( ) ' " ' { } [ ]

### P35 Plain Report

- The P35 Plain Report generates largely the same information as the P35 ROS file, but on plain paper.
- Generate the P35 Plain Report before creating the P35 ROS file. Use it to ensure that your P35 information is correct.
- Pension totals should cover all Retirement Benefit Schemes (Pensions), PRSAs, RACs and CWPS schemes.
- For each pension type, there may have been amounts contributed outside the payroll program. You must add these amounts to the P35.

For example, if the employer maintains an employer pension outside the payroll, this must be included on the P35. Enter adjustment amounts where necessary.

See also

[Pensions at Payroll Year End](#)

[Payroll Year End Reports](#)

[P35 to ROS submission](#)

### Pensions at Payroll Year End

You must include information about pensions on your 2010 P35 submission.

Adjusting pension amounts

The Revenue Commissioners require that P35 submissions should include payroll totals for Retirement Benefit Schemes (Pensions), PRSAs, RACs and CWPS schemes.

When you are creating the P35 to ROS file, these totals are displayed. They are derived from the data contained in Micropay Professional.

However, for each pension type there may have been amounts contributed outside of normal payroll processing. If there are such amounts, you must adjust the payroll totals accordingly. The P35 Pension Adjustments screen enables you to do this.

You can enter adjusted amounts for each of the figures, making it possible to take non-payroll amounts into account.

See also: [P35 to ROS submission](#).

What should I call the P35 to ROS file?

When you are ready to save your P35 to ROS file, the application suggests a default file name. This takes the form:

*[tax year]-[last four digits of the company registration number].P35*

So a typical example of a P35 file name would be:

10-4567T.P35

A second file with the same name but a different extension - .MON - is also created.

Do not submit this file.

What are pension links?

A pension link is an association between a payroll deduction and a pension scheme.

Pension links enable you to ensure that pension contributions are included on the P35.

You can also use a pension link to ensure that employer contributions to an occupational pension scheme or a PRSA are displayed on the employee's payslip. This makes it easier for the employee to keep track of exactly how much has been paid into the scheme.

In addition, pension links enable you to set up pension contribution amounts to be transmitted electronically to the pension provider. This process is similar to the Paypath facility.

The Pension Link is shared by all payrolls that you operate, so that you can have contributions from different payrolls all going into the same pension scheme.

How do I create a pension link?

You may need to set up a pension link for a particular pension deduction.

1. To set up a pension link, log into Micropay Professional as the administrator (username: ADMIN, default [password](#): PASS).
2. Select the **Tables - Pension Link** menu option. The Pension Link window is displayed.
3. Specify the Link ID and the Description, and then click **Find**.
4. If the link does not already exist, the application prompts you to confirm that you want to create a new link. Click **Yes** to proceed.
5. Specify any other relevant details.
  - If you are creating a link solely for the purpose of including the pension contribution amounts in the P35, then it is necessary only to provide a Link ID, a description and the link type (Pension, PRSA, RAC or CWPS).
  - If the pension link will be used as a fully valid pension scheme, you need to specify all rele-

vant details in the Pension Link window. Your pension provider will supply you with the relevant information if you will be submitting electronic pension files.

6. Click **Save**.

When the pension link has been created, it can be attached to deductions as appropriate. This ensures that the relevant details appear on the P35.

The following information can be specified in the Pension Link window.

Field	Description
Link *	A unique number assigned to every pension link. (Maximum: 200 links)
Description*	Identifies the pension link, which facilitates the assignment of a deduction to the link.
Reference Code *	Assigned by pension providers to identify pension files submitted electronically.
Type	The scheme can be a Pension, PRSA, RAC or CWPS.
Name *, Address, Email	Contact information associated with the pension provider.
File Overdue Warning	Enables a reminder (displayed when you set a new period) that a pension file is due. Works in conjunction with Issue Frequency.
File Name	The location and name of the electronic pension file, such as A:\pension1.pen.
Issue Frequency	Period over which Pension Report balances are accumulated. Determines how often you are reminded to create a pension file.
Last Issue	The date on which you last created a pension file.

**\* = Mandatory field when creating a Pension Contribution file**

How do I attach a pension link to a pension deduction?

If a pension link has been set up, but has not been attached to the appropriate deduction, attach the link before creating your P35.

1. Select **Company/Payroll - Deductions**.
2. The Deductions window opens. Click in the **Pension** cell corresponding to the deduction you want to amend. This enables a drop-down menu.
3. Select the pension link you want to attach to the deduction.
4. Click **OK**.

What do I check on the P35 Plain Report?

Check the following on the P35 Plain Report:

- Are all employees (including leavers) listed in the report?
- Do the totals on the report match those on your last control summary? See [Payroll Year End Reports](#).
- Does more than one payroll have a particular Tax Registration number? If so, you should use a consolidation company. For more information, see [Consolidation Company](#)

The Revenue Commissioners recommend that you keep a copy of the P35 Plain Report for future reference.

**See also**

[How do I set up pensions?](#)

## [Construction Workers Pensions](#)

### Extra Pay Period

What is an extra pay period?

Week 53 occurs in a weekly payroll when there are 53 pay days in the tax year. There are normally 52 pay periods in a weekly payroll, but in some years the dates fall in a way that gives rise to an 'extra' pay period'.

An extra pay period can also occur in fortnightly and four-weekly pay frequencies:

- Fortnightly payrolls normally have 26 pay periods, but can occasionally have 27.
- Four-weekly payrolls normally have 13 pay periods, but can occasionally have 14.

Employees are entitled to tax credits for the extra pay period, but only on a Week 1 basis.

This means that the employee receives more than the year's total tax credits. The Inspector of Taxes will take this into consideration when issuing the next year's tax credits.

Do I have an extra pay period?

After you have fully completed Week 52 (or Fortnight 26, or Four-Weekly Period 13), check the date on which the next payday occurs.

If the next payday falls on the 31st December, you have an extra pay period.

If the next payday occurs on or after the 1st January, you DO NOT have an extra pay period. This pay period must be processed as Period 1 of the new tax year.

Incorrect processing of an extra pay period may result in inaccurate returns for that tax year.

Only the date of payment (not the date of work) determines whether a pay period is 'extra' in the current year. So if you have a pay date of 03/01/2011, this must be processed as Period 1 of 2011, regardless of when the actual work for this period was done.

My employees are on holiday over the Christmas period. Should I run a Week 53 to ensure they get their holiday pay before their holiday begins?

Generally, the answer to this question is 'No'. You only run a Week 53 when there is an extra pay period to be processed in the tax year, regardless of any other circumstances.

If the pay date for the holiday week falls in January rather than December, the holiday week is not an extra pay period, and must be processed as a normal week in period 1 of the new tax year.

If Week 1 of the new year is a holiday week, and you still want to pay your employees for this week in advance of their holidays, carry out the following steps:

- complete the current tax year
- run the Payroll Year End in full
- set Period 1 of the new year

This can be done at any time after you have installed the Payroll Year End Update.

How do I set Week 53?

You don't need to treat Week 53 any differently to any other pay period.

1. To check whether you have an extra pay period in the tax year, open the payroll calendar by selecting **Payroll - Calendar**.

For more information, see [Working with the Payroll Calendar](#).

2. If there is an extra pay period, set it in the usual way.

For more information, see [Payroll Run: Recommended Steps](#).

The employee's whose tax is normally calculated on a Normal cumulative basis is calculated on a Week 1 basis in an extra pay period.

### Merging Employees in the P35

Why would employee records have the same PPS number?

There are several possible reasons:

- If an employee left the company's employment, and then was subsequently re-hired by the company, a second employee record may have erroneously been created for them.
- If the employee's pay frequency was changed during the tax year so that, for example, they have a record in your weekly payroll, and another in your monthly payroll.
- A third possibility is that an employee record may lack a PPS number, but other details, such as the name, indicate that it is a duplicate.

When is the system unable to merge duplicate employee records?

When one or more duplicate employee records are active at the same time, the system can't merge them for P35 ROS reporting purposes. In practice, what this means is that all but one of the employee records must have a Finish Date or Finish Period. If you proceed with the P35 to ROS process, the records will be omitted from the submission.

You should cancel the P35 to ROS process and ensure that any employee record that requires a Finish Date or Finish period actually has one. Then begin the P35 to ROS process again.

Do I need to check the numbers in the P35 submission?

Yes. It is essential to check that each total in the Merge Duplicate Employees window is correct. There are a number of reasons why they may be incorrect.

For example, suppose that an employee switches from the Weekly pay frequency to the Monthly pay frequency. A new Monthly employee record should be created for the employee, and the old one should be deleted. The steps involved in doing this are set out here: [Transferring Employees Between Payrolls](#). If, in error, the employee's Weekly employee record remains on the system, the last Weekly pay period's values may overlap with the first Monthly pay period, causing discrepancies when the records are merged for P35 to ROS reporting purposes.

Another possible source of incorrect merged totals is the case of an employee who leaves the company and then returns. If a new employee record is created for them when they return, it is possible for the same pay periods to be processed for both records, leading to incorrect merged totals. Again, check the merged totals carefully on the Merge Duplicate Employees window.

### See also

[P35 to ROS submission](#)

### P35 to ROS submission

You must submit your P35 return online by uploading the file on the ROS website:

<http://www.ros.ie>

The full set of official Revenue Commissioners P35 documentation is at this location:

<http://www.revenue.ie/en/business/pay/p35-end-year-returns.html>

1. Select **Year End - Tax - Tax Year End Reports**.
2. Select the P35 Returns **via ROS** radio button.
3. Click **Create**.

You are now presented with a sequence of windows:

Stage 1: If you are using a consolidation company...

If you are currently logged into a consolidation company (see [Consolidation Companies](#)), the P35 - Consolidation Company Information window opens. This window lists the normal payrolls that are consolidated in the consolidation company.

1. The system may detect discrepancies in the payroll data at this stage. If so, it will indicate this. To proceed anyway, select the **Some payrolls above...** checkbox.
2. Click **Continue Processing P35s** to proceed.

Stage 2: Are there duplicate employee records?

Whether you are in a normal payroll or a consolidation company, the Merge Duplicate Employees window will list any 'duplicate' employee records it detects in the relevant payroll data. Employee records that meet the following criteria are considered be duplicates, representing a single employee for the purposes of the P35:

- Employees with the same PPS Number.
- Employees with a blank PPS number, or where just one of them has a PPS number, but for whom ALL of the following match:
  - First name
  - Surname
  - Date of birth
  - Address 1

If just some of the listed criteria match, it's not a duplicate.

If one of these criteria is blank in all records, it is not considered to be a matching piece of information.

Invalid matches are not merged in the P35 ROS file. This is not mentioned on the P35 Monitor.

1. Check the list in the Merge Duplicate Employees window.
2. There may be cases in which the details in the records make it impossible to automatically merge the details. These cases will be highlighted. Click **Print** to print a report of the information displayed in the window.
3. To resolve any issues preventing the system from merging highlighted employee records, **Cancel** out of the window, and use the report to resolve the relevant issues.
4. When all such issues have been resolved, begin the P35 to ROS procedure again.
5. When you reach the Merge Duplicate Employees window again, verify that all issues have been resolved, and then click **Merge and Continue** to merge the duplicate employee records.

For important additional information, see [Merging Employees in the P35](#).

Stage 3: P35 Return Type

After you have merged employee records, the P35 Return Type window displays. There are three P35 return options available:

- **Original:** Select this option if you have not already submitted a P35 to Revenue for the current Payroll Year.
- **Amended:** Select this option if you have already submitted a P35 to Revenue for the current Payroll Year, but some employee details have subsequently changed.
- **Supplementary:** Select this option when you have already submitted a P35 return for some, but not all employees.



You can also click the **Select Employees** button to specify which employees will be included on the P35. By default, all employees are included.

When you have made your selection, click **Proceed**.

#### Stage 4: Validating Payroll Information

Micropay Professional will now validate all the information you have specified.

If any errors are located during the validation the ROS P35 Data Evaluation Report will list these errors. You must resolve the errors before the ROS P35 return can be created again.

1. Click **Print** to print the validation report.
2. Click **Close**, and use the report to resolve all the identified issues.
3. Begin the P35 to ROS process again.

#### Stage 5: Pension Total Adjustments

The payroll's pension totals are displayed. The Revenue Commissioners require that the P35 include payroll totals for Retirement Benefit Schemes (Pensions), PRSAs, RACs and Construction Workers Pension Schemes. These values were processed through payroll.

1. If any pension amounts were processed outside the payroll system, add them to the P35 totals now by adjusting the amounts using the fields in the +Adjustments column.
2. Click **Proceed** to continue.

#### Stage 6: Saving the ROS File

1. The ROS P35 Save As screen will be displayed.
2. A default filename will be displayed in the following format:  
*10-567T (tax year - the last four characters of the company registration number)*
3. A default folder will also be selected - ROS - which is located under the folder where the payroll data is stored. You can change this if necessary.
4. Click **Save** to save the online ROS P35 file in the specified folder.
5. Click **OK**.
6. The P35 ROS - Complete window opens. This summarises the P35.

To display a report summarising the employees included in the return, click the **View Monitor** button.

Check the overall totals against your last Control Summary.

Print the report for future reference.

7. To open the folder containing the P35 ROS file you have just created, select the **Open folder containing P35 ROS file** checkbox, and click **Done**.

You can now upload this ROS P35 file (the file with the .P35 extension in its filename):

<http://www.ros.ie>

See Also

[Payroll Year End FAQs](#)

### Pensions at Payroll Year End

You must include information about pensions on your 2010 P35 submission.

#### Adjusting pension amounts

The Revenue Commissioners require that P35 submissions should include payroll totals for Retirement Benefit Schemes (Pensions), PRSAs, RACs and CWPS schemes.

When you are creating the P35 to ROS file, these totals are displayed. They are derived from the data contained in Micropay Professional.

However, for each pension type there may have been amounts contributed outside of normal payroll processing. If there are such amounts, you must adjust the payroll totals accordingly. The P35 Pension Adjustments screen enables you to do this.

You can enter adjusted amounts for each of the figures, making it possible to take non-payroll amounts into account.

See also: [P35 to ROS submission](#).

#### What should I call the P35 to ROS file?

When you are ready to save your P35 to ROS file, the application suggests a default file name. This takes the form:

*[tax year]-[last four digits of the company registration number].P35*

So a typical example of a P35 file name would be:

10-4567T.P35

A second file with the same name but a different extension - .MON - is also created.

Do not submit this file.

#### What are pension links?

A pension link is an association between a payroll deduction and a pension scheme.

Pension links enable you to ensure that pension contributions are included on the P35.

You can also use a pension link to ensure that employer contributions to an occupational pension scheme or a PRSA are displayed on the employee's payslip. This makes it easier for the employee to keep track of exactly how much has been paid into the scheme.

In addition, pension links enable you to set up pension contribution amounts to be transmitted electronically to the pension provider. This process is similar to the Paypath facility.

The Pension Link is shared by all payrolls that you operate, so that you can have contributions from different payrolls all going into the same pension scheme.

#### How do I create a pension link?

You may need to set up a pension link for a particular pension deduction.

1. To set up a pension link, log into Micropay Professional as the administrator (username: ADMIN, default [password](#): PASS).
2. Select the **Tables - Pension Link** menu option. The Pension Link window is displayed.
3. Specify the Link ID and the Description, and then click **Find**.
4. If the link does not already exist, the application prompts you to confirm that you want to create a new link. Click **Yes** to proceed.
5. Specify any other relevant details.
  - If you are creating a link solely for the purpose of including the pension contribution amounts in the P35, then it is necessary only to provide a Link ID, a description and the link type (Pension, PRSA, RAC or CWPS).

- If the pension link will be used as a fully valid pension scheme, you need to specify all relevant details in the Pension Link window. Your pension provider will supply you with the relevant information if you will be submitting electronic pension files.

6. Click **Save**.

When the pension link has been created, it can be attached to deductions as appropriate. This ensures that the relevant details appear on the P35.

The following information can be specified in the Pension Link window.

Field	Description
Link *	A unique number assigned to every pension link. (Maximum: 200 links)
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**\* = Mandatory field when creating a Pension Contribution file**

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1. Select **Company/Payroll - Deductions**.
2. The Deductions window opens. Click in the **Pension** cell corresponding to the deduction you want to amend. This enables a drop-down menu.
3. Select the pension link you want to attach to the deduction.
4. Click **OK**.

What do I check on the P35 Plain Report?

Check the following on the P35 Plain Report:

- Are all employees (including leavers) listed in the report?
- Do the totals on the report match those on your last control summary? See [Payroll Year End Reports](#).
- Does more than one payroll have a particular Tax Registration number? If so, you should use a consolidation company. For more information, see [Consolidation Company](#)

The Revenue Commissioners recommend that you keep a copy of the P35 Plain Report for future reference.

## See also

[How do I set up pensions?](#)

[Construction Workers Pensions](#)

## Extra Pay Period

What is an extra pay period?

Week 53 occurs in a weekly payroll when there are 53 pay days in the tax year. There are normally 52 pay periods in a weekly payroll, but in some years the dates fall in a way that gives rise to an 'extra' pay period'.

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If the next payday occurs on or after the 1st January, you DO NOT have an extra pay period. This pay period must be processed as Period 1 of the new tax year.

Incorrect processing of an extra pay period may result in inaccurate returns for that tax year.

Only the date of payment (not the date of work) determines whether a pay period is 'extra' in the current year. So if you have a pay date of 03/01/2011, this must be processed as Period 1 of 2011, regardless of when the actual work for this period was done.

My employees are on holiday over the Christmas period. Should I run a Week 53 to ensure they get their holiday pay before their holiday begins?

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If the pay date for the holiday week falls in January rather than December, the holiday week is not an extra pay period, and must be processed as a normal week in period 1 of the new tax year.

If Week 1 of the new year is a holiday week, and you still want to pay your employees for this week in advance of their holidays, carry out the following steps:

- complete the current tax year
- run the Payroll Year End in full
- set Period 1 of the new year

This can be done at any time after you have installed the Payroll Year End Update.

How do I set Week 53?

You don't need to treat Week 53 any differently to any other pay period.

1. To check whether you have an extra pay period in the tax year, open the payroll calendar by selecting **Payroll - Calendar**.

For more information, see [Working with the Payroll Calendar](#).

2. If there is an extra pay period, set it in the usual way.

For more information, see [Payroll Run: Recommended Steps](#).

The employee's whose tax is normally calculated on a Normal cumulative basis is calculated on a Week 1 basis in an extra pay period.

### Merging Employees in the P35

Why would employee records have the same PPS number?

There are several possible reasons:

- If an employee left the company's employment, and then was subsequently re-hired by the company, a second employee record may have erroneously been created for them.
- If the employee's pay frequency was changed during the tax year so that, for example, they have a record in your weekly payroll, and another in your monthly payroll.
- A third possibility is that an employee record may lack a PPS number, but other details, such as the name, indicate that it is a duplicate.

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When one or more duplicate employee records are active at the same time, the system can't merge them for P35 ROS reporting purposes. In practice, what this means is that all but one of the employee records must have a Finish Date or Finish Period. If you proceed with the P35 to ROS process, the records will be omitted from the submission.

You should cancel the P35 to ROS process and ensure that any employee record that requires a Finish Date or Finish period actually has one. Then begin the P35 to ROS process again.

Do I need to check the numbers in the P35 submission?

Yes. It is essential to check that each total in the Merge Duplicate Employees window is correct. There are a number of reasons why they may be incorrect.

For example, suppose that an employee switches from the Weekly pay frequency to the Monthly pay frequency. A new Monthly employee record should be created for the employee, and the old one should be deleted. The steps involved in doing this are set out here: [Transferring Employees Between Payrolls](#). If, in error, the employee's Weekly employee record remains on the system, the last Weekly pay period's values may overlap with the first Monthly pay period, causing discrepancies when the records are merged for P35 to ROS reporting purposes.

Another possible source of incorrect merged totals is the case of an employee who leaves the company and then returns. If a new employee record is created for them when they return, it is possible for the same pay periods to be processed for both records, leading to incorrect merged totals. Again, check the merged totals carefully on the Merge Duplicate Employees window.

### See also

[P35 to ROS submission](#)

### P35 Disk

The Revenue Commissioners no longer accept the P35 Disk as a valid P35 submission.

You can still create the disk, but only for your own internal purposes.

1. Select the **Year End - Tax - Tax Year End Reports** menu option.
2. The Tax Year End Reports window opens. Select the P35 Returns **via Disk** radio button.
3. Insert a floppy disk in the drive, and then click one of the following buttons:

- **Create** to generate a preview of the file's contents
  - **Verify** to generate the file without printing or a print preview
4. An evaluation report is displayed on screen. You can print this report, or continue with the P35 to Disk process. You need to correct any errors specified in the report before you can successfully generate the P35 file.
  5. The P35 Pension Adjustments window opens. The payroll pension totals are those that were processed through Micropay Professional. You must comply with the Revenue requirement that the P35 should include payroll totals for Retirement Benefit Schemes (Pensions), PRSAs, RACs and CWPS schemes.

For each pension type, there may have been amounts contributed outside the payroll program. Legislation requires that these be added to the P35. For example, if the employer maintains an employer pension outside the payroll, this must be included on the P35.

You can enter adjusted amounts for each of the figures, making it possible to take non-payroll amounts into account.

6. When you have made all necessary adjustments, click **Proceed** to continue.
7. You are prompted to specify the location where you want to save the P35 file.
8. Next, specify whether there was an extra pay period in the tax year.
9. The preview window displays summary details of the information that will be written to disk. You should check that these details are correct by comparing them to the last Control Summary.
10. Click **Print** to print the details and complete the process, or click **Yes** to complete the process without printing.
11. You are prompted to confirm the location where the file should be saved.
12. Remove the disk when the file has been generated, and label it with your Company Tax Registration Number and your Company Name.

### See also

[Pensions at Payroll Year End](#)

[Payroll Year End Reports](#)

[P35 Plain Report](#)

[P35 to ROS submission](#)

### How do I generate a PRC1 report?

The PRC1 Report should be submitted to the Revenue Commissioners at the end of the tax year only when an employee has three or more PRSI classes while in employment with your company during the year.

The format of the Micropay Professional PRC1 Report is Revenue-approved.

1. Select the **Year End - Tax - Tax Year End Reports** menu option.
2. Select **PRC1 Report**.
3. Click **Print**.
4. Post the printed report to the following address:

PO Box 354

Sarsfield House

Francis Street

Limerick

See also

[Payroll Year End Reports](#)

### How do I generate a PRD35 report?

You must print a PRD35 if employees in one or more of your payrolls are subject to the Pension-Related Deduction (PRD) and are still in your employment at the end of the tax year.

The report provides a total of Pay (subject to the PRD deduction) and PRD Paid for each employee, and for the company as a whole.

1. Select **Year End - Tax - Tax Year End Reports**.
2. Select **PRD35**.
3. Click **Preview** or **Print**.

See also

[Tax Year End Reports](#)

### How do I print P60s?

You must print P60s for each employee who is still in your employment at the end of the tax year:

1. Select **Year End - Tax - Tax Year End Reports**.
2. Select a P60 option.
3. Specify the employees whose P60s should be printed. By default, all employees are selected.

You can print a P60 using plain printer paper or using special P60 stationery.

You can also produce P60s in either English or Irish.

If the application detects any errors in your payroll data, they will be listed onscreen when you try to create the relevant P60 report. You must correct all errors before you can create the report.

4. Click **Preview** (if you want to view the reports before printing them) or **Print**.

The relevant P60s are printed. Two copies are printed per employee.

See also

[Tax Year End Reports](#)

### How do I generate a PRD60 report?

You must print a PRD60 for each employee subject to the Pension-Related Deduction (PRD) who is still in your employment at the end of the tax year.

1. Select **Year End - Tax - Tax Year End Report**.
2. Select **PRD60**.
3. Specify the employees whose PRD60s should be printed.
4. Click **Preview** or **Print**.

The relevant PRD60s are printed.

See also

[Tax Year End Reports](#)

## Recording Medical Insurance BIK

You must record medical insurance Benefit in Kind (BIK) for Payroll Year End reporting purposes.

So, before you start processing payroll, you should associate the relevant payments in Micropay Professional with the BIK Type **Medical Insurance**.

1. Select the **Company/Payroll - Payments** menu option.
2. For each relevant payment, select the **Medical Ins** BIK Type.
3. Click **OK**.

In addition, you must record any Medical Insurance BIK amounts reimbursed to the employer. To do this, open each relevant Employee Details record by selecting **Processing - Employee Details**, and enter the yearly reimbursement value relating to that employee.

See also

[Benefit in Kind \(BIK\)](#)

## Tax Credit Import

Tax Credit Import involves setting up employee tax information for the new tax year, or to change to an employee's information during the year.

Tax Credit Import information updates the following:

- tax credits
- standard-rate cut-off
- previous employment Gross Pay
- previous employment Tax Paid details
- Marginal Relief Rate
- Tax Status

If you are a current Revenue Online Service (ROS) customer, you can download the information from the ROS web site.

1. Select **Import Tax Credit Information** in the navigation pane's **Employee** view.
2. The Locate Tax Credit Import File window opens.

Here you specify the location of the Tax Credit Import file.

- The file's name should match the payroll's Tax Registration Number.
- The file's tax year should match that of the payroll.

3. Click **Next** to proceed.
4. The Select Tax Credit Record window displays.

This window lists all the tax credit records in the Tax Credit Import file. Micropay Professional checks each record for discrepancies with your existing payroll information, and displays records with apparent discrepancies in red. Other records are displayed in black, and are selected by default.



Possible types of discrepancy include:

- Records for employees who have left your payroll.
- Records for employees who have not yet been added to your payroll.
- The employee's previous employment Gross Pay in Micropay Professional is greater than the corresponding value in the Tax Credit Import file.
- The employee's previous employment Tax Paid value in Micropay Professional is greater than the corresponding value in the Tax Credit Import file.

You can import records that have discrepancies, but doing so risks introducing errors to your payroll system. You should investigate the cause of each discrepancy, and consult with Revenue to clarify any relevant issues.

5. When you have selected all the records you want to import, click **Import Now**.
6. The Import Progress window displays a summary of the import process.
  - You can generate a more detailed report on the import process by clicking the **Print Tax Credit Import Reports** button.
  - You can also generate this report by selecting the **Miscellaneous - Tax Credit Import - Print Tax Credit Import Report** menu option.
  - You can specify which sections of the report you want to print, and whether you want to generate a detailed or a summary report.
7. Click **Done** to close the window.
8. Spot-check a few Employee Details records to confirm that the tax credit information has been updated correctly.

See also

[Tax Credit Import Report](#)

[Payroll Year End FAQs](#)

## Tax Credit Import Report

This report contains information relating to the most recent tax credit import, including:

- the employees updated
- the employees who were not updated
- the unused disk records (PPS numbers on the disk, but not in the payroll)

You can use the options in the Tax Credit Import Settings window to specify the sections you want to include in the report. You can print:

- all report sections
- only employees updated from the Tax Credit Import file
- only employees who are in the Tax Credit Import file, but not in your payroll
- only employees who are on your payroll but are not listed in the Tax Credit Import file

You can also specify whether you want to generate a summary or a detailed report.

See also

[How do I import tax credit data?](#)

## **How do I manually update PAYE and PRSI tables?**

These tables are updated automatically when you install the Payroll Year End 2010 update.

See also

[How do I install the Budget 2011 Update?](#)

## Payroll Backup and Restore

You can use the payroll backup utility (see [Backing up a Payroll](#)) to make a backup of the current payroll's data files.

The Backup function should be used after each end of period to ensure that you have a copy of your data, so that in the event of a system failure you can [Restoring a Backup](#) previous data.

### Administrative Backup and Restore

Payroll Backup and Restore should not be confused [Administrative Backup and Restore](#), which enables you to back up programs and data associated with **all** payrolls on the system.

### Backing up a Payroll

You can back up the current payroll.

Having a backup means that in the event of your data becoming corrupt, you can revert to a working version.

1. Click the **Backup** button in the Micropay Professional desktop.
2. The Backup window opens. This enables you to specify a destination for the backup data.

Browse to the backup location you have chosen. Use a reliable storage medium, such as a network drive or a memory stick.

3. Click **Backup** to carry out the backup procedure.
4. Click **OK**.

See also

[Payroll Backup and Restore](#)

[Restoring a Backup](#)

### Restoring a Backup

You restore a backup to revert to a previous version of your payroll data. Restoring overwrites all the current data in the relevant payroll.

Typical situations in which you would need to restore a backup include:

- when your data files have become corrupt
- when you need to rebuild from a previous period because of data errors

The Restore option should be used with caution. Contact Support if you have any queries about its use.

1. Select the **Miscellaneous - Restore** menu option.
2. The program displays a dialog box in which you can select the source of the backup files. Browse to the backup location.
3. Clicking **Show Details** to check what data will be restored.

**Note:** Always checking the pay period to make sure you are restoring the correct backup.

4. Click **Restore**.

See also

[Payroll Backup and Restore](#)

[Backing up a Payroll](#)

## Nominal Integration

The Nominal interface allows you to produce a nominal journal for integration with your own Nominal Ledger system.

### Important Topics

[Nominal Setup](#)

[Nominal Payments](#)

[Nominal Deductions](#)

[Nominal Departments and Cost Centres](#)

[Nominal Translations](#)

[Nominal Descriptions](#)

[How do I create a nominal analysis report and a file for integration into my Nominal Ledger system?](#)

**Note:** The Nominal module is not available in some versions of [Micropay Professional Lite](#). Cost centres are not available in Micropay Professional Lite.

### Nominal Setup

You use the **Setup** option to set up the payroll nominal codes for bank, rounding and suspense accounts, employee and employer PRSI and employee PAYE contribution. It also allows you to define the nominal code format and the report layout.

1. Select the **Nominal - Set-up** menu option. The Setup - Nominal window displays. You can use this to enter the details about the nominal interface parameters.
2. Click **OK** to store the nominal setup you have specified.

Field	Description
Nominal Code Format	<p>Specifies the format of the nominal codes to be used in the payroll system for analysis of payroll costs. This field must have an entry. There are three letters with special meaning when you are defining a format:</p> <p>d - department code</p> <p>c - cost centre code</p> <p>a - item code</p> <p><b>Note:</b> Cost centres are not available in <a href="#">Micropay Professional Lite</a>.</p> <p>All other characters are understood by the system, in the context of nominal code formats, to be constants. For example, if you specify the format definition dddccccaaaa, the system expects codes whose first four characters identify the department, the next four the cost centre and the final four the item code.</p> <p>A nominal code format can contain up to 16 characters.</p>
Employee P.R.S.I.	The nominal code assigned for the accumulated value of the employee's PRSI contribution. This is normally a balance sheet account code.

Field	Description
Employer P.R.S.I. +	The nominal code assigned for the accumulated debit value of the employer's PRSI contribution. Normally a profit and loss account.
Employer P.R.S.I. -	The nominal code assigned for the accumulated credit value of the employer's PRSI contribution. Normally a balance sheet account.
PRD	The nominal code assigned for the accumulated value of the employee's contribution to the Pension-Related Deduction (PRD), commonly known as the Public Sector Pension Levy. (For more information, see <a href="#">Setting up the Pension-Related Deduction</a> .) Normally a balance sheet account.
P.A.Y.E.	The nominal code assigned for the accumulated value of the employee's PAYE contribution. Normally a balance sheet account.
Bank Account	The nominal code assigned for the employer's bank account. Normally a balance sheet account.
Rounding Account	The nominal code assigned for the accumulated rounding value of employee nett pay.
Suspense Account	The nominal code assigned for the employer's suspense account.
Journal Format	<p>The fields in the Journal Format section enable you to specify the print column positions in the nominal report/file output of the</p> <ul style="list-style-type: none"> <li>code</li> <li>description</li> <li>debit value</li> <li>credit value</li> <li>total</li> </ul>
Sub-total breaks	<p>You use this field to specify when subtotal breaks should occur. Consider the following examples:</p> <ul style="list-style-type: none"> <li>1 - Subtotals are printed whenever the first character of the nominal code changes</li> <li>1111 - Subtotals are printed whenever a change occurs in the first four characters of the nominal code</li> <li>11112222 - Same as 1111 above, with the additional criterion that a secondary subtotal will print whenever a change occurs in the fifth to eighth characters of the nominal code.</li> </ul>
Show Detail	This checkbox enables you to specify that whether a separate line is printed for each period. If you leave it deselected, period values are combined. (Only relevant if more than one pay period is included in the report.)

See also

[Nominal Integration](#)

The Nominal module is not available in some versions of [Micropay Professional Lite](#).

## Nominal Payments

You use the Payments option to set up a nominal code for each payment you have defined on your system.

1. Select the **Nominal - Payments** menu option.
2. The payments defined on your system are displayed in the Payments - Nominal window. Use this win-

dow to enter the nominal code for each payment.

Depending on the nominal code format defined in the Setup - Nominal window, you can use up to sixteen characters in each Nominal Code field.

3. Click **OK** to store the nominal codes you have specified.

See also

[Nominal Integration](#)

The Nominal module is not available in some versions of [Micropay Professional Lite](#).

## Nominal Deductions

You use the Deductions option to set up a nominal code for each deduction type you have defined in your system.

1. Select the **Nominal - Deductions** menu option.
2. The Deductions - Nominal window displays a list of the deductions defined on your system. For each deduction, use the window to specify a nominal code for the
  - employee credit account
  - employer debit account
  - employer credit account

Depending on the nominal code format defined in the [Setup - Nominal window](#), you can use up to sixteen characters in each field.

3. Click **OK** to store the nominal codes you have specified.

See also

[Nominal Integration](#)

The Nominal module is not available in some versions of [Micropay Professional Lite](#).

## Nominal Departments and Cost Centres

You use the Departments and Cost Centres options to set up a nominal code for each department and cost centre record you have defined in your system.

**Note:** Cost centres are not available in [Micropay Professional Lite](#).

1. Select the **Nominal - Departments** or the **Nominal - Cost Centres** menu option, as appropriate.
2. A window containing a list of the departments or cost centres defined on your system opens. For each department or cost centre, specify a nominal code.

Depending on the nominal code format defined in the Setup - Nominal window, you can use up to eight characters in each Nom. field.

3. Click **OK** to store the nominal codes you have specified.

See also

[Nominal Integration](#)

The Nominal module is not available in some versions of [Micropay Professional Lite](#).

## Nominal Translations

You use the Translations option to set up a table of alternative nominal codes. This is a useful tool if you want to make the nominal coding structure less rigid. You can use it to translate the codes defined in Micropay Professional to alternative codes that will be used when the nominal report or file is produced.

You associate a nominal code with a translation code to be included in the report or in the output file.

If a translation code has been specified, and there is no corresponding nominal code description, the nominal report will include the translation code, and will use the Micropay Professional nominal code in place of a description.

If no description or translation code exists for a nominal item, the nominal code will print twice in the nominal report.

You can delete a translation code using the **F5** function key.

1. Select the **Nominal - Translations** menu option.
2. The Translations - Nominal window opens. Here you can enter nominal codes and corresponding translation codes. Translation codes can be up to sixteen characters in length.
3. Click **OK** to store the information you have specified.

See also

[Nominal Integration](#)

The Nominal module is not available in some versions of [Micropay Professional Lite](#).

## Nominal Descriptions

You use the Descriptions option to set up a table of descriptions for the nominal codes you intend to use for your nominal integration/reporting.

1. Select the **Nominal - Descriptions** menu option.
2. The Descriptions - Nominal window opens. Here you can list nominal codes and provide corresponding descriptions (which can be up to 30 characters in length).
3. Click **OK** to store the nominal descriptions.

Recall that in a nominal code format definition, the letters d, c and a have special meaning:

- d - department
- c - cost centre
- a - item code

For example, this format defines a twelve-character nominal code containing four characters for the department, cost centre and item code: *dddccccaaa*

You can use full stops (‘.’ characters) as placeholders when you specify nominal code descriptions. This makes it possible to associate a particular description with a specific department, cost centre, or item.

For example, if you enter *....C001* in a Nominal Code field, the system understands that you are referring to all nominal codes that are associated with the cost centre with code C001.

Similarly, if you enter *.....A111*, the system understands that you are referring to all nominal codes that are associated with the item with code A111.



A nominal code will be accompanied in the nominal report or file by any description relating to the department, cost centre or item that the nominal code references.

Here are some examples of descriptions you might add to the Descriptions - Nominal window:

Nominal Code	Description
D001	Dublin Branch
....C001	Rathmines Office
.....A111	Administration

See also

[Nominal Integration](#)

The Nominal module is not available in some versions of [Micropay Professional Lite](#).

### How do I create a nominal analysis report and a file for integration into my Nominal Ledger system?

You use the **Report/Create File** option to print a nominal analysis report, or to create a file for integration to your nominal ledger system. You can produce the file for one payroll period, or for a range of payroll periods.

1. Click the **Nominal Transfer** icon in the desktop process map. Alternatively, select the **Nominal - Report/Create File** menu option.
2. The Report/Create File window opens. Here you can enter the output options and period criteria.
3. In the Range boxes, enter the start and finish periods for the report.
4. Select an output option for the report.
5. Click **OK** to produce the report or file.

Field	Description
Range	Enter the start and finish payroll periods that determine the data to be included in the report or file. Only Pay Periods in the relevant Nominal Period can be selected.
Preview Report	Select this radio button to preview the report on screen.
Print Report	Select this radio button to print the report. If you want to change the printer setup, click <b>Setup</b> .
Create File	Select this radio button to create a fixed-format or CSV file. Select the format in the drop-down list. Type the file name and path in the relevant field. The default location is the Micropay Professional directory called <i>nominal.001</i> .

See also

[Nominal Integration](#)

**Note:** The Nominal module is not available in some versions of [Micropay Professional Lite](#).

## Report Writer

The navigation pane's **Other Reports** option (see [Micropay Professional Standard Reports](#)) enables you to access all the essential reports needed for running your payroll.

However, you may have specific reporting requirements of your own. The Report Writer is designed to meet such requirements. It enables you to design your own reports.

Report Writer also enables you to export data to other file formats. This can enable you to use your payroll data in another application, such as in a spreadsheet or a database.

### Important Topics

[How Report Writer Works](#)

[Basic Report Writer Procedure](#)

## How Report Writer Works

Report Writer enables you to use the data stored in your [Micropay Professional Data Files](#) to design reports.

Each report design is based on retrieving data from one of these data-file combinations. You can't mix data from different data file combinations in the same report design. Any of the data fields maintained in a particular data file can be included in a report design. Not all fields included in a design will necessarily be printed in the finished report. For example, you may want to use a data field for sorting or as part of a formula calculation, but to ensure that it is not visible in the printed report.

In the Report Writer window, you can scroll through the fields available to the report. Once you have decided which fields you want to include, you can begin working on your report design.

### Working with fields

You can have up to 26 fields in any one report; each one is referenced by a letter from A to Z. The order in which you select fields determines the order in which the corresponding columns will appear across a report.

For each field included, there are a number of attributes you can specify:

- **Totals** - You can generate a total based on the values contained in several numeric fields, or have a count of the number of occurrences of particular field in the report.
- **Sort** - You can select a field that will be used as the basis upon which the report can be sorted in ascending or descending order.
- **Break** - You can choose to have a break forced when a change of record occurs in a specific field. For example, to include a subtotal for each department, you can include a break when the department code changes in the report. You can also group information by data field to suppress the display of duplicate records. For example, suppose that your report includes the employee code. When your report is printed or displayed, the code is repeated in the report for each relevant payment. By grouping the report's information on the basis of the employee code field, you ensure that the employee code is shown just once per employee.
- **Header** - Each data item you include in the report can have its own column heading. In the Header part of the report design, you can type the column heading you want to appear on the report.
- **Print** - By default, the complete value contained in a field that is part of the report design is included in the printed or exported report. You can specify how much of the value should be included by entering the number of characters to be printed. You may want to do this if, for example, you have limited column width to work with, and only part of the field value need be visible. You can also suppress the printing of any item altogether by setting the field length to *-1*.
- **Filter** - You may not want to display all of the data relating to a particular item in your report. For example, you may want to produce a report based on a range of employees. The Filter section in the Report Writer is used to define which records are to be selected. In other words, the data is *filtered* to

provide the precise range of records you want. A filter can be defined for any or all of the data fields you choose to include in the report design. You may want to select fields simply for the purpose of creating a filter, without having them included in the report output.

See also

[Micropay Professional Data Files](#)

[Filters](#)

[Link](#)

[Formulae](#)

[Output Options](#)

[Report Writer](#)

## Micropay Professional Data Files

Micropay Professional's data files, which store information according to type, are as follows.

- Employee + Elements
- Employee + Deductions
- Employee File
- Departments
- Cost Centres
- Company
- Company Audit
- Calendar
- Deductions
- Elements
- EOY File
- ETP File
- Notes File
- Employee + Timesheets
- Timesheet Elements
- Timesheet Deductions
- Analysis
- Analysis Elements
- Analysis Deductions
- Employee + ETP

See also

[Report Writer](#)

## Filters

Filters are used to restrict the records associated with a particular data field that are included in the report. The selection criteria are entered using an *operator*. The filter is defined using this syntax:

**@ <Operator> <Operand>**

<Operator> is one of the operators defined below

<Operand> specifies the filtering to be applied

Operator	Description	Example
=	Equal To	<b>@=3</b>  Only display records with a value of 3 for this field.
<> or #	Not Equal To	<b>@&lt;&gt;3</b>  Don't display records with a value of 3 for this field.
<	Less Than	<b>@&lt;3</b>  Only display records with a value of less than 3 for this field.
>	Greater Than	<b>@&gt;3</b>  Only display records with a value of greater than 3 for this field.
<=	Less Than or Equal To	<b>@&lt;=3</b>  Only display records with a value less than or equal to 3 for this field.
>=	Greater Than or Equal To	<b>@&gt;=3</b>  Only display records with a value greater than or equal to 3 for this field.
.AND.	And - Both filters must be satisfied	<b>@&gt;3.AND.@&lt;&gt;6</b>  Only display records with values greater than 3, but don't display a record whose value equals 6.
.NOT.	Not - Negativise the Filter	<b>.NOT.@=3</b>  Don't display records with a value of 3.

Operator	Description	Example
.OR.	Or - Join two filters	<b>@=3.OR.@=4</b>  Only display records with a value of 3 or 4 for this field.

**Note:** If the relevant field is a character field, the operand should be enclosed in double quotes. For example, suppose that you want the report to include only details relating to employee 001. You would specify the following filter:

**e@="001"**

See Also

[Report Writer](#)

## Link

By default, the various filter expressions in the [report design](#) are linked together using the AND operator.

However, you can use the Link column in the [report design](#) to link filters using the OR operator.

Consider the following example:

Field	Filter
Employee Elements -> Hours This Period	@<>0
Employee Elements -> Value This Period	@<>0

If the Link field is left blank or *AND* is entered in it, only employee payments with both hours this period and a value this period will be displayed.

If, however, *OR* is entered in the Link column for the hours this period, any payments with either hours this period or value this period will be displayed.

See also

[Report Writer](#)

## Formulae

You can define a formula in a report design field, rather than associating it with a field in a data file. The formula can use the values in other fields, performing arithmetical operations on them.

All the usual arithmetical operators are available:

- addition
- subtraction
- multiplication
- division

You need to include in your report design the fields referenced in the formula. These fields, of course, do not necessarily have to be visible in the report output.

**Note:** You can't reference a formula in another formula.

### Example

Suppose that field F is Gross Pay Previous, and that field G is Gross Pay This Employment.

This means that the formula

**F+G**

would add the Gross Pay Previous value to the Gross Pay This Employment value.

You could, for example, define the formula in field H. You should give this field a meaningful heading, such as "Gross Pay TD" so that an informative title will be printed above the formula column.

See also

[Report Writer](#)

### Output Options

Once you have completed the content of a report design, information is extracted from the relevant data files, and a preview of the selected records displayed.

You can browse the preview and, if you are satisfied with the results, select one of the following output options:

- **Print** - This will send the report to the default Windows printer.
- **Save as DBF** - This will create a database format file with a DBF file extension from the report output.
- **Save as CSV** - This will create a CSV-format (comma-separated variables) file from the report output. This file type can be opened in most spreadsheet applications, including Excel.

See also

[Report Writer](#)

### Basic Report Writer Procedure

The following is a basic overview of the procedure for creating a report design.

For a more detailed overview, contact your supplier to arrange training on the use of the feature.

1. Select the **Reports - Report Writer** menu option.
2. The Report Writer window displays. You use this window to specify design template details.
3. In the Data Files drop-down list, specify the data source.
4. Enter a title for the report in the Report Header box.
5. Use the drop-down lists in the Report->Field Names column to select the fields you want to include in the report. These fields will comprise columns in the finished report. Ensure that you select them in the order in which you want them to appear in the report.

Each drop-down list includes all the fields in the selected data file. A maximum of 26 fields can be selected in a single report.

(As an alternative to using the drop-down lists, you can use the **File - Fields** menu option in the Report Writer window to select fields. This approach enables you to select several fields at once.)

6. To add a line to the report design above the currently selected line, press **F6**.
7. To remove the currently selected line, including all field details, press **F5**.
8. Complete the field attributes as necessary. If you do not want a particular field to be included in the output, set the print length value in the relevant Prnt cell to -1.

9. To add a formula to the report design, type the formula in a the Report->Field Name cell of appropriate line. If the formula references other fields, these should already be included in the report design.
10. To check the output of the report, click **Process**. The program will display the report results in a window called Query Result - Report Writer.
11. To store the report template:
  - select the window's **File - Save** menu option
  - enter the report file name (this must be of the format xxxxxxxx.*RPT*, with no spacing)
  - click **OK**
12. You can retrieve a previously saved report template using the **File - Open** menu option.
13. To output the report when the Query Result - Report Writer window is open, select the **File - Save As** menu option and specify the output destination. If you choose to save the report in either DBF or CSV format, you will be required to enter the filename.
14. When you have finished your report, a disk file copy is stored with the name xxxxxxxx.*RPT* where xxxxxxxx is your chosen report filename. You can retrieve this for reprinting by selecting the **Reports - Print Report** menu option in the main application workspace, and specifying the report you require.

See also

[Report Writer](#)

## Utilities

Micropay Professional includes a range of utilities you may require from time to time to perform non-routine tasks. The majority of these are available only when you log in as the administrator.

The administrative **Miscellaneous** and **Advanced** menus provide access to a number of these utilities.

### Important Utilities

[Consolidation Companies](#)

[Copying Payroll Files](#)

[Administrative Backup and Restore](#)

[System Log and System Audit](#)

[Why have I been locked out of the system?](#)

[Data Import](#)

[Salary/Rate Update](#)

[Period Archive](#)

[Transferring Employee Records to Sage HR](#)

[Importing Employee Records from Sage HR](#)

[Integration with Sage PeopleLink](#)

### Consolidation Companies

You may be using several payrolls in your organisation, each one for a different pay frequency.

To produce [Payroll Reports](#) and [Payroll Year End Reports](#) for the organisation as a whole, you can consolidate these payrolls into a single **consolidation company**.

The consolidation company contains the combined data of all the relevant payrolls.

You can't process payroll within a consolidation company.

To set up a consolidation company, carry out the following steps.

1. Determine which of your organisation's payrolls need to be consolidated.
2. Check that the corresponding payments and deductions in each payroll have the same ID. The consolidation process merges payments and deductions with the same ID.

For example, if Salary has the ID **1** in your Weekly payroll, it must also have the ID **1** in your Monthly payroll, or Salary may be incorrectly merged with another payment.

3. Log in as the system administrator (user name ADMIN, default [password](#) PASS).
4. Select **Configure Consolidation** in the navigation pane's Pay Run view. Alternatively, select the **Payroll - Consolidation Setup** menu option.
5. The Consolidation Company dialog box displays. In the Consolidation Company field, you can type a new (unique) consolidation company name. Alternatively, you may already have created a 'receiving' company for consolidation purposes. In this case, you can use the drop-down list box to select it.
6. Enter the password for the consolidation company, if one is required, in the Password field.
7. In the list of existing payrolls, select the checkboxes corresponding to the payrolls that will be consol-



idated. The pay frequency of each payroll is shown in the Frequency column.

8. You can identify which of the payrolls selected is to be the default payroll by selecting the name in the Default Payroll drop-down list box.
9. When you have finished selecting the payrolls for consolidation, click **Create**. If this is a new consolidation company, you will be prompted to confirm that you want to create it.

See also

[Working in a Consolidation Company](#)

[Viewing Consolidation Details](#)

[Auto-Consolidation](#)

[Consolidation Company](#)

## Working in a Consolidation Company

You can use a consolidation company to generate both normal pay period reports and Payroll Year End reports.

But you can't process payroll or edit employee details.

Activity	Allowed in a Consolidation Company?
Process Payroll	✗
Edit Employee Details	✗
Edit Company Details	✓
Generate Period Reports	✓
Generate PYE Reports	✓

### The Consol checkbox

When you are generating a pay period report in a consolidation company, you'll notice the **Consol** checkbox.

- If you select this checkbox before generating the report, the report will contain the most current payroll information.
- If you leave the checkbox deselected, the report will include only data from the last consolidation.

See also

[Working in a Consolidation Company](#)

[Viewing Consolidation Details](#)

[Auto-Consolidation](#)

[Consolidation Company](#)

[Consolidation Companies](#)

## Viewing Consolidation Details

When you are logged into a consolidation company, you can use the navigation pane's **View Consolidation Details** option to view information about the consolidated company and the payrolls it contains.

Alternatively, select the **Company/Payroll - Consolidation Details** menu option.

By selecting a consolidated company in the list window, you can view data relevant to when it was last consolidated, as well current details for the company.

See also

[Working in a Consolidation Company](#)

[Viewing Consolidation Details](#)

[Auto-Consolidation](#)

[Consolidation Company](#)

[Consolidation Companies](#)

## Auto-Consolidation

When you are logged into a consolidation company, you can update the payroll information it contains (belonging to the payrolls that are part of the consolidation company) using the Auto-Consolidation feature.

1. Log into the relevant consolidation company.
2. Click **Do Consolidation** in the left-hand pane, or select the **Miscellaneous - Consolidate All** menu option.
3. You are prompted to confirm that you want to merge all payroll files.

If a payroll's status is not set to **End of Period**, the following message is displayed:

'Posting has not been processed for...'

You can still continue with the consolidation by clicking **Yes**.

To consolidate all payrolls regardless of their status, click **Yes to All**.

4. The message 'All relevant files have been merged' is displayed. Click **OK**.

You have updated the consolidation company's information.

See also

[Creating a New Payroll](#)

[Company/Payroll Details](#)

[Working in a Consolidation Company](#)

[Viewing Consolidation Details](#)

[Auto-Consolidation](#)

[Consolidation Company](#)

[Consolidation Companies](#)

## Copying Payroll Files

When you are setting up multiple payrolls with similar details, it can save time to use the Copying Payroll Files utility, which can reduce the amount of data you need to manually input. You will later need to consolidate these payrolls for reporting purposes (see [Consolidation Companies](#)). It enables you to copy the details from an existing payroll to the new payroll you are setting up. An added benefit is that it ensures consistency in consolidated reports.

1. Log in as Administrator (username: ADMIN, default [password](#): PASS).
2. Select **Transfer Data** in the navigation pane's Pay Run view. Alternatively, select the **Payroll - Copy Files** menu option.

3. The Copy Files window opens. To specify the payroll from which you want to copy details:

- select the payroll name in the payrolls list
- click **From**

The payroll name is displayed in the Copy Details from Payroll field in the top left of the window. It has been removed from the payrolls list.

4. Select the relevant checkboxes to specify which items you want to copy.

5. To select which payroll from which you want to copy details:

- select the payroll name within the payrolls list
- click **To**

This payroll name is displayed in the Copy To list, and is removed from the payrolls list.

**Note:** The Calendar should not be copied if the pay frequencies of the payrolls are different.

6. Click **Copy** in the window's upper right-hand corner to begin the copying process.

See also

[Utilities](#)

## Administrative Backup and Restore

When you are logged in as the administrator, you can back up the entire payroll system, or specific elements of it, using Administrative Backup.

Carrying out an administrative backup

1. Select **Backup** in the navigation pane's Tasks view.
2. The Backup window opens. Select the payrolls you need to back up.
3. If you want to back up system files too (these contain information such as user names, user groups, and the PRSI table), select the **Backup System Files** checkbox.
4. Use the **Browse** button to select the destination of the backup data.
5. Click **Backup**.
6. The system displays a confirmation message after a successful backup. Click **Close** to close the Backup window.

Restoring payrolls from an administrative backup

**Note:** To restore system files from an administrative backup, use System Restore.

The Restore function is normally used only when:

- data files are found to be corrupt
- you need to resume payroll processing from a previous period because of data errors (and the [Re-wind](#) feature is not available)

1. Click **Restore** in the navigation pane's Tasks view.
2. Click **Show Details**.
3. The list of payrolls at the specified backup location are displayed. Select the payrolls to be restored.
4. Click **Restore**.

5. Click **Close**.

Restoring system files from an administrative backup

1. Select **Miscellaneous - System Restore**.
2. The System Restore window opens. Click **Show Details** view information about the backup system files at the specified backup location.
3. Click **Restore**.

See also

[Backing Up Your Data](#)

[Utilities](#)

## How do I re-install Micropay Professional?

If you need to re-install your Micropay Professional system (for example, when you are switching to a new computer), you need to ensure that program files and payroll data are transferred completely into the new installation.

For a planned re-installation, you can take some extra steps to make the transfer procedure simpler.

**Note:** In the case of an unplanned re-installation (typically this is a disaster-recovery situation in which you can no longer use your original installation), you'll need all program-related disks and updates, as well as the most recent payroll backups.

There are two ways of re-installing the complete system:

[Full Backup, Install & Restore](#)

This approach should be used when the original installation is **fully operational**. This procedure creates a backup the entire existing payroll, and then restores it in full.

[Install, Update and Restore](#)

This approach should be used when the original payroll is **no longer operational**. It involves installing the Micropay Professional using the latest installation disks, and then any updates that followed this release. Finally, a backup of your payroll data is restored. **Note:** This approach also necessitates that each company licence is entered again.

## Full Backup, Install & Restore

### Step 1: Full Backup

1. In the existing installation, log into Micropay Professional as the system administrator.
  - User Name: ADMIN
  - Password: PASS (unless the [password](#) has been changed)
2. Select the **Miscellaneous - Backup** menu option.
3. The Backup screen opens. Select the payrolls that should be backed up for the re-installation.
4. Select the **Back up System Files** checkbox if you wish also to back up the program files and other common files (such as licences, PRSI and PAYE tables and bank sort codes).
5. Specify the location where the backup should be saved. (Sage recommends that you use a reliable storage medium, such as a memory stick or a network location. Floppy disks are not a reliable backup medium.)

6. Click **Backup** to begin the process.

A message box confirms when the backup is complete.

## Step 2: Installation

Install Micropay Professional using the original CD (update disks alone cannot be used).

Note: You can also download the latest installation file from our website: **[www.sage.ie/pye](http://www.sage.ie/pye)**.

Click on the Windows **Start** button.

In the Run field, specify the location of the installation file, and click **OK**.

Follow the onscreen prompts until the installation is complete.

## Step 3: Restore

To restore your payroll data, carry out these steps:

1. Log into Micropay Professional as the administrator.
  - User Name: ADMIN
  - Password: PASS
2. Select the **Miscellaneous - Restore** menu option.
3. The Restore window opens. Select the payrolls you wish to restore.
4. Ensure that the backup location is specified correctly.
5. Click **Restore** to begin the process as indicated.

**Note:** To restore the system and program files as well as payroll data, select **Miscellaneous - System Restore**. Review the backup details that are displayed, and then click **Restore**.

6. Select **Company - Company Setup** and then click the **Add New Payroll** button.
7. Enter the payroll ID, password and payroll frequency.
8. Click **OK**. This enables the system to recognise the payroll ID when you log in.

See also

[How do I re-install Micropay Professional?](#)

## Install, Update and Restore

### Step 1: Install and Update

Install Micropay Professional from your setup disks, and then install any updates that are necessary to bring it completely up to date.

Alternatively, the latest version of the setup file can be downloaded from our website: **[www.sage.ie/pye](http://www.sage.ie/pye)**.

Follow the onscreen prompts until the installation is complete.

### Step 2: Restore

1. Log into Micropay Professional as the administrator.
  - User Name: ADMIN
  - Password: PASS (unless this has been changed)

2. Select the **Miscellaneous - Restore** menu option.
3. The Restore window opens. Select the payrolls you wish to restore.
4. Specify the location of the backup.
5. Click **Restore**.
6. When the payroll backup is restored, select **Company - Company Setup**, and then click **Add New Payroll**.
7. The New Payroll window opens. Specify the payroll ID, the company to which the payroll should belong, and the [password](#) and frequency.
8. Click **Create**.
9. Click in the Activation Key field. The serial number is displayed.
10. Phone Sage Technical Support to obtain an activation key.
11. Enter the activation key, and then click **License**.
12. Click **Create**.
13. The **New Payroll** window opens. Click **Yes** to keep the data that has just been restored.

This payroll is now ready.

Repeat the 'New Payroll' process for any other payrolls.

**Note:** This is effectively a new installation, so user login details will have to be set up before users can log into the payrolls. Select **Security - Users** to do this. Fill in the required user names and passwords, and assign them to User Groups if necessary. (User Group 1 is the default setting.)

See also

[How do I re-install Micropay Professional?](#)

## System Log and System Audit

Micropay Professional maintains two stores of information that can help Support to solve technical problems you encounter using the payroll system.

- A *system log*, which contains information about system usage and system errors.
- A *system audit*, which displays any changes made by the payroll system administrator.

### Opening the system log

To open the system log, carry out these steps:

1. Log in as the system administrator (username: ADMIN, default [password](#): PASS).
2. The System Log dialog box opens. Select either the **Preview** radio button or the **Print** radio button.
3. Click **OK**.

The System Log displays either onscreen or as a hard copy, as appropriate.

### Opening the system audit

1. Log in as the system administrator (username: ADMIN, default [password](#): PASS).
2. Select the **Miscellaneous - System Audit** menu option.
3. The System Audit window opens.

The **Print** button enables you to print a hard copy of the system audit.

The **Preview** button enables you to view the system audit onscreen.

See also

- [System Log](#)
- [Utilities](#)

## Why have I been locked out of the system?

In certain circumstances, Micropay Professional may deny you access to a particular function, alerting you that another user has placed a lock on the system.

By clicking **More** you can expand the message box to obtain more information. (You can collapse the window again by clicking **Less**.) The expanded information sets out three possible reasons why the lock may be in force:

1. You tried to access an option on this PC while using another option.
2. Micropay Professional is accessing an option on another PC that is preventing you from accessing this option.
3. There was an unexpected termination of Micropay Professional while this option was in use. If this is the case you can clear the locks to re-gain access by entering the Administrator [password](#).

**Note:** Clearing the locks should only be done when there are no other users logged into Micropay Professional.

To clear the locks, type the administrator password in the field, and then click **Clear Locks**.

**Note:** If you are logged in as the administrator, you are not prompted to provide the administrator password.

Disengaging multi-user locks (Alternative Method)

You can also clear multi-user locks in the following manner:

1. Ensure no other users are logged into the payroll.
2. Log in as the system administrator (username: ADMIN, default password: PASS).
3. Select **Clear Multi-User Locks** in the navigation pane's System Maintenance section. Alternatively, select the **Advanced - Clear Multi-user Locks** menu option.
4. The Clear Multi-User Locks dialog box displays information relating to the risks involved in clearing multi-user locks inappropriately.
5. Select **OK** to proceed.

You will now be able to access the payroll you were processing.

See also

[Utilities](#)

## Data Import

The Data Import feature - which you access by selecting the **Miscellaneous - Data Import** menu option - will allow you to import information from other files into the payroll system. These files must be in one of the following formats:

- \*.IMP - these files specify:
  - the database files that are to be updated
  - the fields into which you wish to import data

- the CSV files that contain the data to be imported
- the conditions that apply to the import process
- \*.CSV - these files contain data you can import into the payroll

**Note:** The \* symbol represents the name of the file, which can have a maximum length of eight characters.

#### \*.IMP file

You can create a \*.IMP file using a text editor, such as Notepad or Wordpad. Let's look at some of the elements that can make up a \*.IMP file:

- Key= *(the tag key of the file)*

Each payroll database master record has an associated search key that enables the Data Import module to search for that record. The module uses the tag keys it finds in the \*.IMP file as search keys. For example, the tag key 'employee' matches the Employee Details master record's search key.

- A create condition. There are three possible create values:

**No** - Existing records are updated but no new records will be created.

**Yes** - Existing records are updated and, where necessary, no new records are created.

**Only** - Only records that did not previously exist are updated.

- A blank condition. There are two possible values:

**No** - If a blank value has been inserted for a particular field in the \*.CSV file, the corresponding value in the database (\*.DBF) file remains the same - that is, the field is not updated.

**Yes** - If a blank value has been inserted for a particular field in the \*.CSV file, the corresponding value in the database (\*.DBF) file is set to blank or null.

- A decimal condition. There are two possible values:

**No** - This signifies that the values that you are importing into numeric fields are displayed in cent in the \*.CSV file (such as 110 rather than 1.10).

**Yes** - The values that you are importing into numeric fields are displayed as decimal figures in the \*.CSV file (such as 1.10 rather than 110).

#### \*IMP File - Data Validation and Limitations

The import function will generate an error and abort the process if any of the key words are incorrectly spelt or omitted from the import file.

Below is a typical example of an import file containing a single table entry - **Table1**.

Subsequent table entries would be called **Table2**, **Table3**, and so on. Similarly, field entries are numbered: **field1**, **field2**, and so on. Each table entry must contain all the relevant key words: **key**, **create**, **blank** and **decimal**.

Table1=Employee Masterfile *(specifies the file you wish to update)*

[Employee Masterfile] *(the database file to be updated)*

record=emplmast *(the record to be updated)*

key=employee *(the tag key of the file, refer to Note 1)*

field1=employee *(employee number)*



field2=name (*employee surname*)

field3=first (*employee forename*)

field4=addr1 (*fields 4-7 are the employee address*)

field5=addr2

field6=addr3

field7=addr4

data=c:\MicW\Demo\Emplmast.CSV (*the location of the \*.CSV file*)

create=No

blank=Yes (*an entry of Yes/No, refer to Note 3*)

decimals=Yes (*an entry of Yes/No, refer to Note 4*)

audit=No (*will record import info on an audit*)

verbose=Yes (*should be set to Yes to ensure that any import errors are recorded*)

- Spaces are allowed before and after the '=' operator in table and field entries.
- Blank lines are not permitted in the first column of the file.
- If a table section has been assigned to nothing, but is otherwise valid, the program will be aborted.
- If a field has been assigned to nothing, it is ignored by the import function. This is equivalent to assigning it the value NULL.
- If a field has been assigned to a value that doesn't appear in the database file (for instance, if the field entry value in the import file has been misspelt), the field is treated as if it had been assigned the value NULL. An appropriate message is added to the monitor file.
- There is no limit to the number of tables that you may define in the import file, but for each table you can define up to 128 fields.

#### \*.CSV File.

The \*.CSV file can have any name, as long as it is accompanied by the extension of .CSV. The file contains the new data which will be imported into the payroll database. The content of the \*.CSV file must be created by using external resources, such as Excel. Its format must correspond exactly with the fields defined in the \*.IMP file - otherwise, the payroll will be updated with incorrect information.

The following is an example of the contents of a typical \*.CSV file:

001,Smith,Sam,Waterstone House,Moycullen,Galway,

002,Jones,Bill,3 River Dale,Co Galway,

#### Valid Entries

All mandatory fields involved in the import process are validated. If an invalid entry is being imported, it will be ignored, and the field will not be updated in the database.

If a department, cost centre, bank, job or location code has been imported into the Employee Master File, it will have been created exclusively in the Employee Master File, and not at payroll level. Bank Codes can be entered in the \*.CSV file using either of these formats: '99-99-99' or '999999'.

(Cost centres, job codes and location codes are not available in [Micropay Professional Lite](#).)

If the CSV file has more fields per record than is defined in the \*.IMP file, the extra data is ignored by the import process. The import is concerned only with the fields that match the corresponding entries in the

import file.

There is a limit of 2048 characters/digits (including commas) for each record line in the CSV file. Once the limit is reached, the rest of the line is ignored.

#### Monitor File

If there have been any warnings or errors during the import process, they are written to a monitor file (Micwimp.mon). This file is contained in the payroll folder, and may be viewed at any stage using a text editor, such as Notepad.

#### \*.CSV File - Data Validation and Limitations

If the data being imported into a record field is longer than its defined length in the payroll, the following occurs:

- **String** - Extra characters at the end of a string are cleared, and the truncated version of the string is imported.
- **Numbers/Decimals** - If there are extra digits after the decimal point, then the figure is rounded up or down to the nearest number of digits allowed.
- **Whole Numbers** - The extra digit at the beginning of the number is cleared, and the truncated version is imported into the database.
- **Date** - If the date is incorrect, a blank date will be imported in its place. You must correct the record field in the \*.CSV file, and then run import again.

How do I import data?

1. Select the **Miscellaneous - Data Import** menu option.
2. In the Data Import window, select the file you want to import.
3. Click **OK**.
4. Once the data has been imported, view relevant information, such as employee details, to make sure to check that all the details have been imported correctly.
5. If any warnings or errors have been detected, you will be prompted to view them in the monitor file. In fact, you should view the monitor file after every import process.

See also

[Utilities](#)

## Salary/Rate Update

1. Select the **Miscellaneous - Salary/Rate Update** menu option.
2. The Rate Update window opens. Specify the necessary information.

Field name	Requirement
Type	The type can either be a rate update or a salary update.
Ranges	Choose the range of records to be updated. In the From and To fields, you enter the range criteria, such as from employee code 001 to 010.

Field name	Requirement
Hourly Rates	<p>These checkboxes enable you to select the hourly rates to be updated. You must select one or all the rates to update. These rates are stored in the employee details master record. Rate 1 is only used in the Salary Update.</p> <p>The Salary Update option caters for a tiered salary/fixed payments increase. It allows up to eight tiers in the increase, and supports minimum and maximum values of a fixed payment's increase.</p>
Increase	For the corresponding ranges, specify the annual limit for the band and the percentage increase. For example, if employees on a fixed salary are to get a 3% rise on the first 5,000 and 2% on the balance, you would enter 5,000 in the limit box for the first band, and 999,999.99 for the limit in the second.
+ Incr	If you want to guarantee a fixed increase above the calculated percent on the fixed payment increase, you must enter the period's value here.
Min	If you want to guarantee a minimum increase for the fixed payment, you must enter the period's value here.
Max	If you want to ensure that no employee receives an increase of more than a fixed amount per period, you must enter the period's value here.

3. Click **Apply** to carry out the update.

#### Pay Rate/Salary Update Example 1

##### **Salary rate update for a weekly payroll**

Suppose that the following values apply:

Standard Hours = 300

Salary = 16511.88

Rate 1 = 55.0396

Select the **Salary Update** option in the Type drop-down list.

Enter 10 into the Increment field, and select the Rate 1 option.

Click **Apply**.

The system is updated with the following values:

Salary = 16521.88 (that is, 16511.88+10)

Rate 1 = 55.0729 (that is, 55.0396+10/300)

The Salary Rate has now been updated.

#### Pay Rate/Salary Update Example 2

##### **Salary rate update in two bands**

Select the **Salary Update** option in the Type drop-down list.

Suppose that you enter 10000.00 in the first Limit field, and 5 in the %Incr column.

Then you enter 2000.00 in the next Limit field, and 6 in the %Incr column.

Now you select the **Upd** and **Rate 1** checkboxes, and click **Apply**.

Respectively these increases amount to

€ 500

€ 120

So the new salary is € 12,600.00

See also

[Utilities](#)

## Period Archive

The Period Archive utility enables you to archive payroll period data. This makes it possible to generate historical reports, or to enable roll back to a previous pay period and resume payroll processing from that point in time. The archiving process occurs when you set a new pay period. (See [Setting a Pay Period](#).)

There are ways you can revert to an archived period:

- **Admin Level**  
  
Enables you to revert to an archived period and resume payroll processing from that point, with access to all normal payroll processing options.
- **Payroll Level**  
  
Enables you to print reports from the archived period, but not process payroll in the period.

Admin Level: Period Archive - Settings

The archive settings option allows you (as Micropay Professional administrator) to select which payrolls can be archived by the payroll clerk.

1. Log in as the system administrator (username: ADMIN, default [password](#): PASS).
2. Select **Configure Period Archiving** in the navigation pane's Configuration section.
3. The Period Archive Settings window opens. In the Archive column, you select the payrolls whose data you want to be able to archive. The payroll clerk will be able to revert to the selected payrolls subsequently.
4. Click **OK** when you have made your selection(s).

Admin Level: Revert Payroll To

The Revert Payroll To option allows you, as Micropay Professional administrator, to select a payroll that is to be restored, and then to select the specific Period Archive to be restored. You can continue processing the payroll from the restored archived period

1. Log in as the system administrator (username: ADMIN, default password: PASS).
2. Select **Revert to Period Archive** in the navigation pane's Payroll section to access the Period Archive window. The Period Archive screen opens.

The Period Archive pane displays a list of all the available archives that can be restored.

The Archive Information pane displays the Payroll Name, Period No., Status and Frequency of the archived data.

3. Once you have made your selection, click **Revert**. The archived period will now be restored.

#### Payroll Level: Period Archive

The Period Archive option allows you (as an ordinary user) to revert to a previous period, in which you will only have access to the

- reports
- standard report writer
- Period Archive option

These options will allow you to

- print reports for the archived period or for the current period
- revert back to another archived period

1. Select the **Miscellaneous - Period Archive** menu option. The Period Archive screen opens.

The Period Archive pane displays a list of all the available archives that can be restored.

The Archive Information pane displays the Payroll Name, Period No., Status and Frequency of the archived data.

2. Select the **Revert to...** checkbox to revert to the archived data when you log out.
3. Once you have made your selection, click **Revert**. The archived period will now be restored.

See also

[Utilities](#)

## Transferring Employee Records to Sage HR

You can transfer employee records from Micropay Professional into Sage HR. Micropay Professional makes the records available to Sage HR, where the process is actually carried out.

See also

[Importing Employee Records from Sage HR](#)

[Utilities](#)

## Importing Employee Records from Sage HR

You can import employee records from the Sage HR package into Micropay Professional.

1. Open the Micropay Professional payroll into which you need to import the employee records.
2. Select the **Miscellaneous - Data Import - Import from Sage HR** menu option.
3. The Sage HR Import Wizard opens. Review the Welcome information, and then click **Next**.
4. A list of available Sage HR companies is displayed. Select a payroll and enter valid Sage HR login details. Then click **Next**.
5. If you have not already done so, you are now prompted to link a Sage HR company to your Micropay Professional company, which may contain several payrolls. The link between the two companies is permanent, once it has been created. (You are not prompted to do this if you already created the link and imported data from Sage HR.)

**Note:** The link is permanent after you have performed an import. You can't undo it after the first import.

More about permanent links

After the link between the Sage HR company and the Micropay company has been created, corresponding

employee records in each system are permanently linked.

You can make changes to an employee's PPS Number, Surname, Forename, Date of Birth and Start Date in either system without breaking the link.

6. You are prompted to specify the employees to import from Sage HR. Several options are available:

- **New:** Employee records that do **not** already exist in Micropay Professional.
- **Existing:** Employee records that already exist in Micropay Professional, and which will be overwritten by the import process. (You'll have a chance to review the information before it's overwritten to ensure that no important information is lost.)
- **New and Existing:** All available Sage HR employee records.

7. You can also restrict the import to employees in a certain payroll, such as Weekly. By default, the import process selects the pay frequency of the payroll you're currently logged into.

What is an 'existing employee'?

Existing employees are identified as follows:

- Employee records are checked for the same PPS Number, Surname and Forename.
- If the PPS Number is not available, then the Date of Birth is used in conjunction with the Surname and Forename.
- If neither the PPS Number nor the Date of Birth are available, then the Start Date will be used with the Surname and Forename.

If no matches are found using the above criteria, a new employee record will be created.

These criteria only apply during the initial import. Thereafter, employees are permanently linked between the Sage HR and Micropay Professional companies.

Are 'Leavers' imported?

No. Employees who are marked as leavers in Sage HR (that is, employees whose "Ended On" date has been set) will not be available for import into Micropay Professional.

8. Click **Next**.

9. A list is displayed of the employees that match your selection criteria.

You can sort the employee list clicking a column header. For example, to view all employees with Alert icons first, click the **Alert** column header.

10. Select the checkbox of each employee you want to import.

11. Check the **Alert** column for alert icons. When you select an employee with an alert icon, information about the associated issues are displayed in the lower left of the window.

You won't be able to proceed with the import process until you have addressed all alert issues in the employees you have selected.

12. Click **Next**.

13. Now you have a chance to confirm the details that will be imported. Open the Detailed Report to review this information.

14. Depending on the selections you have made, there may be employee data in Micropay Professional that will be overwritten as a result of the import. If this is the case, details of the fields that will be changed are displayed. We recommend that you print out this information for reference. If necessary, click **Back** to return to the previous screen and change your selections.

15. If you are happy to import the details on the report, click **Next**.

16. The employee records in Micropay Professional are now updated with the relevant information from

Sage HR. Click **Finish**.

The import process is complete.

See also

[Importing Departments and Cost Centres](#)

[Data Imported into Micropay Professional from Sage HR](#)

[Transferring Employee Records to Sage HR](#)

[Utilities](#)

## Importing Departments and Cost Centres

For departments and cost centres to be imported into Micropay from Sage HR, they must be set up in Sage HR with the Organisational Unit type 'Department' and/or 'Cost Centre' (case sensitive).

Any organisational units set up with different organisational unit types will not be imported into Micropay Professional.

See also

[Importing Employee Records from Sage HR](#)

[Data Imported into Micropay Professional from Sage HR](#)

[Utilities](#)

**Note:** Cost centres are not available in [Micropay Professional Lite](#).

## Data Imported into Micropay Professional from Sage HR

The following employee information can be imported into Micropay Professional:

- Surname
- Forename
- Address 1
- Address 2
- Address 3
- Address 4
- Telephone
- E-mail Address
- Sex / Gender
- Date Of Birth
- Bank A/C Name
- Bank A/C Number
- Bank Sort Code
- PPS Number
- Pay Method

- Sage HR Works Number
- Start Date
- Postcode
- Mobile
- Annual Salary
- Standard Hours
- Departments
- Cost Centres

See also

[Importing Employee Records from Sage HR](#)

[Importing Departments and Cost Centres](#)

[Utilities](#)

## Integration with Sage PeopleLink

Sage PeopleLink is a browser-based system that provides fast, reliable and paper-free record keeping for supervisors and other employees.

It enables **supervisors** to manage their team members' employee records, and approve and track absences. It also enables them to submit time and pay information to the Payroll Operator, who uses Micropay Professional.

It enables **team members** to check their employee details, and view their payslip archive. It also enables them to log absence requests and check their holiday entitlement.

If you would like to learn more about what Sage PeopleLink can do for you, contact your Micropay Professional supplier or Sage Customer Care at 1890 88 20 60.

Micropay Professional integrates with the Sage PeopleLink system. This enables you to carry out the following tasks:

[Receiving Timesheets from Sage PeopleLink](#)

[Making Payments and Deductions Visible in Sage PeopleLink](#)

[Accepting Employee Details from Sage PeopleLink](#)

[Assigning a Supervisor to Employees for Sage PeopleLink](#)

## Receiving Timesheets from Sage PeopleLink

A team supervisor in Sage PeopleLink prepares the timesheets for their team members in each pay period, and then submits the timesheets to Micropay Professional, where you can review the timesheets and either accept them or reject them.

When you click **Enter Time and Pay** or select the **Processing - Timesheet Entry** menu option, the Timesheets Awaiting Acceptance window opens. This contains the timesheet information submitted by the team supervisor in Sage PeopleLink.

For more information, see [Overview of Timesheet Entry](#).



See also

[Integration with Sage PeopleLink](#)

## Making Payments and Deductions Visible in Sage PeopleLink

You can control which payments and deductions the supervisor sees when they are preparing timesheets in Sage PeopleLink. To do this, you use the **Supervisor Timesheets** checkboxes in the Payments window and the Deductions window.

For more information, see [Setting Up Payments](#) and [Setting Up Deductions](#).

See also

[Integration with Sage PeopleLink](#)

## Accepting Employee Details from Sage PeopleLink

A supervisor can create a new employee record in Sage PeopleLink. You must review and approve the new employee record in Micropay Professional before the changes are applied in either PeopleLink or Micropay Professional.

1. Select **Accept New PeopleLink Employees** in the navigation pane's PeopleLink view or Employees view.

Alternatively, select the **PeopleLink - Accept New PeopleLink Employees** menu option.

2. The Accept New PeopleLink Employees window opens. This contains a list of all new employee records. By selecting an employee, you can edit the employee's details in the relevant fields in the window, and then carry out one of three actions:
  - **Include** the employee in the payroll
  - Opt to deal with the employee **Later**
  - **Reject** the selected employee record, removing it from the payroll permanently.
3. When you have dealt with each employee, click **Next**.
4. A summary screen opens. This provides a brief description of the actions you have taken. Click **Finish**.

You have received employee details information from Sage PeopleLink and performed appropriate actions on it.

See also

[Integration with Sage PeopleLink](#)

## Assigning a Supervisor to Employees for Sage PeopleLink

In Sage PeopleLink, a supervisor manages a team of employees.

To assign a supervisor to employees, you need to log into Sage PeopleLink as a HR Clerk and open the **Company** tab.

The Sage PeopleLink help system provides information about the steps you need to perform.

See also

[Integration with Sage PeopleLink](#)

## Automatic Updates

The first time you launch your Micropay Professional system, it uses your Internet connection to automatically check whether there are any available software updates.

Thereafter, you can configure the system to continue checking automatically for updates. Alternatively, you can opt to carry out manual checks.

### Configuring your system for automatic updates

1. Select the **Tools - Internet Options** menu option.
2. The Internet Options window opens. In the **Software Updates** tab, select one of the 'Automatic' checkboxes.
3. Optionally, open the **Network Settings** tab and ensure that your Internet connection settings are correct.
4. Click **OK**.

### Configuring your system for manual updates

1. Select the **Tools - Internet Options** menu option.
2. The Internet Options window opens. In the **Software Updates** tab, select the **Let me check for Sage software updates...** checkbox.
3. Optionally, open the **Network Settings** tab and ensure that your Internet connection settings are correct.
4. Click **OK**.
5. To carry out a manual check for updates, select the **Help - Check for Updates** menu option.

See also

[Utilities](#)

## Employee Master File - Database Field Names

If you have any problems or queries regarding the employee master file database field names, contact your support centre for assistance.

These database field names are used in conjunction with [Data Import](#).

Contact your support centre if you have any queries regarding the Data Import feature.

### Employee Master File - Database Field Names

Description	Database name	Length	Decimals
Employee	EMPLOYEE	8	0
Surname	NAME	25	0
First Name	FIRST	15	0
Address 1	ADDR1	24	0
Address 2	ADDR2	24	0
Address 3	ADDR3	24	0
Address 4	ADDR4	24	0
Profile	PROFILE	4	0
Pay Type	PAY_TYPE	1	0
Employment Type	EMP_TYPE	1	0
Frequency	FREQUENCY	1	0
Pay Method	PAY_METHOD	1	0
Tax Status	TAX_STATUS	1	0
Tax Table	TAX_TBL	1	0
Tax Credit	TFA_PERIOD	9	2
PRSI start	PRSI_START	2	0
PRSI code	PRSI_CODE	2	0
PRSI lock	PRSI_LOCK	1	0
Finish date	FIN_DATE	8	0
Finish period	FIN_PERIOD	2	0
Paid to	PAID_TO	2	0
Paid this period	PAID_THIS	1	0
Last paid period	LAST_PAID	2	0
Emergency start	EM_START	2	0
Insurable weeks	INS_WKS	2	0
Weeks at current	WKS_CUR	2	0
Department	DEPT	4	0
Cost Centre	COST	4	0
Max. nett pay	MAX_NETT	11	2
Rounding	ROUND	11	2
Standard hours	STD_HOURS	6	2
Hourly rate 1	HRLY_RATE1	8	4
Hourly rate 2	HRLY_RATE2	8	4

Description	Database name	Length	Decimals
Hourly rate 3	HRLY_RATE3	8	4
Hourly rate 4	HRLY_RATE4	8	4
Hourly_code	HRLY_CODE	3	0
Gross Pay P45	GROSS_P45	11	2
Tax Paid P45	TAX_P45	11	2
Gross Pay this employment	GROSS_TE	11	2
Tax Paid this employment	TAX_TE	11	2
Gross Pay this Year	GROSS_TY	11	2
Tax paid this Year	TAX_TY	11	2
Pensionable Pay	PENS_PAY	11	2
E'ee Pension (tax Yr.)	PENS_E_TAX	11	2
E'er Pension (tax Yr.)	PENS_R_TAX	11	2
E'ee Pension (fin Yr.)	PENS_E_FIN	11	2
E'er Pension (fin Yr.)	PENS_R_FIN	11	2
E'ee Pension (all)	PENS_E_ALL	11	2
E'er Pension (all)	PENS_R_ALL	11	2
Employee PRSI	PRSI_EEE	11	2
Employer PRSI	PRSI_EER	11	2
Unused Field	SPARE001	11	2
Nett to Gross	N2G	11	2
Gender	GENDER	1	0
Salary review date	SALARY_REV	8	0
Salary review period	SALARY_PER	2	0
Start date	START_DATE	8	0
Start period	START_PER	2	0
Birth date	BIRTH_DATE	8	0
Director	DIRECTOR	1	0
RSI Number (PPS No.)	RSI_NO	10	0
Holidays b/f	HOL_BF	6	2
Holiday allowance	HOL_ALL	6	2
Holidays taken	HOL_TAK	6	2
Cert. sick b/f	CSICK_BF	6	2
Cert. sick allowance	CSICK_ALL	6	2
Cert. sick taken	CSICK_TAK	6	2
Un cert. sick b/f	USICK_BF	6	2
Un cert. sick allowance	USICK_ALL	6	2
Un cert. sick taken	USICK_TAK	6	2
Other b/f	OTHER_BF	6	2
Other allowance	OTHER_ALL	6	2
Other taken	OTHER_TAK	6	2
Levy (for future use)	LEVY	8	2

Description	Database name	Length	Decimals
Bank code	BANK_CODE	8	0
Account code	AC_CODE	8	0
Account name	AC_NAME	25	0
Mothers Maiden Name	MOTH_MAID	16	0
Disability	DISABILITY	11	2
Memo Value	MEMO	11	2
TFA year to date	TFA_YTD	11	2
Net pay year to date	NETT_YTD	11	2
Split Nett Pay Method 1	SP_METHOD1	1	0
Bank code 1	SP_BANK1	8	0
Account code 1	SP_AC_NO1	8	0
Account name 1	SP_ACC1	25	0
Formula 1	SP_FRMULA1	48	0
Description 1	SP_DESC1	10	0
Split Nett Pay Method 2	SP_METHOD2	1	0
Bank code 2	SP_BANK2	8	0
Account code 2	SP_AC_NO2	8	0
Account name 2	SP_ACC2	25	0
Formula 2	SP_FRMULA2	48	0
Description 2	SP_DESC2	20	0
Split Nett Pay Method 3	SP_METHOD3	1	0
Bank code 3	SP_BANK3	8	0
Account code 3	SP_AC_NO3	8	0
Account name 3	SP_ACC3	25	0
Formula 3	SP_FRMULA3	48	0
Description 3	SP_DESC3	30	0
Job Code	JOB	4	0
Location Code	LOCATION	4	0
Memo 1	MEMO1	24	0
Memo 2	MEMO2	24	0
Memo 3	MEMO3	24	0
Memo 4	MEMO4	24	0
Date 1	MDATE1	8	0
Date 2	MDATE2	8	0
Date 3	MDATE3	8	0
Date 4	MDATE4	8	0
Value 1	MVALUE1	10	2
Value 2	MVALUE2	10	2
Value 3	MVALUE3	10	2
Value 4	MVALUE4	10	2

Description	Database name	Length	Decimals
Std. Rate Limit	T_LIMIT	8	2
Payment Currency	PAY_CURR	1	0
Interim Paypath Amount	PPINT_AMT	11	2
Interim Paypath Last Amount	PPINT_LST	11	2
Multiple Employment	MULT_EMPL	1	0
Employment Status	STATUS	1	0
Split Nett Pay Holidayable	SP_HDABLE	1	0
Print Pension Note	PRINT_REM	1	0
Min. Nett Pay	MIN_NETT	11	2
BIK Year To Date Amount	BIK_YTD	11	2
Main Cr Union A/C	CUNION	18	0
Split1 Cr Union A/C	CUNION1	18	0
Split2 Cr Union A/C	CUNION2	18	0
Split3 Cr Union A/C	CUNION3	18	0
Field: PEN_TX_E not in use.	PEN_TX_E	11	2
Field: PEN_TX_R not in use.	PEN_TX_R	11	2
Field: PRSA_TX_E not in use.	PRSA_TX_E	11	2
Field: PRSA_TX_R not in use.	PRSA_TX_R	11	2
EE Email Address	EMAIL_ADDR	100	0
EE Email Password	EMAIL_PASS	10	0
Email Payslip (Y/N)	EMAIL_SLIP	1	0
Emerg. Contact Name	EMG_CONTACT	40	0
Emerg. Contact Phone No	EMG_PHONE	20	0
EE Telephone No	TELEPHONE	30	0
EE Mobile No	MOBILE	30	0
Marg. Relief Rate (Y/N)	APPLY_MRR	1	0
Hol. Accrual Method	HOL_ACC	1	0
Hol. Adjustment	HOL_ADJ	9	2
Hours in a working day	HR_PER_DAY	5	2
Working days per week	WORKDAYS	4	2
Adjust Period Hours	ADJ_PER_HR	9	2
Annual pay	ANNUAL_PAY	11	2
Pay Holiday pay (Y/N/H)	PAY_HOLPAY	1	0
Memo 5	MEMO5	24	0
Memo 6	MEMO6	24	0
Memo 7	MEMO7	24	0
Date 5	MDATE5	8	0
Date 6	MDATE6	8	0
Date 7	MDATE7	8	0

Description	Database name	Length	Decimals
Value 5	MVALUE5	10	2
Value 6	MVALUE6	10	2
Value 7	MVALUE7	10	2
Holiday days accrued (Custom payslips)	HOLIDAY_TD	11	2
Holiday hours accrued (Custom payslips)	HOLHRS_TD	11	2
For the Don't Pay setting from batch ts	TO_BE_PAID	1	0
Construction Pens. Category Code	CWPS_CAT	4	0
Construction Pens. Membership No.	CWPS_NUM	8	0
County	COUNTY	32	0
CSO Category	CSO_CAT	1	0
Employment Basis	CSO_E_BAS	1	0
Type of Employment Contract	CSO_E_TYP	1	0
Occupation Status Code	CSOCCSTAT	2	0
Nett Pay this Year	NETT_TY	11	2
BIK Medical Ins Amt Made Good	BIK_MED_GD	11	2
Holidays Taken (Hours) (Custom payslips)	HOL_TAK_HR	6	2
Holidays Due (Days) (Custom payslips)	HOLDUE_DAY	6	2
Holidays Due (Hours) (Custom payslips)	HOLDUE_HR	6	2
Pro-Rata Holidays(Days)(Custom payslips)	HOLDUE_PRO	6	2
Deceased (Y/N)	DECEASED	1	0
Employee Post-Code	POSTCODE	15	0
Exclude Employee From CSO Reports	CSO_EXCLD	1	0
Enable Employee for Sage PeopleLink	SIRONA_ON	1	0
Employee Unique identifier	GUID	38	0
The Supervisor employee code	SUPERCODE	8	0
The payroll containing the supervisor	SUPERPAYRL	8	0
Marital Status	MARITAL_ST	1	0
Inc Levy To Date (Custom payslips)	LEVY_TD	11	2
Inc Levy To Date (Custom payslips)	LEVY_TD	11	2
Gross Income To Date (Custom payslips)	GRS_INC_TD	11	2
USC Refund Calc. Required (Y/N)	USCRECALC	1	0

Description	Database name	Length	Decimals
Public Servant Y/N	PUBLIC_SRV	1	0
Pension Levy (PRD) paid to-date	PRD_TD	11	2
Gross PRD'able pay to-date	GRS_PRD_TD	11	2
Inc Levy Rate 1 (To Date)	LEVY_R1_TD	11	2
Inc Levy Rate 2 (To Date)	LEVY_R2_TD	11	2
Inc Levy Rate 3 (To Date)	LEVY_R3_TD	11	2
Inc Levy Override Amount (To Date)	LEVY_OV_TD	11	2



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