Payroll from the HR admin's perspective

NOTIZ

Important: It is recommended to update all person-related data in HR-Expert BEFORE a new payroll run is started. This also applies to salary changes that began on the 1st of the payroll month or that have already been agreed for the future.
(Be careful with the "valid from" and "valid to" data fields!)

Starting payroll

- In Webdesk, go to "Administration" > Start payroll.
- The wizard then opens, offering selection of the client, payroll month and payroll date.
- Clicking "Continue to wage type entry" opens the next step in the wizard.
- **Important:** This loads the data relevant for the payroll run from HR-Expert. Later changes in HR-Expert no longer take effect in the wizard!

Salary items

- You are now in the "Salary items" tab, which displays all persons to be paid for this period.
- To adjust an employee's record, click the edit icon at the end of the corresponding row.
  - **Important:** If salaries need to be adjusted retroactively, this is only possible in the current payroll step!
  - Benefits in kind are noted in the comment field, see How to submit benefits in kind to LeitnerLeitner[1] for details.
  - Enter a corrected value in the correct column and note that the associated date field receives a "valid from".
  - **Important:** These salary changes are only transferred to HR-Expert once this workflow has been fully completed, that is, at the same time as the payslips are delivered!
- When all values for this employee have been entered, click the "Save" icon at the end of the row.
- With "Upload salary items", manual entry can be avoided or supplemented.
  - **Important:** In case of conflict, the items in the import file take precedence!
- Your manually entered items are retained if the corresponding items in the import file are empty!
- However, if a valid item is found in the import file, it overwrites the current value!
- With "Add missing employee", former or terminated employees can be added to the payroll in addition to the active employees that are loaded automatically.

Absences (NLZ)

In the "Absences (NLZ)" tab, you can either upload a CSV file or use "Add" to select individual employees with an absence reason and time span; clicking the "Save" icon completes the process.
Please note: How to submit longer sick leave to LeitnerLeitner[2] **Important:** In case of conflict, the absences in the import file take precedence! (see also under "Salary items")

Payroll files

In the "Payroll files" tab, the HR admin can use "Upload file" to also submit all payroll-relevant documents to LeitnerLeitner, such as documents on

- tax benefits,
- disabilities, or

- salary garnishments.

Saving payroll and forwarding it to LeitnerLeitner

- With "Save and forward", the payroll (the workflow) is submitted to LeitnerLeitner, to the responsible LL consultant, for processing.
- If the LL consultant notices any discrepancies, they can send the request back to the HR admin for revision, several times if necessary.
- When the LL consultant has finished processing the payroll, the client can, if desired, have it presented to the HR admin once more for review under the menu item "Open tasks" before it is forwarded to the LL consultant for final processing.
- Only after another check by LeitnerLeitner are the earnings statements and any other documents relevant to the employees (such as travel expense reports) automatically delivered by the system to the employees in their Webdesk.

Files in the Payroll workflow

This is an overview of all files involved in the "Payroll" workflow:

- In the "Salary items" and "Absences (NLZ)" tabs, a CSV file is expected. A sample file can be downloaded in the dialog window.
- In the "Payroll files" tab, all file types that were previously sent by email can be uploaded.
- In HR-Expert: PDF files are recommended in the Documents tab[3] and for linking documents and employee entries[4]; however, there is no restriction on file types.

1. /daisy/personalwolke-admin/7874-dsy.html?language=4
2. /daisy/personalwolke-admin/7875-dsy.html?language=4
3. /daisy/personalwolke-admin/7779-dsy.html?language=4
4. /daisy/personalwolke-admin/7783-dsy.html?language=4