Required Fields PS

Required for creating an employee in HR-Expert

Below is a list of the required fields for a selection of topic areas.
More detailed information on the topic areas can be found in the instructions for the individual menu items.

> NOTIZ
> Required fields are fields marked with an asterisk and can differ from client to client.
> To be able to save a record / employee, all required fields must be filled in.

- Master Data tab[1]
  - Client (prefilled)
  - Last name
  - First name
  - Personnel number (suggested by the system, but can be changed as long as it is unique in the company)
  - User name (same behavior as personnel number)
  - Valid from (start of validity of the employee record as a whole; entries for before this date are not possible, see: Time Limitation and Historization)
- Employment tab[2]
  - Status
  - Employment code
  - Full-time weekly hours
  - Working time unit
  - Weekly hours or percent
  - Working days per week
  - Weekly schedule
  - Entry date
  - Social insurance group
  - Valid from
  - Valid until
- Organization tab[3]
  - Organizational unit
  - Valid from
  - Valid until

1. /daisy/webdesk-manual-admin/7741-dsy.html?language=4
2. /daisy/webdesk-manual-admin/7758-dsy.html?language=4
3. /daisy/webdesk-manual-admin/7750-dsy.html?language=4

Additionally required for social security registration

- Master data tab:
  - All existing titles
  - Date of birth
  - Social security number

    - Gender
    - Citizenship
    - Occupation/position
- Contact info tab -> Business address
    - Postal code
    - City
    - Or: if a location is assigned, the function "Synchronize business address with location" can be selected.
- Contact info tab -> Home addresses
    - Street and house number
    - Postal code
    - City
    - Country
    - Primary (registered) address
- Employment tab:
    - Collective agreement
- Organization tab -> Groups
    - Cost center(s)
    - Location
- Finances tab:
    - Salary/wage
        - Salary or wage and
        - - if agreed -
        - Bonus
        - Benefit in kind
        - Dirt allowance
        - Overtime flat rate
        - All-in hours portion
        - Allowances
    - Bank account

Possibly required before the first payroll

- Finances tab -> Tax benefits (incl. supporting document for each entry)
    - Sole earner tax credit
    - Single parent tax credit
    - Commuter allowance
    - Company transport
    - Night worker
    - L16 of the previous employer
    - Benefit in kind
    - Travel cost subsidy
    - ZS-QU1
    - Cross-border commuter
    - A1 document

    - Tax-free allowance notice
    - Advertising expenses flat rate for expatriates
- Employment tab -> Disabilities (incl. supporting document for each entry)
    - Wheelchair
    - Visually impaired
    - Hearing impaired
    - Speech impaired