



EasyHR User Manual

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Section I: Introduction

Overview

- EasyHR is a cloud-based payroll software solution that provides automated features for handling essential payroll tasks, including the calculation and automation of statutory payroll deductions such as BIR, HDMF, SSS, and Philhealth. It also streamlines the computation of DTR (Daily Time Record) for tardiness, absences, undertime, overtime, holidays, and various leave types, simplifying manual and repetitive tasks such as report preparation for the BIR, HDMF, SSS, and PhilHealth.

Purpose of this User Manual

- The EasyHr user manual is designed with the primary objective of delivering clear and comprehensive guidance to users on the effective and safe utilization of the product, system, or service.

Our core aim in creating this user manual is to furnish users with detailed, step-by-step instructions pertaining to the operation, assembly, installation, and utilization of the product or system. This equips users with the knowledge necessary to optimize the utilization of the product's features and functionalities.

Moreover, this manual functions as a readily accessible reference document, allowing users to swiftly access information concerning specific functions, settings, or maintenance procedures.

This user manual offers a meticulously structured and easily understandable guide, effectively augmenting the user experience and increasing the probability that users will proficiently engage with

the product or service, ultimately resulting in heightened user satisfaction.

Who should use this manual

- Primary users within the EasyHR system are typically employees or staff members of an organization. These individuals consult the EasyHR user manual to access guidance, information, and instructions pertaining to HR-related policies, procedures, and practices.
- The EasyHR user manual functions as an all-encompassing reference resource for anyone within the organization seeking to gain insights, implement, or adhere to HR-related policies and procedures. Its purpose is to promote consistency, transparency, and alignment of HR practices with the organization's overarching goals and values.

Best Practices

By following these best practices, an organization can streamline its HR processes, enhance employee engagement, and better manage its workforce, leading to improved productivity and compliance.

Setting up the master files

- EasyHR offers two master files setup features: one for manual adding and another for bulk uploads. Master files on EasyHR include: **Employee**, **Users**, **DTR** and **Payroll**. Keep the following guidelines in mind to ensure successful entry when setting up the master file(s):

Employee

- Among the employee detail fields listed below, we've set a validation to prevent the use of special characters, with the only exceptions of(- 'Ññ').
 - Select Position
 - Select Payroll Group
 - Contact Tel No.
 - Contact Mobile No.
 - Address
 - Select City
 - Select Date of Birth
 - Select Religion
 - Select Zip Code
 - Place of Birth
 - Select Civil Status
 - Select Sex
 - Select Citizenship
 - Height
 - Weight
 - Blood Type
- These are the special characters that were restricted: ~ ` ! @ # \$ % ^ & * () _ + = { } [] | \ / : ; " < > , ? `À Á Â Ã Ä Å Æ Ç È É Ê Ë Ì Í Î Ï Ð Ò Ó Ô Õ Ö × Ø Ù Ú Û Ü Ý Þ ß:
- Please ensure the avoidance of duplicate **ID Number**, as they must be unique to prevent any errors when users upload employee master files.
- Please ensure the avoidance of duplicate **Biometric ID Number**, as they must be unique to prevent any errors when users upload employee master files.
- Make sure all fields in the master file have a value or data to prevent any errors when uploading the employee master file.

Users

- The users uploading the master file should be unique and all fields should have a value to prevent any errors when uploading the Users credentials master file.
 - Username
 - Passwords *Note: Must contain uppercase, lowercase, number and special character. Special characters such as [`<>?/:;'"}| _ = + ()`] are NOT allowed.*
 - FullName
 - Employee ID number *Note: Must be the same ID number as the employee.*

DTR

- The users uploading the master file should follow the template of the system to prevent any errors when uploading the DTR master file.
- Essential fields must contain valid values for importing DTR.
 - Employee ID
 - Employee Name *Note: Same as Employee ID*
 - Att_Time *Note: The format should be '9/16/2023 8:00:14 AM*

Payroll

- The users uploading the master file should follow the template of the system to prevent any errors when uploading the Payroll master file.
- Essential fields must contain valid values for importing DTR.
 - Employee ID
 - Employee Name
 - Regular Working Day

Internet Connection

- To ensure a smooth experience with EasyHR and to avoid unexpected issues when uploading new master files or updating existing ones, it's important to have reliable internet connection. Here are some best practices to consider:

- **Use a Secure Network:** Connect to a secure and trusted Wi-Fi network or wired connection.
- **Minimum Upload Speed:** For efficient uploading of new master files and updates, your internet connection should have a minimum speed of at least **25 Mbps**.

Device Shutdown

- To maintain the condition of your device and ensure consistent access to the EasyFS cloud system, it's essential to follow these best practices for proper device shutdown:
 - **Regular Device Shutdown:** Shut down your computer or mobile devices regularly to prevent overheating and extend hardware lifespan.
 - **Graceful Closure:** Before shutting down your computer, ensure all applications, including EasyFS, are closed properly. Saving any unsaved work is essential.
 - **Close EasyFS:** Specifically, close EasyFS and log out of your EasyFS account before shutting down your device. This ensures that any ongoing tasks are saved and that EasyFS is in a stable state.
 - **Update Software:** Keep your device's operating system and EasyFS software up to date. Updates often include bug fixes and security enhancements that can prevent hardware-related issues.
 - **Battery Maintenance:** If you're using a laptop or mobile device, manage your device's battery health by following the manufacturer's recommendations for charging and discharging cycles.

- **Uninterruptible Power Supply (UPS):** If possible, use a UPS to provide backup power during brief outages, ensuring that your device has enough time to shut down gracefully.

Section II: Getting Started

Introduction

The EasyHR system is a powerful and comprehensive software solution that has been implemented to enhance and simplify the management of human resources within our organization. Designed to meet the evolving needs of modern businesses, our EasyHR system is a vital component of our strategic approach to workforce management. It facilitates the efficient and effective handling of various HR functions, ensuring a more organized, compliant, and productive work environment.

How to Access EasyHR System

Logging In

- **Open your web browser:** Launch your preferred web browser. We recommend using the latest version of popular web browsers like **Google Chrome, Mozilla Firefox, Safari, or Microsoft Edge.**
- **Visit the system's web address:** In the address bar of your web browser, enter the URL for EasyHR. The web address may look like "<https://demo.easycloudhr.com/security/login>".
- **Enter your credentials:** You will be redirected to the login page. Here, enter your username and password. Make sure to use the correct credentials associated with your EasyHR account. If you have no account yet, better inform the system's Administrator to create you an account.



- **Click “Login”**: Once you’ve done entering your credentials, click the **Login** button.

Forgot Password

- If you've forgotten your password, no need to worry. Simply click the "Forgot Password" link on the login page. You'll receive instructions on how to reset your password via your registered email address.

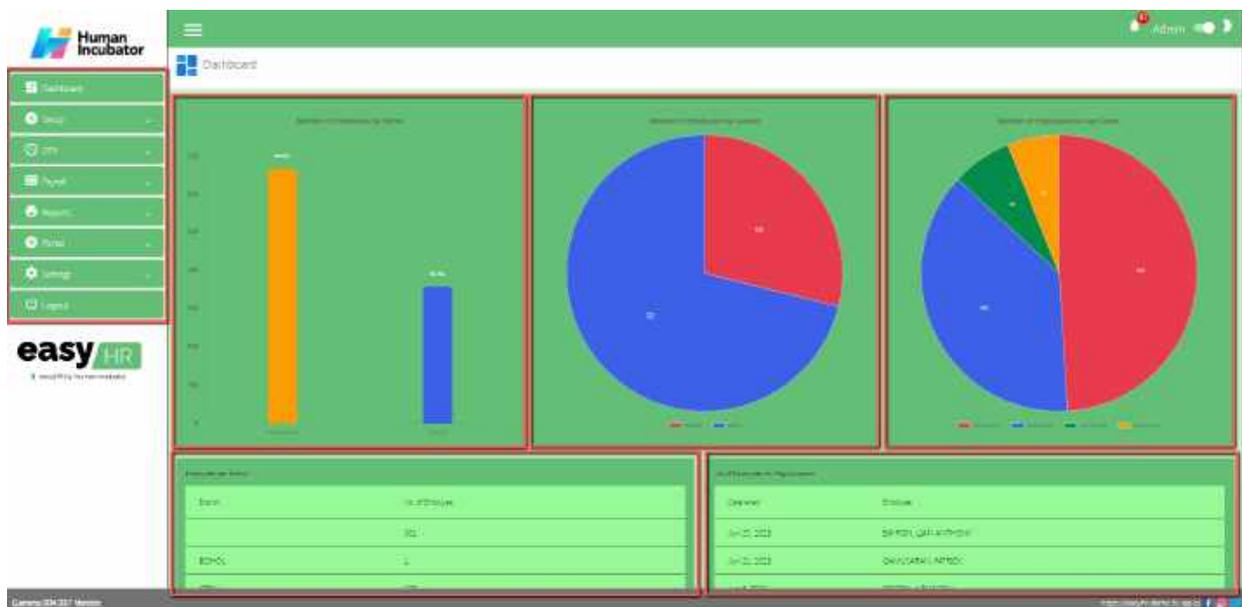
Note: You are required to provide your username in the event that you select the "forgot password" option.



Section III: Dashboard

Dashboard Page

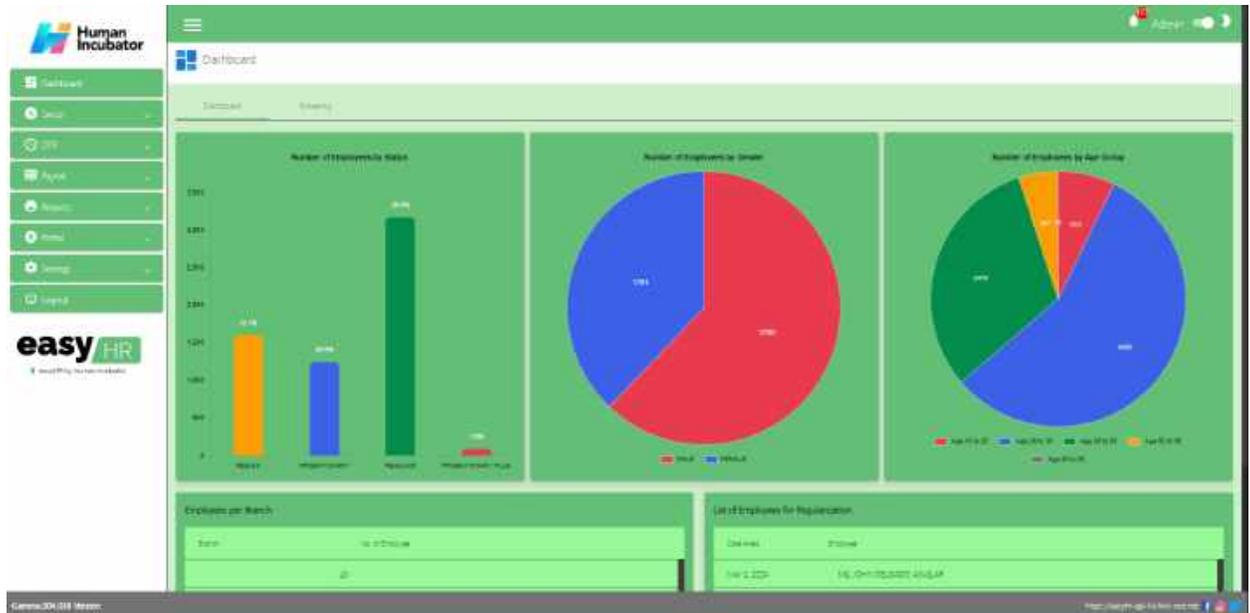
- Once login is successful, the user will be redirected to this page.
- **Module** - shows all features that users can use in the system.
- **Dashboard** - shows the employees summary (Number of Employees by Status, by Gender, by Age Group, Employees per Branch and List of Employee for Regularization).



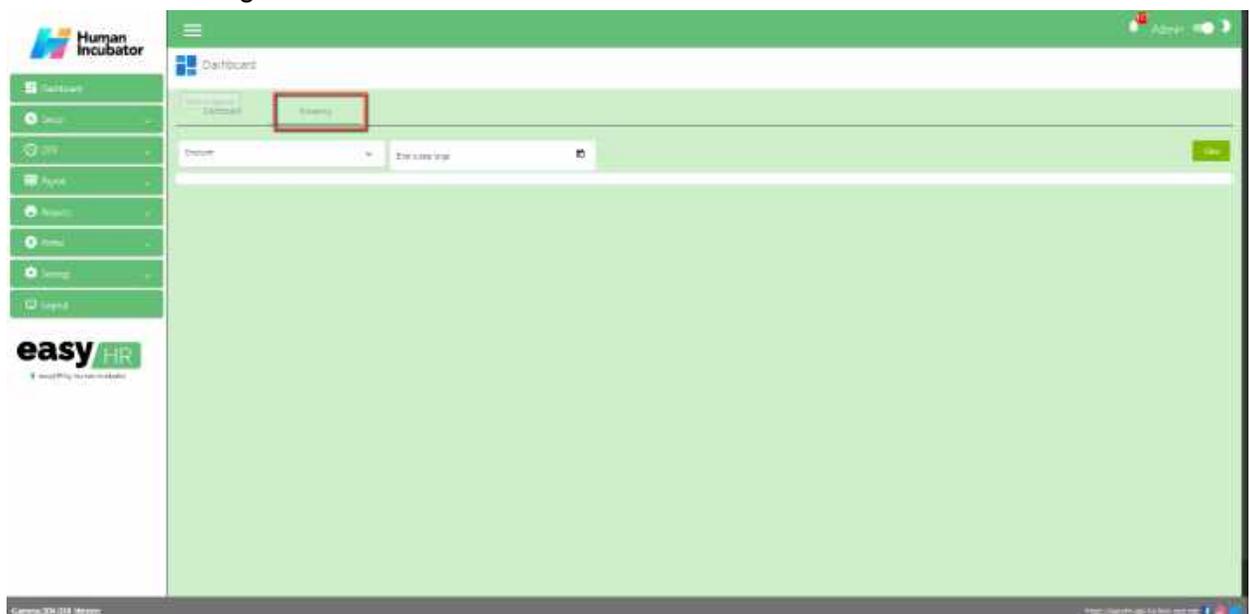
Rostering Tab

Steps:

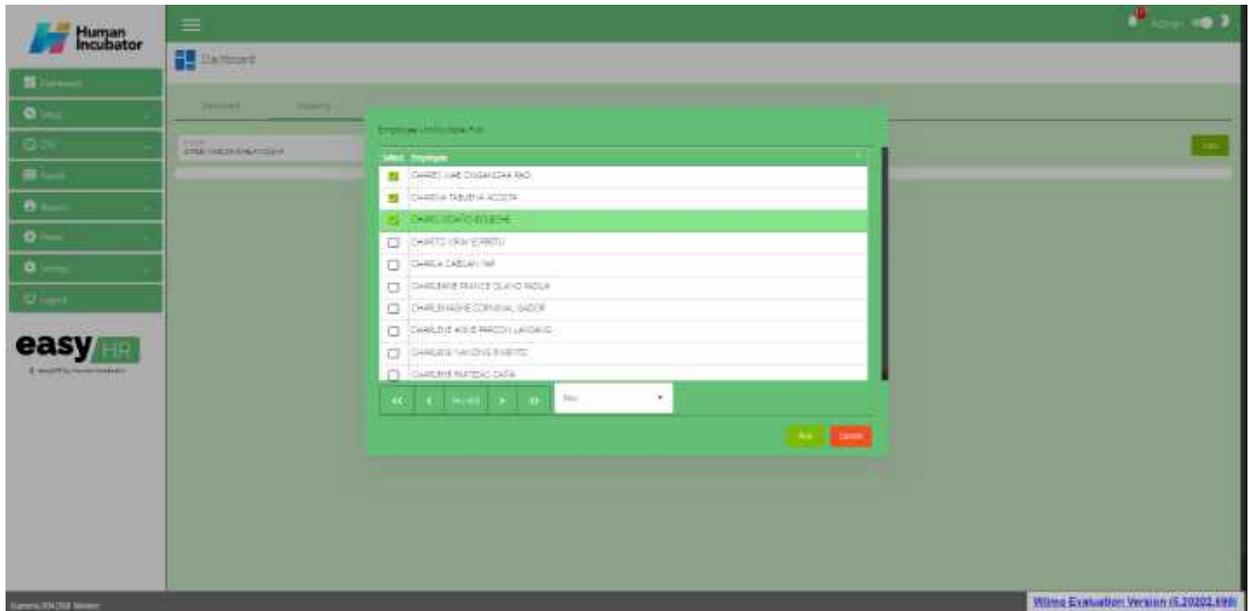
1. Go to Dashboard



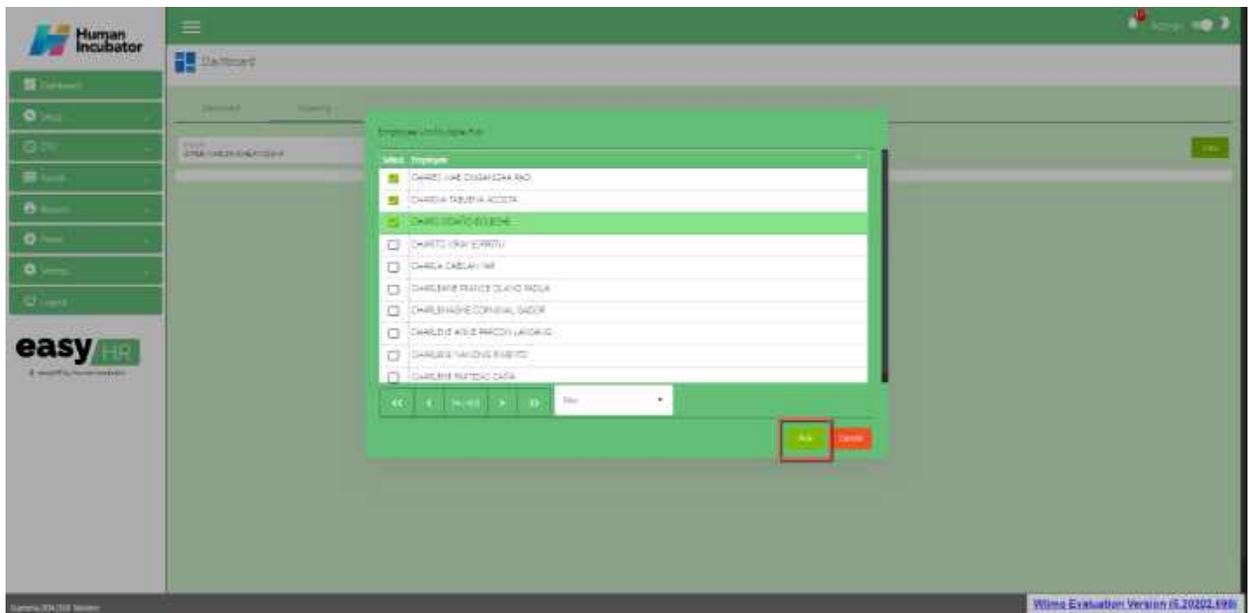
2. Go to the Rostering Tab



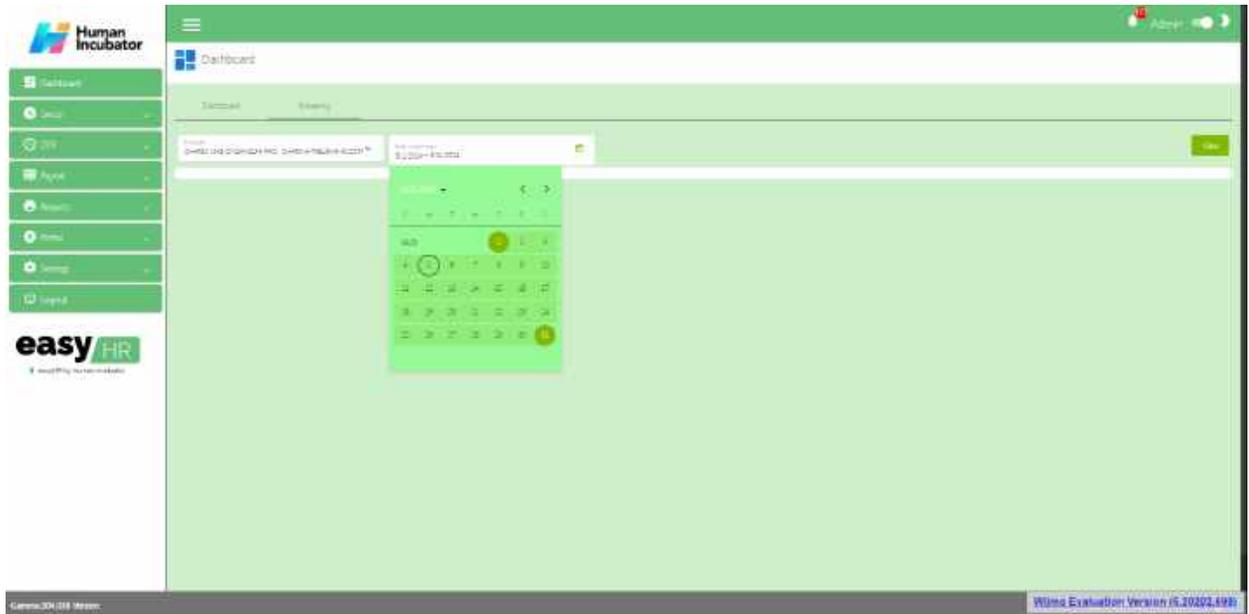
3. Click Checkbox to select one or multiple Employee



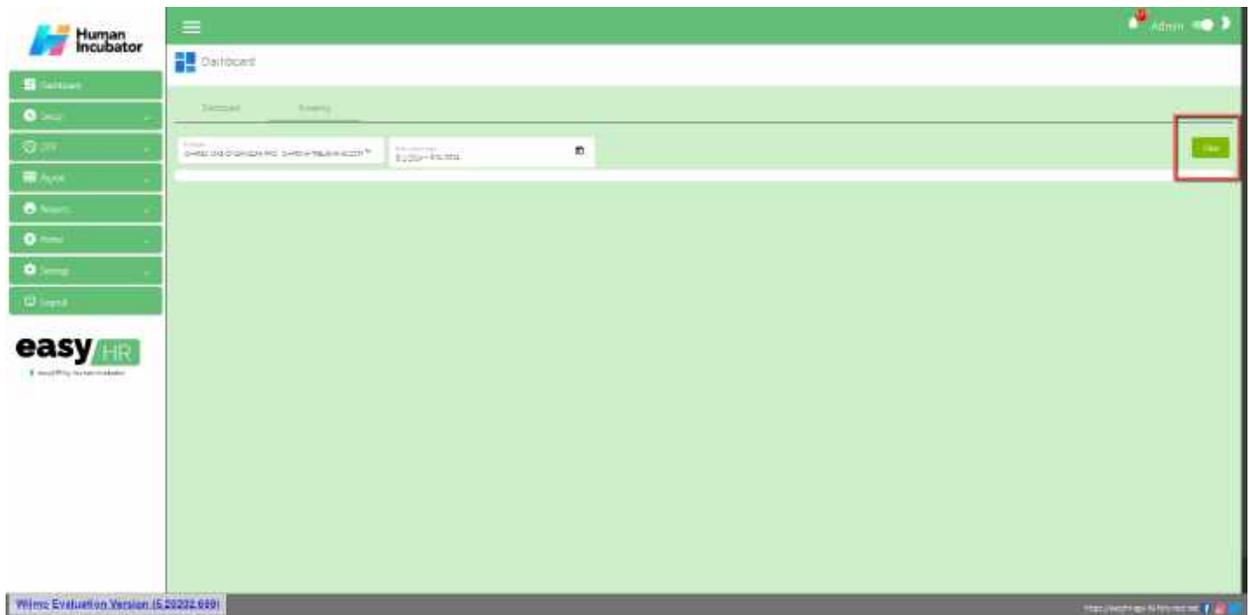
4. Click Pick



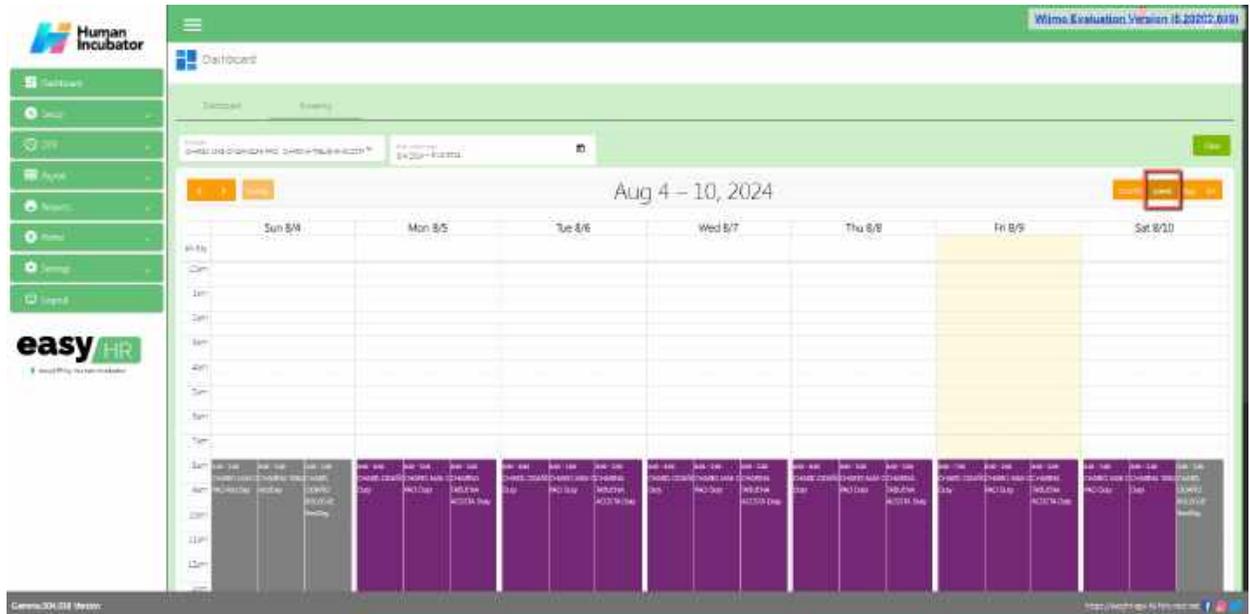
5. Select Date Range



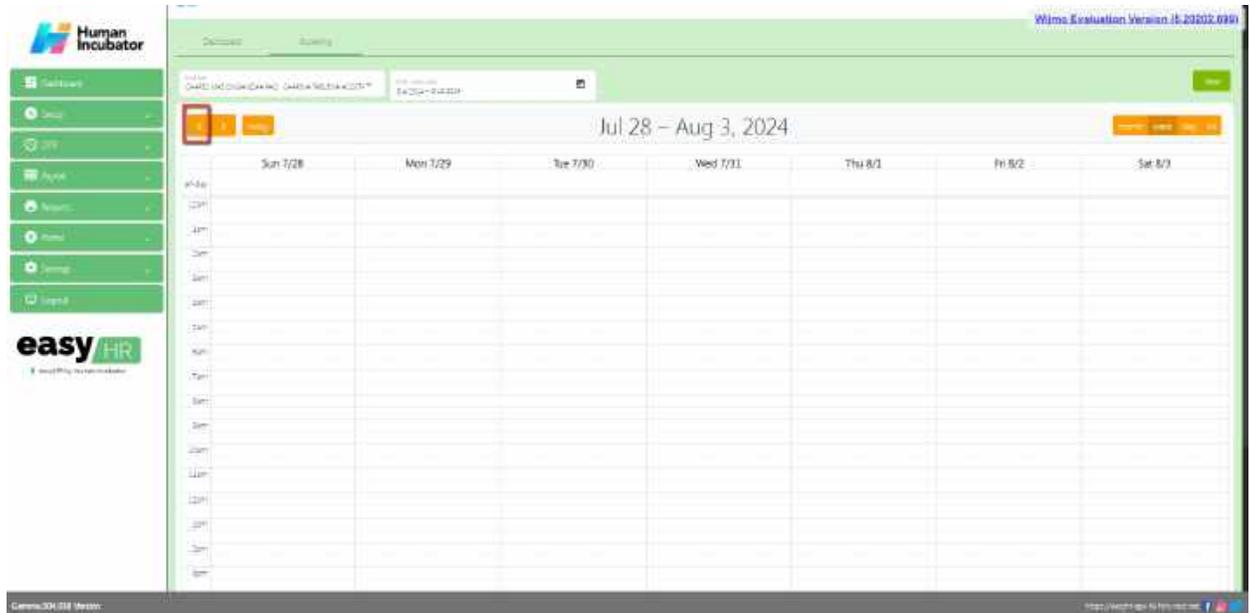
6. Click View



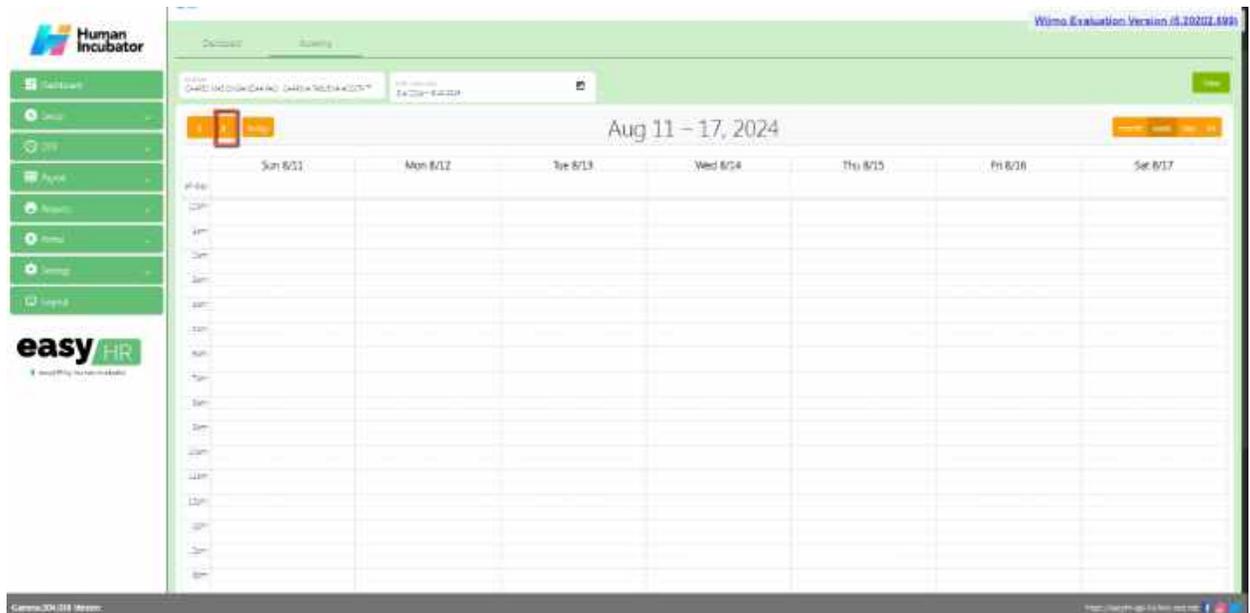
7. Week View



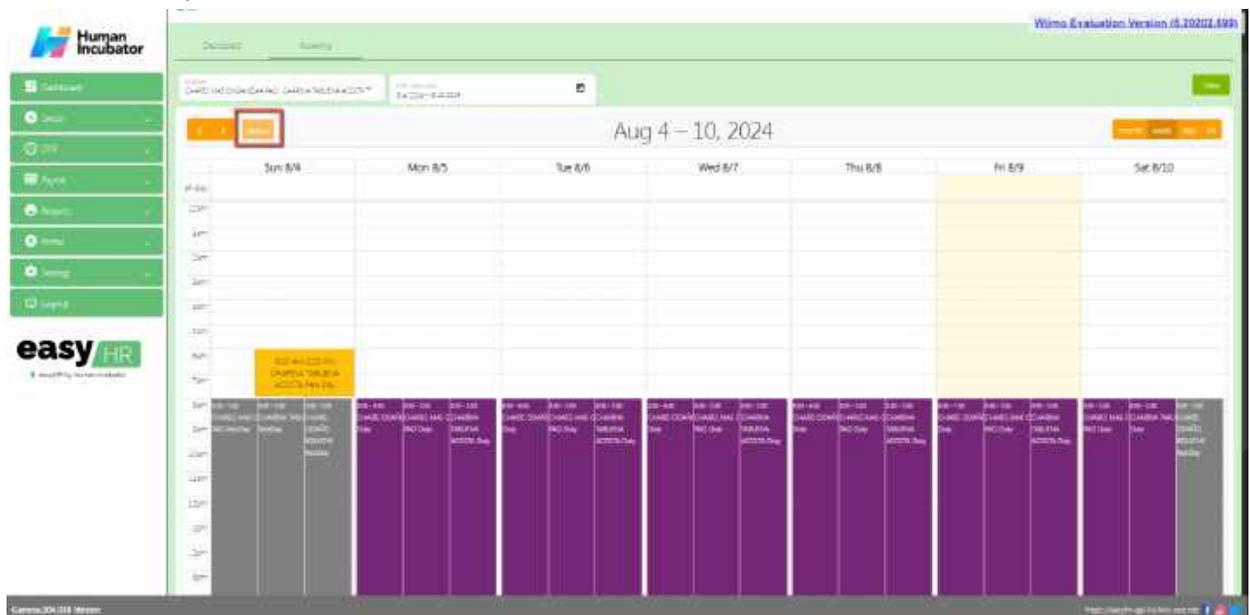
8. Click this arrow to view previous week



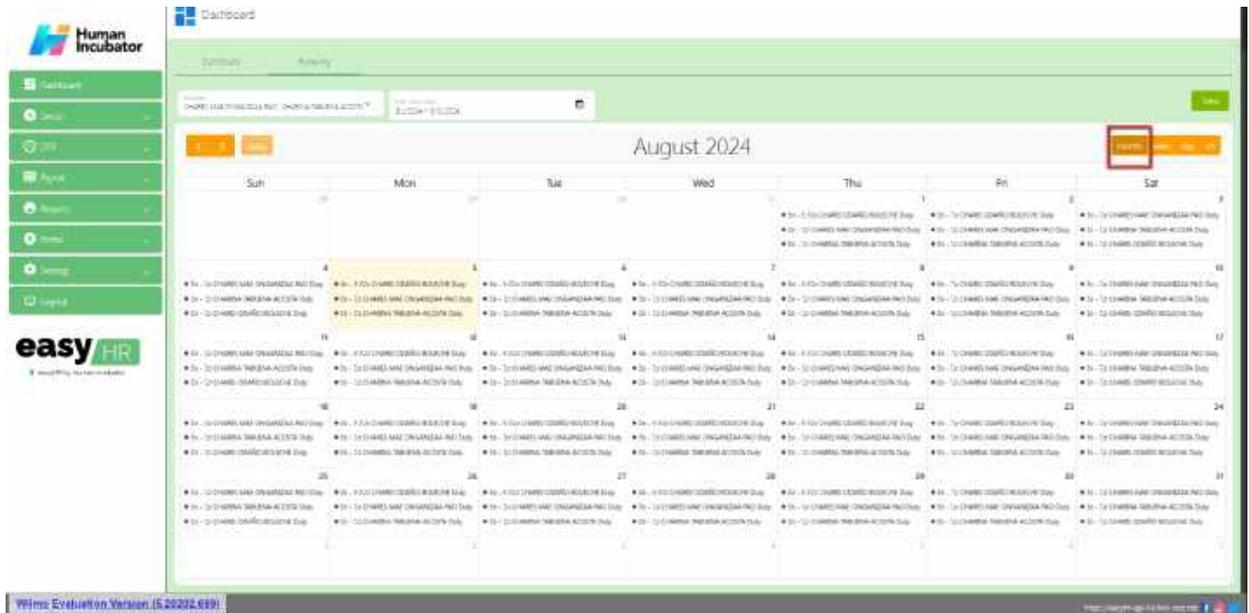
9. Click this arrow to view next week



10. Click this today button to view current week

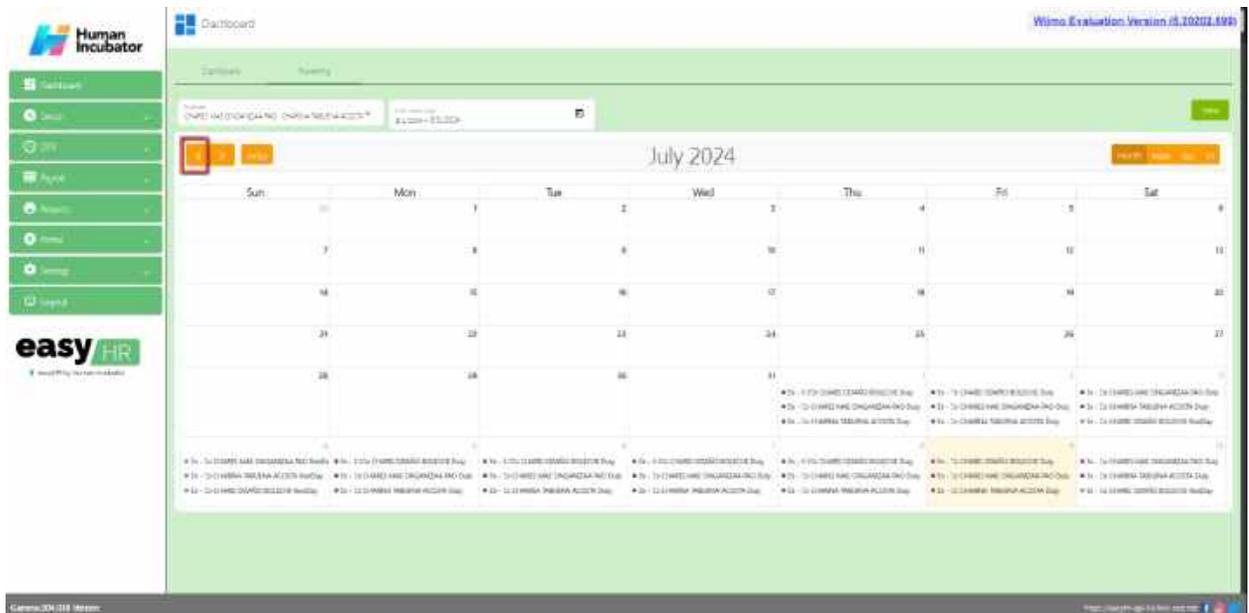


11. Month View



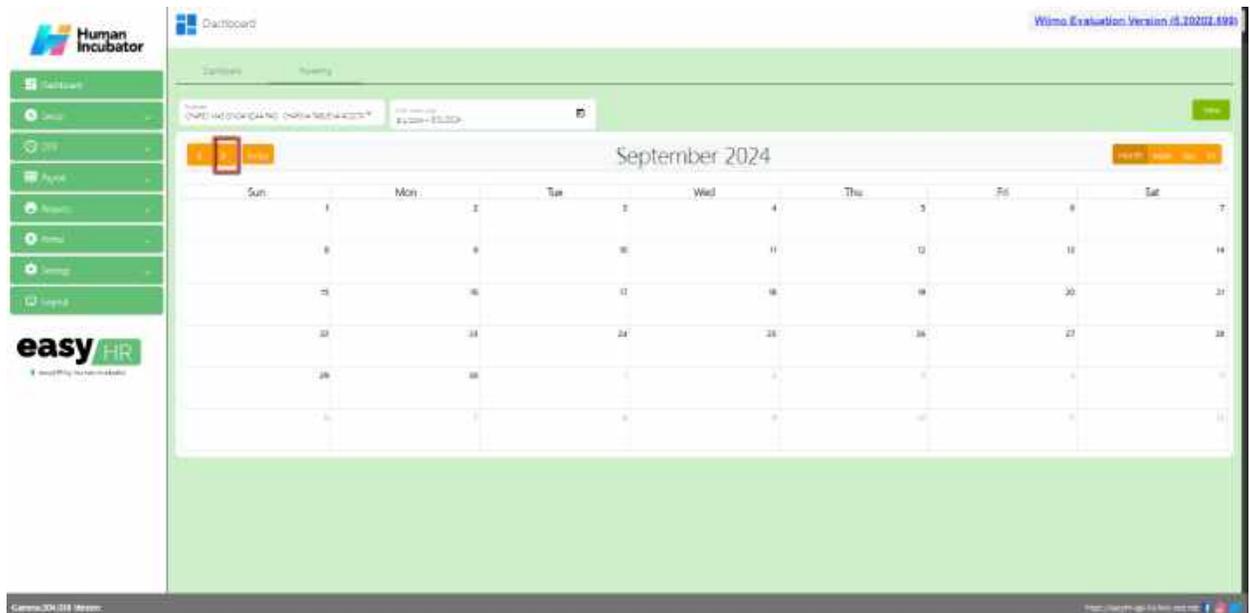
The screenshot shows the 'easyHR' dashboard with a sidebar on the left containing navigation options like Dashboard, Leave, HR, Payroll, Reports, Profile, Settings, and Logout. The main content area displays a calendar for August 2024. At the top of the calendar, there are navigation buttons: 'Previous' (highlighted with a red box), 'Next', and 'Today'. The calendar grid shows dates from Sunday to Saturday, with some dates containing event icons and text.

12. Click this arrow to view previous month

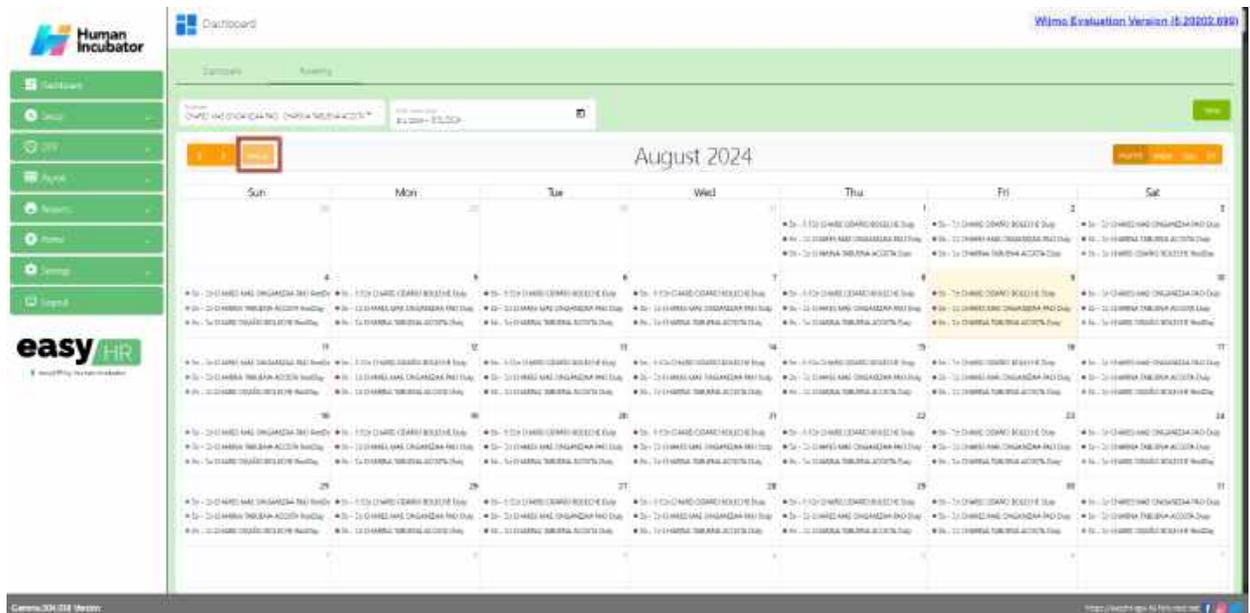


This screenshot is similar to the previous one but shows the calendar for July 2024. The 'Previous' arrow in the calendar navigation bar is highlighted with a red box, indicating the action to view the previous month.

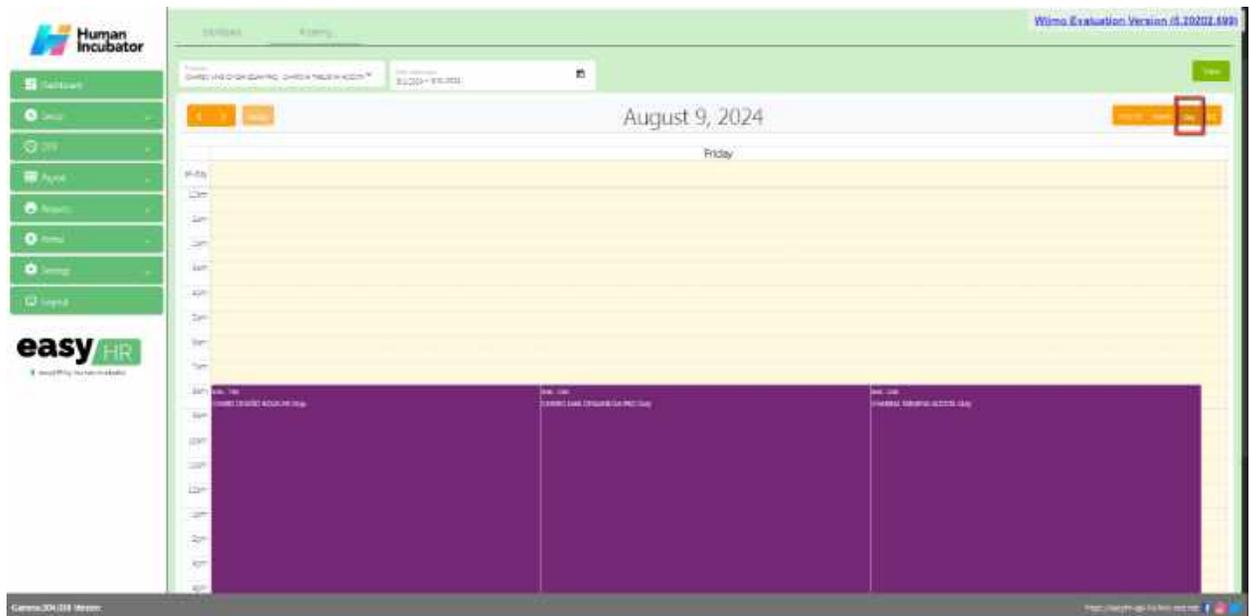
13. Click this arrow to view next month



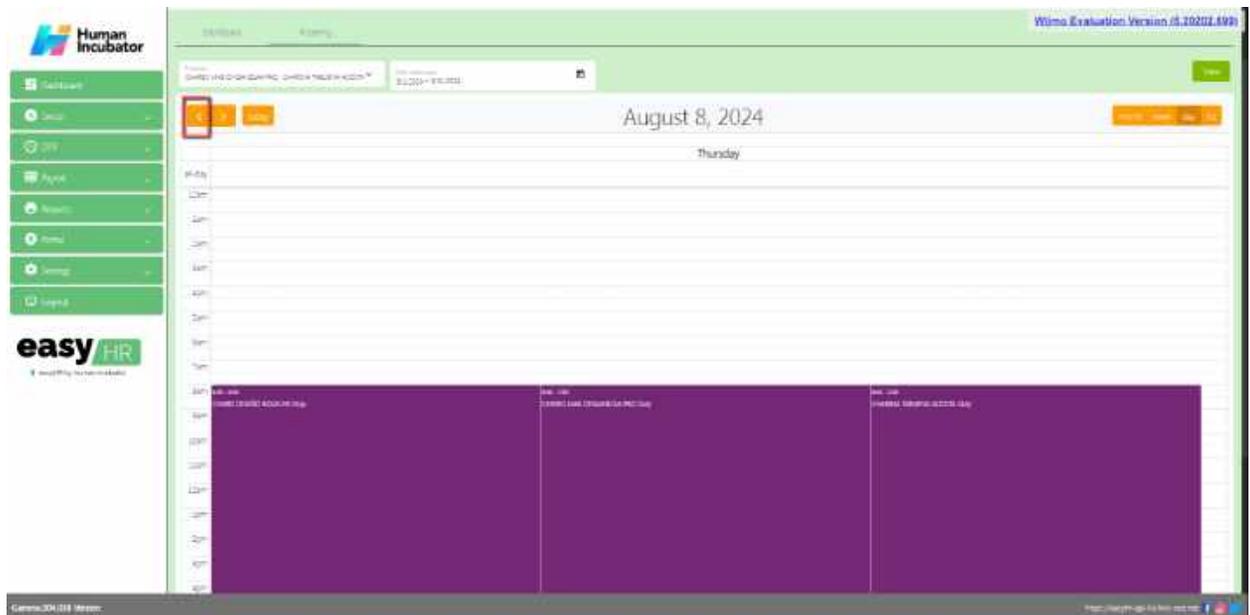
14. Click today button to view current month



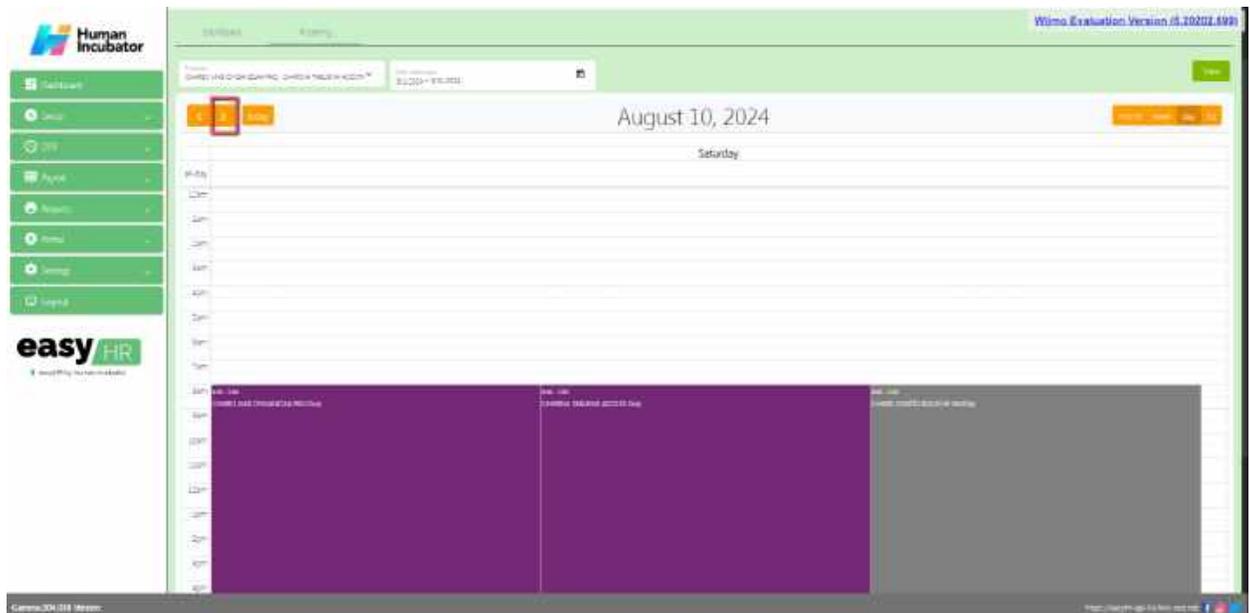
15. Day View



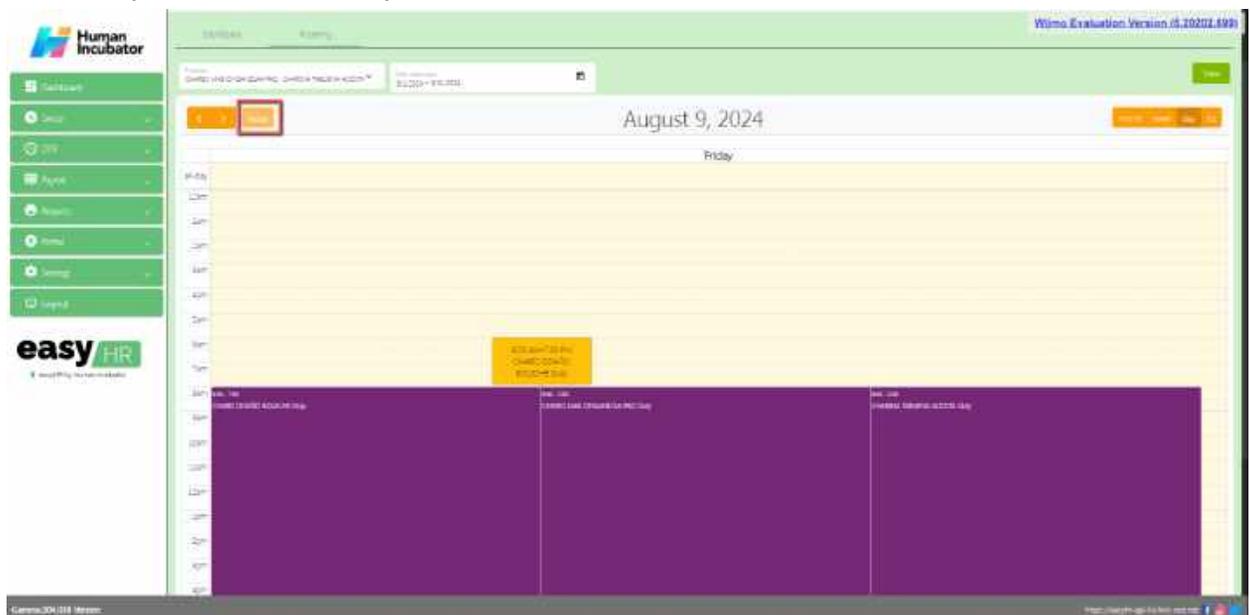
16. Click to view previous day



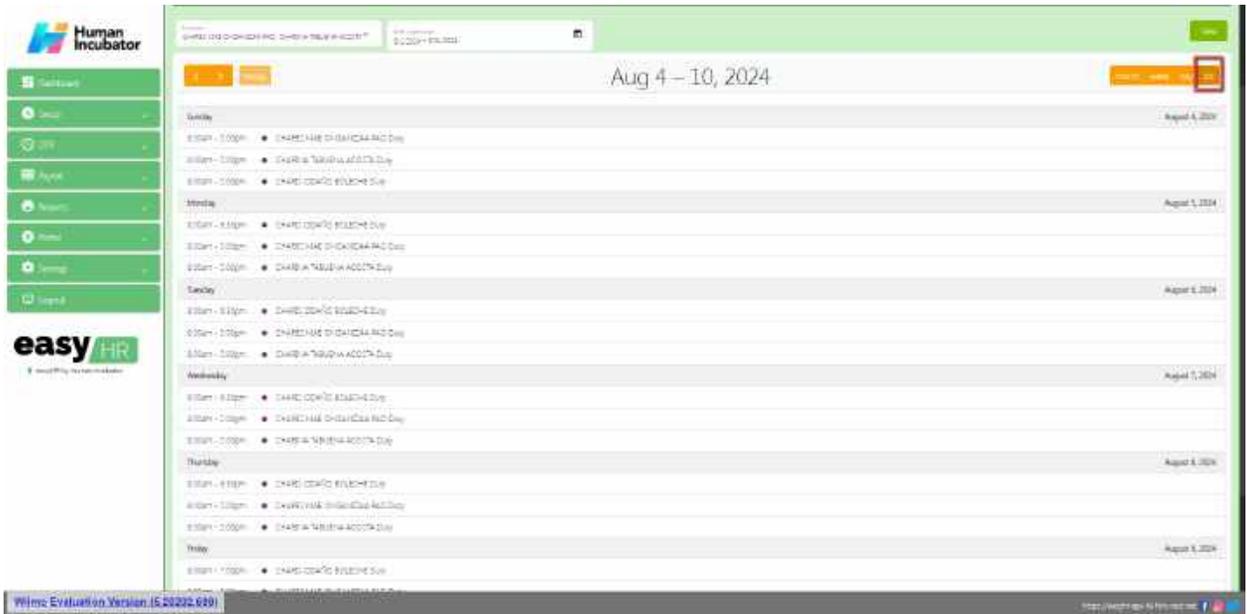
17. Click to view next day



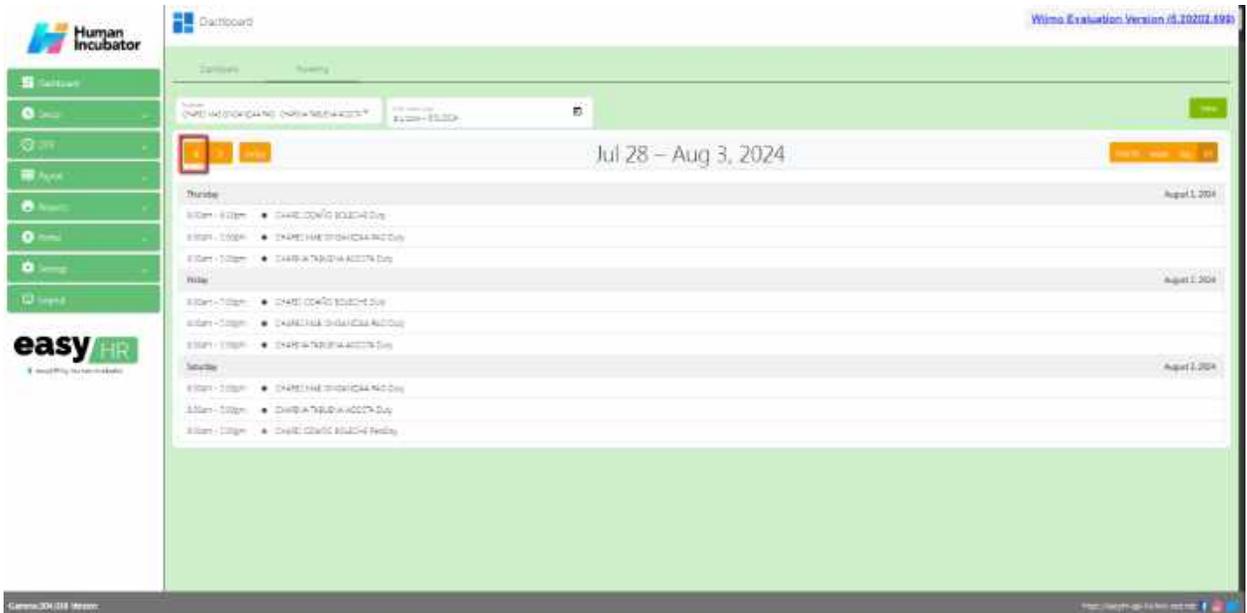
18. Click today to view current day



19. List View



20. Click this arrow to view previous week



21. Click this arrow to view next week

The screenshot shows the Human Incubator dashboard interface. On the left is a green sidebar with navigation options: Dashboard, Home, HR, Payroll, Reports, Profile, Settings, and Logout. Below the sidebar is the 'easy HR' logo. The main content area is titled 'Dashboard' and 'Planning'. It features a search bar and a date range selector set to 'Aug 11 - 17, 2024'. The calendar view shows a grid of days with specific shift assignments for each day, categorized by 'Sunday', 'Monday', 'Tuesday', 'Wednesday', and 'Thursday'. The 'Today' button in the top right corner of the calendar area is highlighted in orange.

22. Click today button to view current week

This screenshot is identical to the one above, showing the Human Incubator dashboard. However, the date range selector is set to 'Aug 4 - 10, 2024'. The 'Today' button in the top right corner of the calendar area is highlighted in orange, indicating the current week's view.

Section IV: Set Up

Company Setup

Overview

- Company it will use to add company, add Approver, setting for showable in payslip report, Non- Taxable/ Taxable and inclusion for 13th month and also Announcement for company.

Company List

- Shows the list of all added Company.

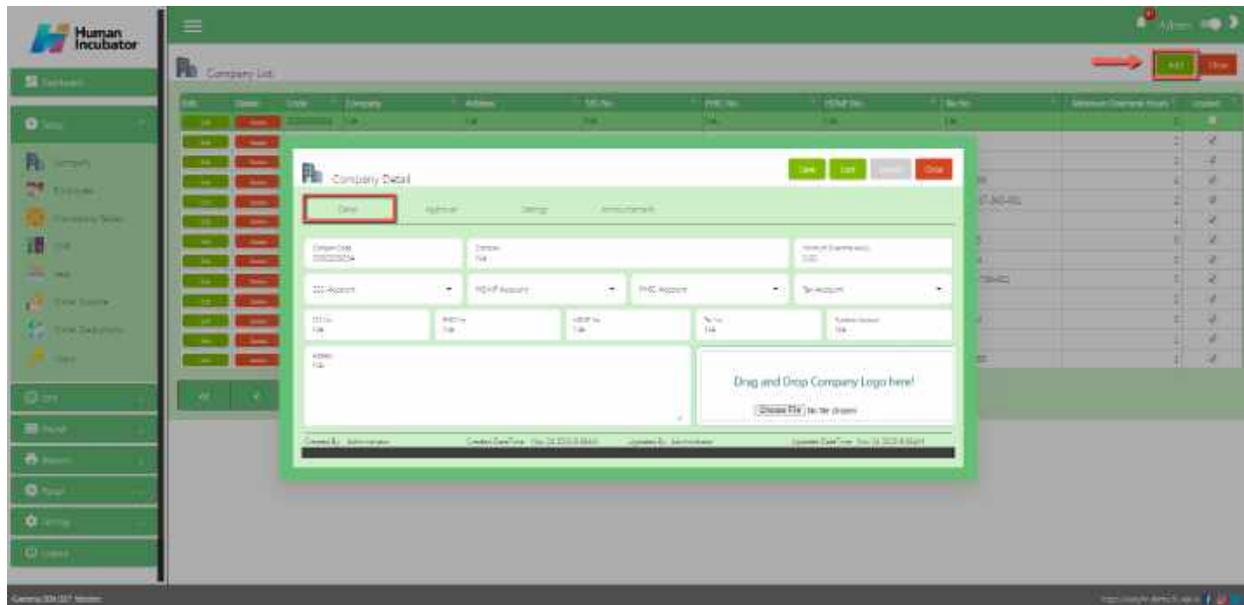
Company List Table

- Edit: This is a button that has the function to edit the company
- Delete: This is a button that has the function to Delete the company (**Note: You cannot delete the company once it already has a transaction data**)
- Code: This will automatically generate according to the sequence of the added company
- Company: This column is for the Company Name
- Address: This column is for the Company Address
- SSS No.: This column is for the Company SSS No.
- PHIC No.: This column is for the Company PHIC No.
- HDMF No.: This column is for the Company HDMF No.
- Tax No.: This column is for the Company Tax No.
- Minimum Overtime Hours: You can input minimum overtime hours applicable to the company.
- Locked: If the Checkbox is checked then it is locked but if uncheck then it is unlocked. (**Note: If the Company is unlocked it will not show in the other module**)



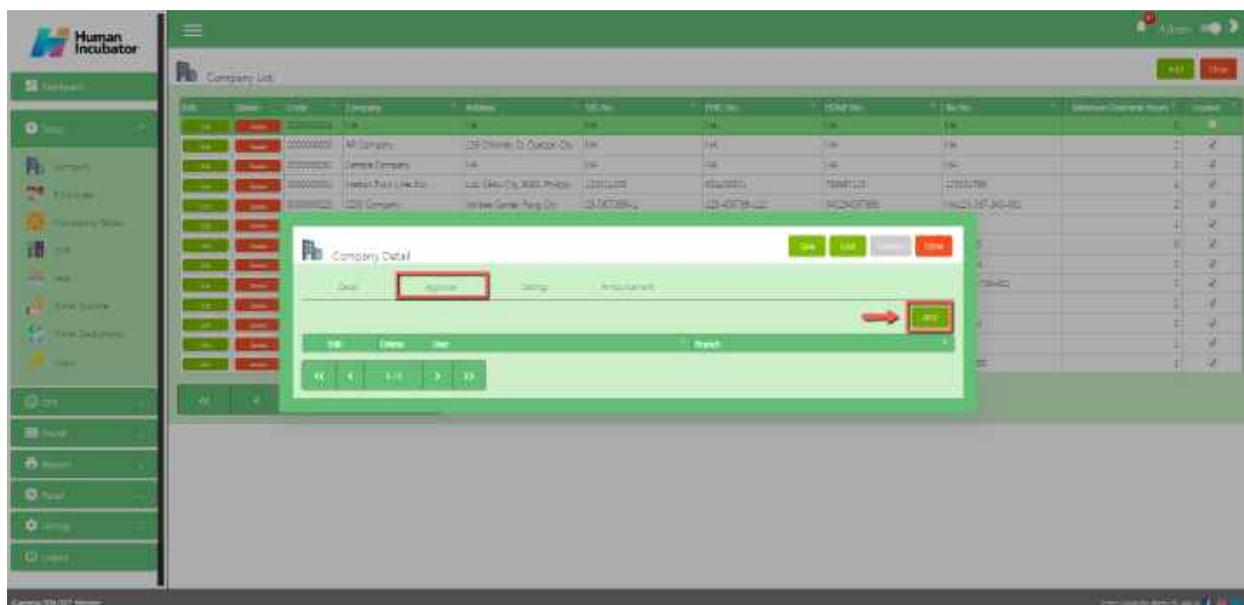
Company Detail

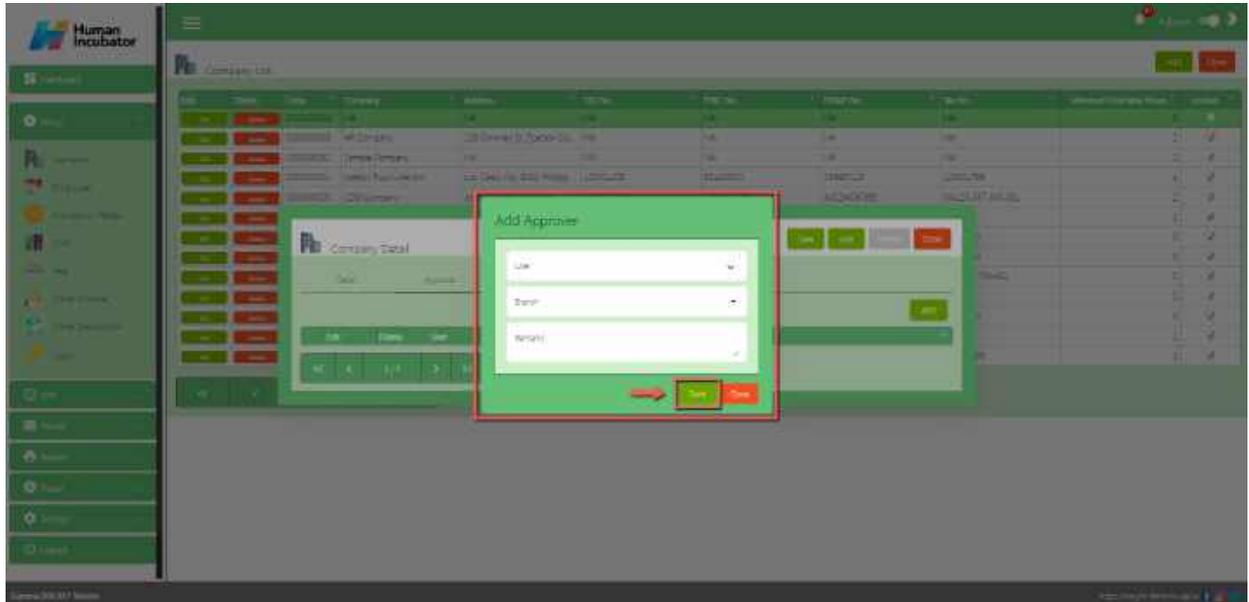
- **Assumption:** The user already clicked the **Add** button on the upper right corner in the company list.
- There are 4 tabs in company detail
 - Detail, Approver, Settings and Announcement
- The user need to select and fill up all the necessary information like
 - Company name, Minimum overtime hours, SSS no., PHIC no., HDMF no., Tax no., Funding Account, Address and company logo.
- There are some fields user need to select
 - SSS Account, HDMF Account, PHIC Account and Tax Account



Approver

- In Approver tab the user can **Add** the approver per branch
 - Select user, select the branch and also put a remarks
 - Click save button

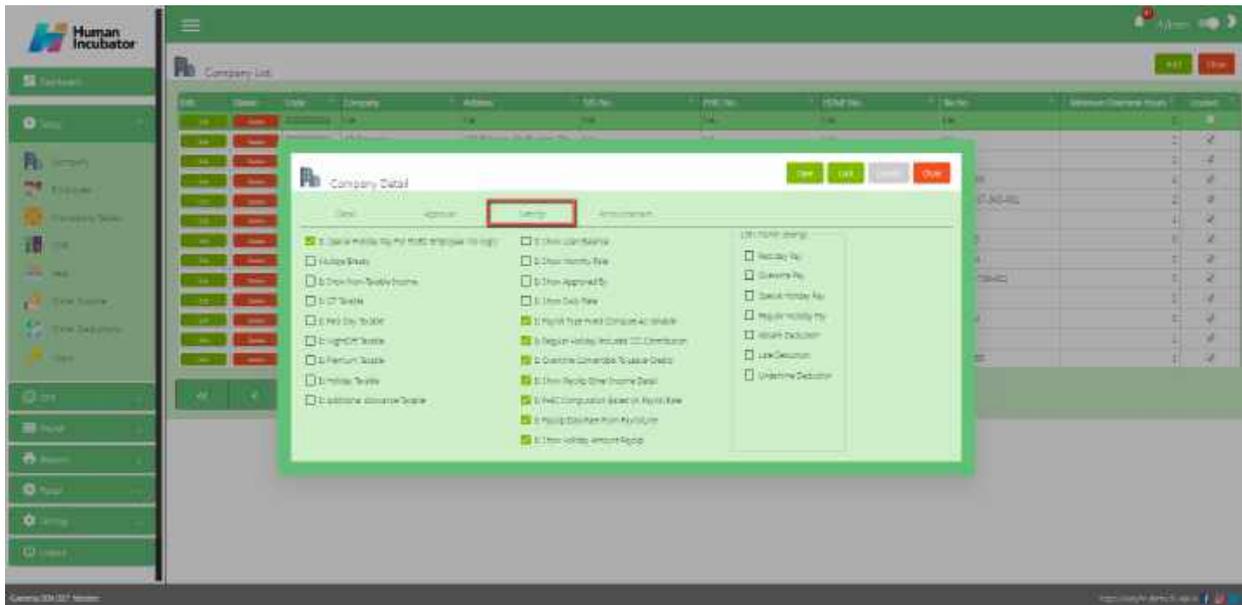




Settings

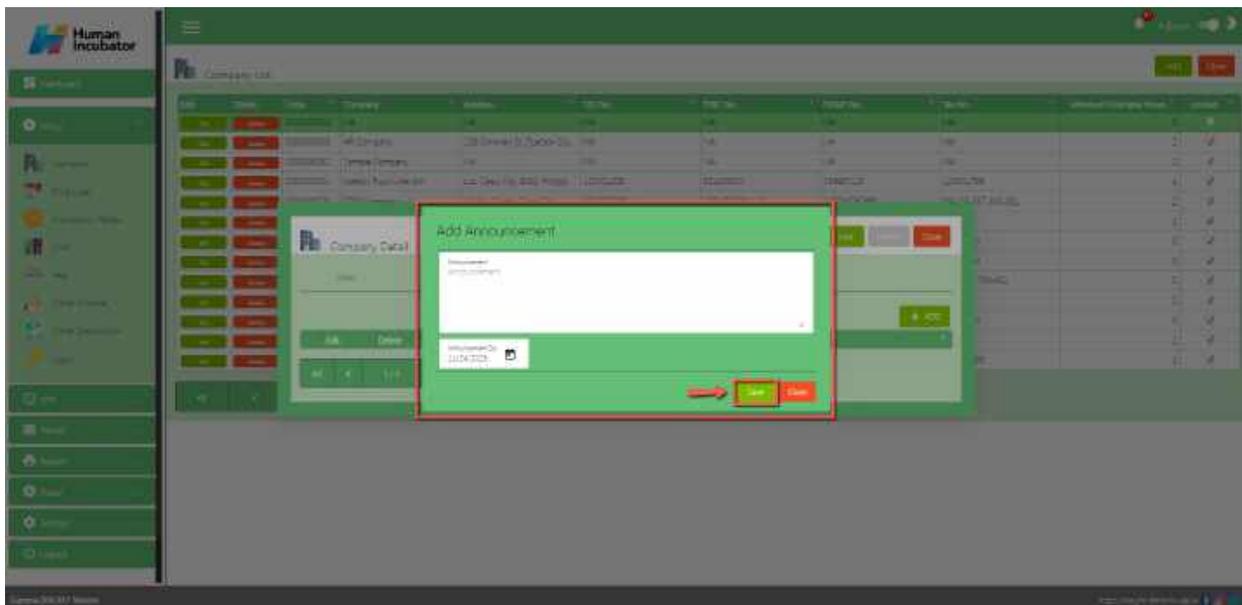
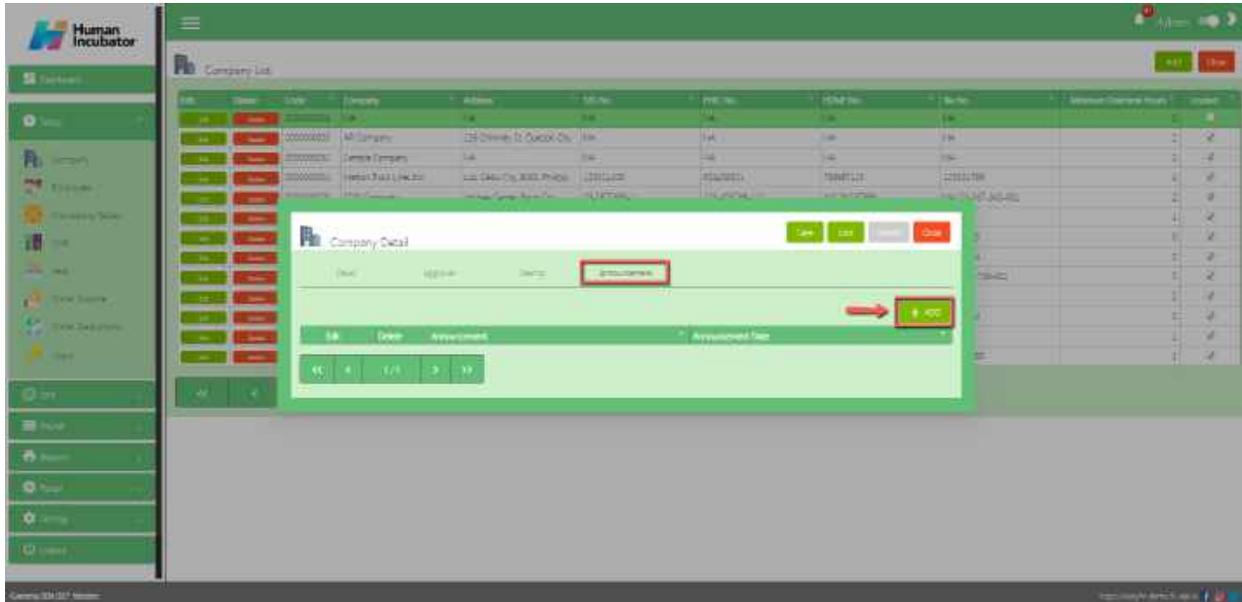
- In Settings tab the user can check the **check box**
 - The Left side in the settings is for Non-taxable/Taxable
 - The Center of the settings of for the of Showable in payslip report
 - The Right side of the settings is for Inclusion for 13th Month
 - **Is Special Holiday Pay for FIXED Employee (No logs)** - This setting is for the Fixed Employee to have a special holiday pay even if no logs.
 - **Is Payroll Type Fixed Compute As Variable** - This Setting is for Fixed Employee and the salary is computed as a variable.
 - **Is Regular Holiday Included SSS Contribution** - This setting is for the regular holiday pay will be added in SSS contribution if the employee works in regular holiday.

- **Is Overtime Convertible To Leave Credits** - This setting is for the employee applying for overtime the employee has an option to convert to leave credits.
- **Is Show Payslip Other Income Detail** - This setting is for showing the other income detail in payslip.
- **Is PHIC Computation Based on Payroll Rate** - This setting is for the PHIC Computation Base on payroll rate.
- **Is Payslip DailyRate From PayrollLine** -
- **Is Show Holiday Amount Payslip** - This setting is for showing the amount of holiday pay in payslip.



Announcement

- In Announcement tab the user can **Add** the announcement in company
 - Input the announcement and Announcement date
 - Click save button

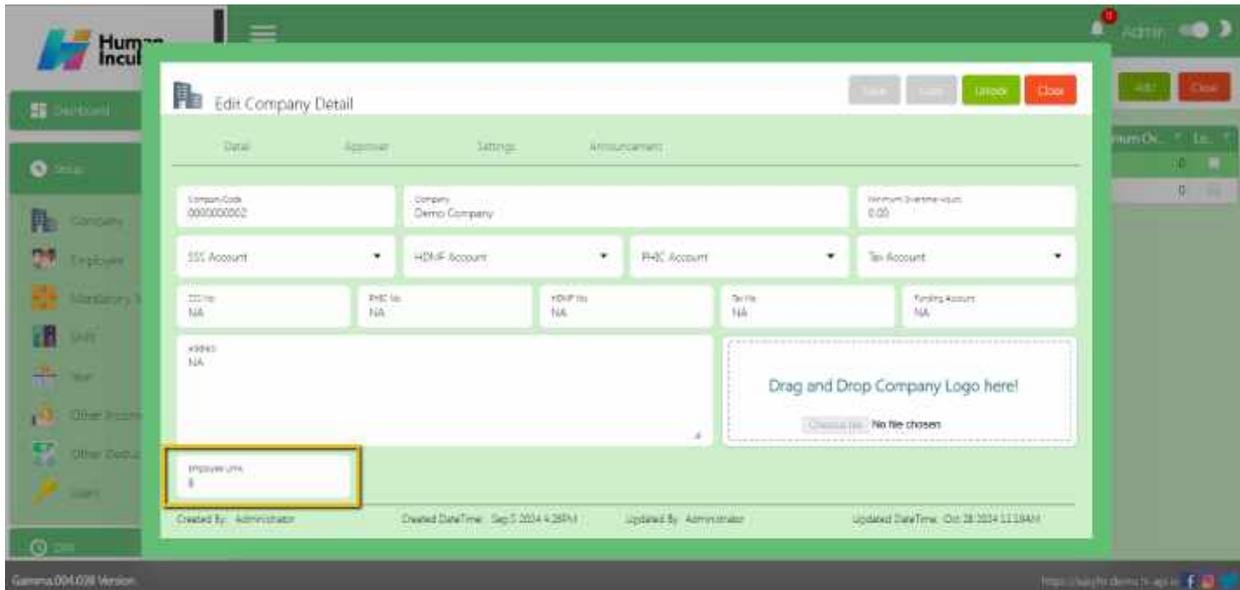


Save/Lock

- Make sure to save/lock the record so that in every transaction the company details will show.

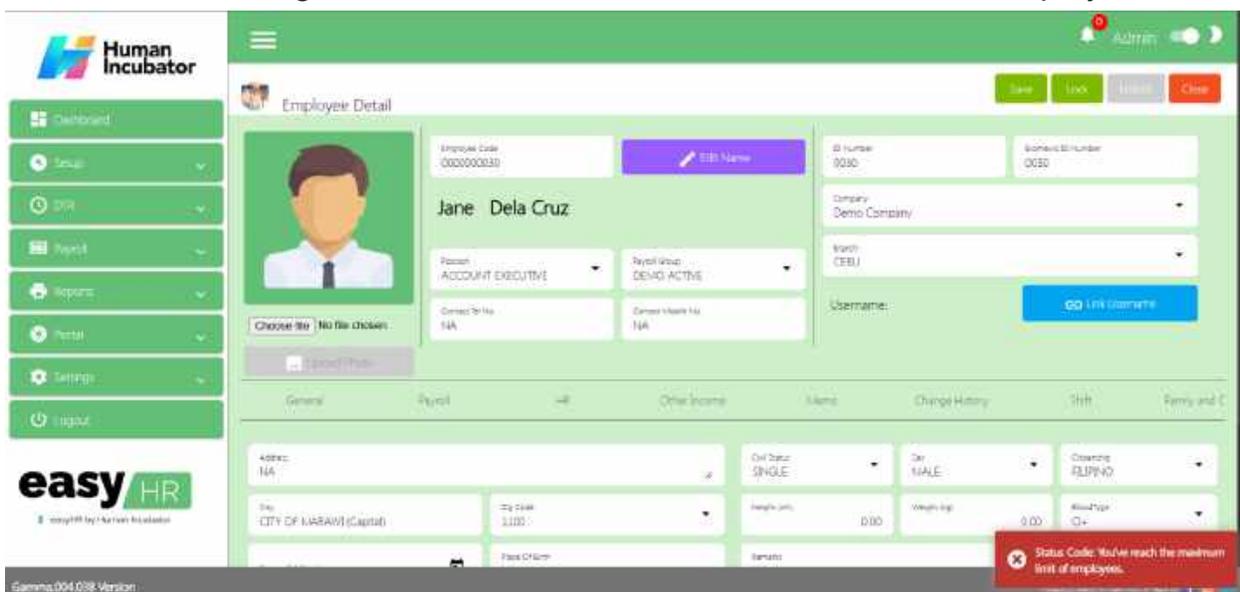
Employee Limit

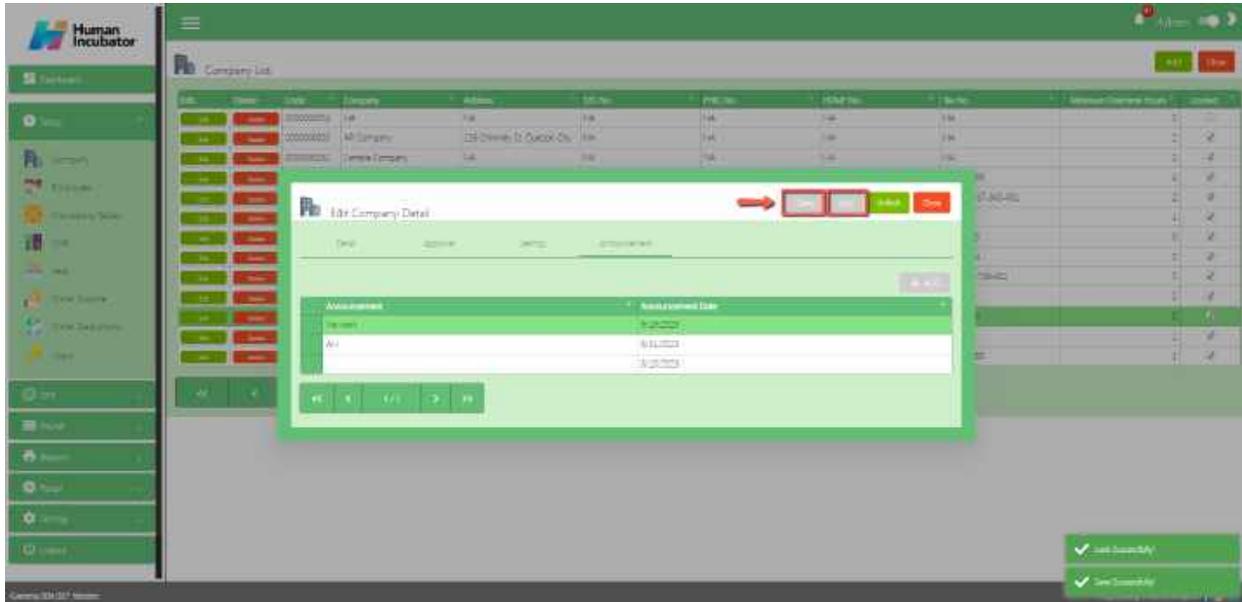
- You can set a limit of maximum number of employees



Employee limit

- After setting up the employee limit If the newly added employee is already above the employee limit number it will prompt a toast message that “You’ve reached the maximum limit of employees





Employee Setup

Overview

- Employee is used for add Employee, Employee detail, Payroll, Shift Schedule, Payroll Group

Employee List

- Shows all the list of the employee

Employee List Column

- Edit: This is a button that has the function to edit the company
- Delete: This is a button that has the function to Delete the Employee
(Note: You cannot delete the Employee once it already has a transaction data)
- Code: This will automatically generate according to the sequence of the added Employee
- ID: This is for the Employee ID
- Biometric ID: This is for the Employee Biometric ID if the Company is using a Biometric Device for their Employee's logs

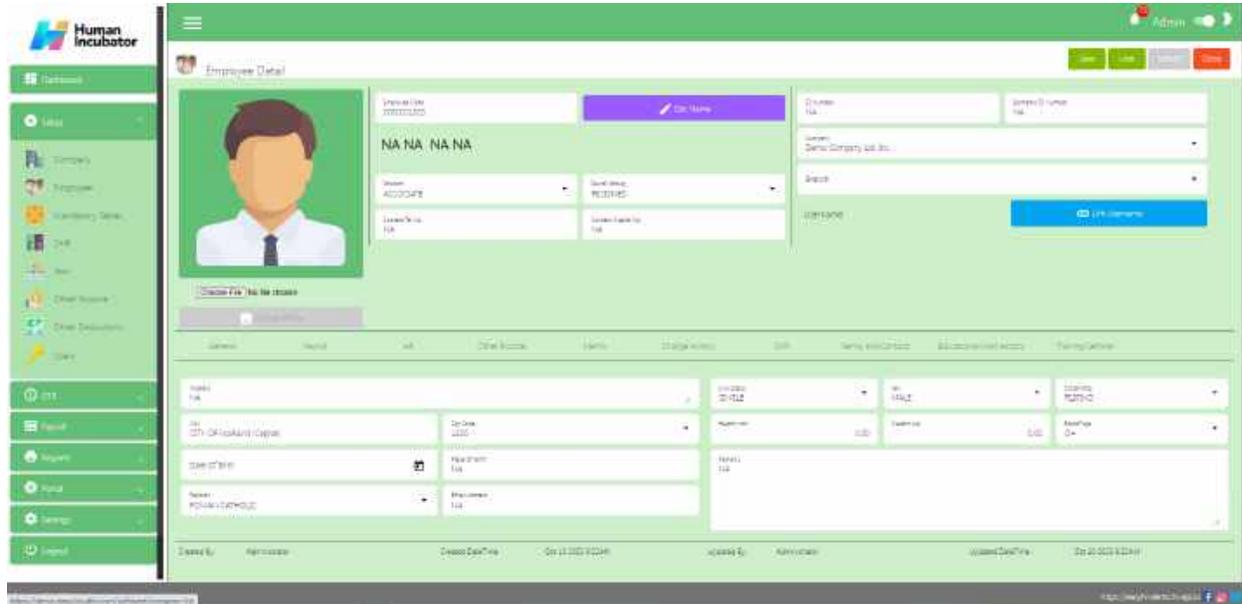
- Full Name: This is for the Employees Fullname
- Company: This is for the Employees Company
- Branch: This is for the Employees Branch
- Position: This is for the Employees Position
- Address: This is for the Employees Address
- Contact No.: This is for the Employees Contact No.
- Mobile No.: This is for the Employees Mobile No.
- Email Address: This is for the Employee's Email Address
- Remarks: You can put any Remarks for this Employee
- Locked: If the Checkbox is checked then it is locked but if uncheck then it is unlocked. (Note: If the Employee is unlocked it will not show in the other module)

Job	Date	Code	ID	Remarks ID	Full Name	Company	Branch	Position	Address	Contact No.	Mobile No.	Email Address
ADD					ADD							
ADD		00000001	001	001	ADD							
ADD		00000002	002	002	ADD							
ADD		00000003	003	003	ADD							
ADD		00000004	004	004	ADD							
ADD		00000005	005	005	ADD							
ADD		00000006	006	006	ADD							
ADD		00000007	007	007	ADD							
ADD		00000008	008	008	ADD							
ADD		00000009	009	009	ADD							
ADD		00000010	010	010	ADD							
ADD		00000011	011	011	ADD							
ADD		00000012	012	012	ADD							
ADD		00000013	013	013	ADD							
ADD		00000014	014	014	ADD							
ADD		00000015	015	015	ADD							
ADD		00000016	016	016	ADD							
ADD		00000017	017	017	ADD							
ADD		00000018	018	018	ADD							
ADD		00000019	019	019	ADD							
ADD		00000020	020	020	ADD							
ADD		00000021	021	021	ADD							
ADD		00000022	022	022	ADD							
ADD		00000023	023	023	ADD							
ADD		00000024	024	024	ADD							
ADD		00000025	025	025	ADD							
ADD		00000026	026	026	ADD							
ADD		00000027	027	027	ADD							
ADD		00000028	028	028	ADD							
ADD		00000029	029	029	ADD							
ADD		00000030	030	030	ADD							

Employee Detail

- **Assumption:** The user already clicked the **Add** button that can be seen on the Employee List.
- Fill all the important fields for Employee Detail like:

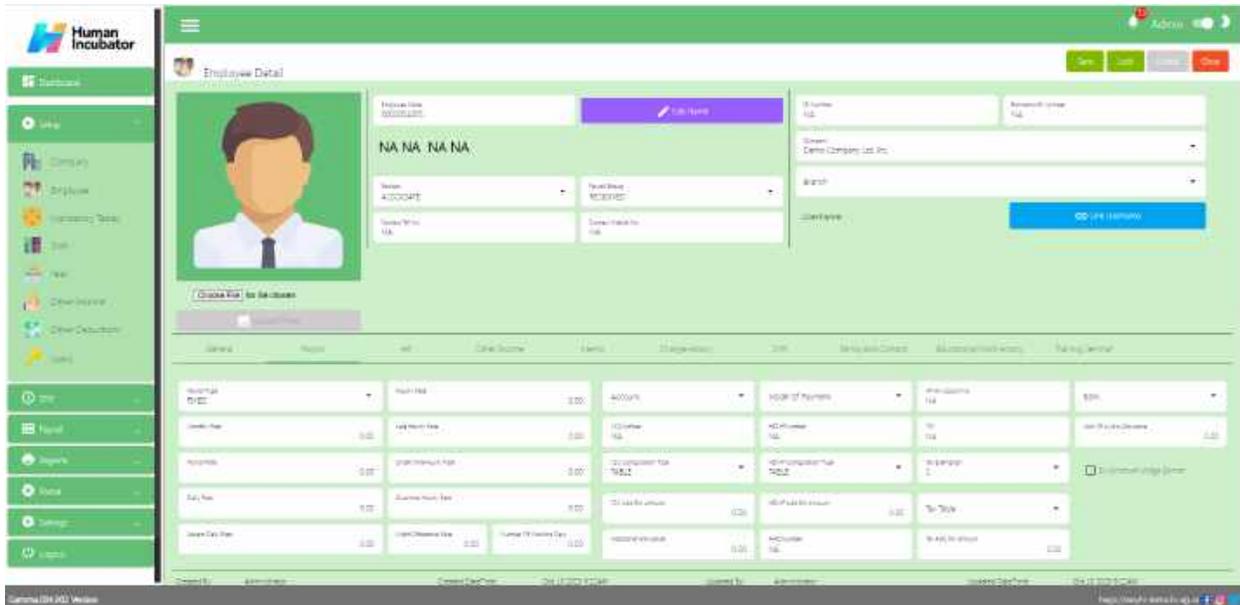
- Click **Edit Name** button to fill up the Last name, First name, Middle name, Extension name
- ID number
- Biometric number
- Select Company
- Select Branch
- Upload Photo
- Select Position
- Select Payroll Group
- Contact Tel No.
- Contact Mobile No.
- Address
- Select City
- Select Date of Birth
- Select Religion
- Select Zip Code
- Place of Birth
- Email Address
- Select Civil Status
- Select Sex
- Select Citizenship
- Height
- Weight
- Blood Type



Payroll

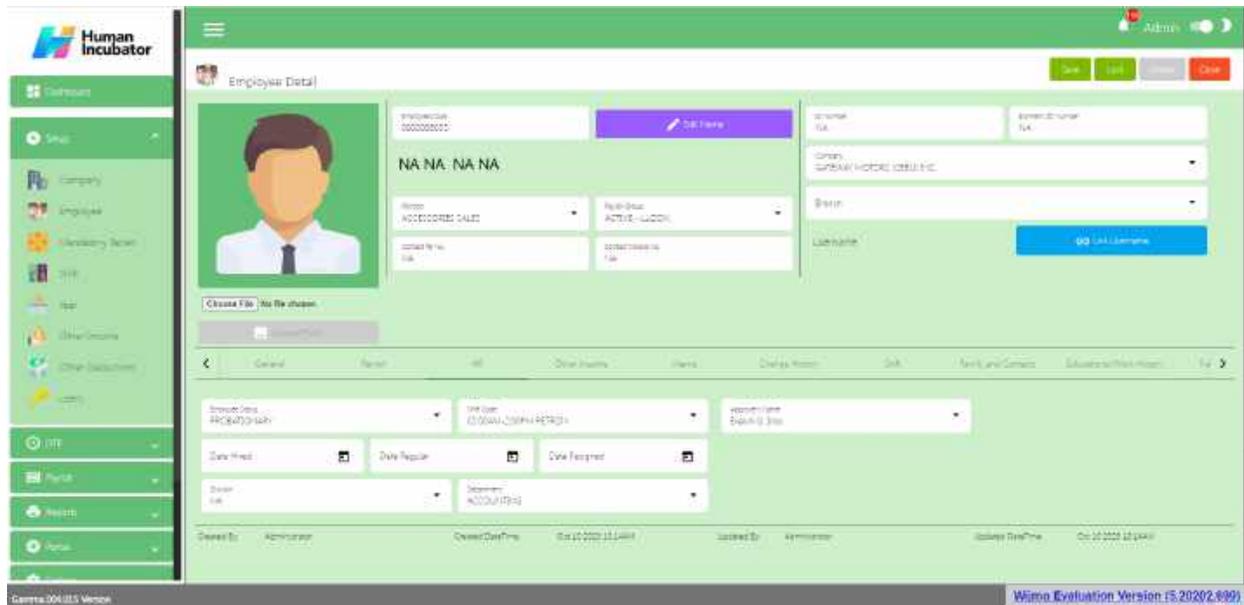
- In **Payroll** tab the user can input monthly rate and mandatory account of employee
- Select and Fill all the important fields for Employee Detail like:
 - Select Payroll Type
 - Monthly Rate
 - Number of Working Days
 - Input SSS Number
 - Input HDMF Number
 - Input PHIC Number
 - Input TIN
 - Tax Exemption
 - Select SSS Computation Table
 - Select HDMF Computation Table
 - Tax Table
 - Select Mode of Payment
 - Input Additional Allowance if Necessary

- Input ATM Account Number
- Select Bank



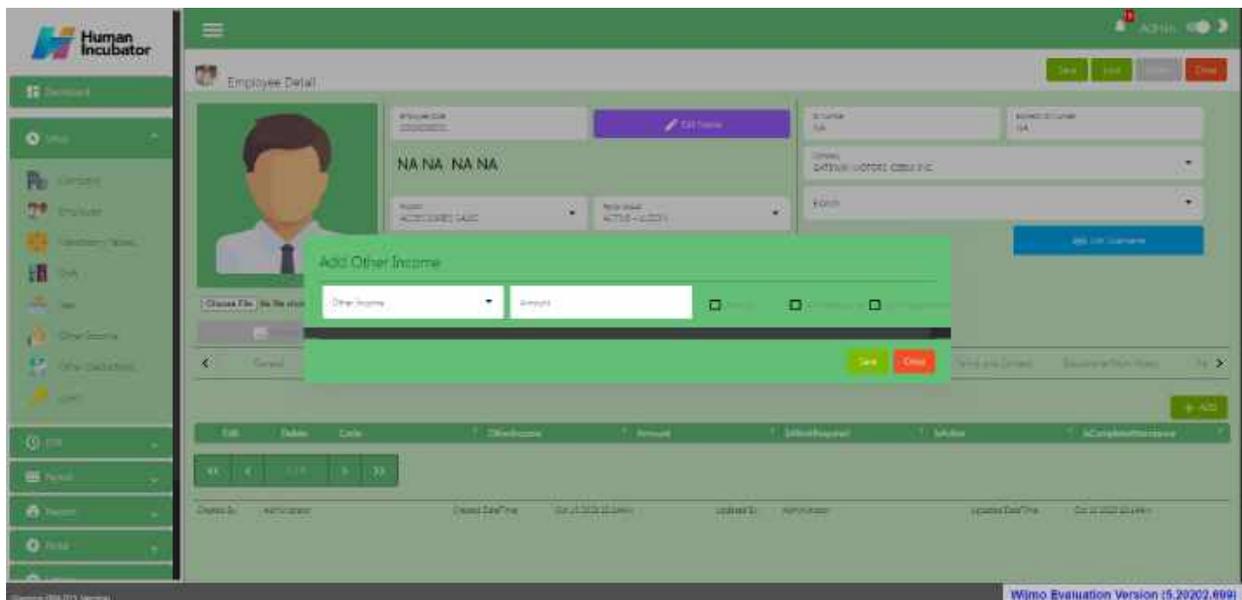
HR

- In the **HR** tab the user can select the status of the employee and also the Date hired.
- Select the important fields like:
 - Employee Status
 - Shift Code
 - Date Hired
 - Date Regular
 - Division
 - Department
 - Approver's Name



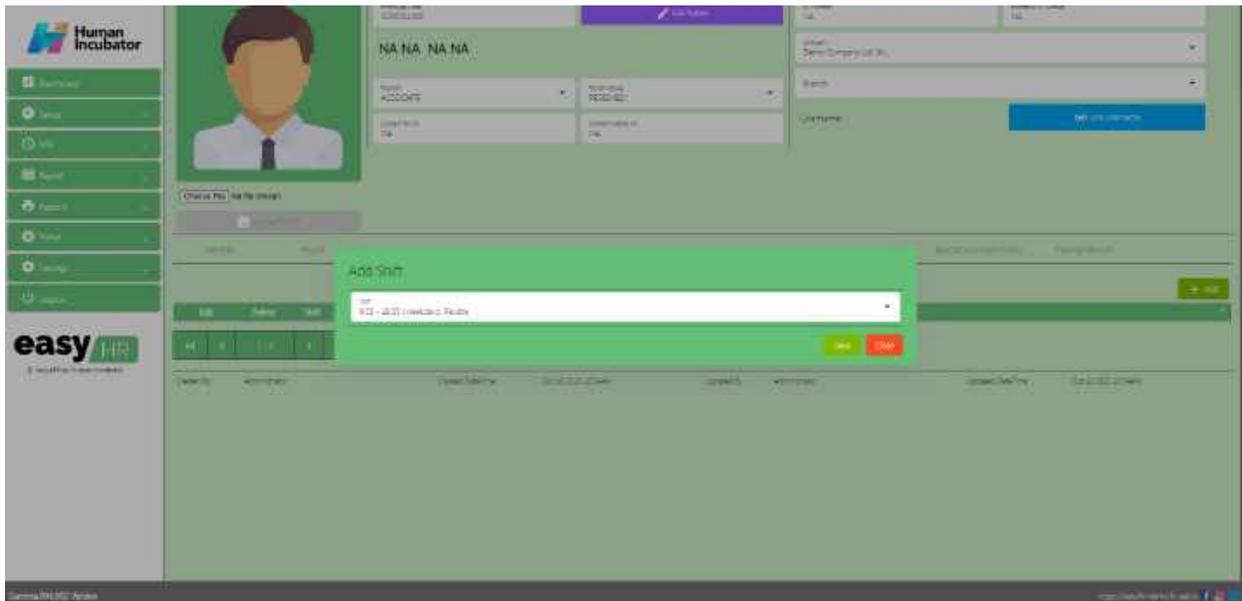
Other Income

- In **Other Income** tab the user can add the other income of the employee
 - Click the **Add** button
 - Select other Income
 - Input Amount
 - Check the box **IsActive**, **IsWorkRequired**
 - Click **Save** button to add in Other Income table



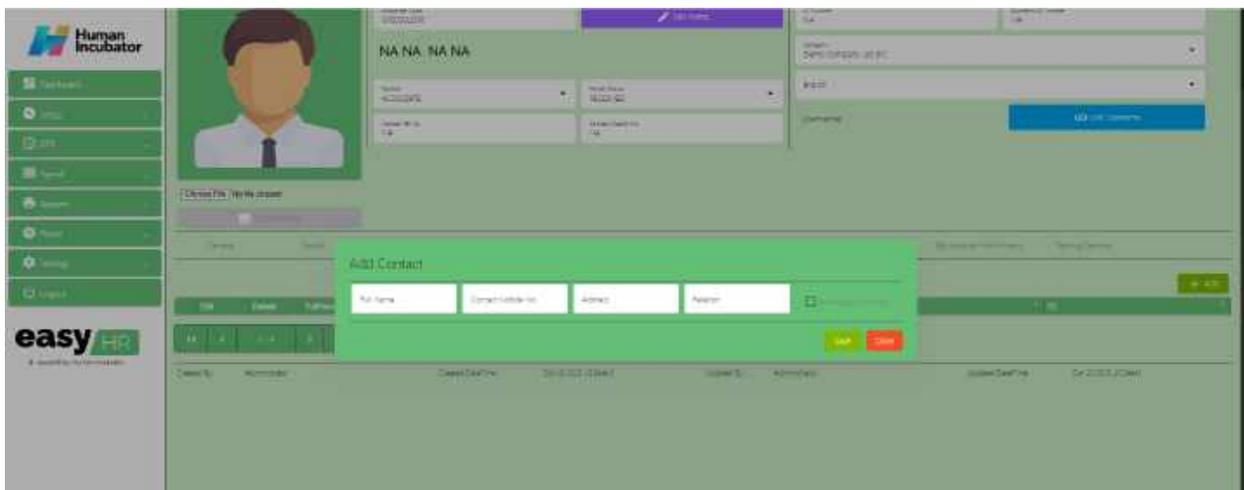
Shift

- In **Shift** tab the user can **Add** other shift of employee
 - Click **Add** button
 - Select Shift
 - Click **Save** button to add in Shift table



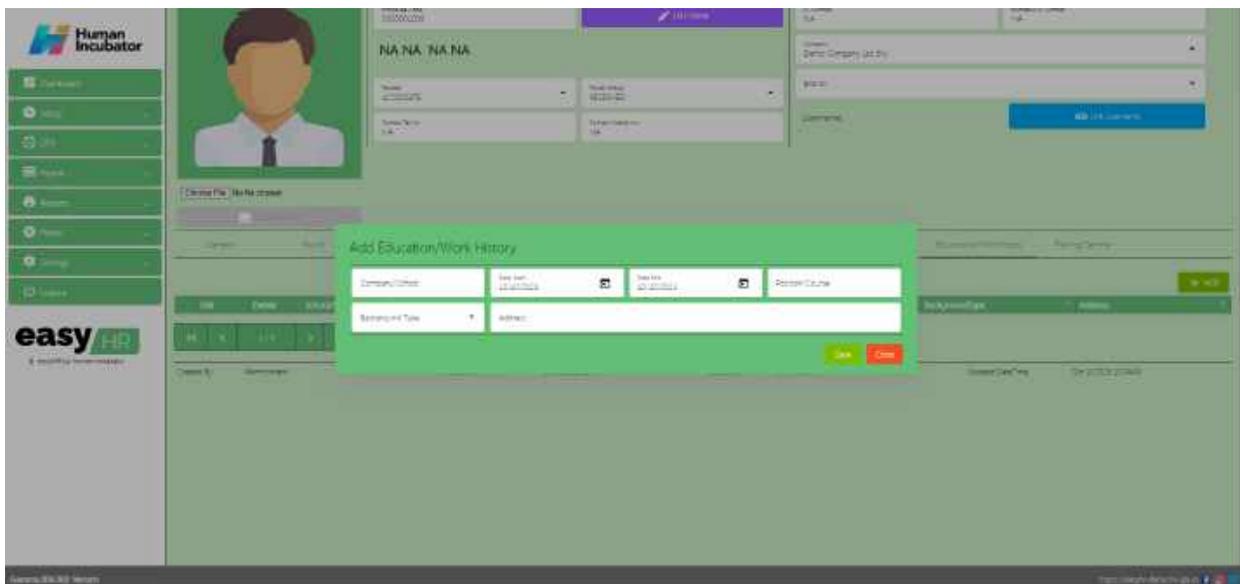
Family and Contacts

- In **Family and Contacts** tab the user can **Add** contacts for his family
 - Click **Add** button
 - Fill all the important fields
 - Click **Save** button to **Add** in table



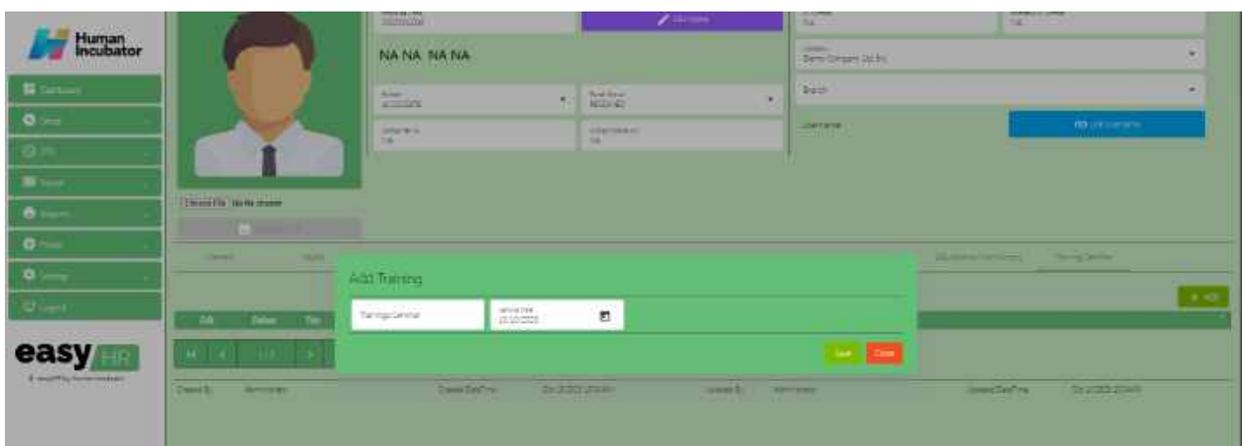
Educational/Work History

- In **Educational/ Work History** tab the user can **Add** the educational attainment and Work History
 - Click **Add** button
 - Fill all the important fields
 - Click **Save** button to **Add** in table



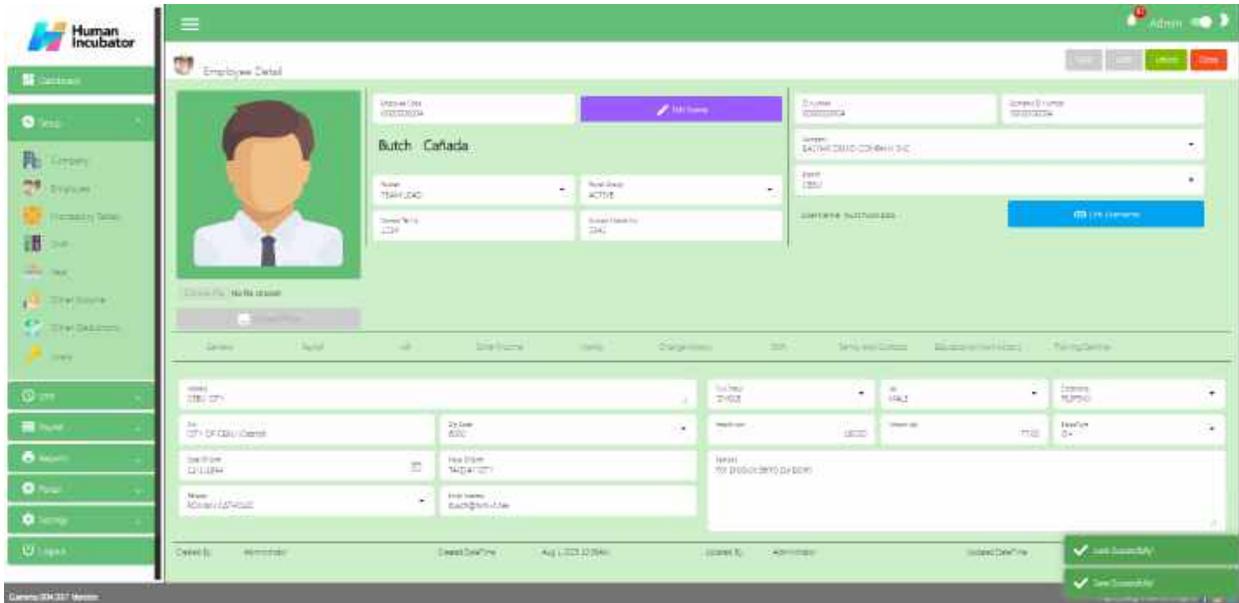
Training/Seminar

- In **Training/Seminar** tab the user can **Add** if the employee has a seminar
 - Click **Add** button
 - Fill all the important fields
 - Click **Save** button to **Add** in table



Save/Lock

- Make sure to save/lock the record so that in every transaction the employee details will show.

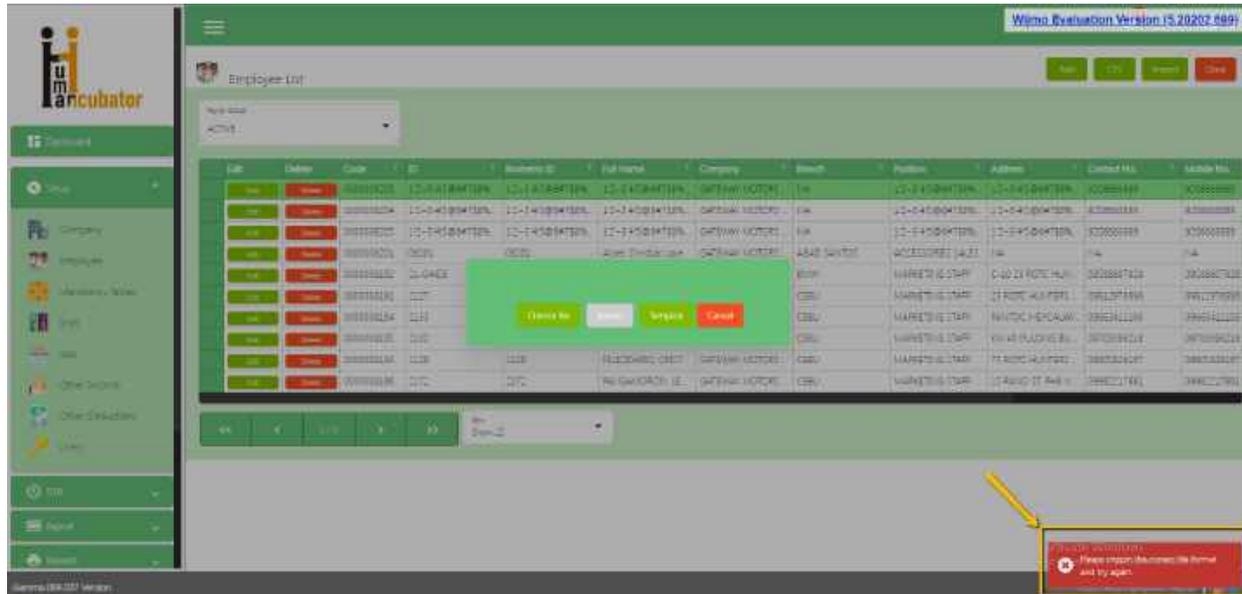


Employee Special Characters Importing

- Input special Characters in all the fields that is not Integer required

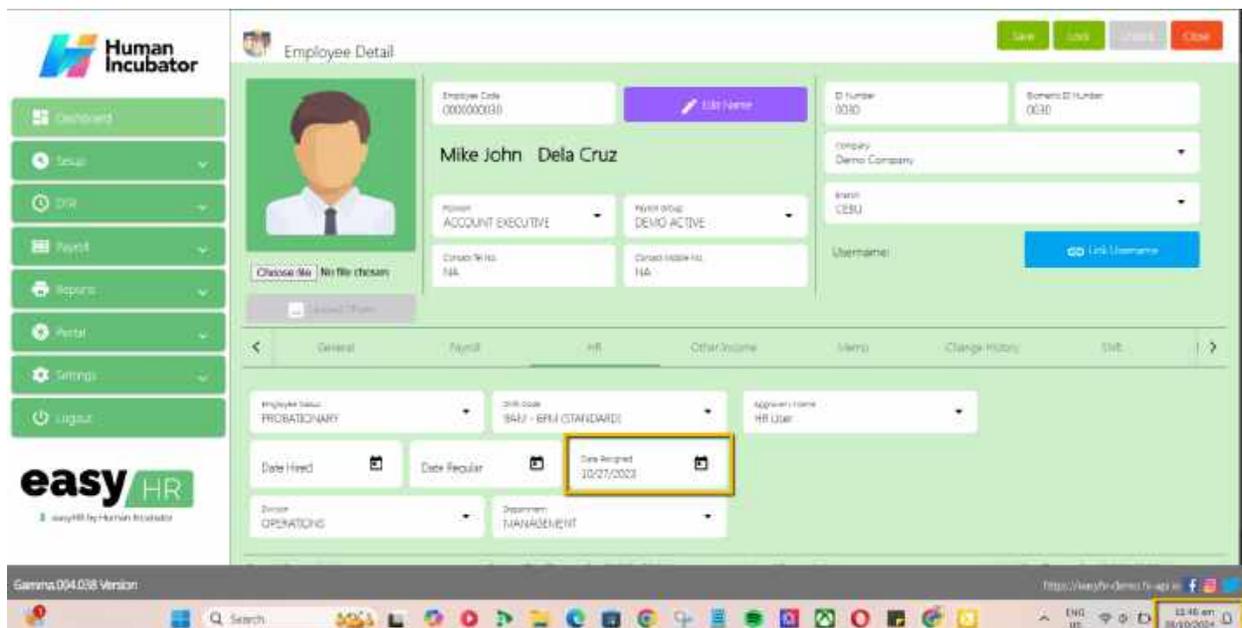
- Import in the Employee 201

- Import Employee

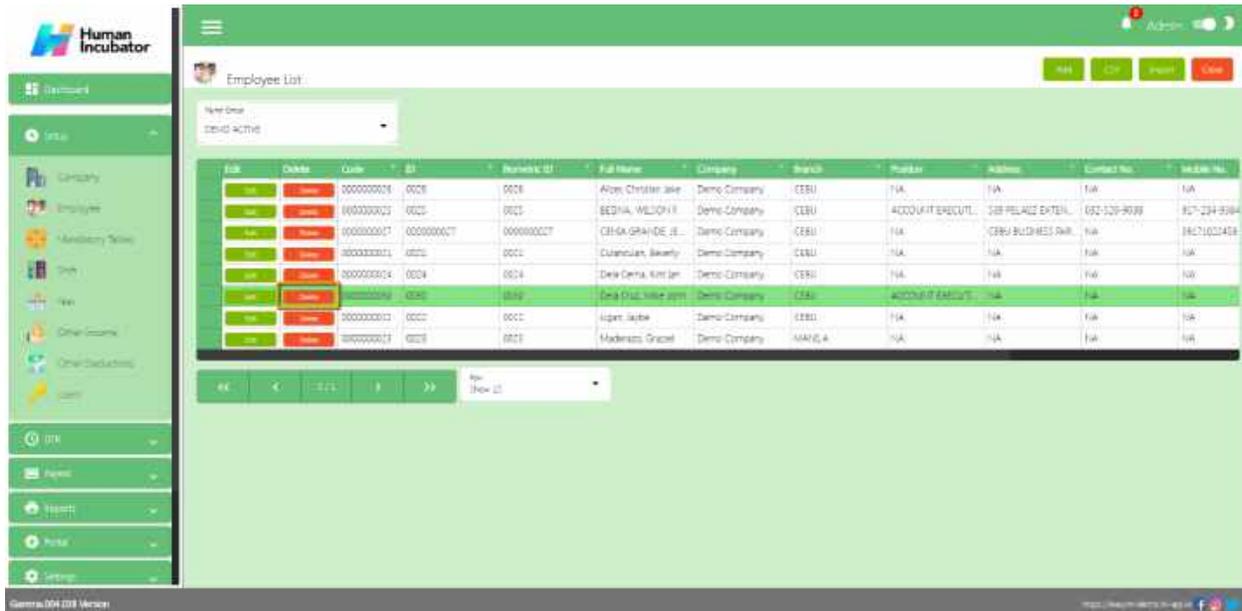


Employee Soft Delete

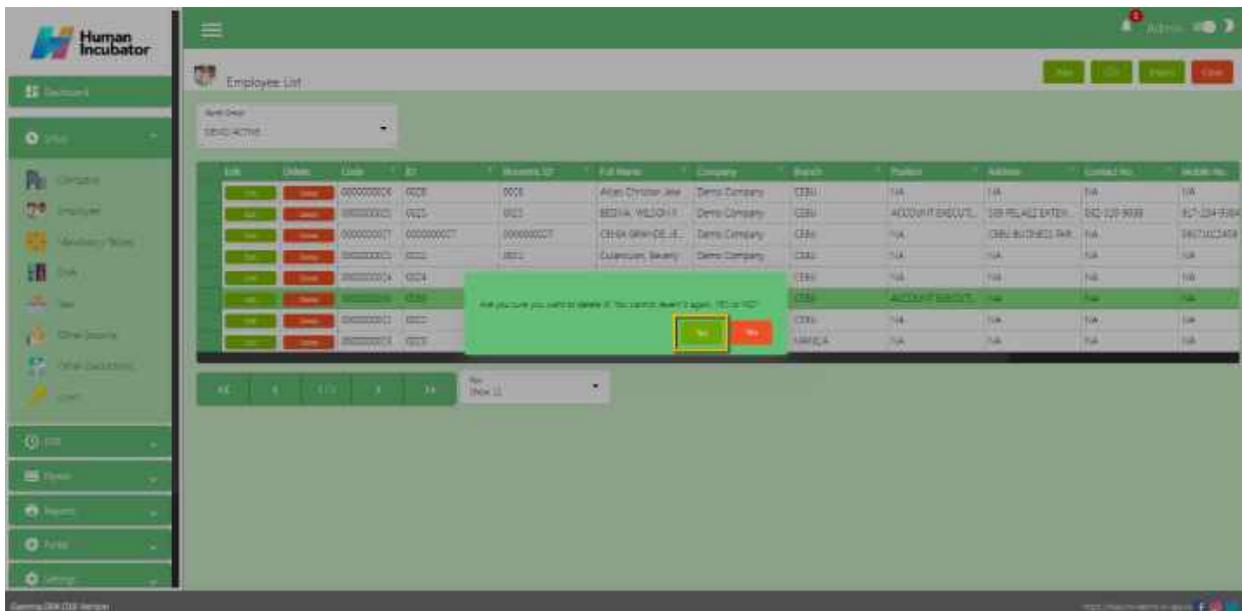
- If the employee's resignation date was at least a year ago from the present date you can soft delete the employee in the employee 201



- Go to Employee 201
- Click **Delete** button



- Click **Yes** for the Confirmation “Are you sure you want to delete it? You cannot revert it again. YES or NO?”



- Employee can be deleted from the employee 201

ID	Delete	Code	Business ID	Full Name	Company	Branch	Position	Address	Contact No.	SSN No.
0000000006	0006	0006	0006	Allen Christopher	Demo Company	CEBU	IA	IA	IA	IA
0000000007	0007	0007	0007	BEDINA, WELCHIE	Demo Company	CEBU	ACCOUNT EXECUT.	102 PELAGE EXTER.	052-529-8038	827-234-9384
0000000007	0007	0007	0007	CRISA GRAFDE JE	Demo Company	CEBU	IA	CEBU BUSINESS PAR.	IA	9827002408
0000000008	0008	0008	0008	Cunha, Beverly	Demo Company	CEBU	IA	IA	IA	IA
0000000004	0004	0004	0004	Dela Cruz, Kim Jan	Demo Company	CEBU	IA	IA	IA	IA
0000000004	0004	0004	0004	Ligan, Nylee	Demo Company	CEBU	IA	IA	IA	IA
0000000003	0003	0003	0003	Maldonado, Orabel	Demo Company	MANILA	IA	IA	IA	IA

Mandatory Tables

Overview

- Mandatory table is used for mandatory deduction for employee
Note: Please do not change the mandatory table it's all based on the government mandate (Update the range mandatory deduction if there is changes in government mandate)

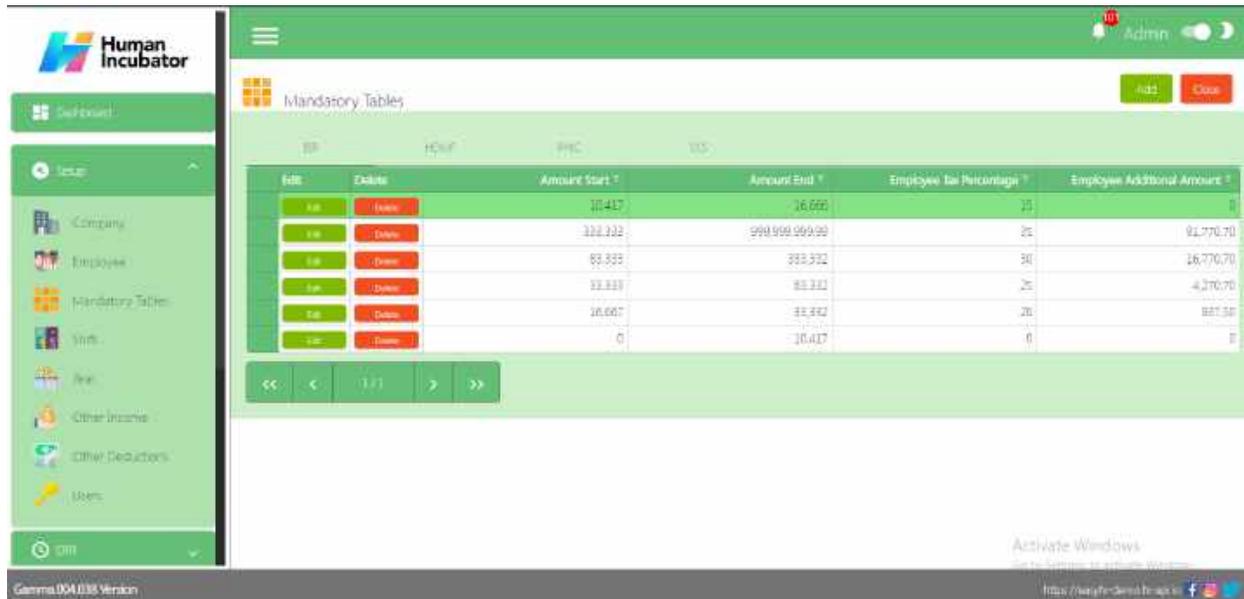
ID	Delete	Amount	Amount	Deduction Percentage	Employee Address

BIR Mandatory

BIR Mandatory is based on the Employee's Payroll Rate

Column Table

- Edit: This is a button that has the function to edit the mandatory per line
- Delete: This is a button that has the function to Delete the mandatory per line
- Amount Start: This is the Range for the Employees Payroll Rate
- Amount End: This is the Range for the Employees Payroll Rate
- Employee Tax Percentage: Tax Percentage according to the Employees Payroll Range
- Employee Additional Amount: Additional Amount according to the employee's Payroll Range



ID	Edit	Delete	Amount Start	Amount End	Employee Tax Percentage	Employee Additional Amount
10417	Edit	Delete	10417	16660	25	0
332332	Edit	Delete	332332	9999999999	25	8177070
88333	Edit	Delete	88333	88333	30	1677070
33333	Edit	Delete	33333	88333	25	437070
36667	Edit	Delete	36667	88333	25	88750
0	Edit	Delete	0	10417	0	0

HDMF Mandatory

HDMF Mandatory is based on the Employee's Payroll Rate

Column Table

- Edit: This is a button that has the function to edit the mandatory per line
- Delete: This is a button that has the function to Delete the mandatory per line
- Amount Start: This is the Range for the Employees Payroll Rate
- Amount End: This is the Range for the Employees Payroll Rate
- Employee Contribution Percentage: Contribution Percentage according to the Employees Payroll Range
- Employer Contribution Percentage: Contribution Percentage according to the Employer's Payroll Range
- Employee Contribution Value: Contribution Value according to the employees Payroll Range
- Employer Contribution Value: Contribution Value according to the employer's Payroll Range
- Remarks: You can input any remarks



EP	EMP	PhC	ES					
Edit	Delete	Amount Start	Amount End	Employee Contribution Percentage	Employer Contribution Percentage	Employee Contribution Value	Employer Contribution Value	Remarks
		1,000.00	390,999	2	2	100	100	PHC
		0	1,500	1	2	100	100	PHC

PHIC Mandatory

PHIC Mandatory is based on the Employee's Payroll Rate

Column Table

- Edit: This is a button that has the function to edit the mandatory per line
- Delete: This is a button that has the function to Delete the mandatory per line
- Amount Start: This is the Range for the Employees Payroll Rate
- Amount End: This is the Range for the Employees Payroll Rate
- Employee Contribution Percentage: Contribution Percentage according to the Employees Payroll Range
- Employer Contribution Percentage: Contribution Percentage according to the Employer's Payroll Range
- Employee Contribution Value: Contribution Value according to the employees Payroll Range
- Employer Contribution Value: contribution Value according to the employer's Payroll Range
- Remarks: You can input any remarks



Edit	Delete	Amount Start	Amount End	Employee Contribution Percentage	Employer Contribution Percentage	Employee Contribution Value	Employer Contribution Value	Remarks
		80,000	999,999,999.99	0	0	1,600	1,600	BRACKET 3
		10,000.01	79,999.99	2	2	0	0	BRACKET 2
		0	10,000	0	0	200	200	BRACKET 1

SSS Mandatory

SSS Mandatory is based on the Employee's Payroll Rate

Column Table

- Edit: This is a button that has the function to edit the mandatory per line
- Delete: This is a button that has the function to Delete the mandatory per line
- Amount Start: This is the Range for the Employees Payroll Rate
- Amount End: This is the Range for the Employees Payroll Rate
- Employee Contribution Value: Contribution Value according to the employees Payroll Range
- Employer Contribution Value: contribution Value according to the employer's Payroll Range
- Employer EC Value: This is also part of the Employers Contribution
- Remarks: You can input any remarks

Edit	Delete	Amount Start	Amount End	Employee Contribution Value	Employer Contribution Value	Employer EC Value	Remarks
		25.750	25.999,999,999.99	1.330	2.500	30	NA
		25.250	25.749.99	1.327.50	2.500.50	30	NA
		24.750	25.249.99	1.305	2.755	30	NA
		24.250	24.749.99	1.282.50	2.707.50	30	NA
		23.750	24.249.99	1.260	2.660	30	NA
		23.250	23.749.99	1.237.50	2.612.50	30	NA
		22.750	23.249.99	1.215	2.565	30	NA
		22.250	22.749.99	1.192.50	2.517.50	30	NA
		21.750	22.249.99	1.170	2.470	30	NA
		21.250	21.749.99	1.147.50	2.422.50	30	NA
		20.750	21.249.99	1.125	2.375	30	NA
		20.250	20.749.99	1.102.50	2.327.50	30	NA
		19.750	20.249.99	1.080	2.280	30	NA
		19.250	19.749.99	1.057.50	2.232.50	30	NA

Shift

Overview

- Shift setup is used for Shift schedule for employees and also the user can add more shift base in company shift schedule.

Shift Code List

- Shows all list of shift schedule

Column Table:

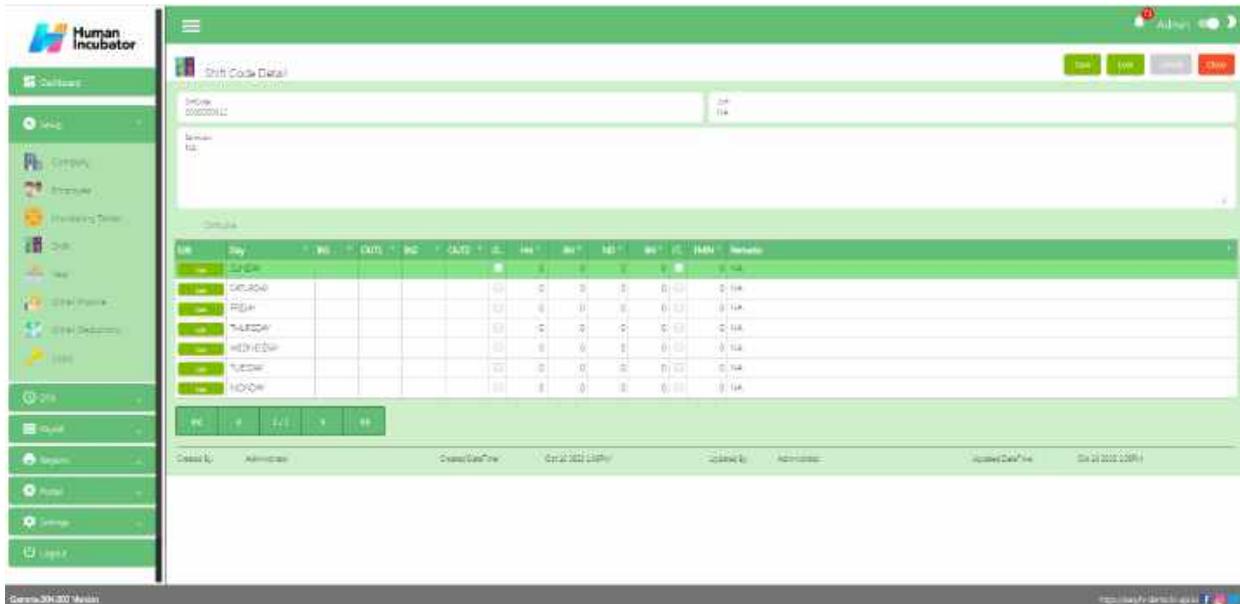
- Edit: This has a function to Edit the Shift
- Delete: This has a function to Delete the Shift
- Code: This code will automatically generate according to the sequence of the added shift
- Shift: The name of the shift
- Particulars: in the Particulars this is just like the remarks you can input any details
- Locked: If the Checkbox is checked then it is locked but if uncheck then it is unlocked. (**Note: If the Shift is unlocked it will not show in the other module**)

Shift	Code	Shift	Particulars	Locked
00000001	00000001	00000001	00000001	<input checked="" type="checkbox"/>
00000002	00000002	00000002	00000002	<input checked="" type="checkbox"/>
00000003	00000003	00000003	00000003	<input checked="" type="checkbox"/>
00000004	00000004	00000004	00000004	<input checked="" type="checkbox"/>
00000005	00000005	00000005	00000005	<input checked="" type="checkbox"/>
00000006	00000006	00000006	00000006	<input checked="" type="checkbox"/>
00000007	00000007	00000007	00000007	<input checked="" type="checkbox"/>
00000008	00000008	00000008	00000008	<input checked="" type="checkbox"/>
00000009	00000009	00000009	00000009	<input checked="" type="checkbox"/>
00000010	00000010	00000010	00000010	<input checked="" type="checkbox"/>
00000011	00000011	00000011	00000011	<input checked="" type="checkbox"/>
00000012	00000012	00000012	00000012	<input checked="" type="checkbox"/>
00000013	00000013	00000013	00000013	<input checked="" type="checkbox"/>
00000014	00000014	00000014	00000014	<input checked="" type="checkbox"/>
00000015	00000015	00000015	00000015	<input checked="" type="checkbox"/>
00000016	00000016	00000016	00000016	<input checked="" type="checkbox"/>
00000017	00000017	00000017	00000017	<input checked="" type="checkbox"/>
00000018	00000018	00000018	00000018	<input checked="" type="checkbox"/>
00000019	00000019	00000019	00000019	<input checked="" type="checkbox"/>
00000020	00000020	00000020	00000020	<input checked="" type="checkbox"/>

Shift Code Detail

- **Assumption:** To **Add** a new shift, click the **Add** button that can be seen on the right side of the screen
- Fill all the important fields for Shift Code Detail like:

- Shift
- Particulars



Shift Line

- In **Shift line** the user need to click **Edit** to set the shift schedule of the employee (**Edit** Sunday to Monday and set the Rest Day of employee)
 - Input the **Time In 1** hour and **Time Out 2**
 - Input the Total Number of Hours
 - Input the Total Number of break Hours
 - Input the Night Differential Hours if necessary
 - Input the Fix Hours Limit if necessary
 - Remarks
 - Click **Save** button to add in table



Save/Lock

- Make sure to save/lock the record so that in every transaction the Shift will show.



Year

Overview

- Year setup is used for setting up a holiday in that particular year and also to Add leave credits per employee.

Note: Always make sure the current Year is locked.

Year List

- Shows all list of year

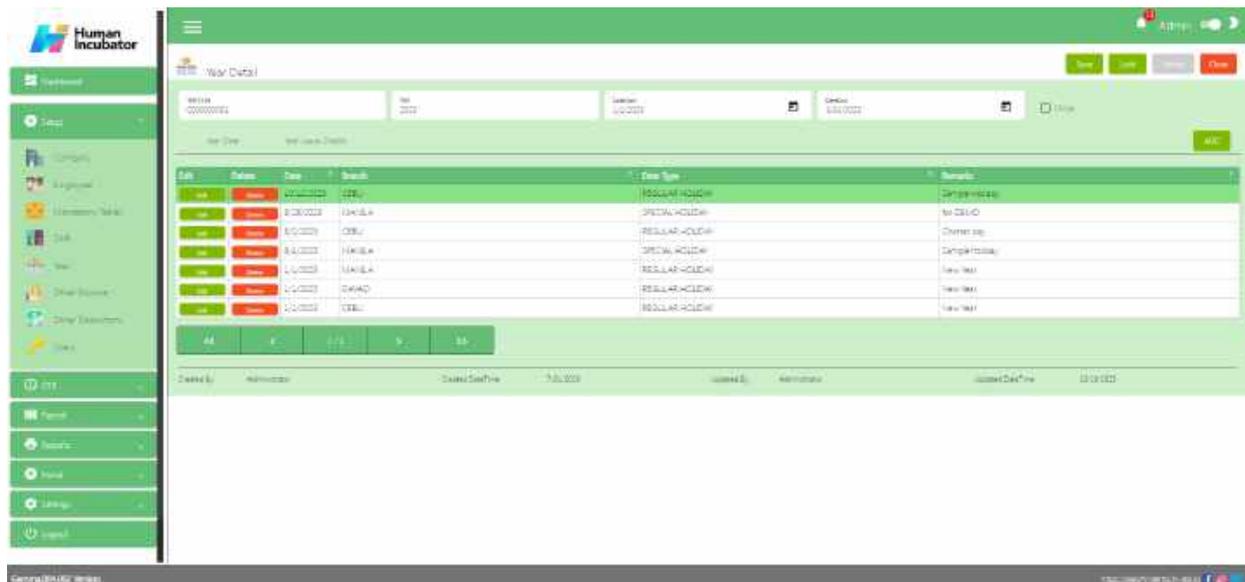
Column Table

- Edit: This has the function to edit the Year
- Delete: This has a function to delete the Year
- Code: This code will automatically generate according to the sequence of the added shift
- Year: The is an input on what year added
- Date Start: Date Start of the Year
- Date End: Date End of the Year
- Closed: You can no longer select if the year is closed.

Code	Year	Date Start	Date End	Locked
0000000001	14	1/1/2014	12/31/2014	<input type="checkbox"/>
0000000002	15	1/1/2015	12/31/2015	<input type="checkbox"/>
0000000003	16	1/1/2016	12/31/2016	<input type="checkbox"/>
0000000004	17	1/1/2017	12/31/2017	<input type="checkbox"/>
0000000005	18	1/1/2018	12/31/2018	<input type="checkbox"/>
0000000006	19	1/1/2019	12/31/2019	<input type="checkbox"/>
0000000007	20	1/1/2020	12/31/2020	<input type="checkbox"/>

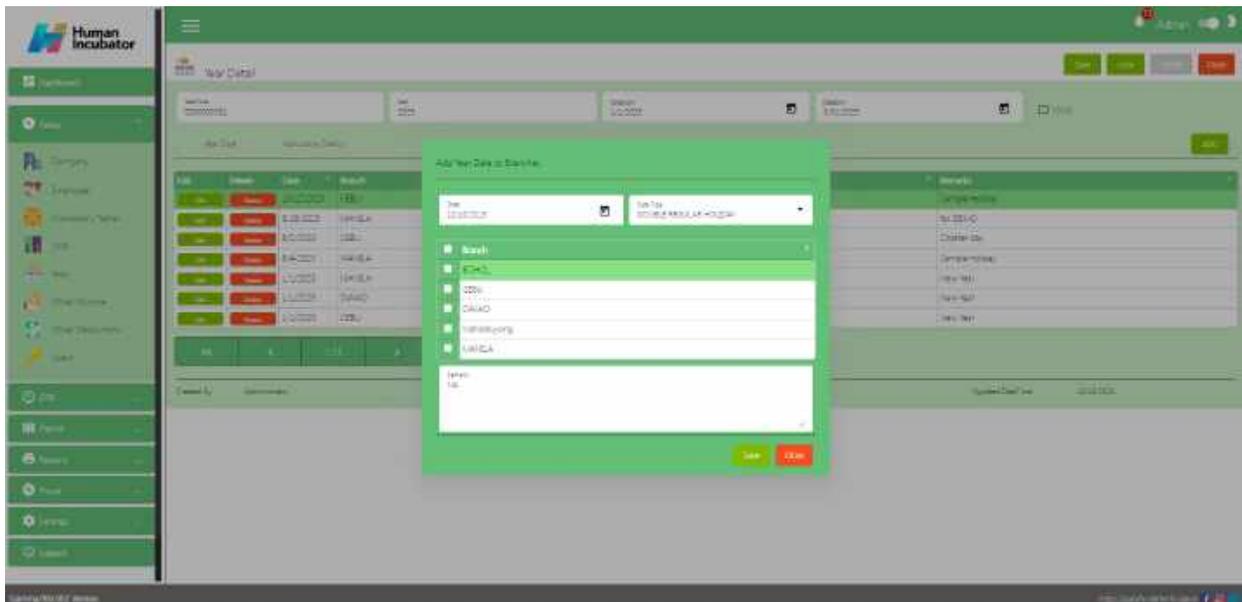
Year Detail

- **Assumption:** To **Add** a new year, click the **Add** button that can be seen on the right side of the screen
- There are 2 tabs that show in year detail
 - Year Date
 - Year Leave Credits
- Fill all the important fields for Year Detail like:
 - Year
 - Select Date Start
 - Select Date End



Year Date

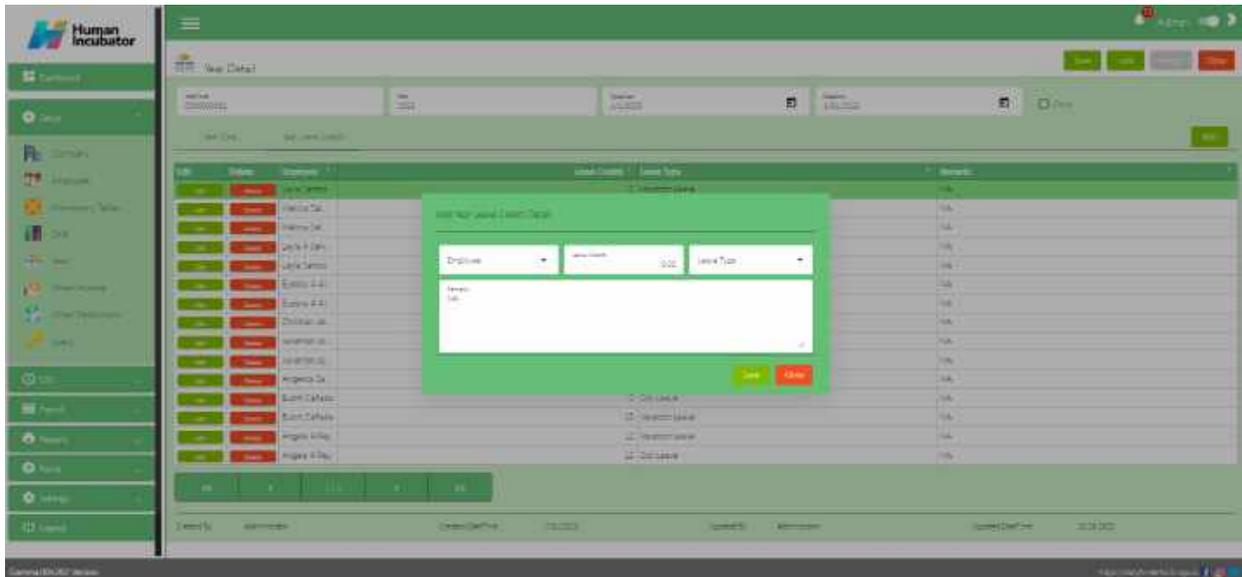
- In **Year Date** tab the user can **Add** all the regular holiday in that particular year
 - Click **Add** button
 - Select Date
 - Select Date Type
 - Select Branch
 - Input remarks
 - Click **Save** button to **Add** in table



Year Leave Credits

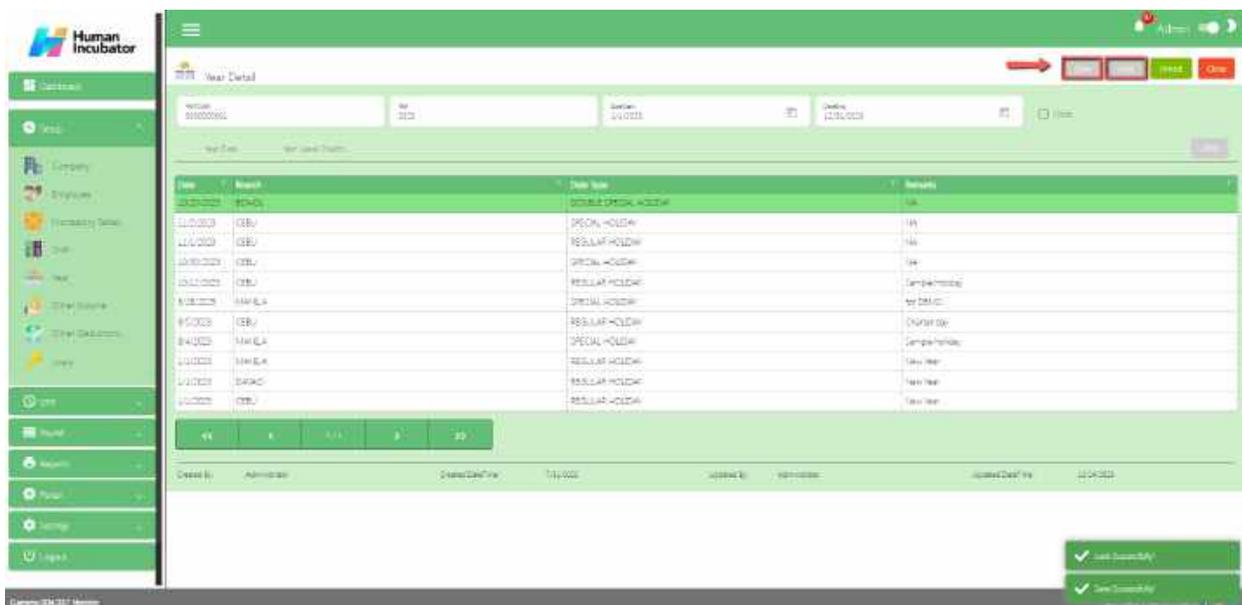
- In **Year Leave Credits** tab the user can add the leave credits per employee
 - Click **Add** button
 - Select Employee, Input leave credits and Select Leave Type
 - Remarks

- Click Save button to **Add** in table



Save/Lock

- Make sure to save/lock the record so that in every transaction the Year details will show.



Other Income

Overview

- Other Income setup is used for Making other income just like allowances of the company and also can add if Taxable or Non-taxable

Other Income List

- Shows all list of Other Income

Table Column

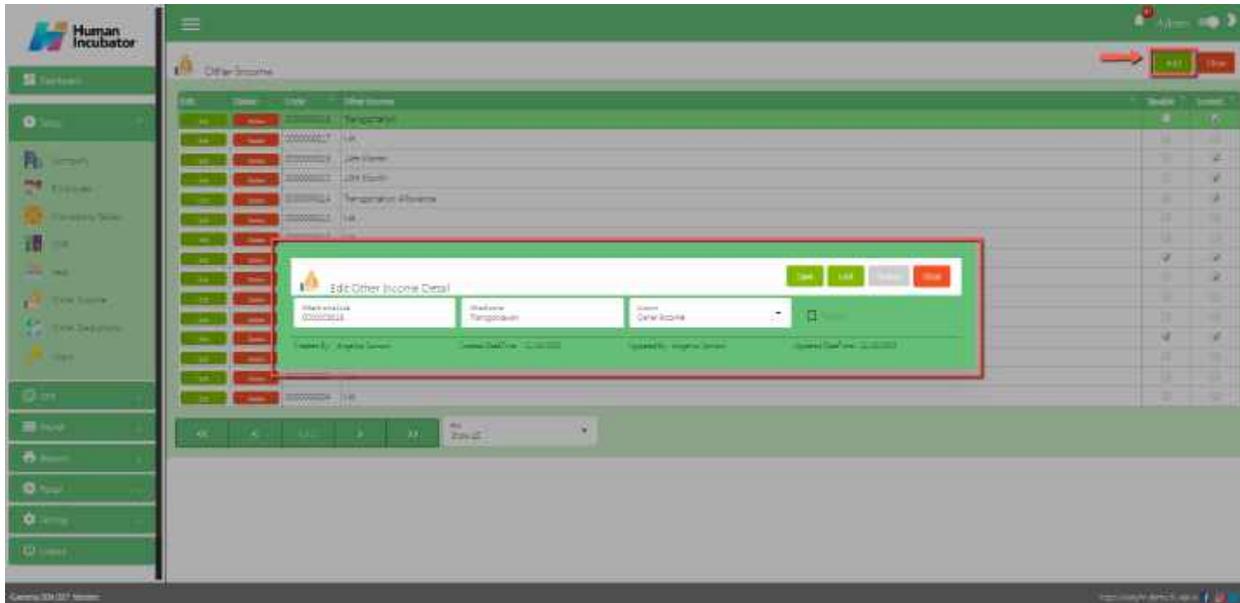
- Edit: This has the function to edit the Other Income
- Delete: This has the function to Delete the Other Income
- Other Income: Name of the Other Income
- Taxable: Check if the Other Income is taxable, uncheck if not
- Locked: If locked you can now select this type of other income

ID	Name	Code	Other Income	Taxable	Locked
000000001	Transportation			<input type="checkbox"/>	<input type="checkbox"/>
000000002	Job Allowance			<input type="checkbox"/>	<input type="checkbox"/>
000000003	Job Allowance			<input type="checkbox"/>	<input type="checkbox"/>
000000004	Transportation Allowance			<input type="checkbox"/>	<input type="checkbox"/>
000000005	Job Allowance			<input type="checkbox"/>	<input type="checkbox"/>
000000006	Job Allowance			<input type="checkbox"/>	<input type="checkbox"/>
000000007	Job Allowance			<input type="checkbox"/>	<input type="checkbox"/>
000000008	Job Allowance			<input type="checkbox"/>	<input type="checkbox"/>
000000009	Job Allowance			<input type="checkbox"/>	<input type="checkbox"/>
000000010	Job Allowance			<input type="checkbox"/>	<input type="checkbox"/>
000000011	Job Allowance			<input type="checkbox"/>	<input type="checkbox"/>
000000012	Job Allowance			<input type="checkbox"/>	<input type="checkbox"/>
000000013	Job Allowance			<input type="checkbox"/>	<input type="checkbox"/>
000000014	Job Allowance			<input type="checkbox"/>	<input type="checkbox"/>
000000015	Job Allowance			<input type="checkbox"/>	<input type="checkbox"/>
000000016	Job Allowance			<input type="checkbox"/>	<input type="checkbox"/>
000000017	Job Allowance			<input type="checkbox"/>	<input type="checkbox"/>
000000018	Job Allowance			<input type="checkbox"/>	<input type="checkbox"/>
000000019	Job Allowance			<input type="checkbox"/>	<input type="checkbox"/>
000000020	Job Allowance			<input type="checkbox"/>	<input type="checkbox"/>

Other Income Detail

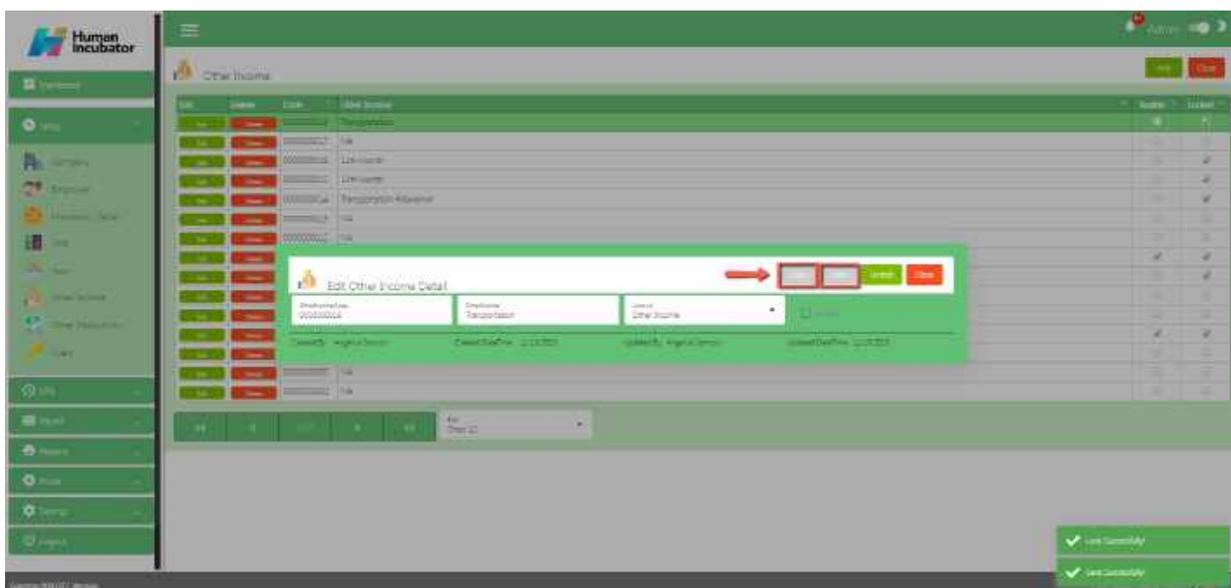
- **Assumption:** To **Add** a new other income, click the **Add** button that can be seen on the right side of the screen
- Fill all the important fields in Other Income detail like:

- Input Other Income name
- Select Other Income account
- Check the **Check Box** if taxable or non-taxable



Save/Lock

- Make sure to save/lock the record so that in every transaction the Other Income will show.



Other Deductions

Overview

- Other Deductions setup is used for making other deductions just like Salary loans and all loans in company.

Other Deductions List

- Shows all list of Other Deductions

Other Deductions

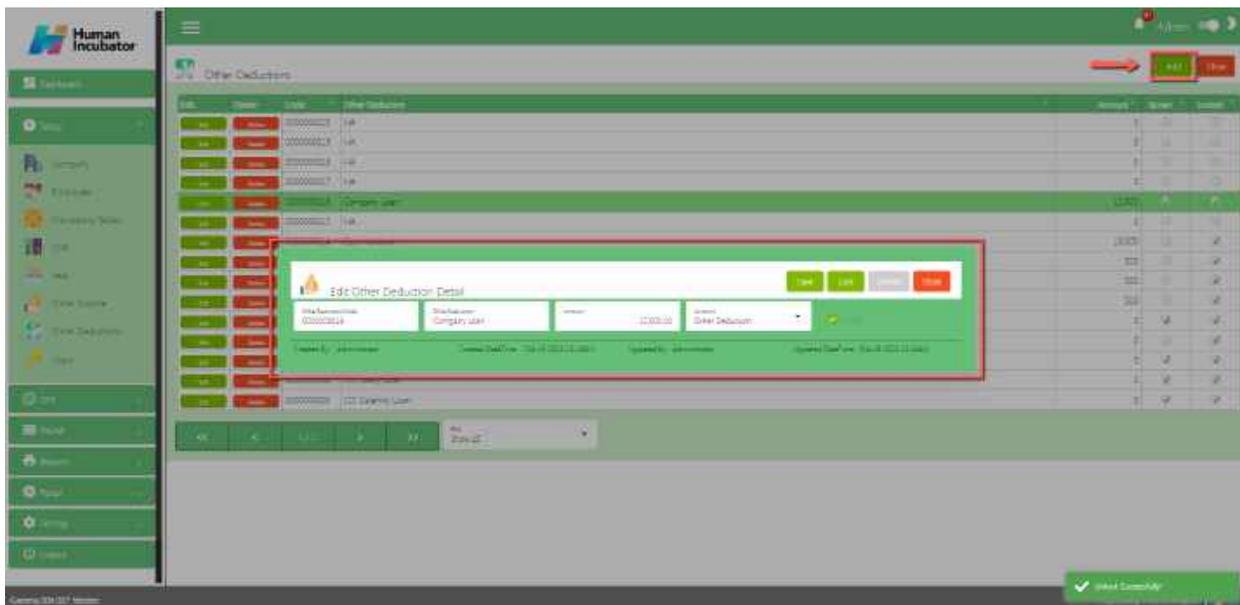
- Edit: This has the function to edit the Other Deductions
- Delete: This has the function to Delete the Other Deductions
- Other Deduction: Name of the Other Deduction
- Amount: This is optional you can either put and amount or not
- IsLoan: Check if this Other Deduction is a Loan Type
- Locked: If locked you can now select this type of Other Deduction

ID	Name	Code	Other Deduction	Amount	Is Loan	Locked
000000001	PA	000000001	PA			
000000002	PA	000000002	PA			
000000003	PA	000000003	PA			
000000004	Company Loan	000000004	Company Loan	15,000		
000000005	PA	000000005	PA			
000000006	Cash Advance	000000006	Cash Advance	10,000		
000000007	PAC, Etc.	000000007	PAC, Etc.	100		
000000008	CO-OP	000000008	CO-OP	100		
000000009	HDFC	000000009	HDFC	100		
000000010	Company Loan	000000010	Company Loan			
000000011	HDFC Salary Loan	000000011	HDFC Salary Loan			
000000012	HDFC Loan	000000012	HDFC Loan			
000000013	CO-OP Salary Loan	000000013	CO-OP Salary Loan			
000000014	CO-OP Loan	000000014	CO-OP Loan			
000000015	CO-OP Salary Loan	000000015	CO-OP Salary Loan			
000000016	CO-OP Salary Loan	000000016	CO-OP Salary Loan			

Other Deductions Detail

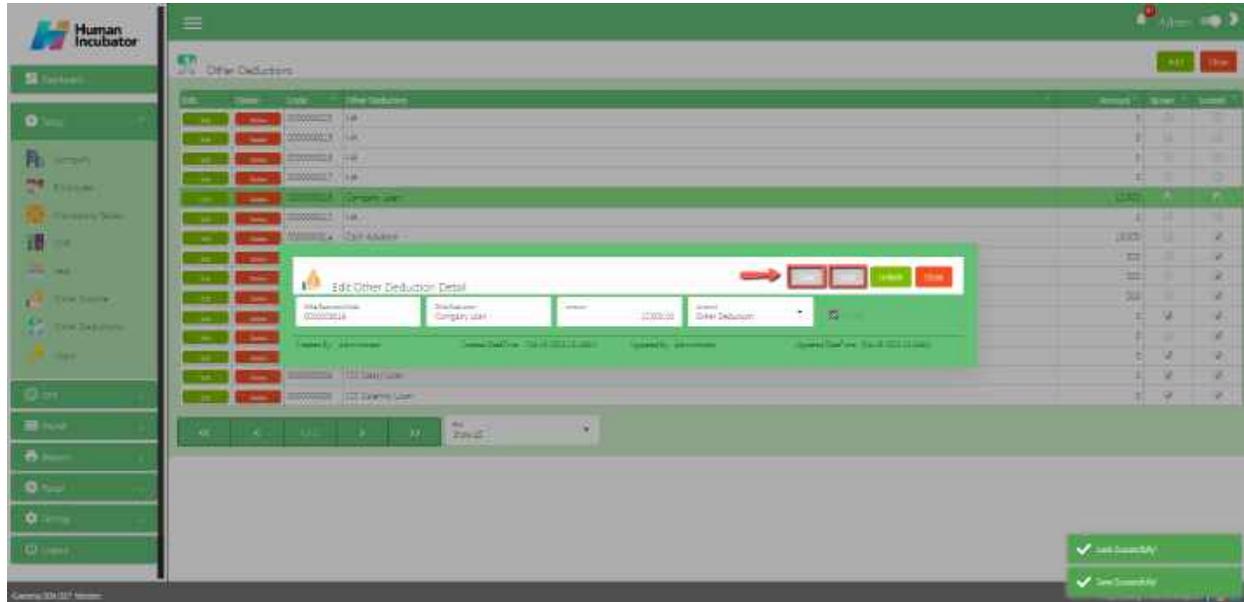
- To **Add** a new other deductions, click the **Add** button that can be seen on the right side of the screen

- Fill all the important fields in Other Deductions detail like:
 - Input Other Deductions name
 - Input Amount *Note: Input amount is optional*
 - Select Other Deductions account
 - Check the **Check Box** if **IsLoan**



Save/Lock

- Make sure to save/lock the record so that in every transaction the Other Deductions will show. (**Note: There should be at least 1 other deduction that is locked so that you can add a loan**)



Users

Overview

- Users setup is used for making the credentials of employees, user rights and also can upload more users.

User list

- Shows all list of Users

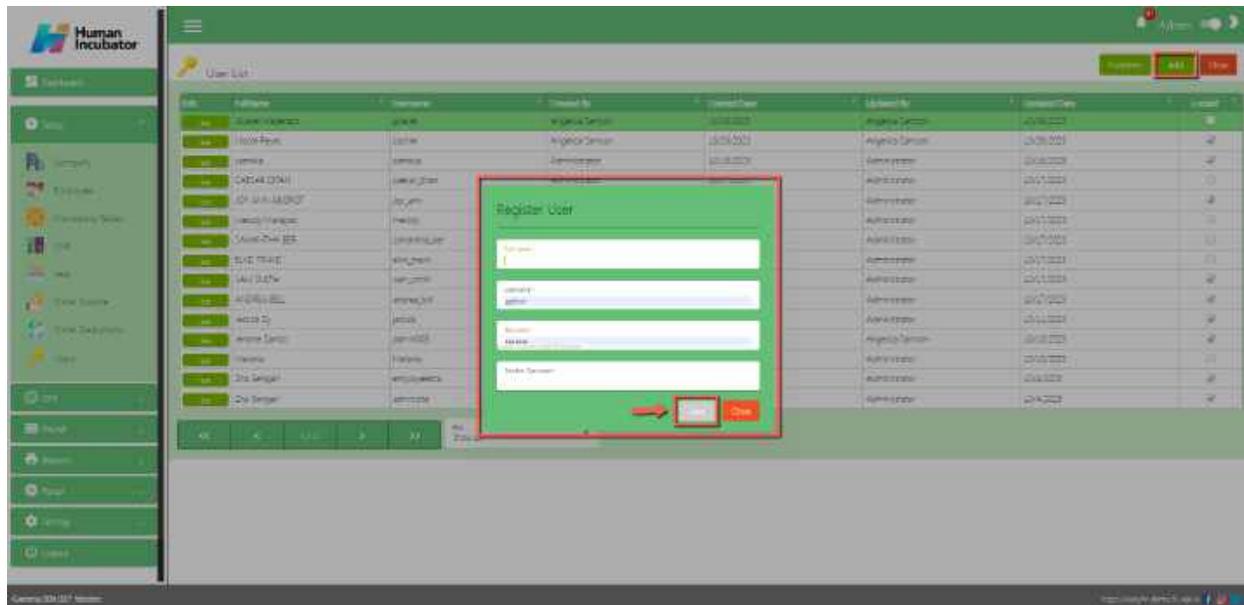
Table Column

- Edit: This has the function to edit the User
- FullName: Fullname of the user
- Username: Username of the user
- Created By: Fullname of the login user who created the user
- Created Date: Creation date of the user
- Updated By: Fullname of the login user who updated the user
- Updated Date: Updated date of the user
- Locked: If it is already locked you can now login the account.



Register User

- To **Add** a new user, click the **Add** button that can be seen on the right side of the screen
- Fill all the important fields in Register User like:
 - Input Full Name
 - Input Username
 - Input Password *Note: Password must require Uppercase, Lowercase, Numbers, Special characters except (=+_-?/{}[]\|) and also must be at least 12 characters.*
 - Confirm Password
 - Click **Save** button to add in table

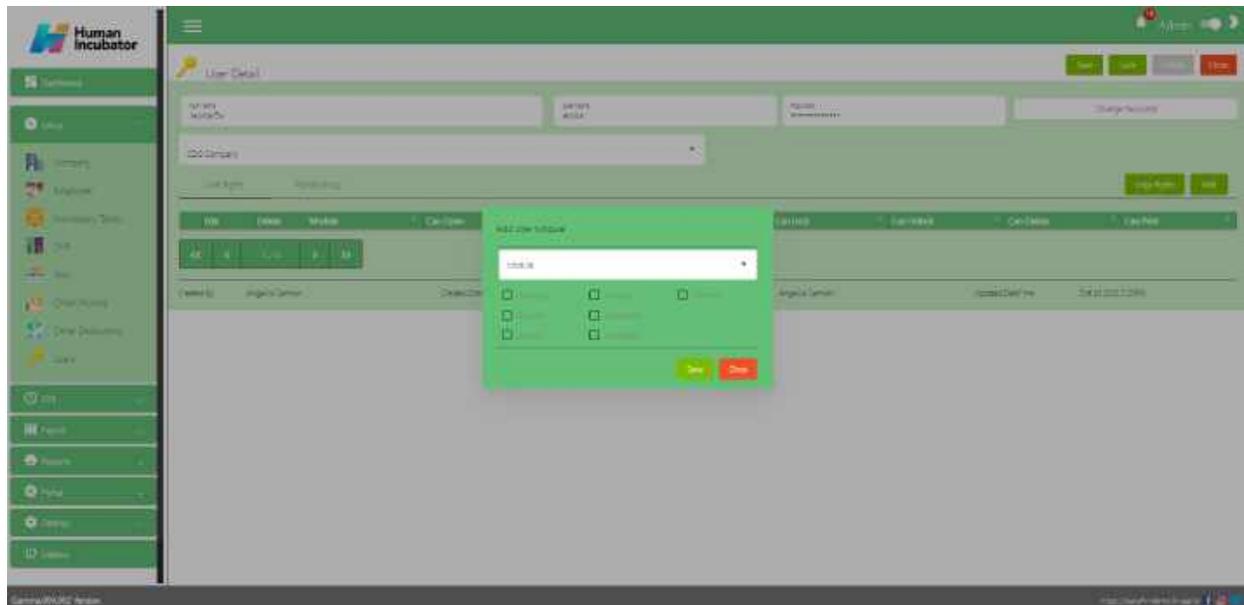


User Detail

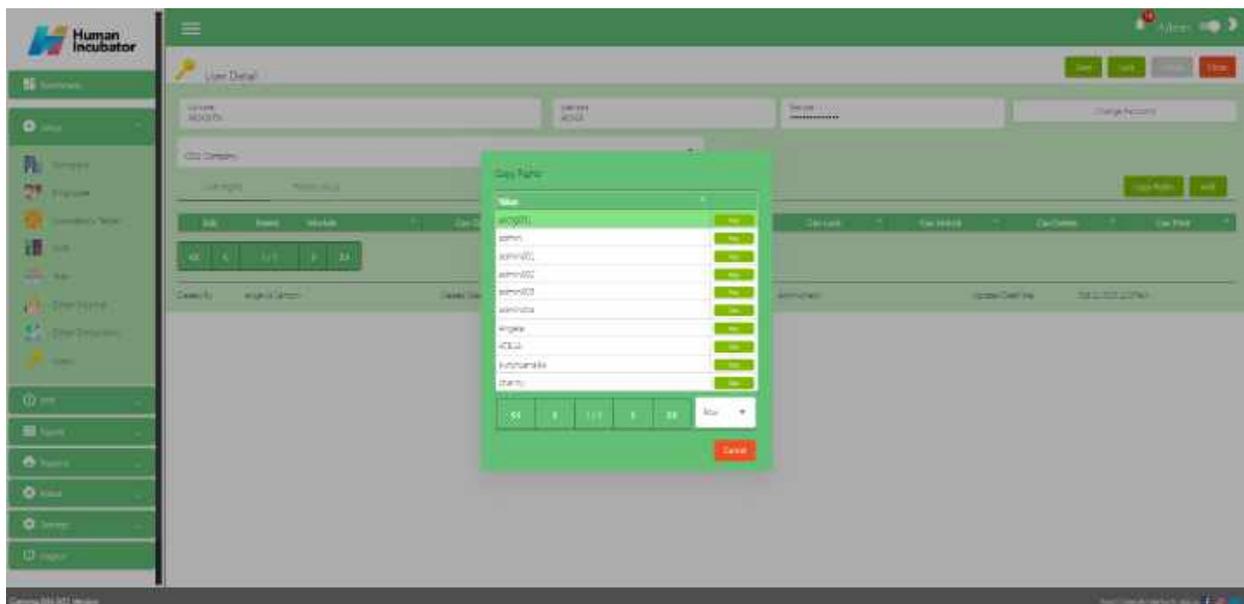
- Click **Edit** button to add the user rights of employee
- There are 2 tabs in user detail
 - User Rights and Payroll Group

User Rights

- Click **Add** button to add the user rights what module to access
 - Select **Module**
 - Check the **Check Box**
 - Click **Save** button to add in table

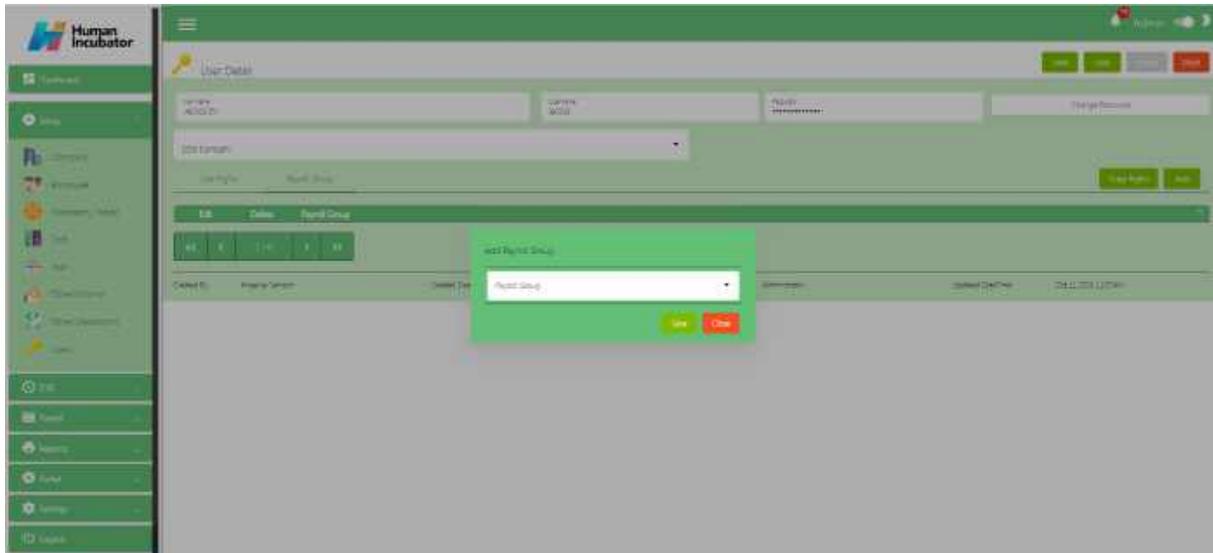


- Click **Copy Rights** button to copy the rights of employee
 - Select the User need to copy rights
 - Click **Pick** button to add in table



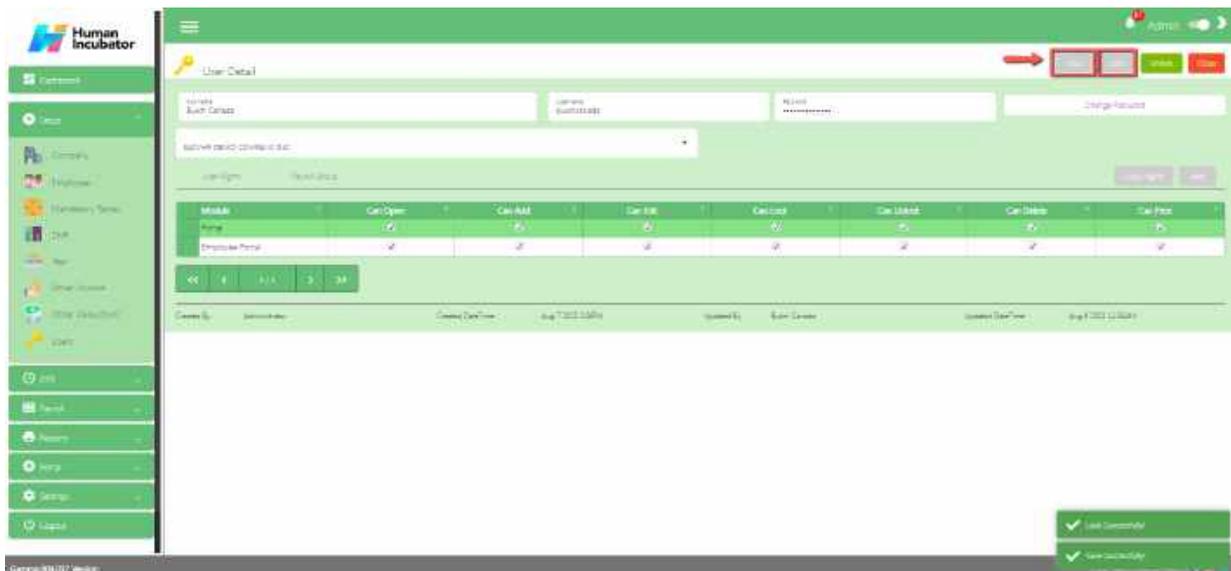
Payroll Group

- Click **Add** button to add what payroll group to access
 - Select Payroll Group
 - Click **Save** button to add in table



Save/Lock

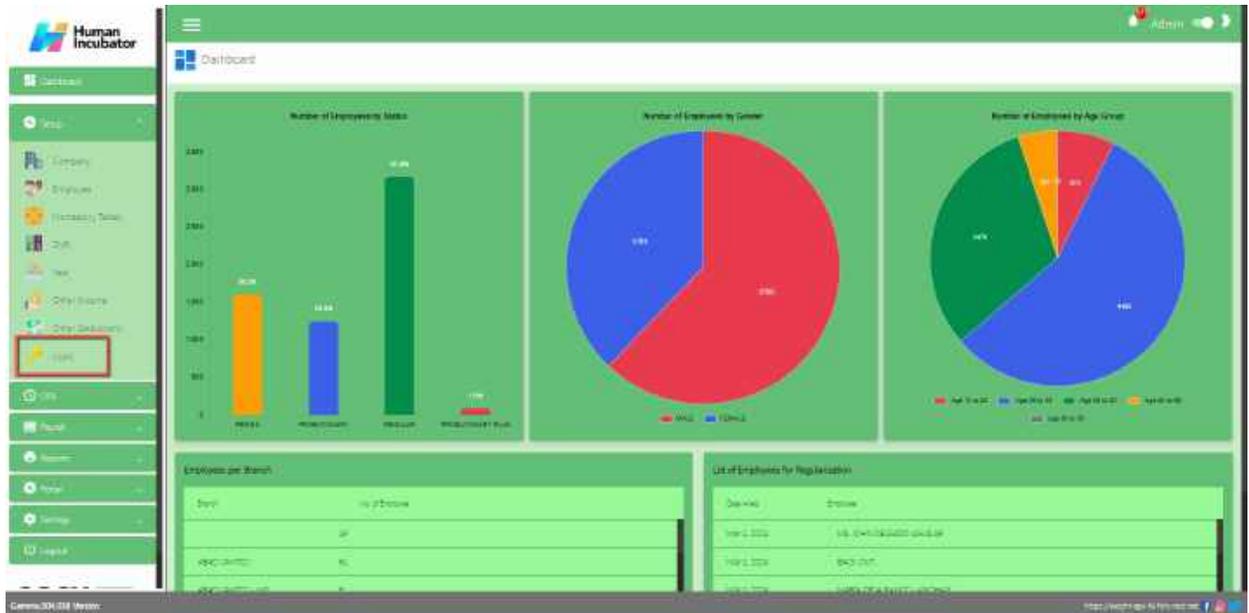
- Make sure to save/lock the record so that it can access the user every transaction.
- Click **Close** button to go back in User List



Rostering

Steps

1. In the Setup module click Users



2. Edit User

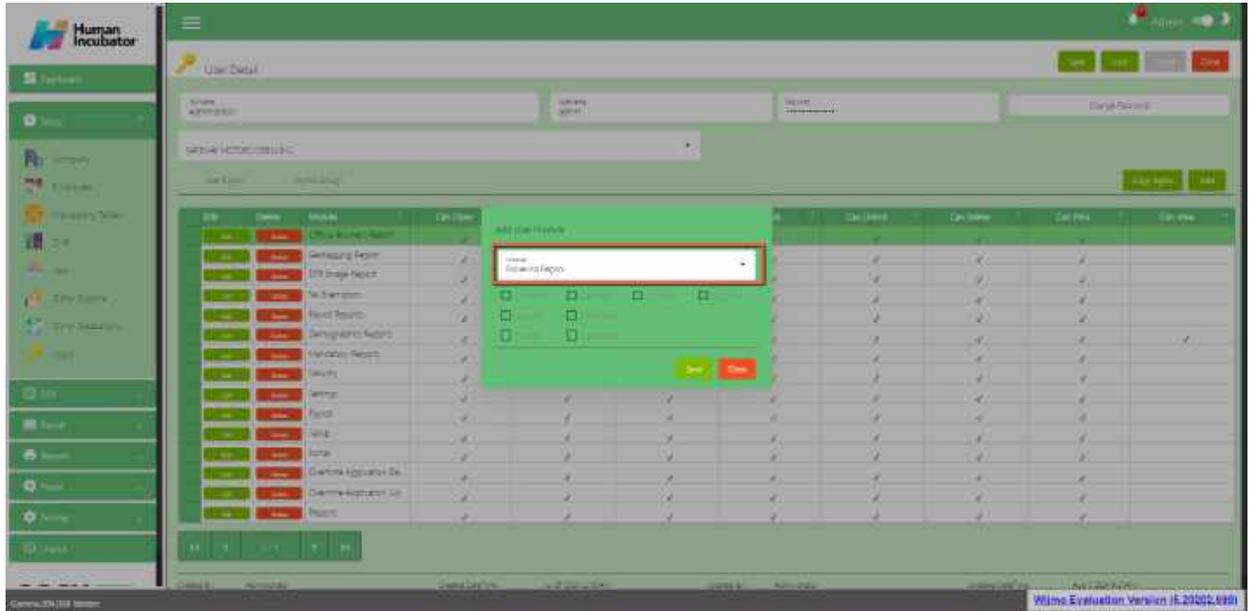
Id	Fullname	Username	Created By	Created Date	Updated By	Updated Date	Locked
1	Admin User	admin	Administrator	8/20/2024	Administrator	8/20/2024	✓
2	Kristian Dale Cerna	keerna	Administrator	8/20/2024	Administrator	8/20/2024	✓
3	Christian Jela-Ron	chrjela	Administrator	8/20/2024	Administrator	8/20/2024	✓
4	JD Accounting	jdaaccounting	Administrator	2/28/2024	Administrator	2/28/2024	✓
5	Yasenia Cerna	ycerna	Administrator	10/15/2023	Administrator	10/15/2023	✓
6	JEDICAR (DWARTRIN)	jedicar@dwartrn	Administrator	8/20/2024	Administrator	8/20/2024	✓
7	JEDICAR (DWARTRIN)	je	Administrator	8/20/2024	Administrator	8/20/2024	✓
8	Mary Jane Cernon	mcernon	Administrator	8/20/2024	Administrator	8/20/2024	✓
9	Yasenia Cerna	ycerna	Administrator	8/20/2024	Administrator	8/20/2024	✓
10	Mary Jane Cernon	mcernon	Administrator	8/20/2024	Administrator	8/20/2024	✓
11	KORAL	korals	Administrator	7/8/2024	Administrator	7/8/2024	✓
12	Administrator	admin	Administrator	7/8/2024	Administrator	8/20/2024	✓

3. Go to the User Rights Tab

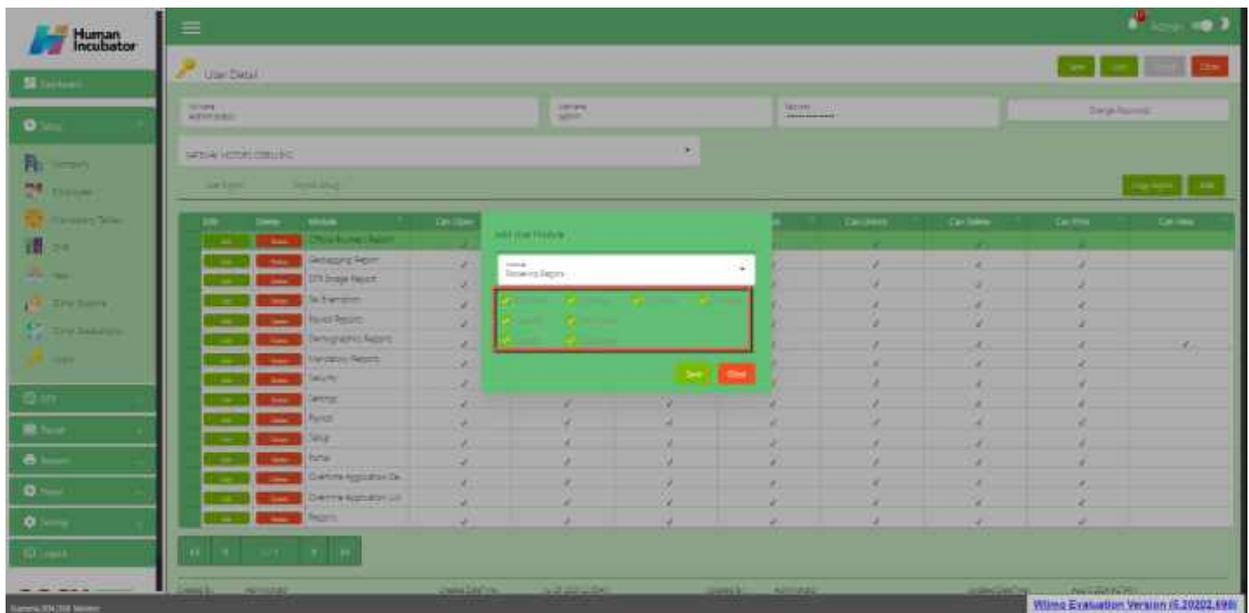
Module	Can Open	Can Add	Can Edit	Can List	Can View	Can Delete	Can Print	Can View
Office Business Report	✓	✓	✓	✓	✓	✓	✓	✓
Geocoding Report	✓	✓	✓	✓	✓	✓	✓	✓
GPS Usage Report	✓	✓	✓	✓	✓	✓	✓	✓
Re-Assignment	✓	✓	✓	✓	✓	✓	✓	✓
Print Report	✓	✓	✓	✓	✓	✓	✓	✓
Demographic Reports	✓	✓	✓	✓	✓	✓	✓	✓
Validity Reports	✓	✓	✓	✓	✓	✓	✓	✓
Security	✓	✓	✓	✓	✓	✓	✓	✓
Settings	✓	✓	✓	✓	✓	✓	✓	✓
Print	✓	✓	✓	✓	✓	✓	✓	✓
API	✓	✓	✓	✓	✓	✓	✓	✓
Role	✓	✓	✓	✓	✓	✓	✓	✓
Electronic Application DL	✓	✓	✓	✓	✓	✓	✓	✓
Electronic Application LUP	✓	✓	✓	✓	✓	✓	✓	✓
Records	✓	✓	✓	✓	✓	✓	✓	✓

4. Click Add

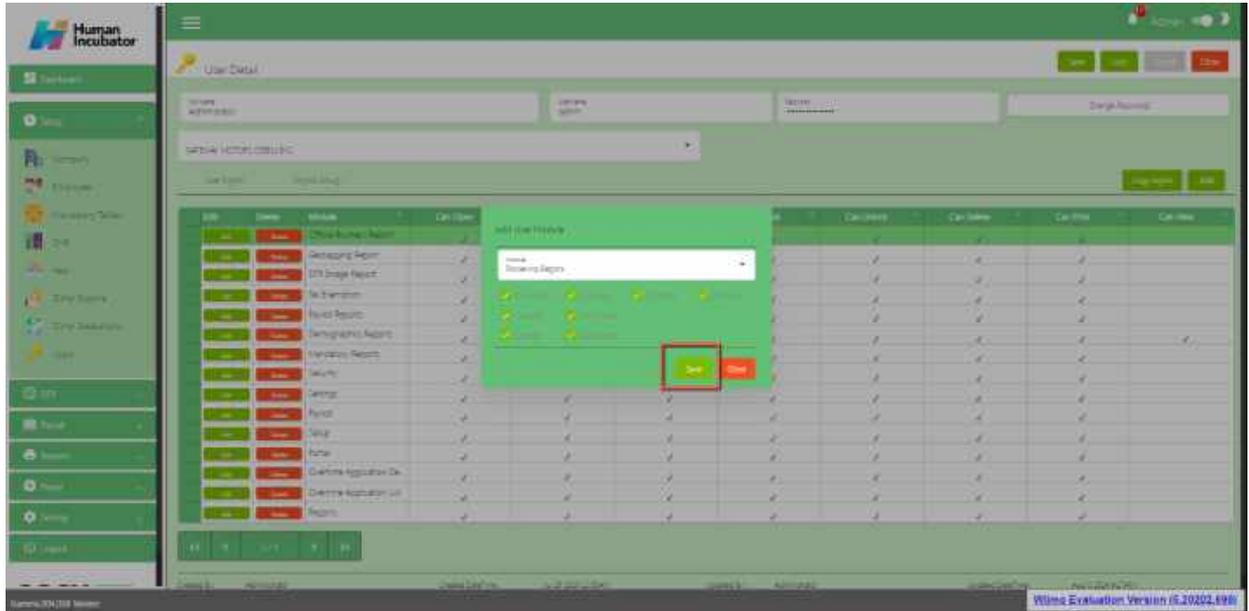
5. Select Rostering Report



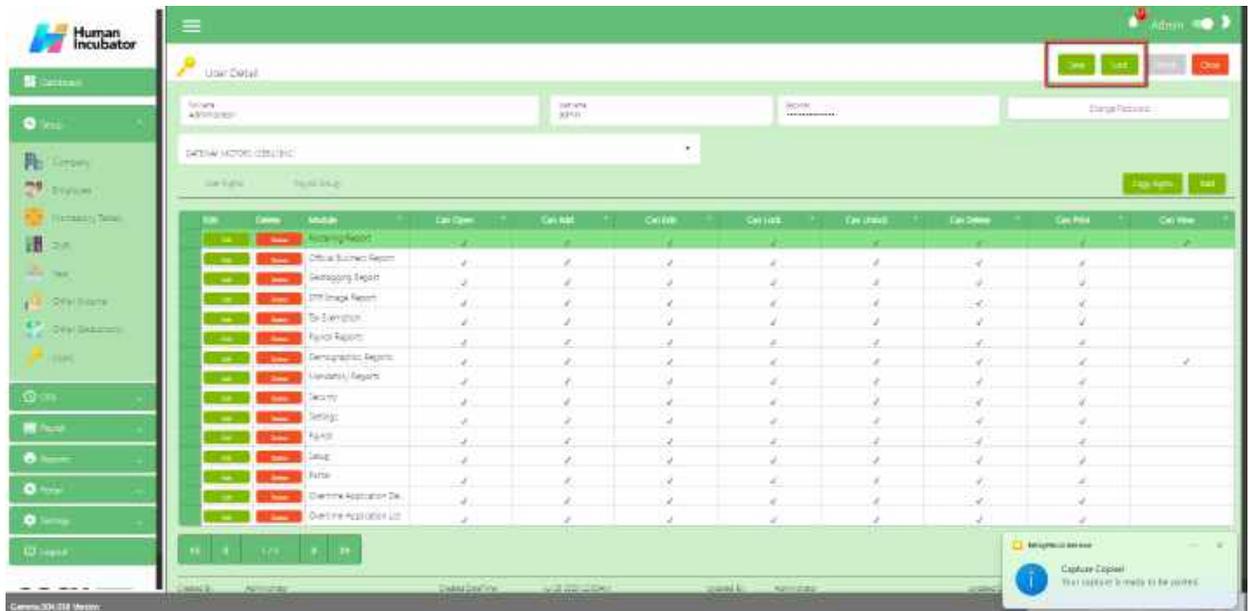
6. Click Rights Can Open, Can Add, Can Edit, Can Lock, Can Lock, Can Unlock, Can Print and Can View



7. Click Save



8. Click Save and Lock



9. Click Close

The screenshot displays the 'User Detail' page for the user 'ADMINISTRATOR'. The interface includes a sidebar with navigation options and a main content area with a table of report types and their availability for different user roles.

Module	Can View	Can Add	Can Edit	Can Lock	Can Print	Can Delete	Can Post	Can View
Reporting Report	✓	✓	✓	✓	✓	✓	✓	✓
Official Scores Report	✓	✓	✓	✓	✓	✓	✓	✓
Marketing Report	✓	✓	✓	✓	✓	✓	✓	✓
OTR Image Report	✓	✓	✓	✓	✓	✓	✓	✓
Tax Declaration	✓	✓	✓	✓	✓	✓	✓	✓
Payroll Report	✓	✓	✓	✓	✓	✓	✓	✓
Demographic Report	✓	✓	✓	✓	✓	✓	✓	✓
Handbook Report	✓	✓	✓	✓	✓	✓	✓	✓
Security	✓	✓	✓	✓	✓	✓	✓	✓
Settings	✓	✓	✓	✓	✓	✓	✓	✓
Payroll	✓	✓	✓	✓	✓	✓	✓	✓
Setup	✓	✓	✓	✓	✓	✓	✓	✓
Home	✓	✓	✓	✓	✓	✓	✓	✓
Overtime Application Detail	✓	✓	✓	✓	✓	✓	✓	✓
Overtime Application List	✓	✓	✓	✓	✓	✓	✓	✓

Section V: DTR

Change Shift

Overview

- Change shift is used for setup a start date and end date per cut-off and also the user can approve if the employee filed a change shift
- The user file change shift in employee portal it is automatically seen by approver or admin

Change shift List

- Shows all list of Change Shift setup per cut off
- Select Payroll Group

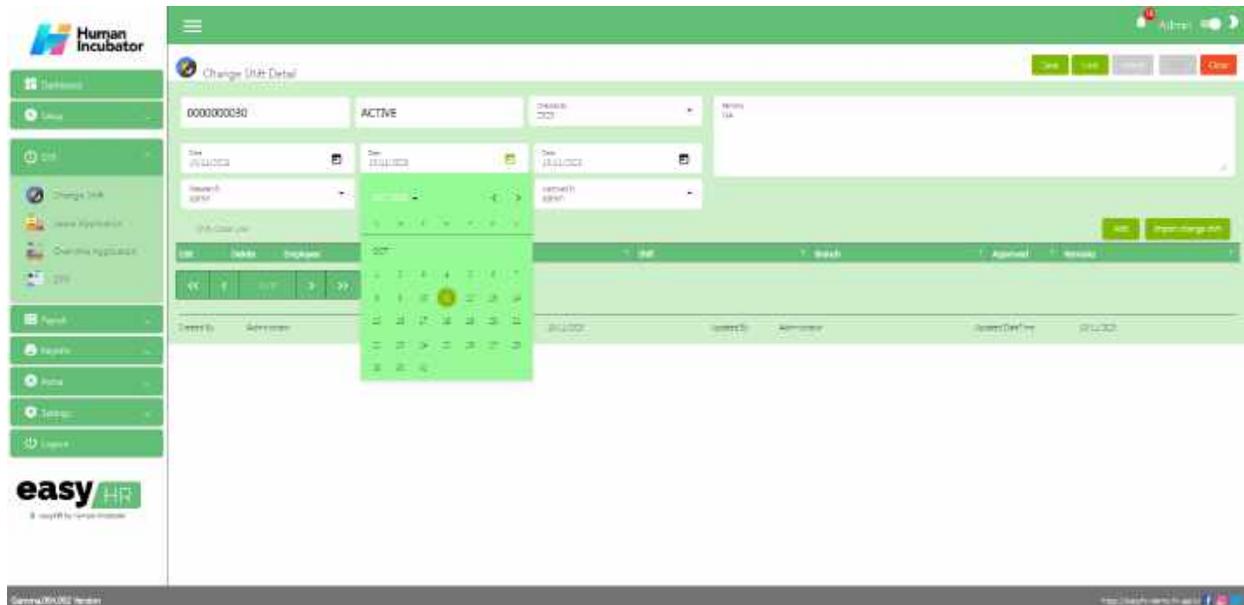
Table Column

- Edit: This has a function to edit the Change Shift
- Delete: This has a function to Delete the Change Shift (**Note: You will not be able to delete the Change Shift if it has still a Change Shift lines or the DTR connected is already locked**)
- CS No.: This for the Change Shift number (**Note: It will automatically generate according to the sequence of the added Change Shift**)
- Date: Date of the Change Shift created
- Year: This is for the Year
- Remarks: You can input any remarks
- Prepared By: This is for the name of the login user who prepared the change shift
- Locked: If the change shift is locked you can select it for the DTR

Shift	Status	ID No.	Date	Year	Remarks	Prepared by	Checked
NA	Added	000000001	11-23-2023	2023	NA	Administrator	✓
NA	Added	000000004	11-23-2023	2023	NA	Administrator	✓
NA	Added	000000005	11-29-2023	2023	Change Shift Cutoff October 25-26, 2023	Administrator	✓
NA	Added	000000003	10-26-2023	2023	Change Shift Cutoff October 18-19, 2023	Administrator	✓
NA	Added	000000002	10-17-2023	2023	NA	Administrator	✓
NA	Added	000000001	10-12-2023	2023	NA	Administrator	✓
NA	Added	000000010	10-11-2023	2023	NA	Administrator	✓
NA	Added	000000009	10-10-2023	2023	NA	Administrator	✓
NA	Added	000000008	10-10-2023	2023	NA	Administrator	✓
NA	Added	000000007	10-09-2023	2023	Cutoff October 4-15, 2023	Angela Carmon	✓
NA	Added	000000006	10-08-2023	2023	Cutoff October 4-15, 2023	Angela Carmon	✓
NA	Added	000000005	10-06-2023	2023	NA	Angela Carmon	✓
NA	Added	000000004	10-02-2023	2023	NA	Administrator	✓
NA	Added	000000003	10-01-2023	2023	NA	Administrator	✓
NA	Added	000000002	10-01-2023	2023	NA	Administrator	✓
NA	Added	000000001	10-01-2023	2023	NA	Administrator	✓

Change Shift Detail

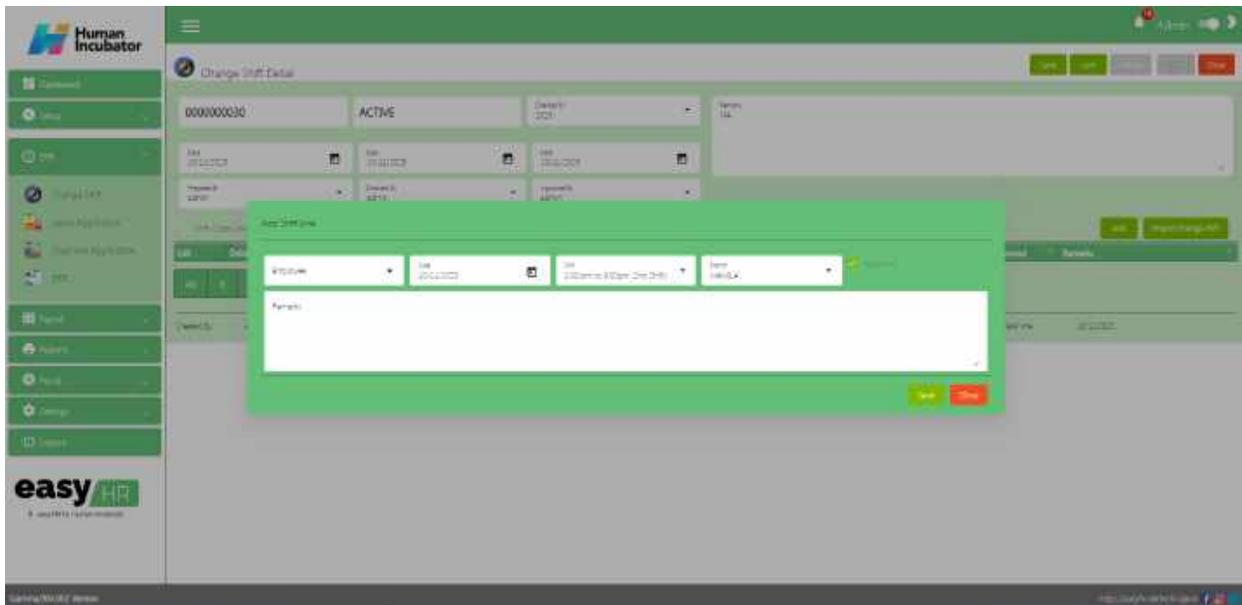
- To **Add** a new change shift detail, click the **Add** button that can be seen on the right side of the screen
- Fill all the important fields in Change Shift detail like:
 - Select Date Start
 - Select Date End
 - Input Remarks
 - Select Prepared By
 - Select Check By
 - Select Approved By



Note: Do not Save and Lock so that this shift code seen in employee portal

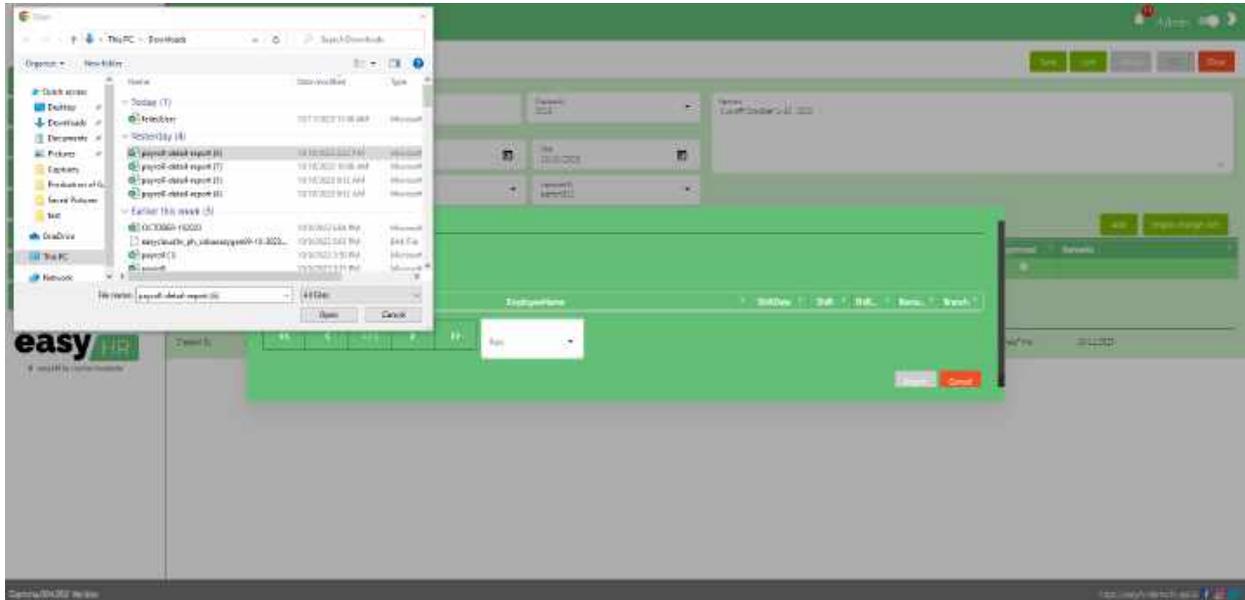
Add Change Shift Manually

- Click **Add** button to add manually change shift of employee
- Fill all the important fields Shift line like:
 - Select Employee
 - Select Date
 - Select Shift
 - Select Branch
 - Check Approved
 - Input Remarks
 - Click **Save** button to add in table

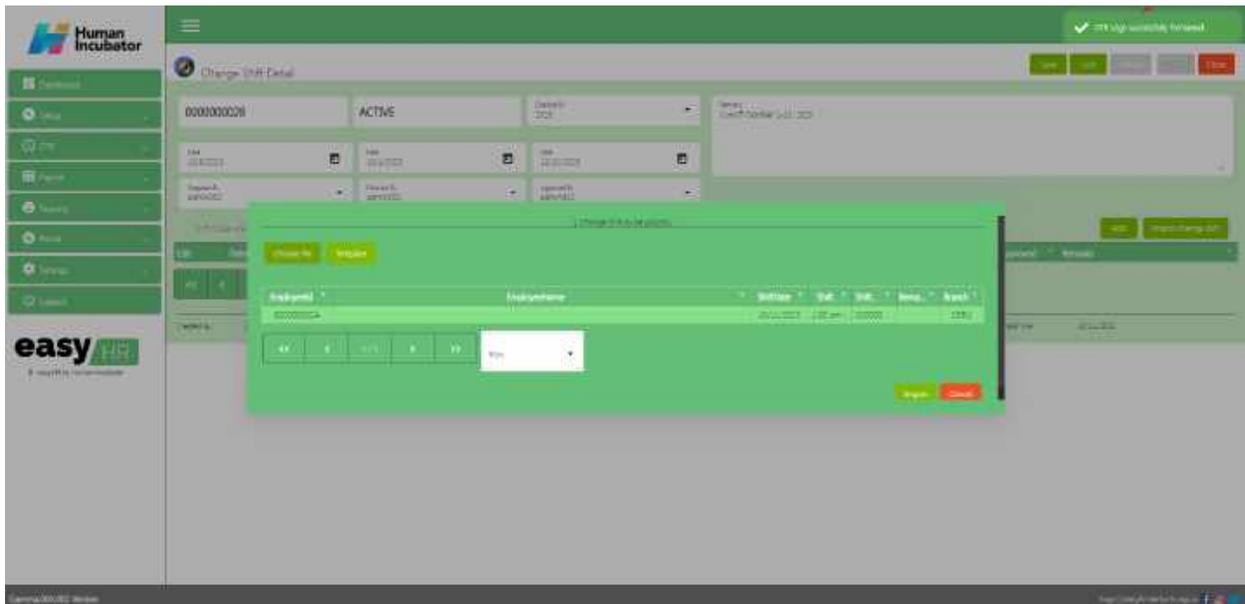


Import Change Shift

- Click **Import Change Shift** to import the master file
 - Choose file
 - Select file
 - Click Open

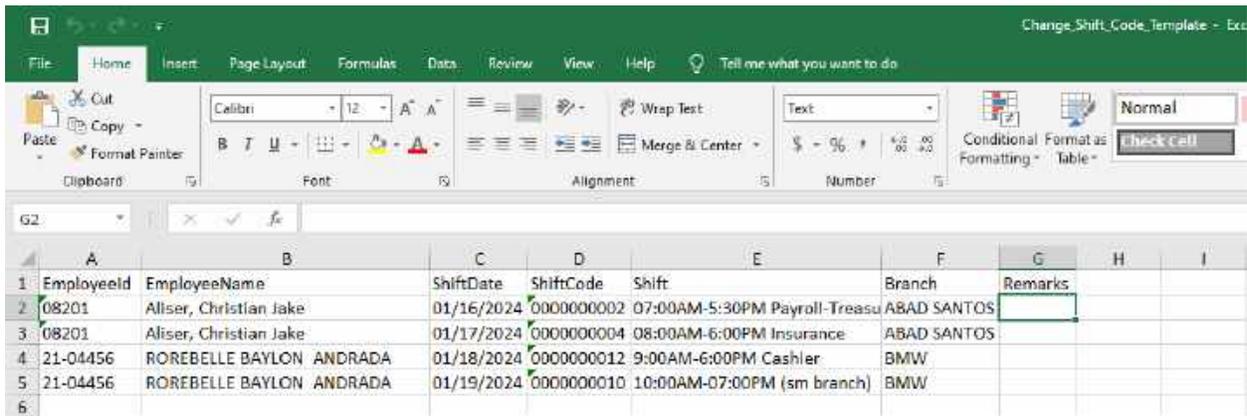


- Click **Import** button to add in the shift code line



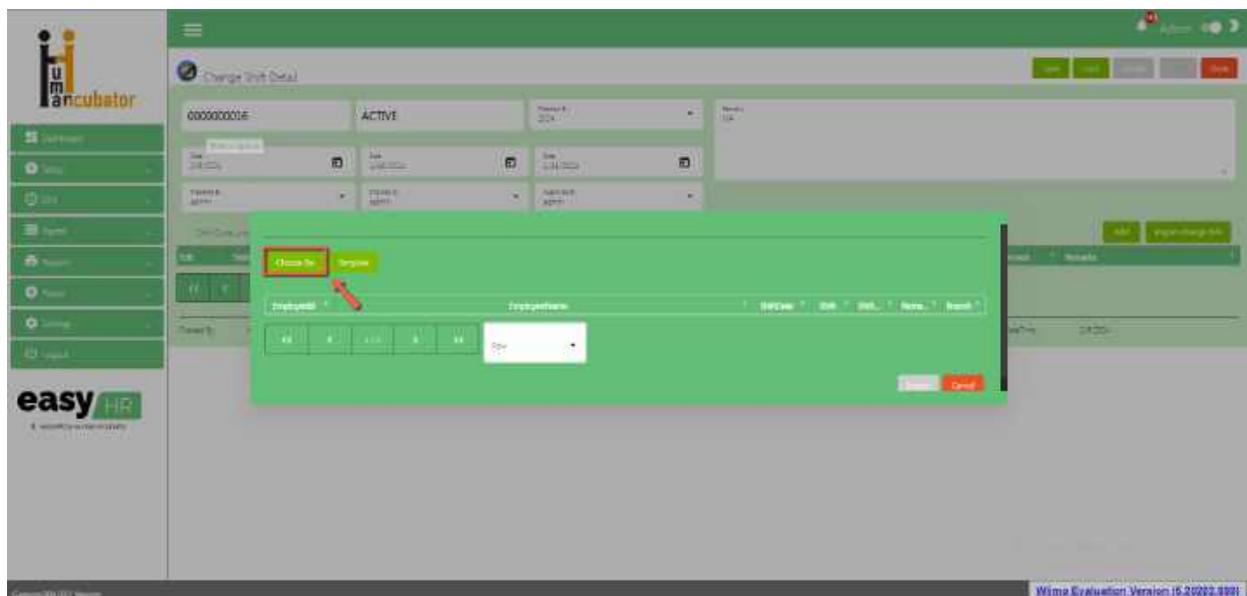
Change Shift Error Message

- If you import Change Shift with a wrong format an error message will pop-up (Example: Empty field in the Remarks) (**Note: do not leave the field empty, should put atleast NA in the field**)

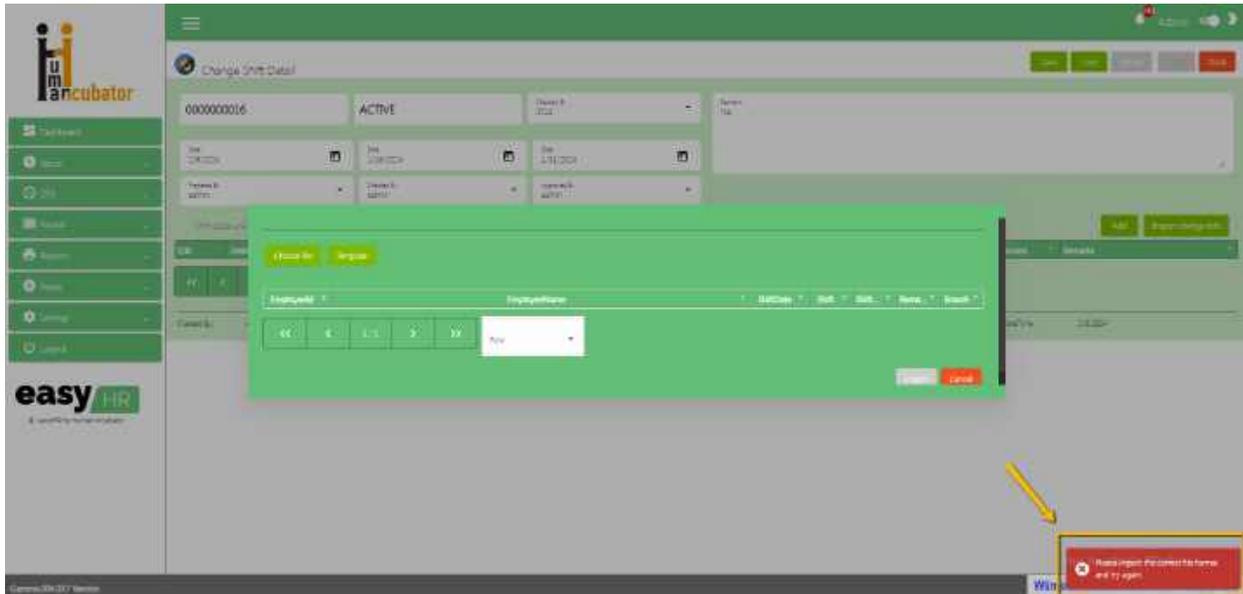


EmployeeId	EmployeeName	ShiftDate	ShiftCode	Shift	Branch	Remarks
08201	Aliser, Christian Jake	01/16/2024	000000002	07:00AM-5:30PM Payroll-Treasu	ABAD SANTOS	
08201	Aliser, Christian Jake	01/17/2024	000000004	08:00AM-6:00PM Insurance	ABAD SANTOS	
21-04456	ROREBELLE BAYLON ANDRADA	01/18/2024	000000012	9:00AM-6:00PM Cashier	BMW	
21-04456	ROREBELLE BAYLON ANDRADA	01/19/2024	000000010	10:00AM-07:00PM (sm branch)	BMW	

- Select File to Import

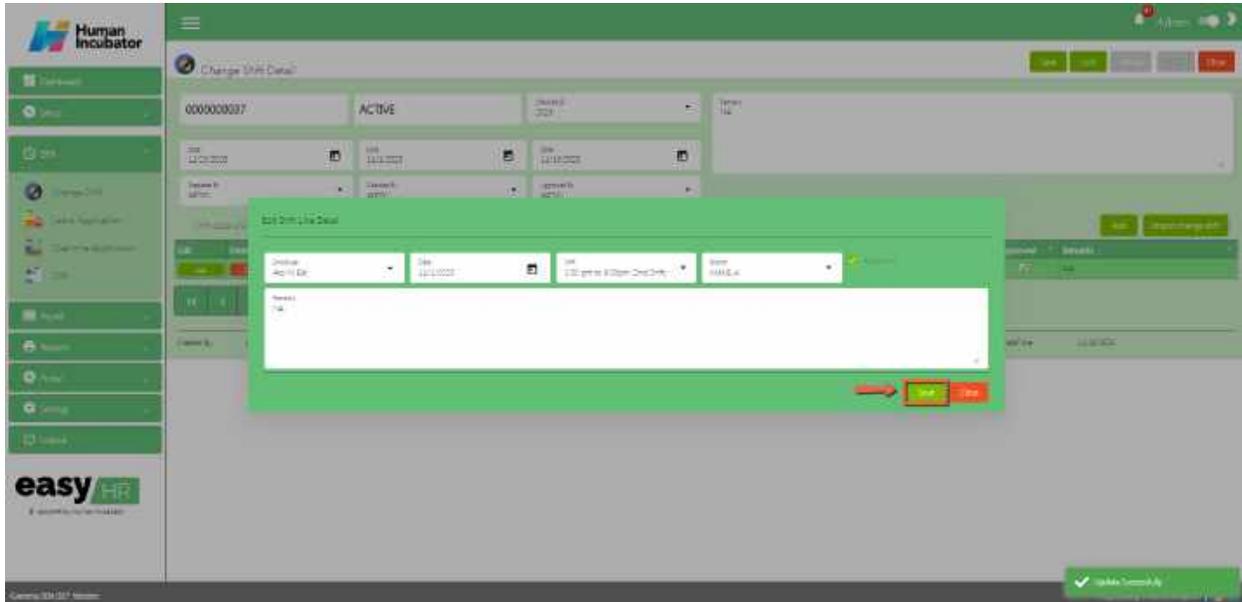


- Error Message will appear



Approved Change Shift

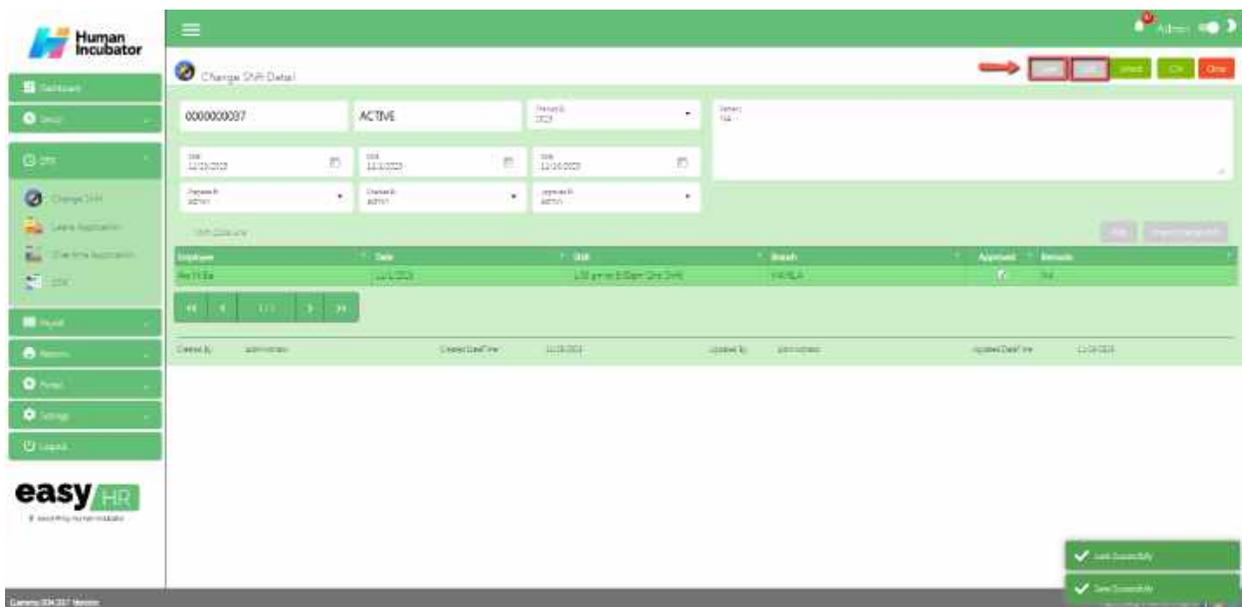
- Click **Edit** button to approve the change shift file in Employee portal
 - Check the Approved
 - Click **Save** button
 - Click **Close** button



Save/Lock

- Make sure to save/lock so the this record read and compute in system

Note: Do not Save and Lock unless this cut-off will not yet finish and make sure all file change shifts are approved.



Column Table

- Employee: Name of the Employee
- Date: Date of the applied change shift
- Shift: Name of the shift schedule
- Branch: Employees Branch
- Approved: Check if it is already approved
- Remarks: You can input any remarks

Leave Application

Overview

- Leave Application is used for setup a start date and end date per cut-off and also the user can approve if the employee filed a Leave Application
- The user file Leave in employee portal it is automatically seen by approver or admin

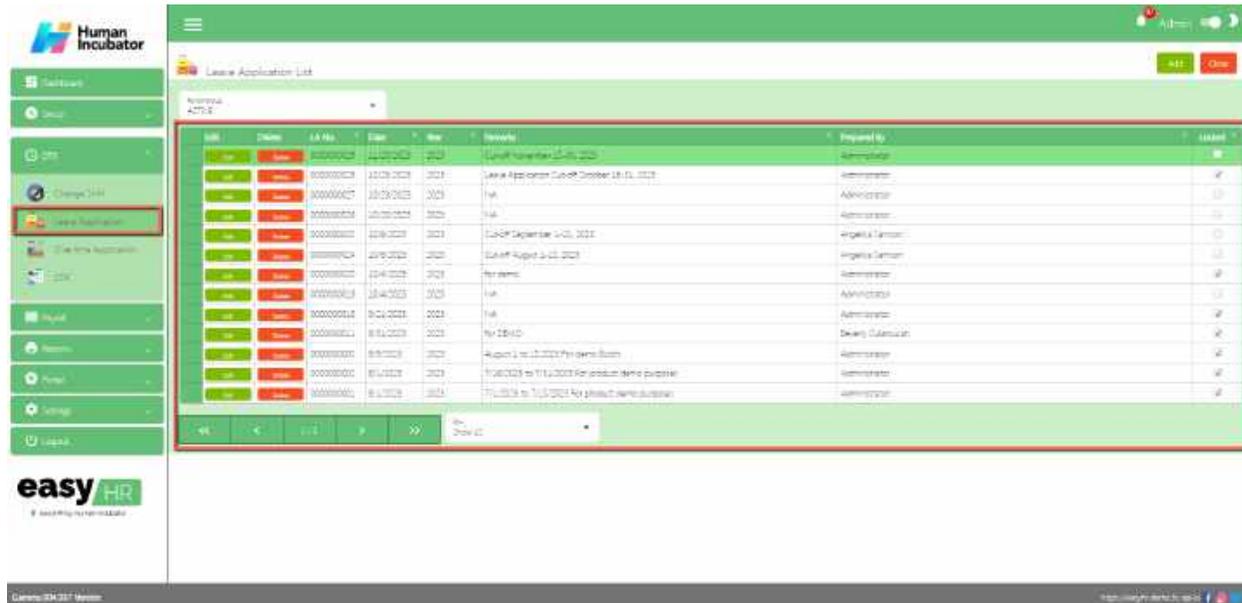
Leave Application List

- Shows all list of Leave Application setup per cut off
- Select Payroll Group

Column Table:

- Edit: This has a function to edit the Leave Application
- Delete: This has a function to Delete the Leave Application (**Note: You will not be able to delete the Leave Application if it has still a Leave Application lines or the DTR connected is already locked**)
- LA No. This is for the Leave Application number (**Note: It will automatically generate according to the sequence of the added Leave Application**)
- Date: Date of the Leave Application created
- Year: Year date of the Leave Application
- Remarks: You can input any remarks
- Prepared By: Full Name of the user who created the change shift

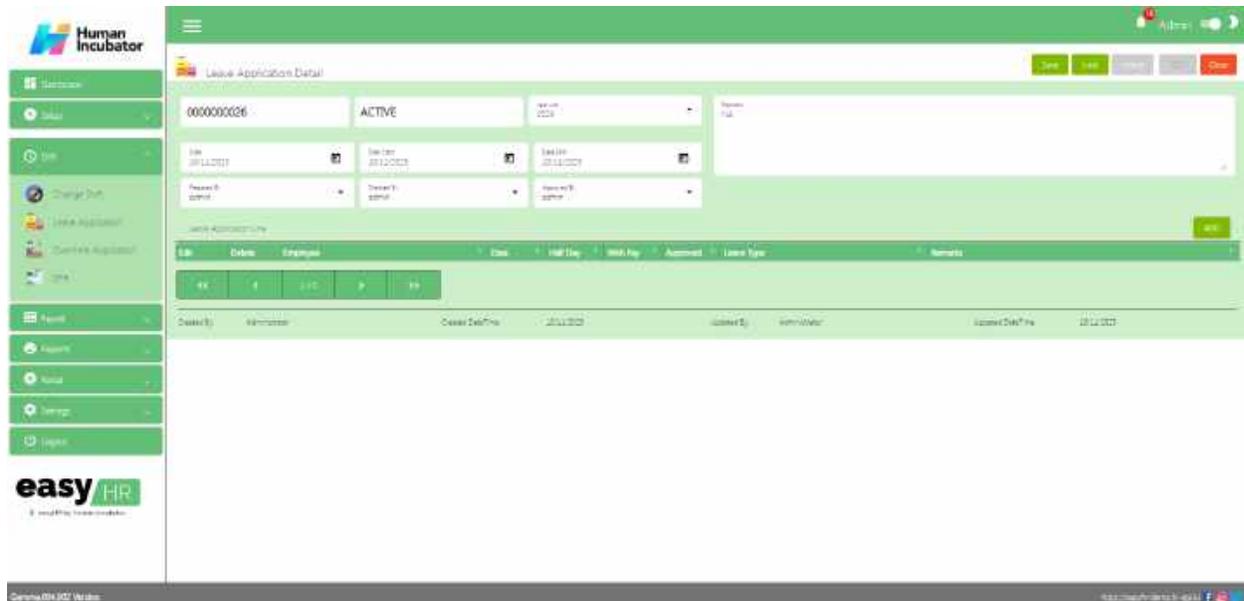
- Locked: If the Leave Application is locked you can select it for the DTR



Leave Application Detail

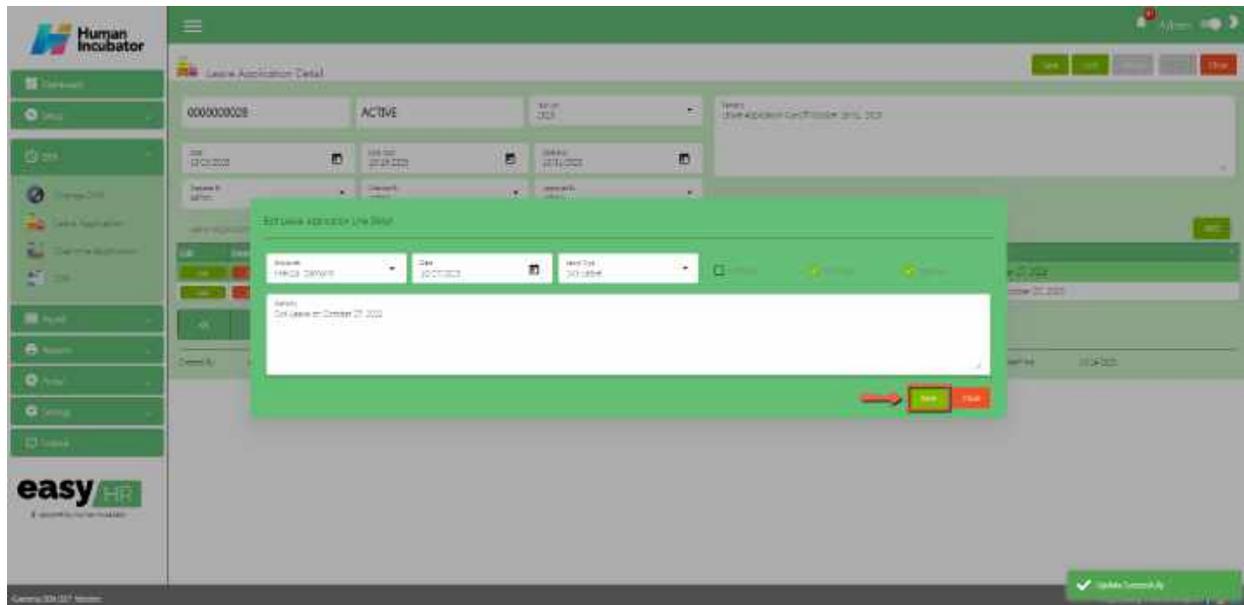
- To **Add** a new Leave Application detail, click the **Add** button that can be seen on the right side of the screen
- Fill all the important fields in Leave Application detail like:
 - Select Date Start
 - Select Date End
 - Input Remarks
 - Select Prepared By
 - Select Check By
 - Select Approved By

Note: Do not Save and Lock so that this shift code seen in employee portal



Add Leave Application Manually

- Click **Add** button to add manually leave application of employee
- Fill all the important fields Shift line like:
 - Select Employee
 - Select Date
 - Select Leave Type
 - Check the **Checkbox** if Half Day/ With Pay
 - Check Approved
 - Input Remarks
 - Click **Save** button
 - Click **Close** button to add in table



Approved Leave Application

- Click **Edit** button to approve the leave application file in Employee portal
 - Check the Approved
 - Click **Save** button
 - Click **Close** button

Save/Lock

- Make sure to save/lock so the this record read and compute in system

Note: Do not Save and Lock unless this cut-off will not yet finish and make sure all file leaves are approved.

The screenshot shows the 'Leave Application Detail' page in the Human Incubator HR system. The interface is green-themed and includes a sidebar with navigation options such as Dashboard, HR, Leave Application, and a main content area. The main content area displays the details of a leave application, including the employee's name (Nancy Lantion), the date of the application (10/27/2023), and the leave type (Sick Leave). A table below the details shows the leave application record with columns for Employee, Date, Half Day, With Pay, Approved, Leave Type, and Remarks.

Employee	Date	Half Day	With Pay	Approved	Leave Type	Remarks
Nancy Lantion	10/27/2023	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Sick Leave	Sick leave on October 27, 2023

Column Table

- Employee: Name of the Employee
- Date: Date of the applied Leave
- Halfday: Check if it is halfday
- With Pay: Check if it is with pay
- Approved: Check if it is already approved
- Leave Type: Type of leave, Vacation leave or Sick leave
- Remarks: You can input any remarks

Overtime Application

Overview

- Overtime Application is used for setup a start date and end date per cut-off and also the user can approve if the employee filed a Overtime Application
- The user file Overtime in employee portal it is automatically seen by approver or admin

Overtime Application List

- Shows all list of Overtime Application Setup per cut off
- Select Payroll Group

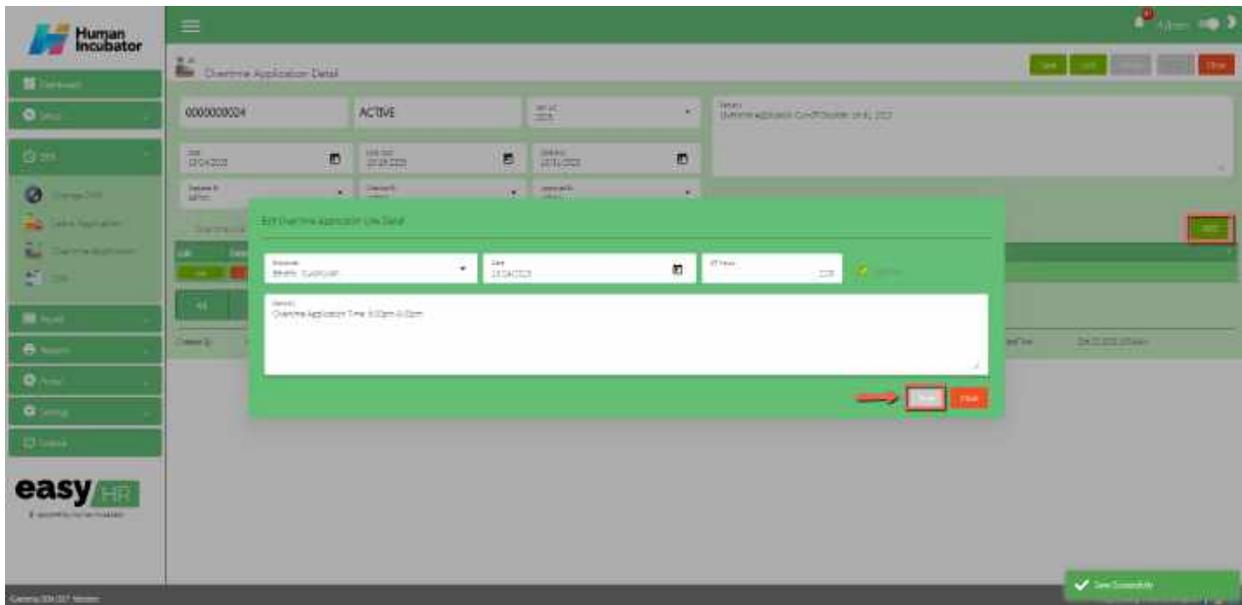
Column Table

- Edit: This has a function to edit the Overtime Application
- Delete: This has a function to delete the Overtime Application (**Note: You will not be able to delete the Overtime Application if it has still a Overtime Application lines or the DTR connected is already locked**)
- OT No.: This is for Overtime Application number (**Note: It will automatically generate according to the sequence of the added Overtime Application**)
- Date: Date of the Overtime Application added
- Year: Year Date of the Overtime Application
- Remarks: You can input any remarks
- Prepared By: Fullname of the user who created the Overtime Application
- Locked: If the Overtime Application is locked you can select it for the DTR



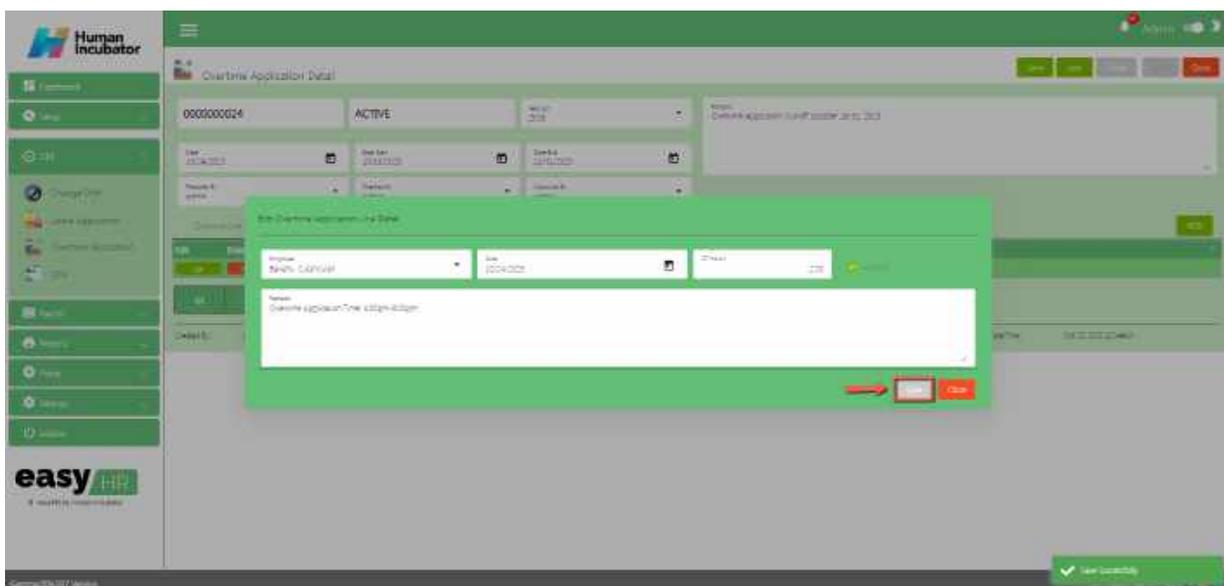
Add Overtime Application Manually

- Click **Add** button to add manually Overtime application of employee
- Fill all the important fields Shift line like:
 - Select Employee
 - Select Date
 - Input OT hours
 - Check Approved
 - Input Remarks
 - Click **Save** button
 - Click **Close** button to add in table



Approved Overtime Application

- Click **Edit** button to approve the overtime application file in Employee portal
 - Check the Approved
 - Click **Save** button
 - Click **Close** button



Save/Lock

- Make sure to save/lock so the this record read and compute in system

Note: Do not Save and Lock unless this cut-off will not yet finish and make sure all file overtime are approved.

Column Table

- Employee: Name of the Employee
- Date: Date of the applied Overtime
- OT Hours: Applied Overtime Hours
- Approved: Check if it approved
- Remarks: You can input any remarks



DTR

Overview

- DTR is used for adding a DTR logs, Import DTR logs for employee and also compute the total net pay, Overtime and Additional Allowance

DTR List

- Shows all list of DTR per cut off
- Select Payroll Group

Table Column

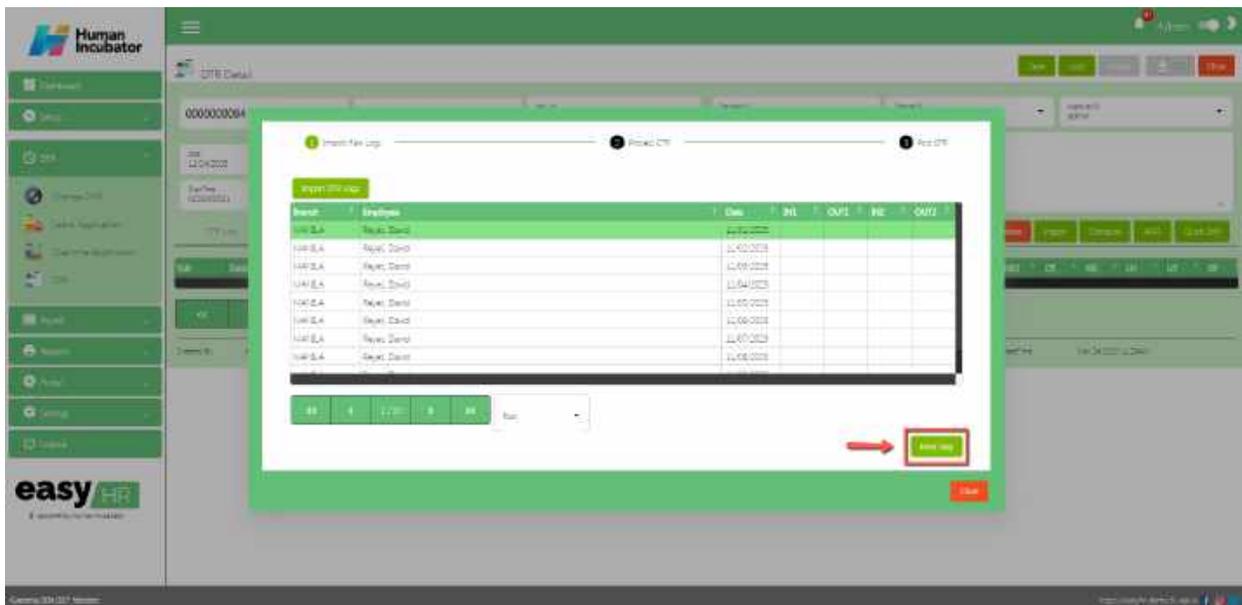
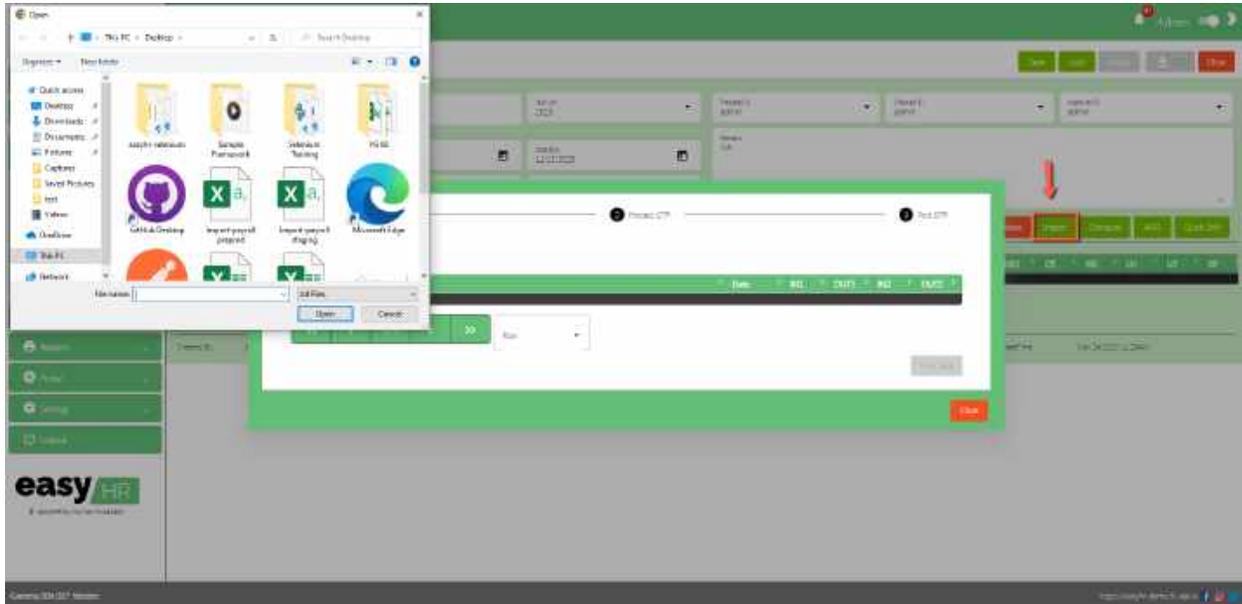
- Edit: This has a function to edit the DTR
- Delete: This has a function to Delete the DTR (**Note: You will not be able to delete the DTR if it has still a DTR lines or the Payroll connected is already locked**)
- DTR No.: This is for the DTR number (**Note: It will automatically generate according to the sequence of the added DTR**)
- Date: Date of the added DTR
- Year: Year Date of the added DTR

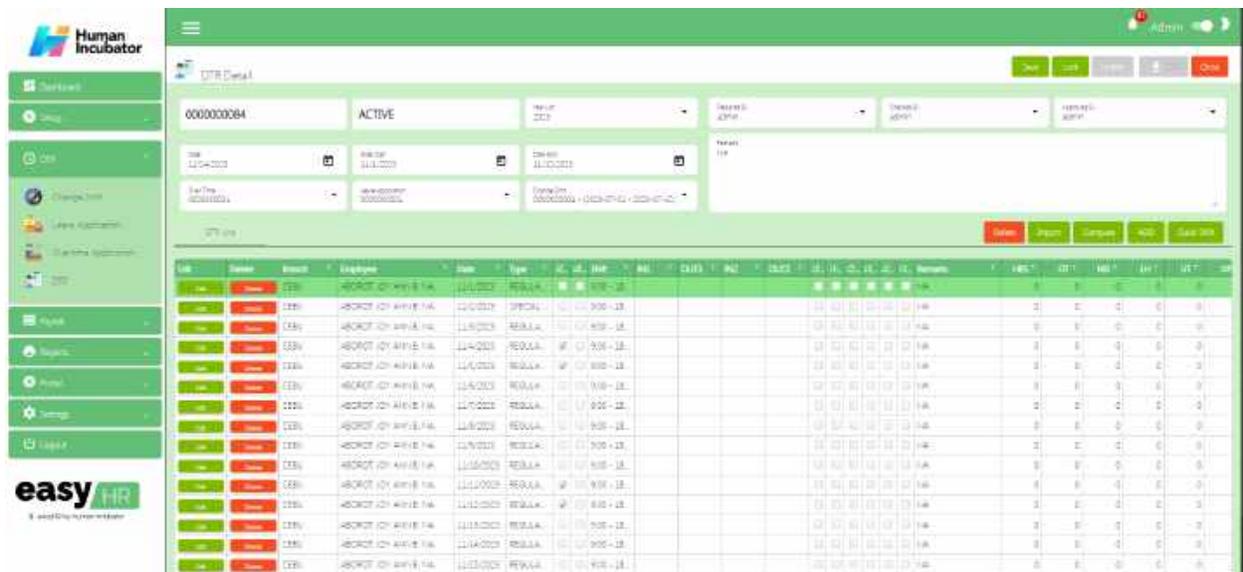
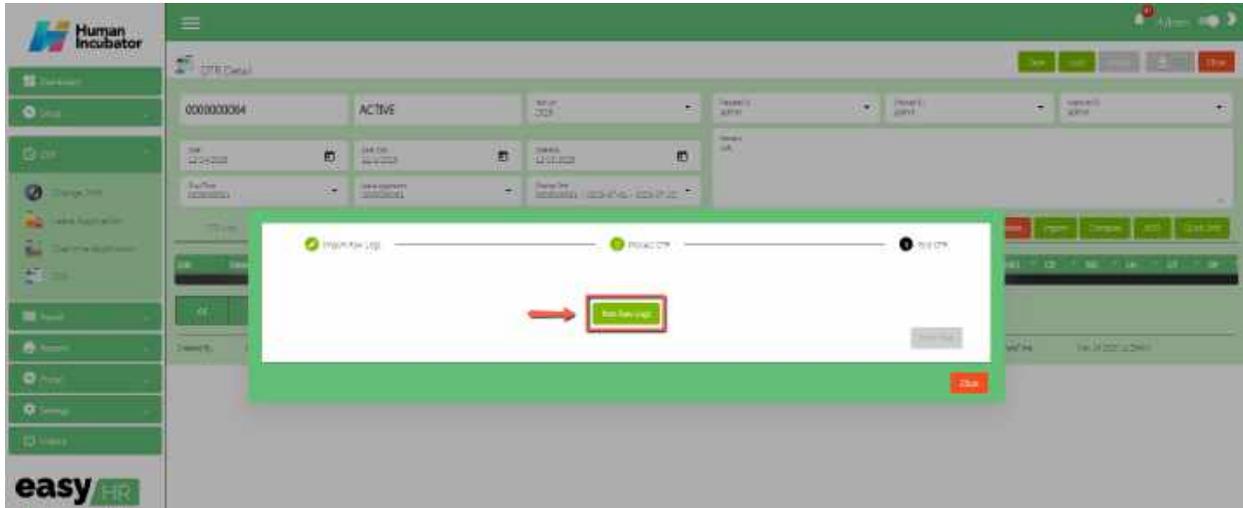
- Select Checked By
- Select Approved By
- Input Remarks
- Click **Save** button to save all selected fields

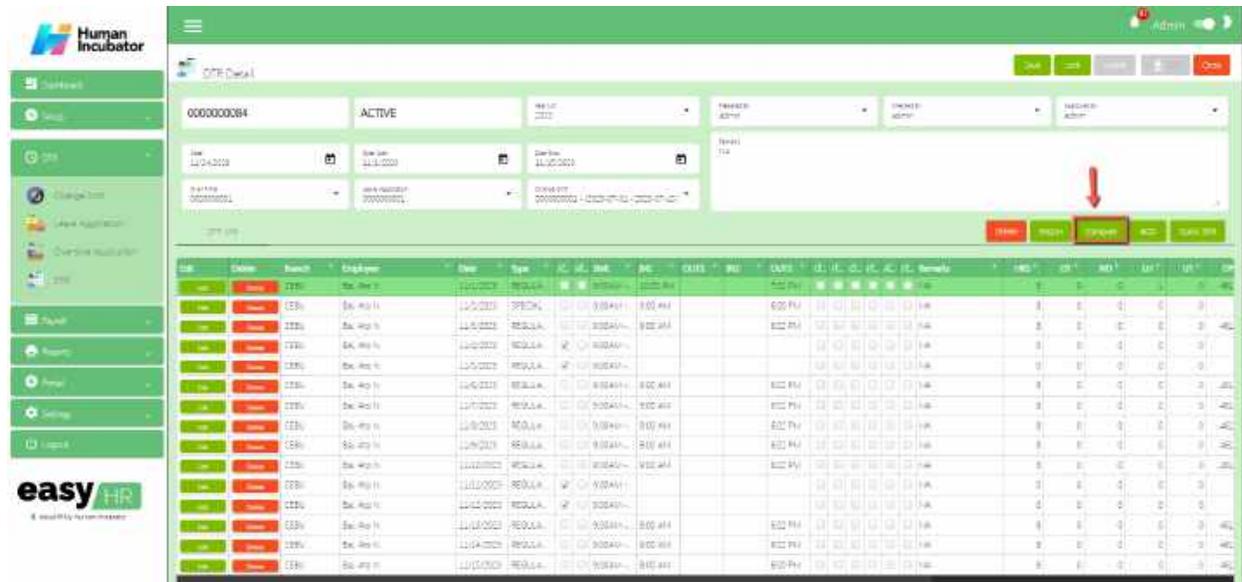


Import DTR

- Click **Import** button to import DTR logs for employee
 - Click **Import DTR Logs** button
 - Select master file
 - Click **Open** to import DTR logs
 - Click **Next Step** button
 - Click **Post Raw Logs** button
 - Click **Post DRT** button (DTR Lines Successfully posted)
 - Click **Close** button
 - Click **Compute** button to compute the total net pay





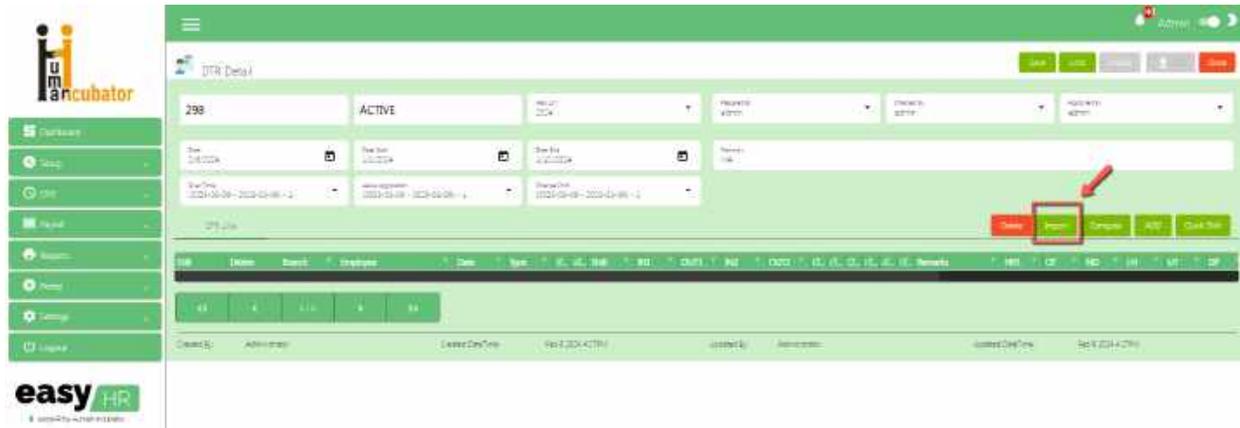


Import DTR Incorrect Format Error Message

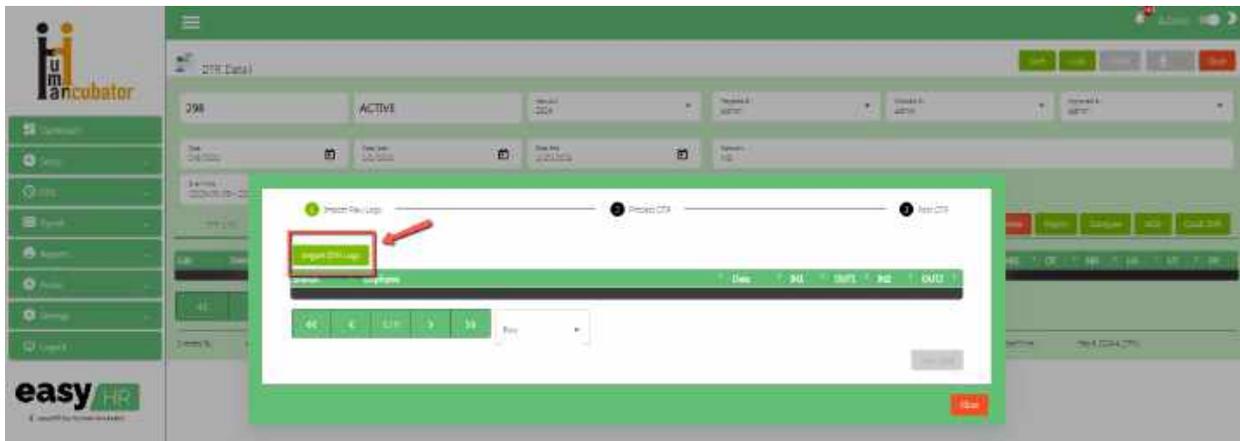
- In the Excel file Delete column ID and EmployeeName
- Import Excel File

1			Department	Att_Time	Att_ID	Dev_ID	Photo_ID
2	08201	08201		01/02/24 08:37:53			
3	08201	08201		01/02/24 18:42:42			
4	08201	08201		01/03/24 08:41:54			
5	08201	08201		01/03/24 18:36:41			
6	08201	08201		01/04/24 08:29:57			
7	08201	08201		01/04/24 18:30:18			
8	08201	08201		01/05/24 08:41:25			
9	08201	08201		01/05/24 18:01:57			
10	08201	08201		01/08/24 08:50:59			
11	08201	08201		01/08/24 18:31:25			
12	08201	08201		01/09/24 08:45:15			
13	08201	08201		01/09/24 18:26:22			
14	08201	08201		01/10/24 08:29:18			
15	08201	08201		01/10/24 18:16:02			
16	08201	08201		01/11/24 08:51:17			
17	08201	08201		01/11/24 18:02:31			
18	08201	08201		01/12/24 08:41:56			
19	08201	08201		01/12/24 18:10:16			
20	08201	08201		01/15/24 08:41:27			
21	08201	08201		01/15/24 18:28:01			

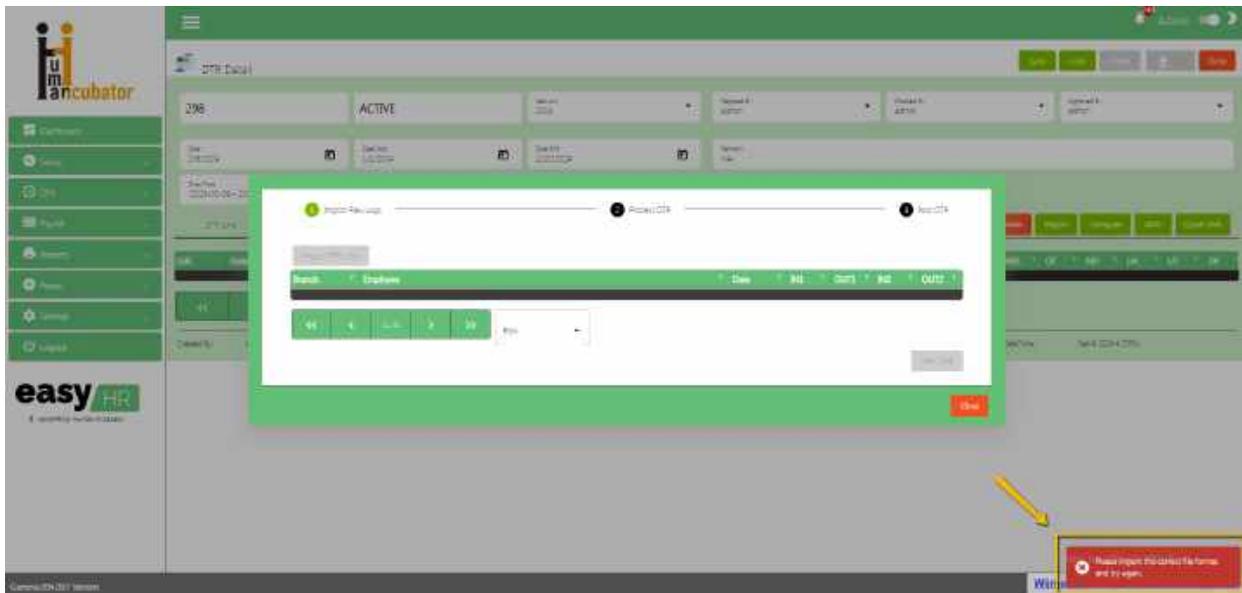
- Click Import



- Click Import DTR Logs

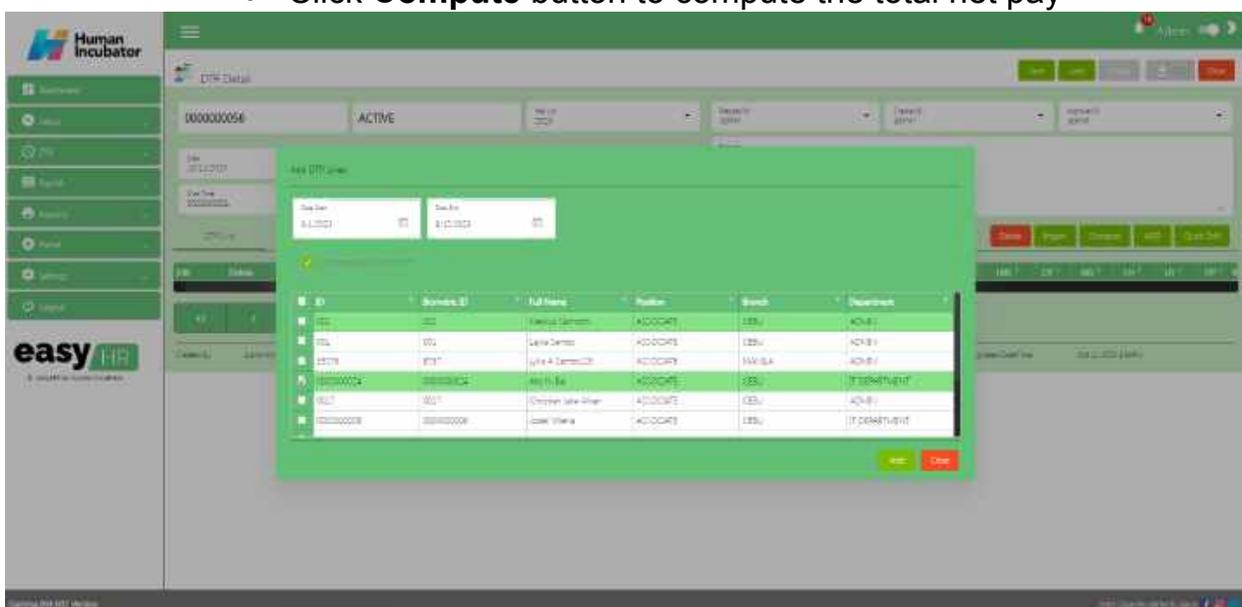


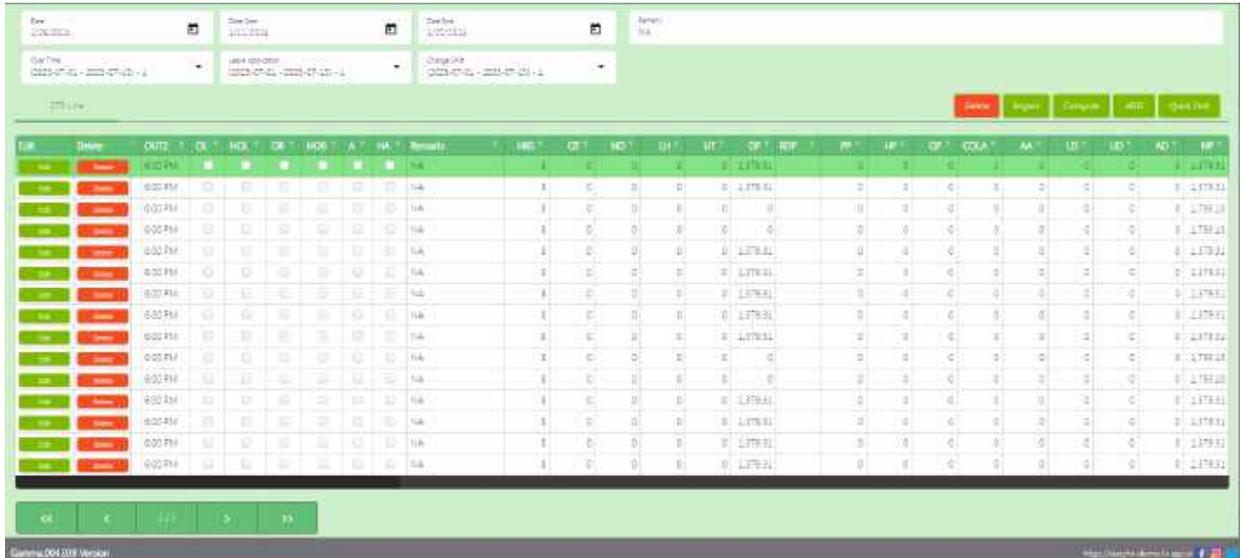
- Error Message will appear if wrong format



Add DRT logs

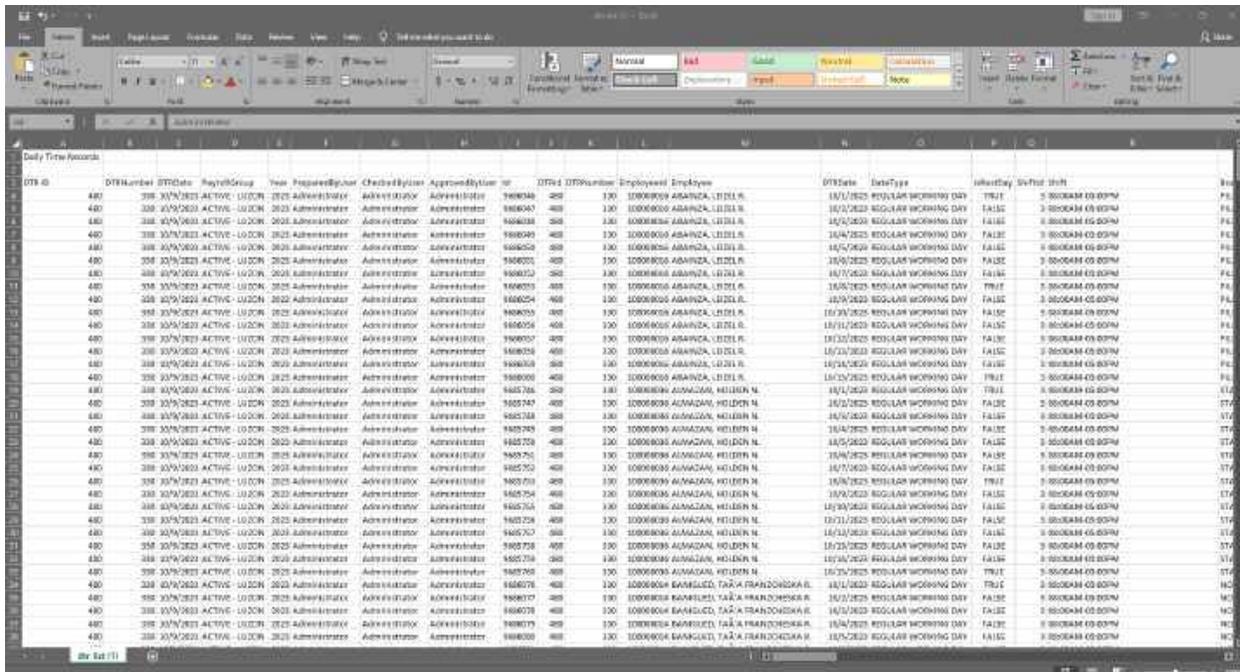
- Click **Add** button to add manually DTR logs for employee
 - Check the **Use Employee's Default Shift**
 - Pick the employee
 - Click **Add** button to add in DTR line
 - Click **Compute** button to compute the total net pay





Download CSV

- Click the **CSV** button to download the CSV file



Section VI: Payroll

Loan

Overview

- Loans are used to view the list of loan balances for employees and also the user can add loans

Loan List

- Shows all the list of loans for employee

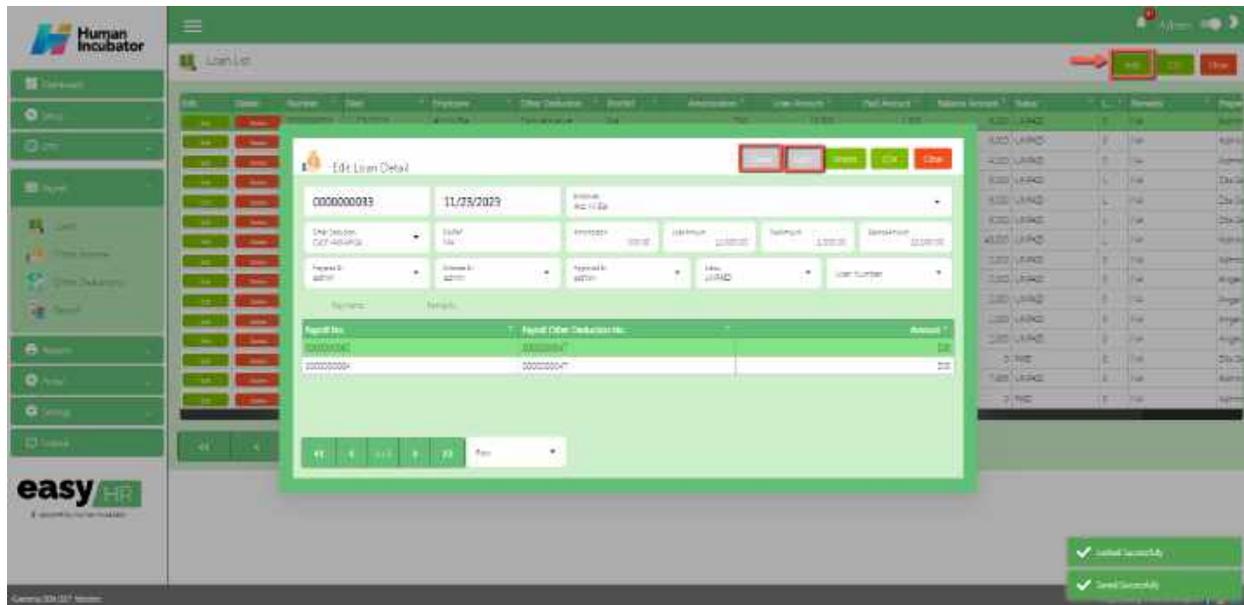
Column Table

- Edit: This has a function to edit the loan
- Delete: This has a function to delete the loan (**Note: You will not be able to delete the loan if it has already a transaction data**)
- Number: This is for the loan number (**Note: It will automatically generate according to the sequence of the added Loan**)
- Date: Date of the loan added
- Employee: Name of the Employee
- Other Deduction: Name of the Other Deduction
- DocRef: You can input any doc ref
- Amortization: Payment amortization of the loan
- Loan Amount: Amount of the loan
- Paid Amount: Paid amount of the loan
- Balance Amount: Balance amount of the loan
- Status: Status of the loan if it is paid or unpaid
- Loan Number: This loan number is used to separate the loans for the Get loan feature in the Other Deduction module
- Remarks: You can input any remarks
- Prepared By: Fullname of the user who added the loan
- Locked: Check if is already locked

ID	Status	Name	Date	Employee	Other Deduction	Amount	Amortization	Loan Amount	Paid Amount	Release Amount	Status	Remarks	Action
000000001	Unpaid	ADD LOAN	10/06/2021	CHERRIE APOLLO DT	Company Loan	100	100	10,000	1,000	9,000	UNPAID		Add
000000002	Unpaid	Wendy Armasan II	10/06/2021	Company Loan	100	100	10,000	1,000	9,000	UNPAID		Add	
000000003	Unpaid	Die Seligan	10/04/2021	40K-F Loan	100	100	10,000	1,000	9,000	UNPAID		Edit	
000000004	Unpaid	Die Seligan	10/04/2021	100 Salary Loan	100	100	10,000	1,000	9,000	UNPAID		Edit	
000000005	Unpaid	Die Seligan	10/04/2021	100 Salary Loan	100	100	10,000	1,000	9,000	UNPAID		Edit	
000000006	Unpaid	Christian Lim-Mun	10/04/2021	Salary Advance	100	100	50,000	2,000	48,000	UNPAID		Edit	
000000007	Unpaid	Ray Angelo	10/01/2021	Company Loan	100	100	1,000	0	1,000	UNPAID		Add	
000000008	Unpaid	Ray Angelo	10/01/2021	100 Salary Loan	100	100	1,000	0	1,000	UNPAID		Add	
000000009	Unpaid	Ray Angelo	10/01/2021	100 Salary Loan	100	100	1,000	0	1,000	UNPAID		Add	
000000010	Unpaid	Die Seligan	10/01/2021	Salary Advance	100	100	1,000	1,000	0	0	PAID		Edit
000000011	Unpaid	Verica Zamora	10/01/2021	100	100	1,000	1,000	0	0	0	PAID		Add
000000012	Unpaid	Verica Zamora	10/01/2021	Company Loan	100	100	1,000	1,000	0	0	PAID		Add

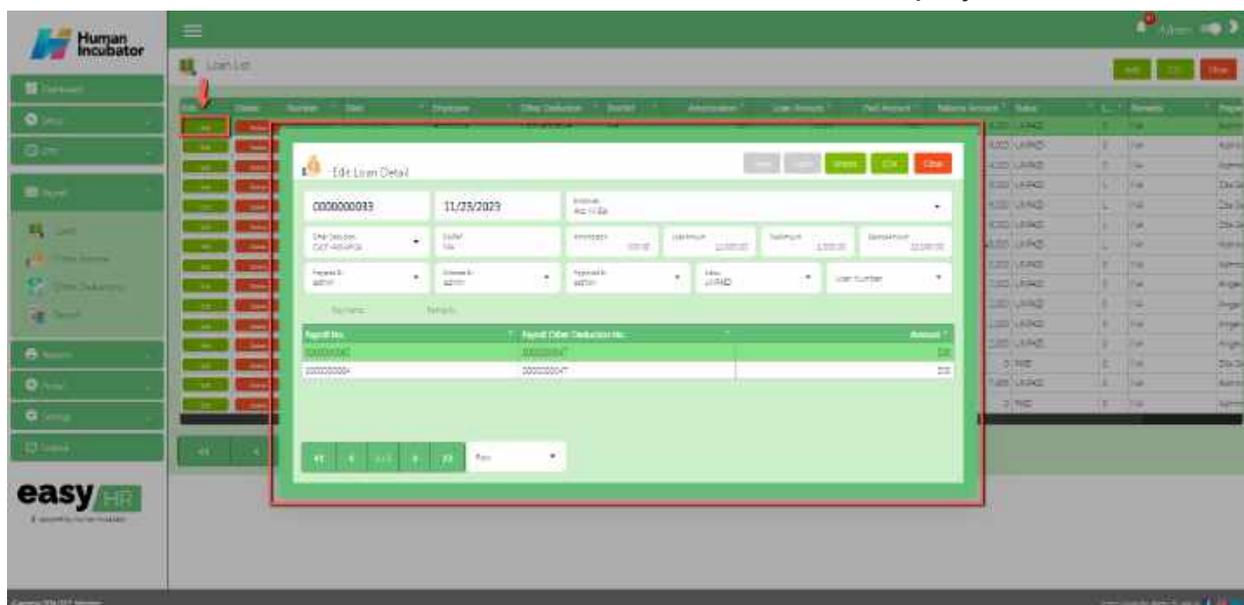
Loan Detail

- To **Add** a new Loan, click the **Add** button that can be seen on the right side of the screen
- Fill all the important fields in Loan detail like:
 - Select Employee
 - Select Other Deduction (Loan Name)
 - Input monthly Amortization and Loan Amount
 - Select Checked By and Approved By
 - Select Status (Unpaid)
 - Select Loan number
 - Click **ADD** button to add the loan
 - Click **Edit** button and **Save/Lock** so that the loan will be posted



Show Loan Detail

- Click **Edit** button to show the loan details of employee



Column Table

- Payroll No.: Payroll number history of the loan

Other Income

Overview

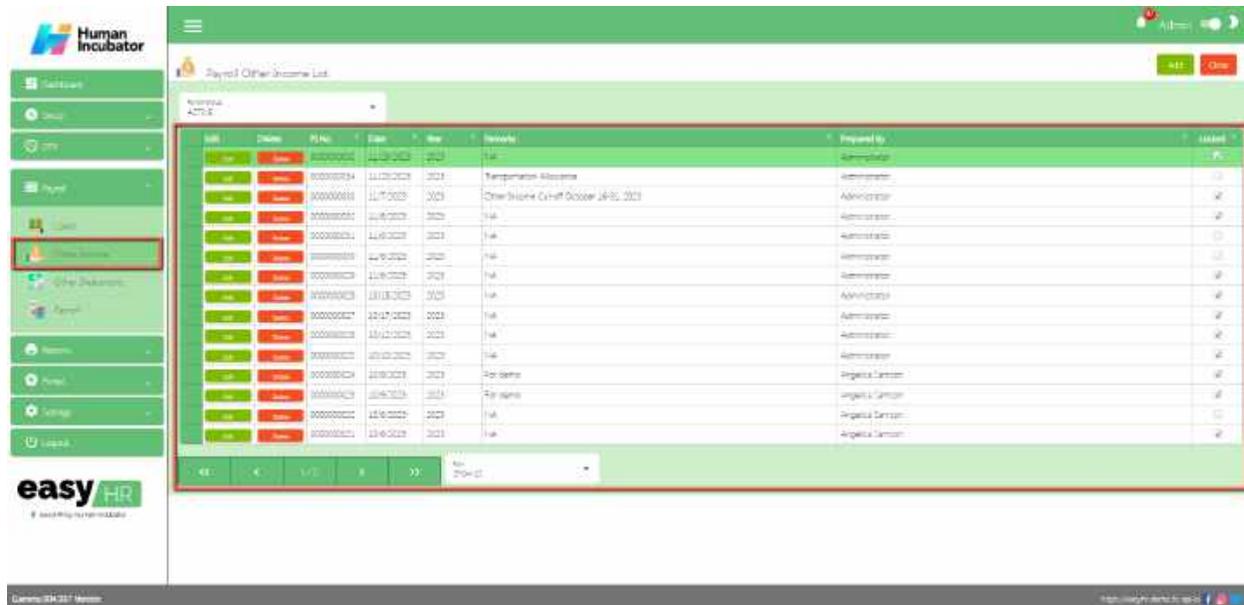
- Other Income is used to add other income to include to employee payroll and also the user can compute the 13th month for employees

Payroll Other Income List

- Shows all list of Payroll Other Income
- Select Payroll Group

Column Table

- Edit: This has a function to edit the Other Income
- Delete: This has a function to delete the Other Income (**Note: You will not be able to delete the Other income if the payroll connected is already locked**)
- PI No.: This is for the Other Income number (**Note: It will automatically generate according to the sequence of the added Other Income**)
- Date: Date of the Other Income added
- Year: Year Date of the Other Income added
- Remarks: You can input any remarks
- Prepared By: Full Name of the user who added the Other Income
- Locked: Check if this is already locked



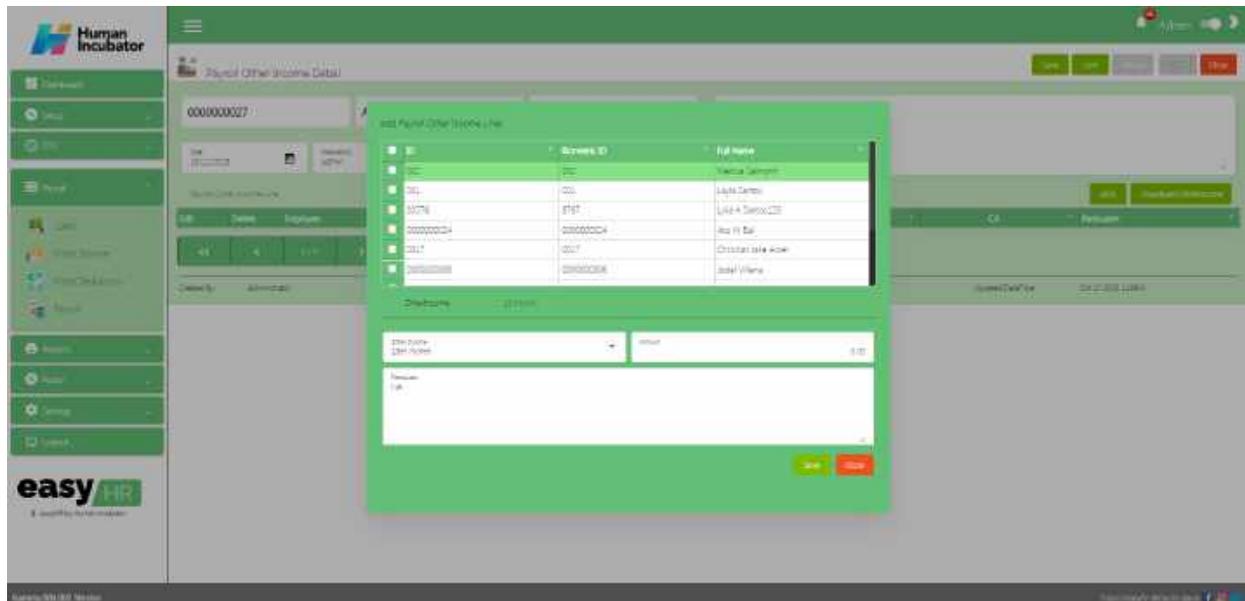
Payroll Other Income Detail

- To **Add** a new Payroll Other Income, click the **Add** button that can be seen on the right side of the screen
- Fill all the important fields in Loan detail like:
 - Input Remarks
 - Select Date
 - Select Prepared By
 - Select Checked By
 - Approved By

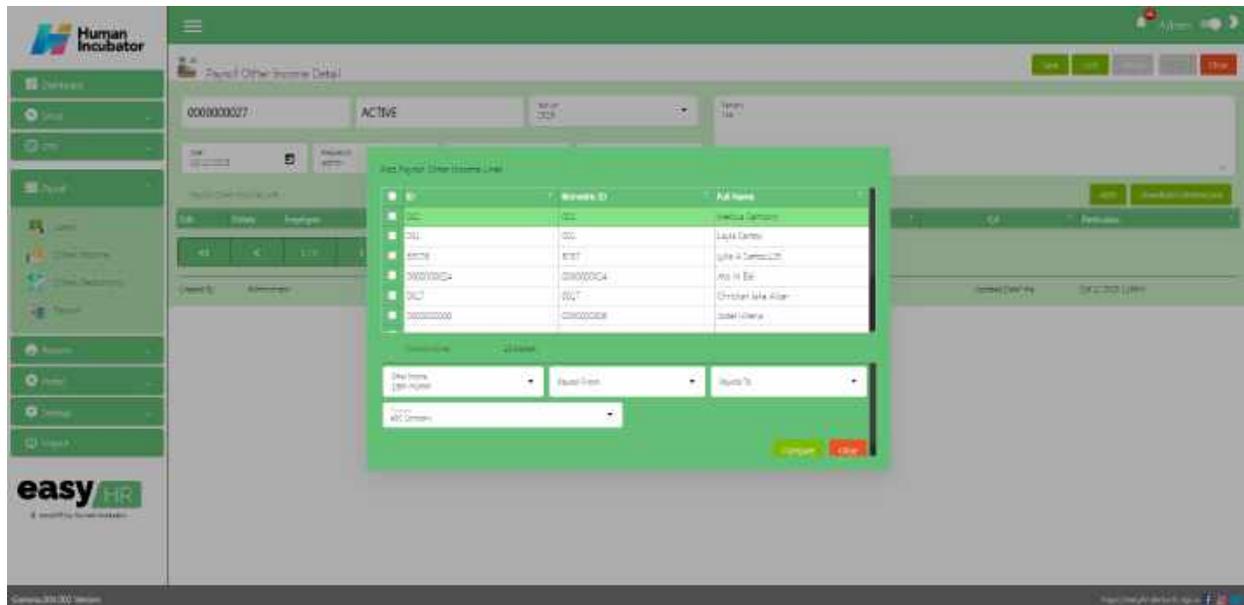


Add Payroll Other Income Lines

- To **Add** a manually Payroll Other Income lines, click the **Add** button
- There 2 tabs in add payroll other income lines
 - Select Employee
 - **OtherIncome** Tab and **13th Month** Tab
- In **Other Income** tab there are important fields need to fill up and select
 - Select Other Income Name
 - Input Amount
 - Input Particulars
 - Click **Save** button to add in Payroll Other Income Line

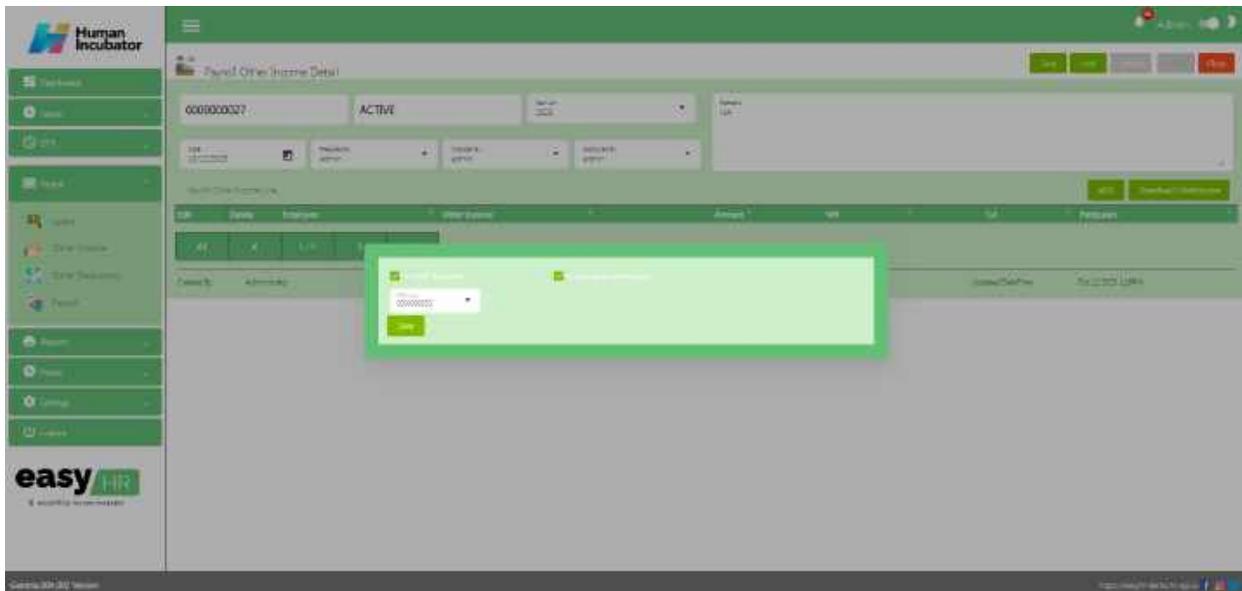


- In **13th Month** tab there are important fields need and select
 - Select 13th Month
 - Select Payroll From
 - Select Payroll To
 - Select Company
 - Click **Compute** button to compute the 13th month



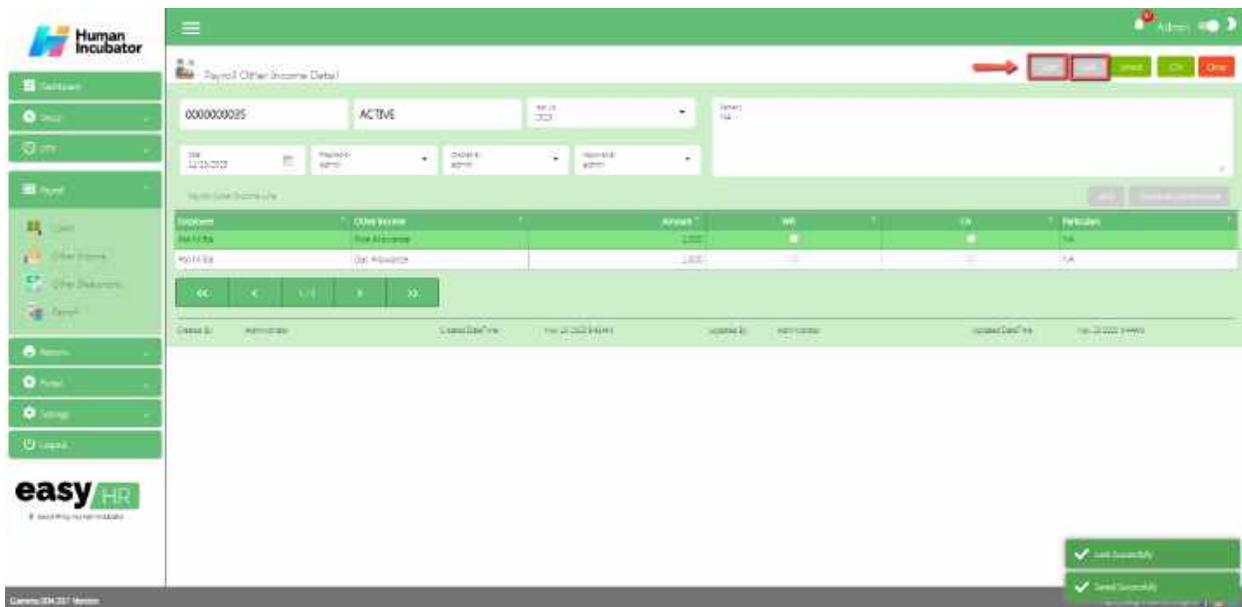
Download Other Income

- Click **Download Other Income** button to download the other Income of employee
 - Check the **Checkbox** if **Is Work Required** or **Is Complete Attendance**
 - Select DTR Code
 - Click **Save** button to add in Payroll Other Income Line



Save/Lock

- Make sure to save/lock so that this record is read and computed in the system also the Other Income code will be viewed in the Payroll module.

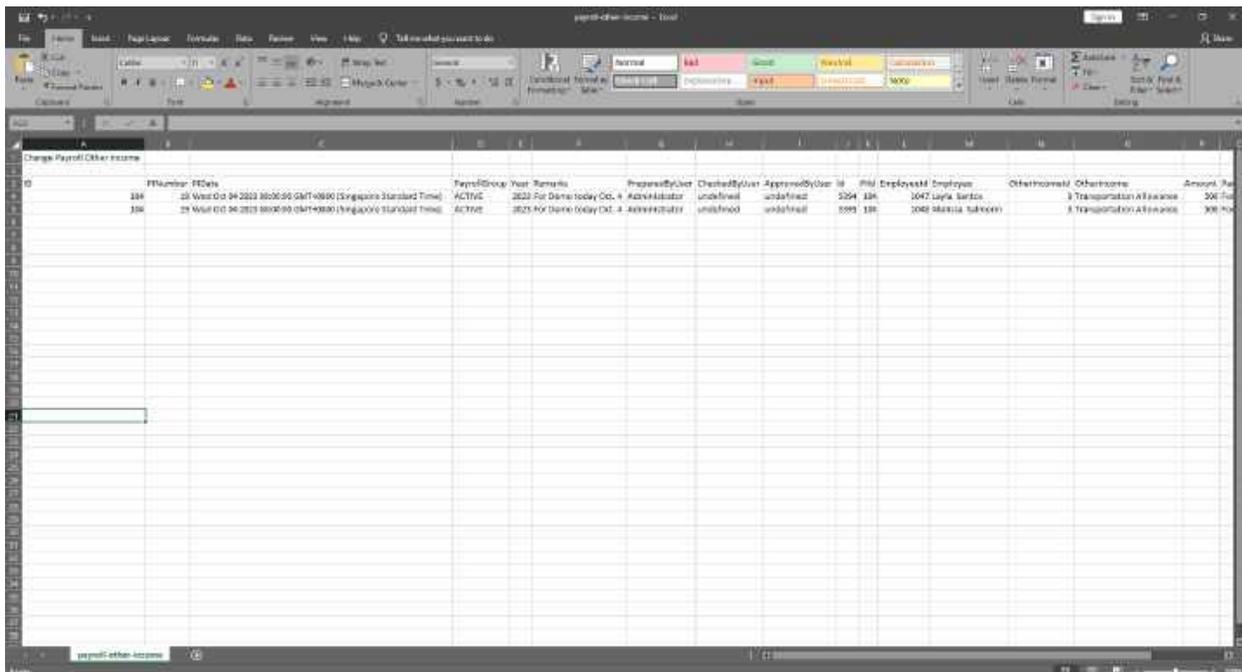


Column Detail

- Employee: Name of the Employee
- Other Income: Name of the Other Income
- Amount: Amount of the Other Income
- WR: Meaning “Work Required” the employee will only get the other income if the employee has a work
- CA: Meaning “Complete Attendance” the employee will only get the other income if the employee got Complete Attendance
- Particulars: You can input any remarks

Download CSV In Payroll Other Income Detail

- Click the CSV button to download the CSV file



ID	PI Number	PI Date	Payroll Period	Year	Remarks	Prepared By/ User	Checked By/ User	Approved By/ User	PIU	Employee M	Employee	Other Income M	Other Income	Amount	Remarks
134	25	2023-04-28 09:00:00	2023-04-28 09:00:00	2023	For Demo today	Administrator	undefined	undefined	5294	134	1047	Lyla Barbo	3	Transportation Allowance	500.00
136	29	2023-04-28 09:00:00	2023-04-28 09:00:00	2023	For Demo today	Administrator	undefined	undefined	5294	136	1049	Maria Suberin	1	Transportation Allowance	300.00

Other Deductions

Overview

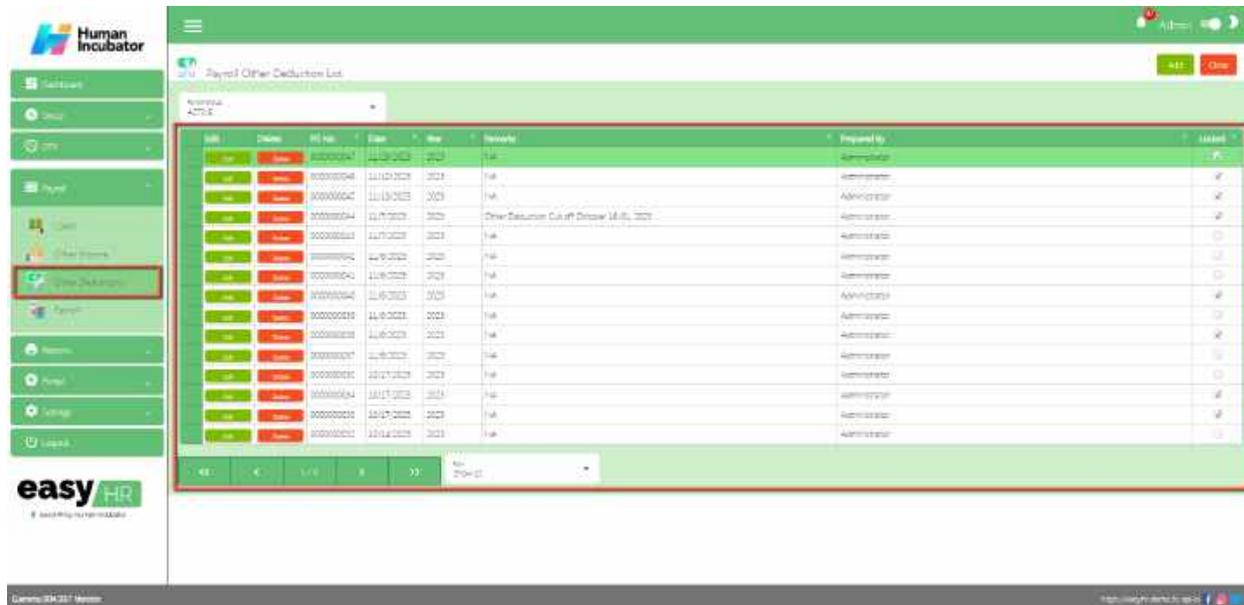
- Other Deduction is used generate the deduction or loans of employee and also the user can add the loan for the 1 time payment deduction

Payroll Other Deduction List

- Shows all the list of Payroll Other Deduction
- Select Payroll Group

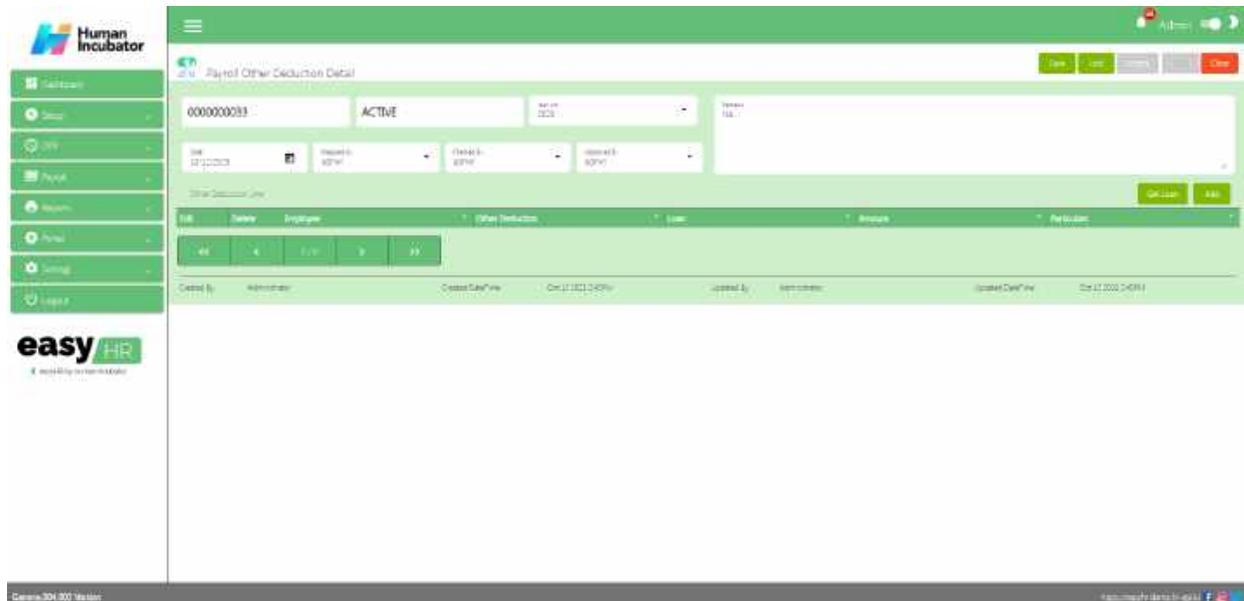
Column Table:

- Edit: This has a function to edit the Other Deduction
- Delete: This has a function to delete the Other Deduction (**Note: You will not be able to delete the Other Deduction if the payroll connected is already locked**)
- PD No.: This is for the Other Deduction number (**Note: It will automatically generate according to the sequence of the added Other Deduction**)
- Date: Date of the Other Deduction added
- Year: Year Date of the Other Deduction added
- Remarks: You can Input remarks
- Prepared By: Full Name of the user who added the Other Deduction
- Locked: Checked if this is already locked

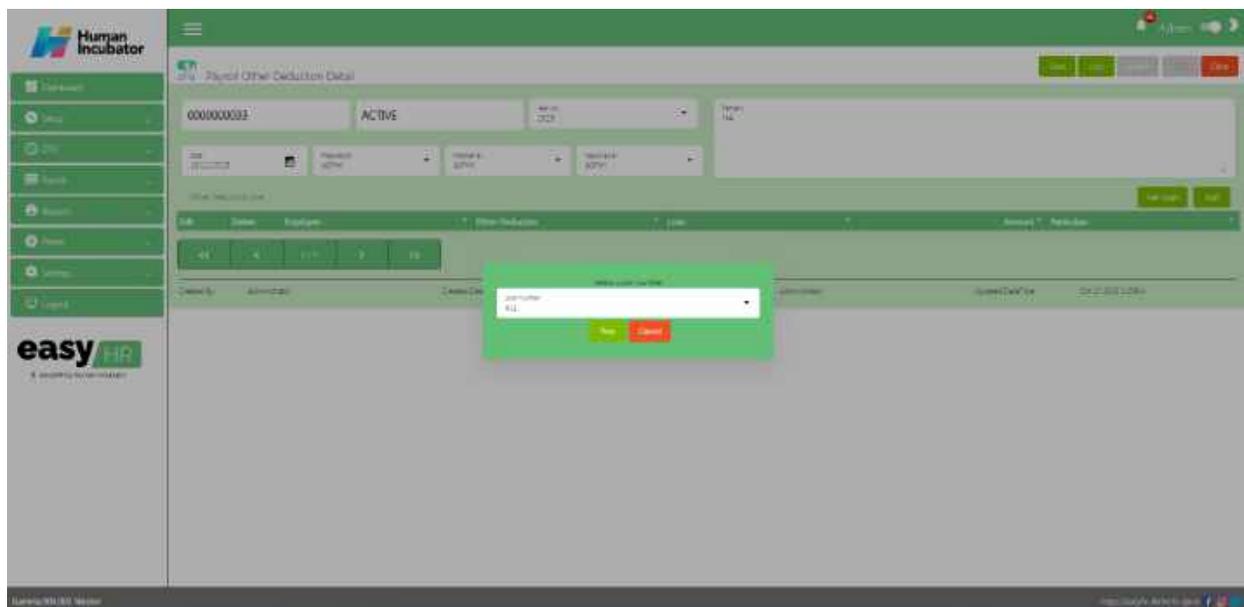


Payroll Other Deduction Detail

- To **Add** a new Payroll Other Deduction, click the **Add** button that can be seen on the right side of the screen
- Fill all the important fields in Loan detail like:
 - Select Checked By
 - Select Approved By
 - Input Remarks

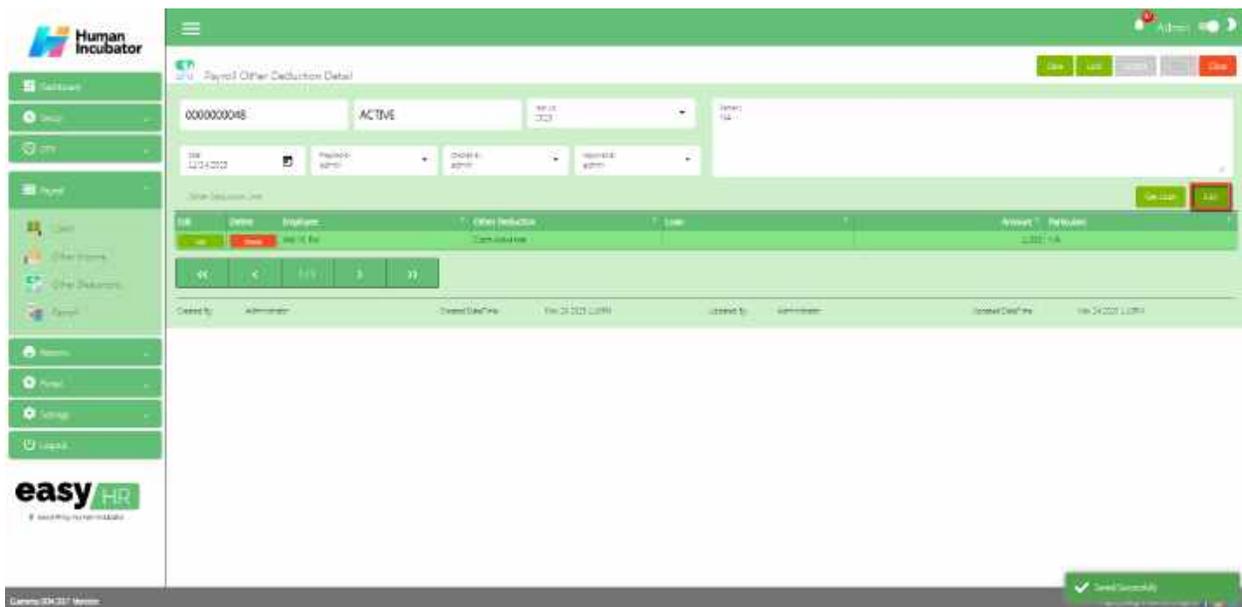
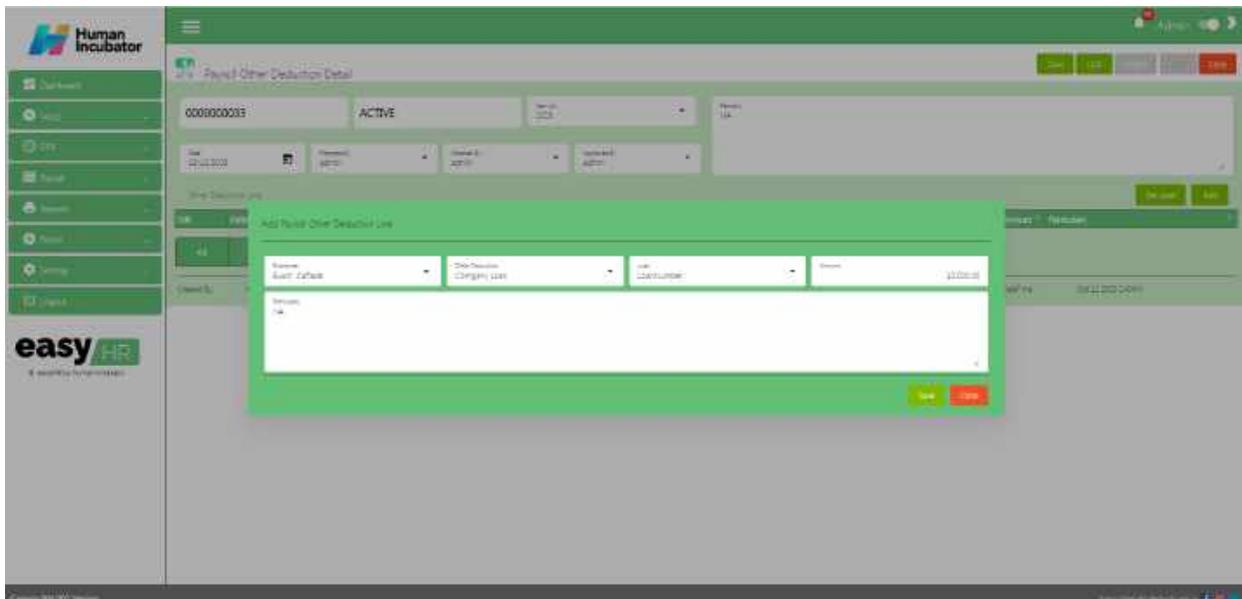


- Click **Get loan** button to get all employees loan
 - Select All to Loan Number
 - Click **Post** button to add in other deduction line



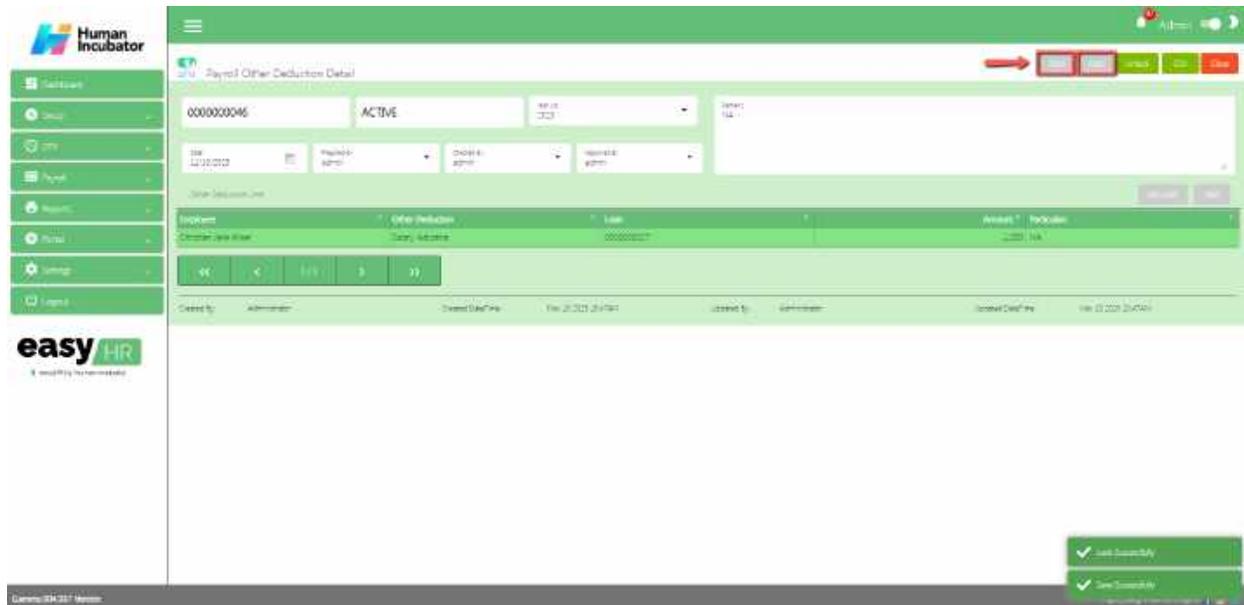
The screenshot shows the 'Payroll Other Deduction Detail' interface. At the top, there are search filters for ID (000000003), Status (ACTIVE), and Date (12/11/2023). Below this is a table with the following columns: ID, Name, Employee, Other Deduction, Date, Amount, and Particulars. The table contains several rows of data for different employees and deduction types like 'Company Loan' and 'Salary Advance'. At the bottom right of the table, there is a green 'Add' button. The interface also includes a sidebar with navigation options like Dashboard, Home, Payroll, and Settings, and a footer with the 'easyHR' logo.

- Click **Add** button to manually or individually add a loan to the employee.
 - Select Employee
 - Select Other Deduction Name
 - Select Loan Number
 - Input Amount
 - Click **Save** button to add in other deduction line



Save/Lock

- Make sure to save/lock so that this record is read and computed in the system also the Other Deduction code will be viewed in the Payroll module.



Column Table

- Employee: Name of the Employee
- Other Deduction: Name of the Other Deduction
- Loan: Loan number of the Employee
- Amount: Loan payment amount
- Particulars: You can add any particulars

Payroll

Overview

- Payroll is used to compute all the Deduction, Other Income, Daily rate, Monthly Rate, Net Income

Payroll List

- Shows all the list of Payroll
- Select Payroll Group

Column Table

- Edit: This has a function to edit the Payroll

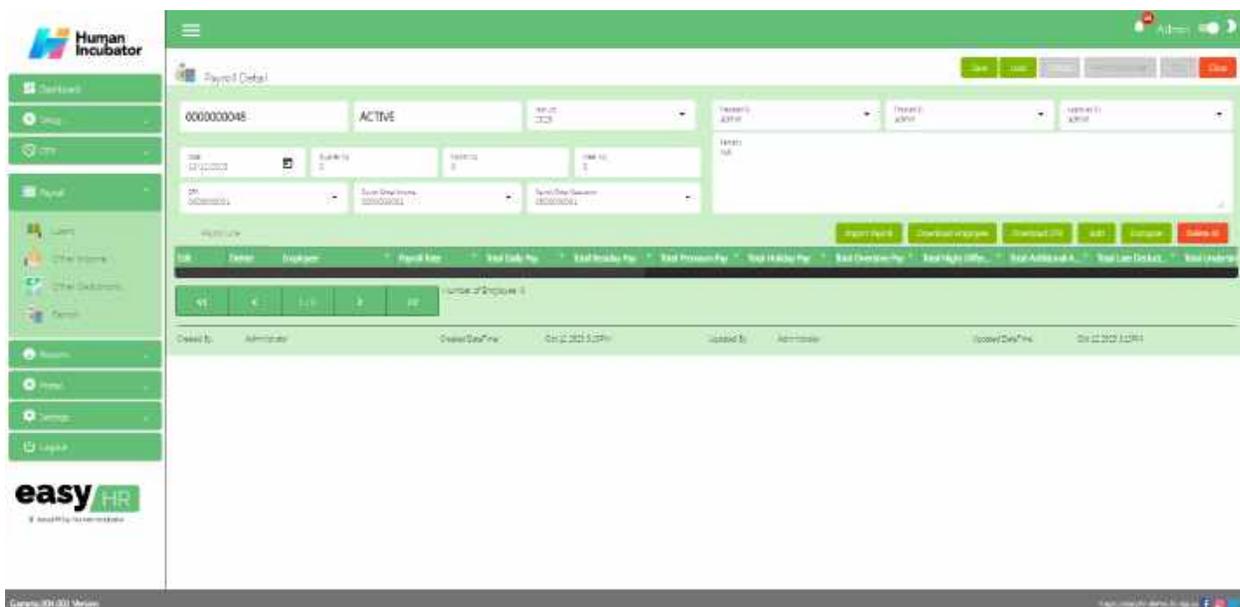
- Delete: This has a function to delete the Payroll (**Note: You will not be able to delete the Payroll if it has still a Payroll lines**)
- Pay No.: This is for the Payroll number (**Note: It will automatically generate according to the sequence of the added Payroll**)
- Date: Date of the Payroll added
- Year: Year Date of the Payroll added
- Remarks: You can Input any remarks
- Prepared By: Full Name of the User who added the Payroll
- Locked: Check if the Payroll is already locked.

ID	Status	Pay No.	Date	Year	Remarks	Prepared By	Locked
1000000001	Active	0000000001	11/23/2021	99	NA	Administrator	<input type="checkbox"/>
1000000002	Active	0000000002	11/23/2021	99	2nd outp	Administrator	<input type="checkbox"/>
1000000003	Active	0000000003	11/23/2021	99	NA	Administrator	<input type="checkbox"/>
1000000004	Active	0000000004	11/23/2021	99	2nd outp	Administrator	<input type="checkbox"/>
1000000005	Active	0000000005	11/23/2021	99	NA	Administrator	<input type="checkbox"/>
1000000006	Active	0000000006	11/23/2021	99	NA	Administrator	<input type="checkbox"/>
1000000007	Active	0000000007	11/23/2021	99	NA	Administrator	<input type="checkbox"/>
1000000008	Active	0000000008	11/23/2021	99	Reverse JCI Payroll Card	Administrator	<input type="checkbox"/>
1000000009	Active	0000000009	11/23/2021	99	10-00	Administrator	<input type="checkbox"/>
1000000010	Active	0000000010	11/23/2021	99	NA	Administrator	<input type="checkbox"/>
1000000011	Active	0000000011	11/23/2021	99	NA	Administrator	<input type="checkbox"/>
1000000012	Active	0000000012	11/23/2021	99	NA	Administrator	<input type="checkbox"/>
1000000013	Active	0000000013	11/23/2021	99	NA	Administrator	<input type="checkbox"/>
1000000014	Active	0000000014	11/23/2021	99	NA	Administrator	<input type="checkbox"/>
1000000015	Active	0000000015	11/23/2021	99	NA	Administrator	<input type="checkbox"/>

Payroll Detail

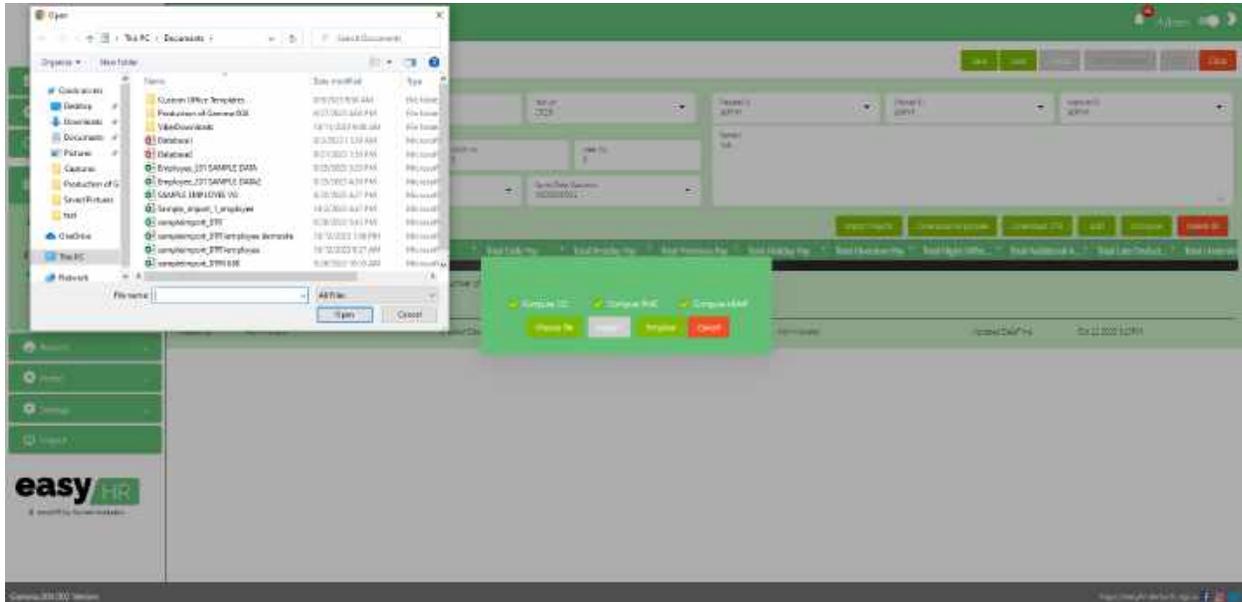
- To **Add** a new Payroll, click the **Add** button that can be seen on the right side of the screen
- Fill all the important fields in Payroll detail like:
 - Select Date
 - Input Quarter Number
 - Input Month Number
 - Input Week Number (For Weekly Salary)
 - Select DTR Number

- Select Payroll Other Income Number
- Select Payroll Other Deduction Number
- Select Checked By
- Select Approved By
- Input Remarks
- Click **Save** button to save all details



Import Payroll

- Click **Import Payroll** button to import payroll master files
 - Click **Choose** file
 - Click **Open** file
 - Click **Import** (Employee payroll is successfully imported)
 - Click **Done** button
 - Click **Compute** button to Compute the Payroll line
 - Click **Next** button
 - Click **Compute** button to Compute your mandatory deduction
 - Click **Done** button

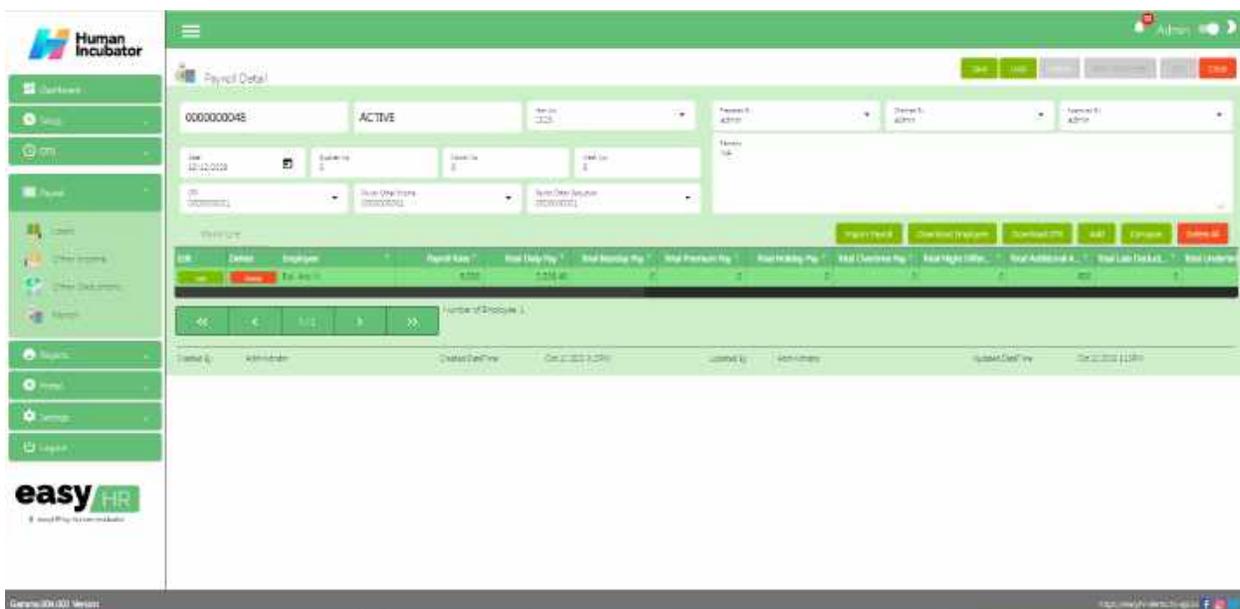
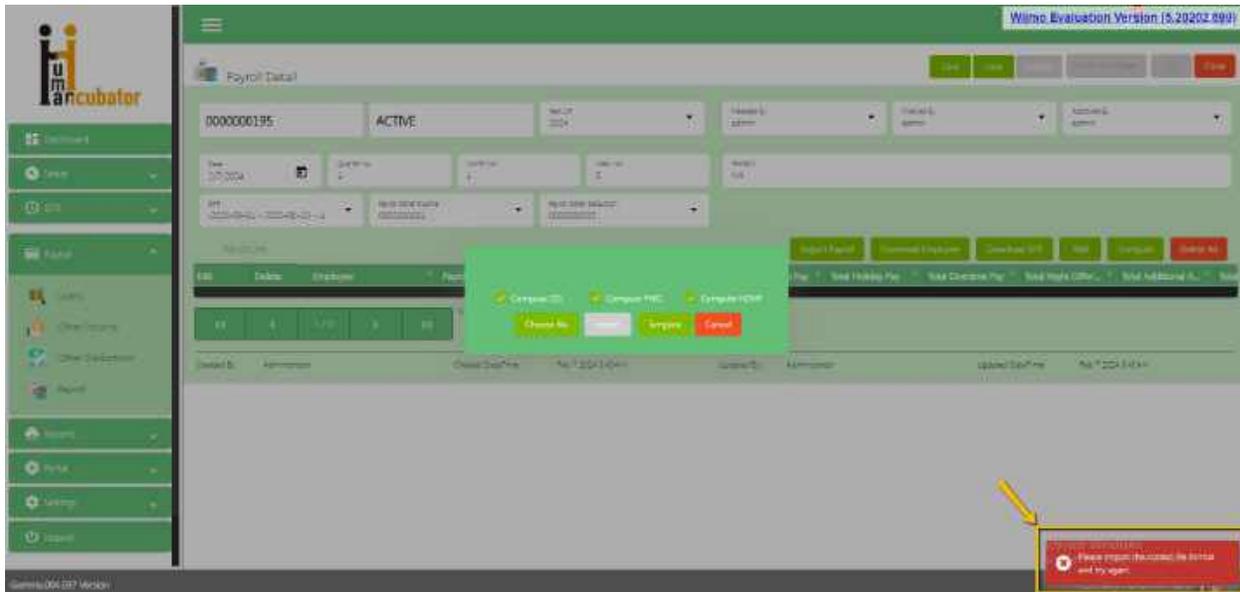


Import Payroll Incorrect File Format Error Message

- Edit excel file removed column name

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X															
1	Employee	Employee	Regular	W	Legal	H	K	Legal	H	K	Special	H	K	RestDay	Legal	H	K	Special	H	K	Regular	W	Legal	H	K	Special	H	K	RestDay	Legal	H	K	Special	H	K	AWOL	Total	Later	Hours
2	19025	Alizer, Chi	12	1	1	1	1	0	0	2	2	2	2	1	1	1	2	2	2	1	0	1	0	1	0	1	0	1	0	1	0	1	0	1	0	1	0		
3	21-84458	ANDRADA	12	1	1	1	1	0	0	2	2	2	2	1	1	1	2	2	2	1	0	1	0	1	0	1	0	1	0	1	0	1	0	1	0	1	0		
4	2127	ANTONIO	12	1	1	1	1	0	0	2	2	2	2	1	1	1	2	2	2	1	0	1	0	1	0	1	0	1	0	1	0	1	0	1	0	1	0		
5	2133	BELLO, MI	12	1	1	1	1	0	0	2	2	2	2	1	1	1	2	2	2	1	0	1	0	1	0	1	0	1	0	1	0	1	0	1	0	1	0		
6	2132	FELICIANO	12	1	1	1	1	0	0	2	2	2	2	1	1	1	2	2	2	1	0	1	0	1	0	1	0	1	0	1	0	1	0	1	0	1	0		
7	2128	FELICIANO	12	1	1	1	1	0	0	2	2	2	2	1	1	1	2	2	2	1	0	1	0	1	0	1	0	1	0	1	0	1	0	1	0	1	0		
8	2172	PABOYAN	12	1	1	1	1	0	0	2	2	2	2	1	1	1	2	2	2	1	0	1	0	1	0	1	0	1	0	1	0	1	0	1	0	1	0		
9																																							
10																																							
11																																							
12																																							

- Import Excel file



Download Employee

- Click **Download Employee** to Download individual employee
 - Click **Pick Employee** in Employee list
 - Click **Compute** button to Compute the Payroll line
 - Click **Next** button

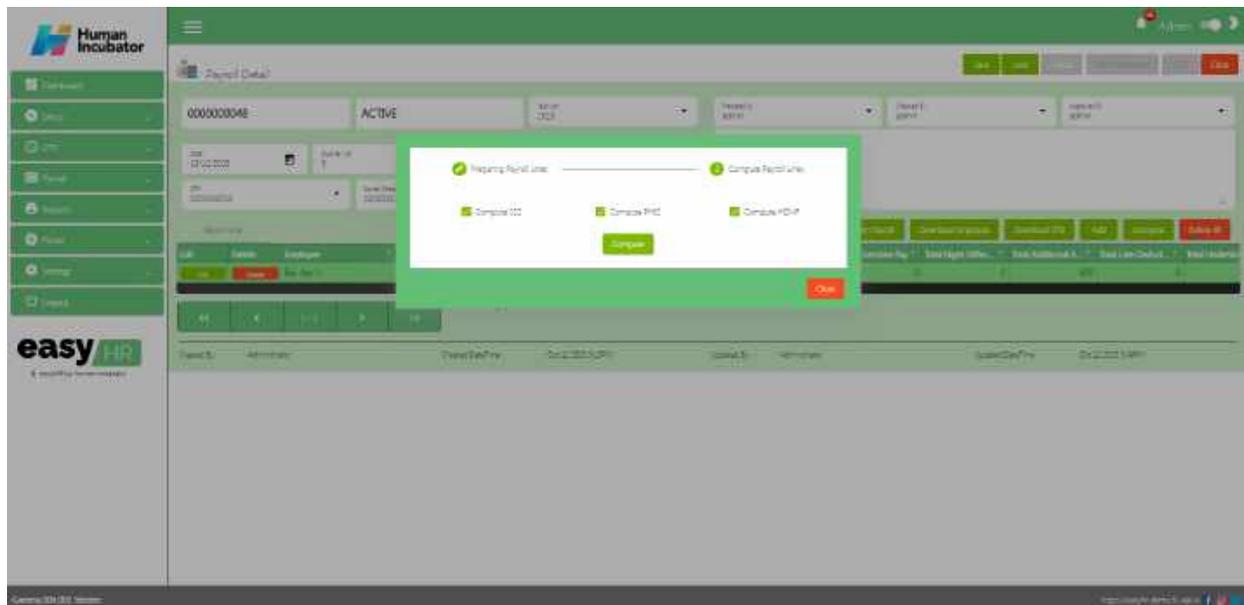
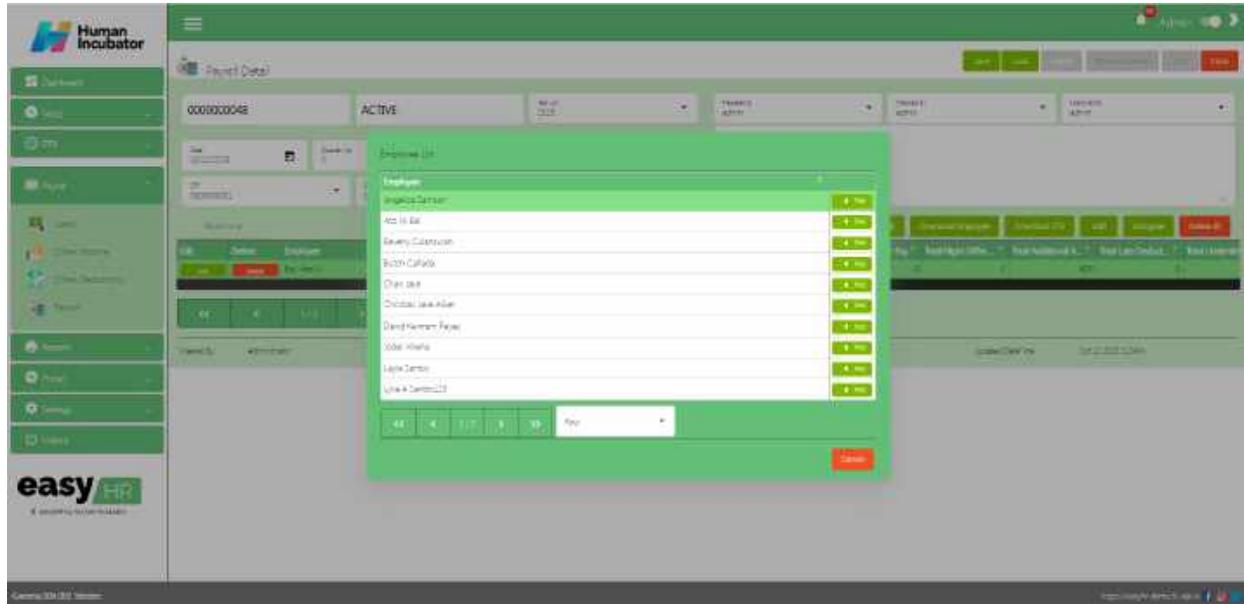
- Click **Compute** button to Compute your mandatory deduction

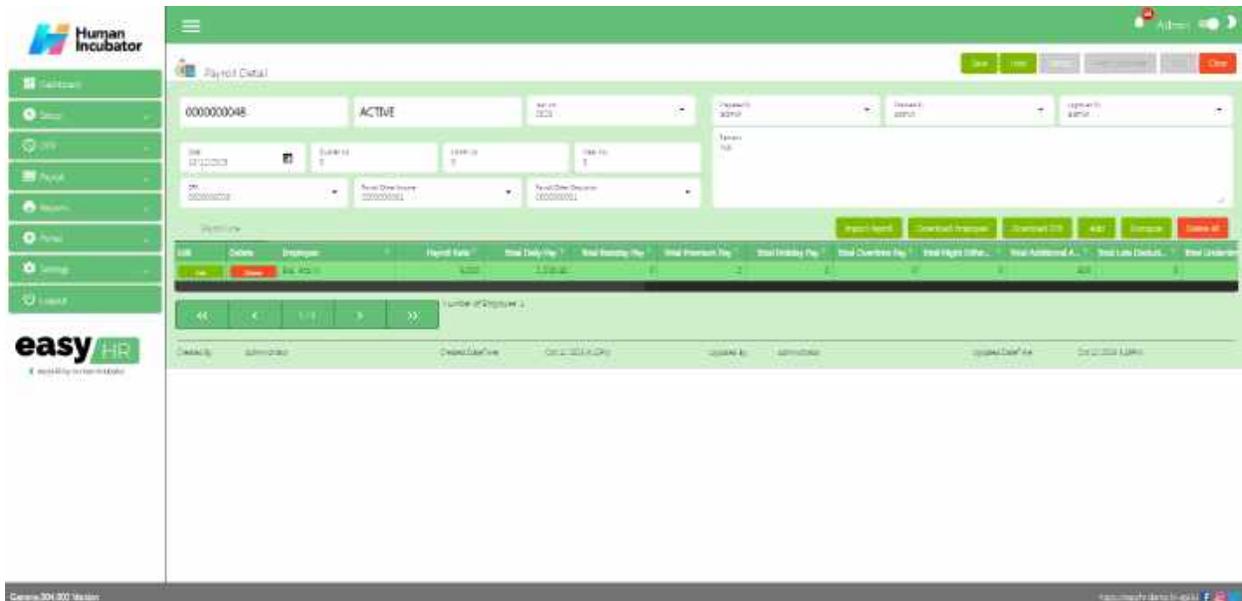
Note: The mandatory deduction will be based on the payroll rate for the first half and the deduction for the second half will deduct the remaining amount based on the monthly rate

Note: If the payroll rate exceeded 29,750 amount the SSS mandatory deduction will deduct fully in the first half but the deduction for the second half will be zero

	SSS	PHIC	HDMF Fixed Percentage	Tax
1 Rule	Based on SSS Table	2% of Gross Salary	2% of Gross Salary	Based on Table
2 Example:				
3 Gross Salary P29,750 Monthly Salary P59,500	The SSS Premium Contribution of P1,350 will be a be deducted totally in the first payroll cut off, and in the second payroll cut off the the SSS Contribution will be zero.	The PHIC Premium contribution will be P595 for the first Payroll cut off and for the second payroll cut off will be P595 total of P1,190 for the whole monthly contribution	The HDMF Premium contribution will be P595 for the first Payroll cut off and for the second payroll cut off will be P595 total of P1,190 for the whole monthly contribution	
4 Example:				
5 Gross Salary P25,000 Monthly Salary P50,000	The SSS Premium Contribution for the first payroll cut off will be P1,125 and in the second payroll cut off will be P225 total of P1350 for the whole monthly contribution	The PHIC Premium contribution will be P500 for the first Payroll cut off and for the second payroll cut off will be P500 total of P1,000 for the whole monthly contribution	The HDMF Premium contribution will be P500 for the first Payroll cut off and for the second payroll cut off will be P500 total of P1,000 for the whole monthly contribution	
6 Example:				
7 Gross Salary P20,000 Monthly Salary P40,000	The SSS Premium Contribution for the first payroll cut off will be P900 and in the second payroll cut off will be P450 total of P1350 for the whole monthly contribution	The PHIC Premium contribution will be P400 for the first Payroll cut off and for the second payroll cut off will be P400 total of P800 for the whole monthly contribution	The HDMF Premium contribution will be P400 for the first Payroll cut off and for the second payroll cut off will be P400 total of P800 for the whole monthly contribution	
8 Example:				
9 Gross Salary P15,000 Monthly Salary P30,000	The SSS Premium Contribution for the first payroll cut off will be P675 and in the second payroll cut off will be P675 total of P1350 for the whole monthly contribution	The PHIC Premium contribution will be P300 for the first Payroll cut off and for the second payroll cut off will be P300 total of P600 for the whole monthly contribution	The HDMF Premium contribution will be P300 for the first Payroll cut off and for the second payroll cut off will be P300 total of P600 for the whole monthly contribution	
10 Example:				
11 Gross Salary P10,000 Monthly Salary P20,000	The SSS Premium Contribution for the first payroll cut off will be P450 and in the second payroll cut off will be P450 total of P900 for the whole monthly contribution	The PHIC Premium contribution will be P200 for the first Payroll cut off and for the second payroll cut off will be P200 total of P400 for the whole monthly contribution	The HDMF Premium contribution will be P200 for the first Payroll cut off and for the second payroll cut off will be P200 total of P400 for the whole monthly contribution	
12 Example:				
13 Gross Salary P5,000 Monthly Salary P10,000	The SSS Premium Contribution for the first payroll cut off will be P225 and in the second payroll cut off will be P225 total of P450 for the whole monthly contribution	The PHIC Premium contribution will be P200 for the first Payroll cut off and for the second payroll cut off will be zero total of P200 for the whole monthly contribution	The HDMF Premium contribution will be P100 for the first Payroll cut off and for the second payroll cut off will be P100 total of P200 for the whole monthly contribution	

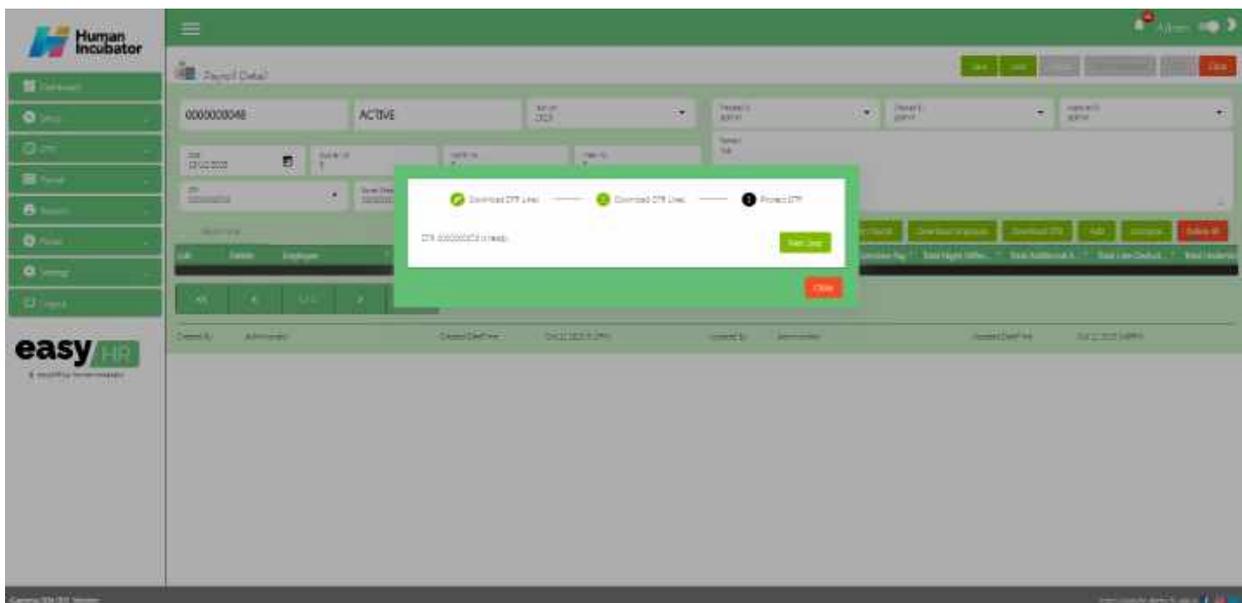
- Click **Done** button

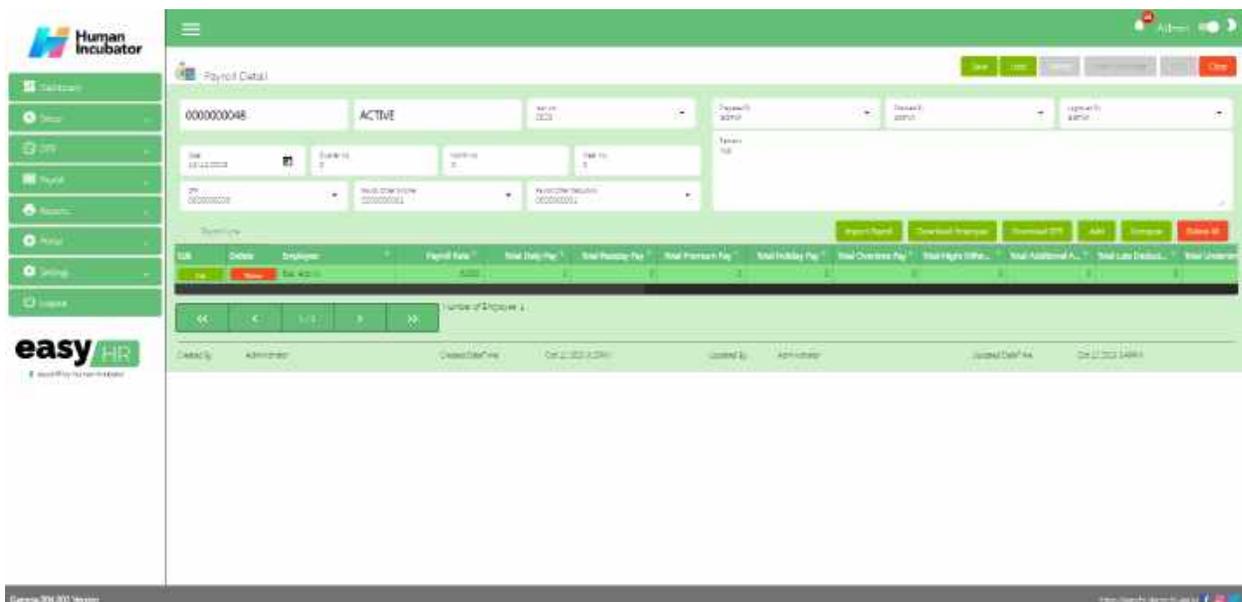




Download DTR

- Click **Download DTR** to Download all DTR of employees from the DTR module
 - Click **Next** button
 - Click **Post** button (Processing..)
 - Click **Done** button to add in payroll line





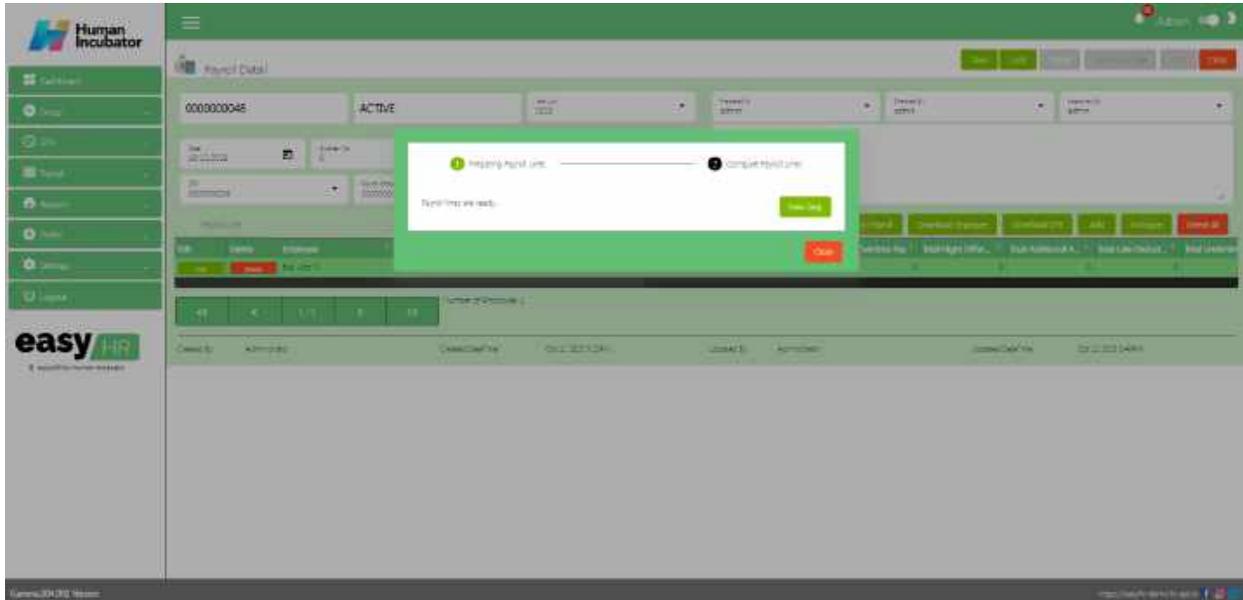
- Click **Compute** button to Compute the Payroll line
- Click **Next** button
- Click **Compute** button to Compute your mandatory deduction

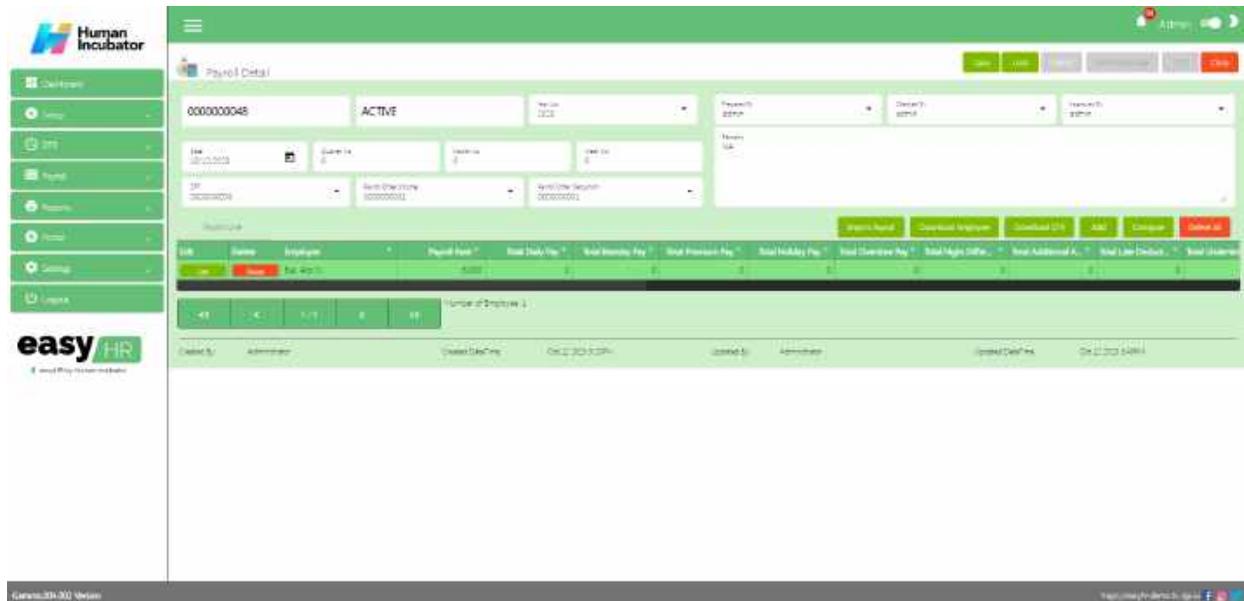
Note: The mandatory deduction will be based on the payroll rate for the first half and the deduction for the second half will deduct the remaining amount based on the monthly rate

Note: If the payroll rate exceeded 29,750 amount the SSS mandatory deduction will deduct fully in the first half but the deduction for the second half will be zero

	SSS	PHIC	HDMF Fixed Percentage	Tax
1 Rule	Based on SSS Table	2% of Gross Salary	2% of Gross Salary	Based on Table
2 Example: Gross Salary P29,750 Monthly Salary P59,500	The SSS Premium Contribution of P1,350 will be a be deducted totally in the first payroll cut off, and in the second payroll cut off the the SSS Contribution will be zero.	The PHIC Premium contribution will be P595 for the first Payroll cut off and for the second payroll cut off will be P595 total of P1,190 for the whole monthly contribution	The HDMF Premium contribution will be P595 for the first Payroll cut off and for the second payroll cut off will be P595 total of P1,190 for the whole monthly contribution	
3 Example: Gross Salary P25,000 Monthly Salary P50,000	The SSS Premium Contribution for the first payroll cut off will be P1,125 and in the second payroll cut off will be P225 total of P1350 for the whole monthly contribution	The PHIC Premium contribution will be P500 for the first Payroll cut off and for the second payroll cut off will be P500 total of P1,000 for the whole monthly contribution	The HDMF Premium contribution will be P500 for the first Payroll cut off and for the second payroll cut off will be P500 total of P1,000 for the whole monthly contribution	
4 Example: Gross Salary P20,000 Monthly Salary P40,000	The SSS Premium Contribution for the first payroll cut off will be P900 and in the second payroll cut off will be P450 total of P1350 for the whole monthly contribution	The PHIC Premium contribution will be P400 for the first Payroll cut off and for the second payroll cut off will be P400 total of P800 for the whole monthly contribution	The HDMF Premium contribution will be P400 for the first Payroll cut off and for the second payroll cut off will be P400 total of P800 for the whole monthly contribution	
5 Example: Gross Salary P15,000 Monthly Salary P30,000	The SSS Premium Contribution for the first payroll cut off will be P675 and in the second payroll cut off will be P675 total of P1350 for the whole monthly contribution	The PHIC Premium contribution will be P300 for the first Payroll cut off and for the second payroll cut off will be P300 total of P600 for the whole monthly contribution	The HDMF Premium contribution will be P300 for the first Payroll cut off and for the second payroll cut off will be P300 total of P600 for the whole monthly contribution	
6 Example: Gross Salary P10,000 Monthly Salary P20,000	The SSS Premium Contribution for the first payroll cut off will be P450 and in the second payroll cut off will be P450 total of P900 for the whole monthly contribution	The PHIC Premium contribution will be P200 for the first Payroll cut off and for the second payroll cut off will be P200 total of P400 for the whole monthly contribution	The HDMF Premium contribution will be P200 for the first Payroll cut off and for the second payroll cut off will be P200 total of P400 for the whole monthly contribution	
7 Example: Gross Salary P5,000 Monthly Salary P10,000	The SSS Premium Contribution for the first payroll cut off will be P225 and in the second payroll cut off will be P225 total of P450 for the whole monthly contribution	The PHIC Premium contribution will be P200 for the first Payroll cut off and for the second payroll cut off will be zero total of P200 for the whole monthly contribution	The HDMF Premium contribution will be P100 for the first Payroll cut off and for the second payroll cut off will be P100 total of P200 for the whole monthly contribution	

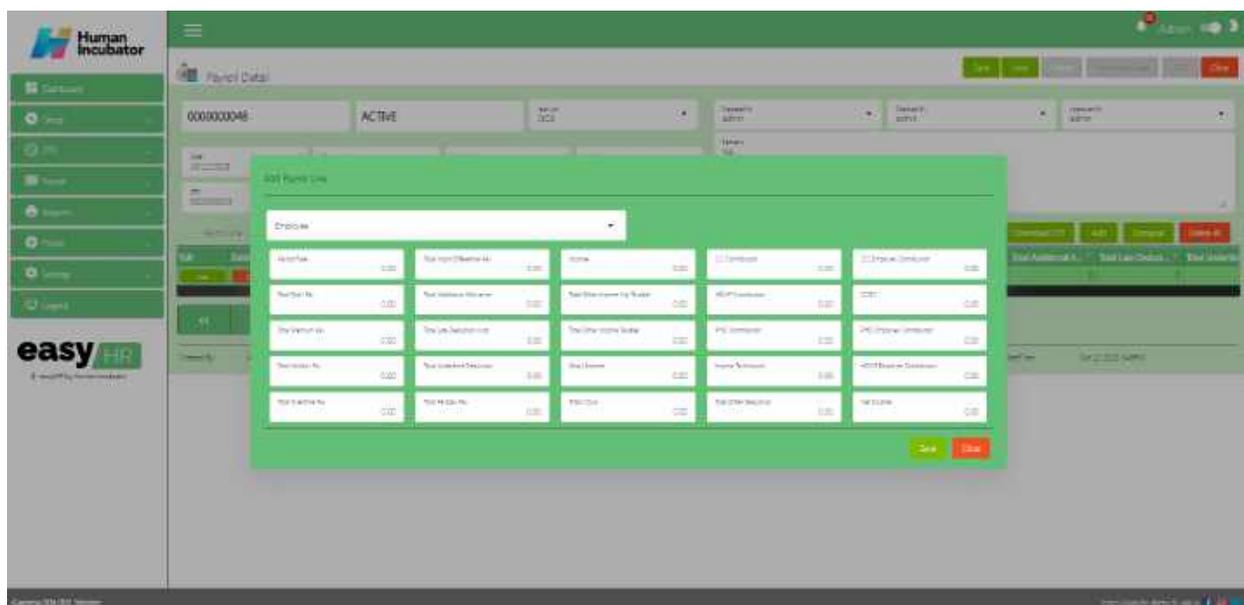
- Click **Done** button





Add

- Click **Add** button to manually add payroll line
 - Select Employee
 - Fill all the important fields in Add Payroll Line
 - Click **Save** button to add payroll line

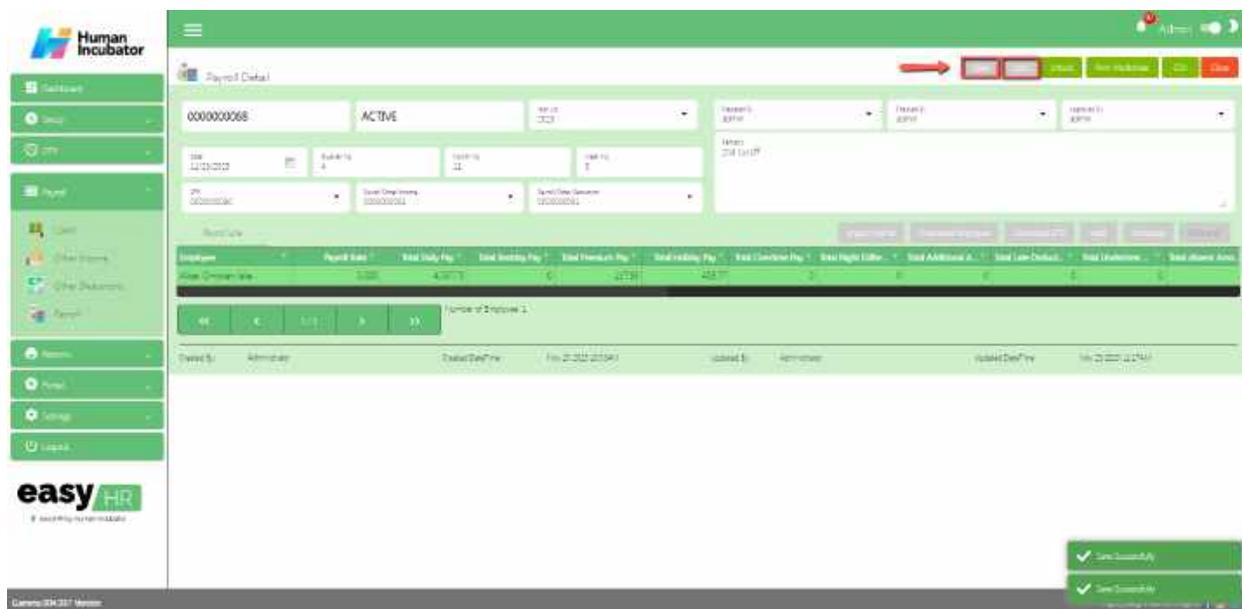


Delete All

- Click **Delete** button to delete all payroll line
 - Click **Yes** to delete

Save/Lock

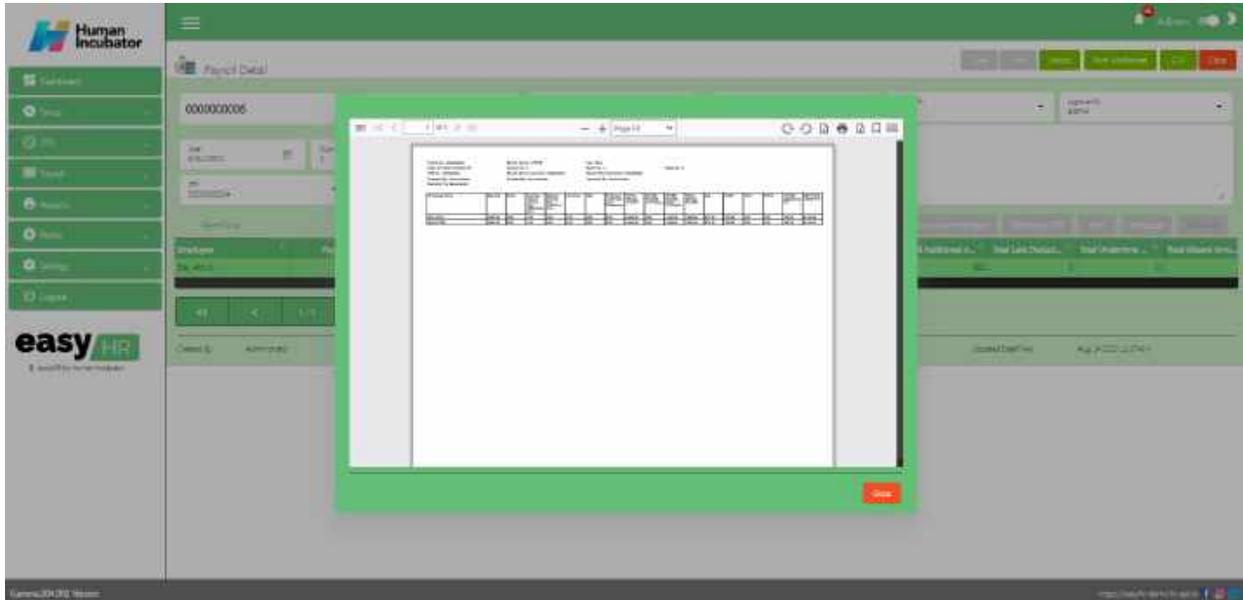
- Make sure to save/lock so that this record is displayed in the reports module.



Column Table

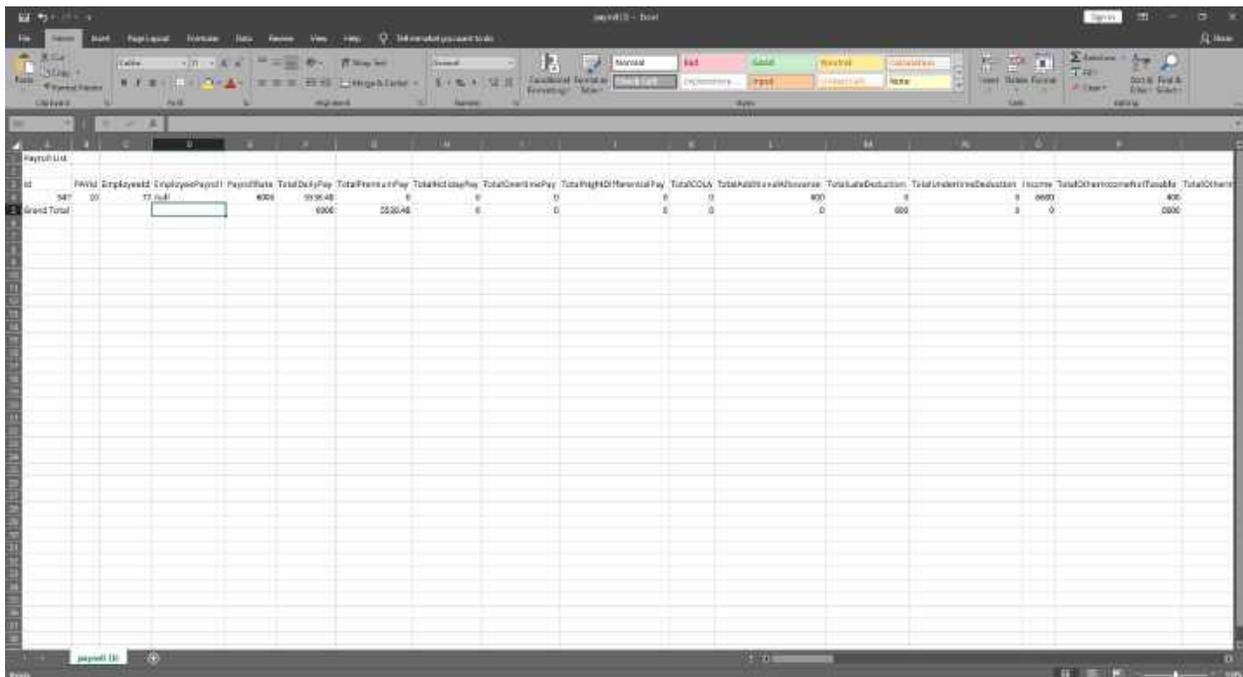
- Employee: Name of the Employee
- Payroll Rate: Payroll Rate of the Employee
- Total Daily Pay: Total Daily Pay of the Employee based of the number of working days
- Total Restday Pay: Total Rest Day Pay of the Employee
- Total Premium Pay: Total Premium Pay of the Employee (**Note: Premium Pay means Special Holiday Pay**)
- Total Holiday Pay: Total Holiday Pay of the Employee (**Note: Holiday Pay means Regular Holiday Pay**)
- Total Overtime Pay: Total Overtime of the Employee

- Total Night Differential: Total Night Differential Pay of the Employee
- Total Additional Allowance: Total Additional Allowances of the Employee
- Total Late Deduction: Total Late Deduction of the Employee
- Total Undertime Deduction: Total Undertime Deduction of the Employee
- Total Absent Amount: Total Absent Amount of the Employee
- Income: Total Income of the Employee
- Taxable Other Income: Taxable Income of the Employee
- Non-Taxable Other Income: Non-Taxable Income of the Employee
- Gross Income: Total Gross Income of the Employee (Note: If the Employee has Taxable or Non-Taxable Income it will be added in total in the Gross Income)
- SSS Contribution: SSS Contribution of the Employee
- PHIC Contribution: PHIC Contribution of the Employee
- HDMF Contribution: HDMF Contribution of the Employee
- Income Tax Amount: Income Tax Amount of the Employee
- Total Other Deductions: Total Other Deductions of the Employee
- Net Income: Total Net Income of the Employee (Note: This includes all Other Incomes and All Deductions such as Mandatory Deductions, Tax Deductions and Other Deductions of the Employee)
- SSS Employer Contribution: SSS Contribution of the Employer
- SSS EC: SSS EC of the Employer
- PHIC Employer Contribution: PHIC Contribution of the Employer
- HDMF Employer Contribution: HDMF Contribution of the Employer



Download CSV

- Click the **CSV** button to download the CSV file



The screenshot shows an Excel spreadsheet with the following data:

id	PAID	EmployeeId	EmployeePayroll	PayrollDate	TotalDailyPay	TotalPremiumPay	TotalHolidayPay	TotalOvertimePay	TotalNightDifferentialPay	TotalCOLA	TotalAssets and Allowance	TotalLateDeduction	TotalUnderminedDeductions	Income	TotalOtherIncome available	TotalOthers
547	00	77	Full	6/30	9196.48	0	0	0	0	0	0	0	0	9196.48	0	0
Grand Total:					9196.48	0	0	0	0	0	0	0	0	9196.48	0	0

Section VII: Reports

Alpha List

Overview

- Used to view a detailed report required by the **Bureau of Internal Revenue (BIR)** that contains information about employees' income, tax withholdings, and other related details for a specific tax year. It is submitted by employers as part of their compliance with tax regulations.

Alpha List

- Generate or view Report
 - Select Year Period
 - Select Company
 - Click Checkbox if Is Minimum Wage
 - Click the View button to generate a **Alpha List** report.
 - The user can **Download** this report and also can **Print**

The screenshot displays the 'Alpha List Report' interface. At the top, there are navigation buttons for 'View' and 'Close'. Below the title bar, there are search filters for 'Name' and 'Company' (set to 'AUTOMATIC'). A checkbox for 'Minimum Wage' is also visible. The main content area shows a detailed table for 'Schedule 1 - Alphabetical Employees (Detailed and Consolidated, BIR Form No. 5318)'. The table is divided into two main sections: 'PRESENT EMPLOYEES' and 'PREVIOUS EMPLOYEES'. Each section has a 'TABLE' header and a grid of data columns including employee name, address, relationship, dates of employment, various compensation types (Basic, 13th Month, etc.), and tax withholdings. The 'TOTALS' row at the bottom of each section summarizes the data. The interface also includes a 'Generate Report' button and a 'Download' link.

Form 2316

Overview

- To view a detailed report and It serves as proof of the employee's total compensation and taxes withheld during a specific calendar year. This form is required by the **Bureau of Internal Revenue (BIR)** for compliance with income tax regulations.

Form 2316

- Generate or view Report
 - Select Year Period
 - Select Company
 - Select employee if you want to view a specific employee
 - Click the View button to generate a **Form 2316** report.
 - The user can **Download** this report and also can **Print**

The screenshot displays the 'Form 2316 Report' interface. The sidebar on the left contains navigation options: Dashboard, Salary, BIR, Report, Report, Role, Setting, and Logout. The main content area shows a detailed report for employee 'Cerna, Jayden Ian' from 'AUTOWEL INC.' for the year 2021. The report includes fields for employee information, company details, and a table of earnings and deductions.

Item	Amount
21 Compensation (Gross)	125,000.04
22 Compensation (Net)	0.00
23 Compensation (Gross)	13,100.00
24 Compensation (Net)	0.00
25 Compensation (Gross)	0.00
26 Compensation (Net)	0.00
27 Compensation (Gross)	10,418.67
28 Compensation (Net)	0.00
29 Compensation (Gross)	0.00
30 Compensation (Net)	0.00
31 Compensation (Gross)	0.00
32 Compensation (Net)	0.00
33 Compensation (Gross)	145,811.71
34 Compensation (Net)	0.00
35 Compensation (Gross)	0.00
36 Compensation (Net)	0.00
37 Compensation (Gross)	0.00
38 Compensation (Net)	0.00
39 Compensation (Gross)	0.00
40 Compensation (Net)	0.00
41 Compensation (Gross)	0.00
42 Compensation (Net)	0.00
43 Compensation (Gross)	0.00
44 Compensation (Net)	0.00
45 Compensation (Gross)	0.00
46 Compensation (Net)	0.00
47 Compensation (Gross)	0.00
48 Compensation (Net)	0.00
49 Compensation (Gross)	0.00
50 Compensation (Net)	0.00
51 Compensation (Gross)	0.00
52 Compensation (Net)	0.00
53 Compensation (Gross)	0.00
54 Compensation (Net)	0.00
55 Compensation (Gross)	0.00
56 Compensation (Net)	0.00
57 Compensation (Gross)	0.00
58 Compensation (Net)	0.00
59 Compensation (Gross)	0.00
60 Compensation (Net)	0.00
61 Compensation (Gross)	0.00
62 Compensation (Net)	0.00
63 Compensation (Gross)	0.00
64 Compensation (Net)	0.00
65 Compensation (Gross)	0.00
66 Compensation (Net)	0.00
67 Compensation (Gross)	0.00
68 Compensation (Net)	0.00
69 Compensation (Gross)	0.00
70 Compensation (Net)	0.00
71 Compensation (Gross)	0.00
72 Compensation (Net)	0.00
73 Compensation (Gross)	0.00
74 Compensation (Net)	0.00
75 Compensation (Gross)	0.00
76 Compensation (Net)	0.00
77 Compensation (Gross)	0.00
78 Compensation (Net)	0.00
79 Compensation (Gross)	0.00
80 Compensation (Net)	0.00
81 Compensation (Gross)	0.00
82 Compensation (Net)	0.00
83 Compensation (Gross)	0.00
84 Compensation (Net)	0.00
85 Compensation (Gross)	0.00
86 Compensation (Net)	0.00
87 Compensation (Gross)	0.00
88 Compensation (Net)	0.00
89 Compensation (Gross)	0.00
90 Compensation (Net)	0.00
91 Compensation (Gross)	0.00
92 Compensation (Net)	0.00
93 Compensation (Gross)	0.00
94 Compensation (Net)	0.00
95 Compensation (Gross)	0.00
96 Compensation (Net)	0.00
97 Compensation (Gross)	0.00
98 Compensation (Net)	0.00
99 Compensation (Gross)	0.00
100 Compensation (Net)	0.00

Mandatory Reports

Overview

- Mandatory Reports are used to view or generate all mandatory deductions just like SSS, HDMF and PHIC.

Mandatory Report

- Generate or view reports
 - Select Report (SSS, HDMF and PHIC)
 - Select Period (Year)
 - Select Company
 - Select Month number
 - Click the View button to generate a mandatory report.
 - The user can **Download** this report and also can **Print**

The screenshot displays the 'Mandatory Report' interface in the Human Incubator system. The report is generated for the year 2024 and the company EASTHE DOBO COMPANY, INC. The table shows the following data:

Item	SSS No.	Report No.	Amount	Employee Name	Employee Code	SS	TS	SHAM Total
As. Multi	123	202400001	5,000.00	2024	2024	0.00	0.00	0.00
		202400002	5,000.00	2024	2024	0.00	0.00	0.00
Total			10,000.00			0.00	0.00	0.00

Download CSV

- Click the **CSV** button to download the CSV file

Name	TIN	Date of Birth	SSN	Payroll No.	Income	Employee Share	Employer Share	GC Total
BAL. ATD NI	24 12312	12/15/1991	123	45	4000	270	570	294
BAL. ATD NI	24 12313	12/25/1991	123	44	4000	270	570	294
TOTAL						1008	1140	

Demographics

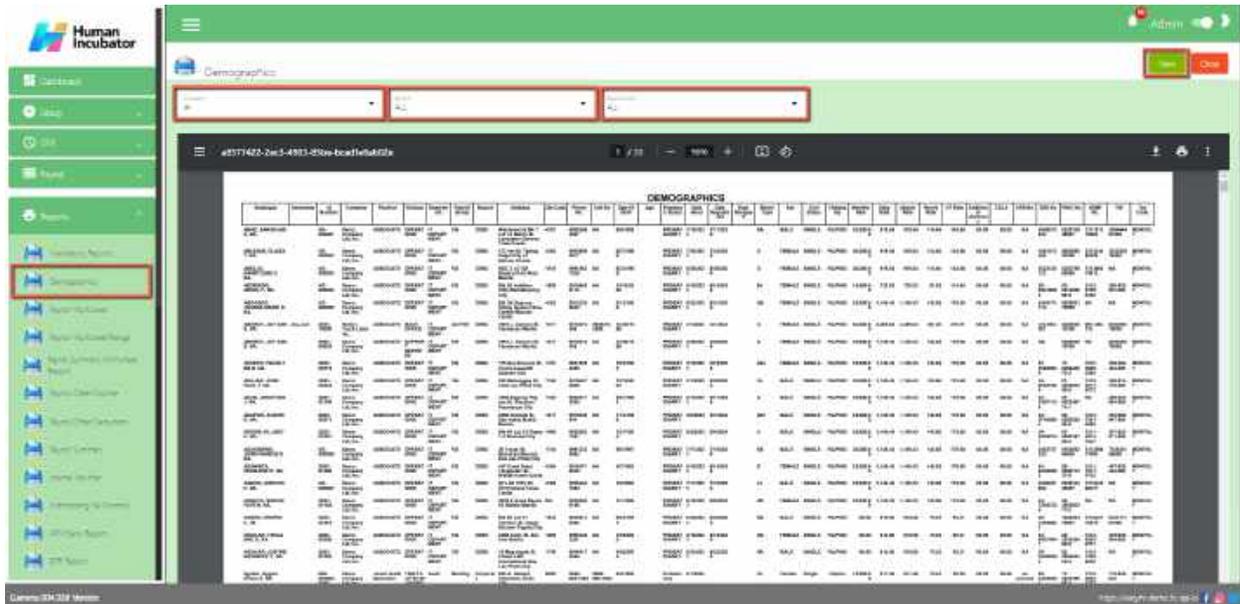
Overview

- Demographics is used to provide information about the characteristics and statistics of a population. Demographics typically include details about age, gender, race, ethnicity, income, education, occupation, marital status, and other factors that help describe and understand a group of people.

Demographics

- Generate or view reports
 - Select Company (The user can select all companies)
 - Select Branch (The user can select all branches)
 - Select Payroll Group (The user can select all the payroll group)

- Click the View button to generate a demographics report.



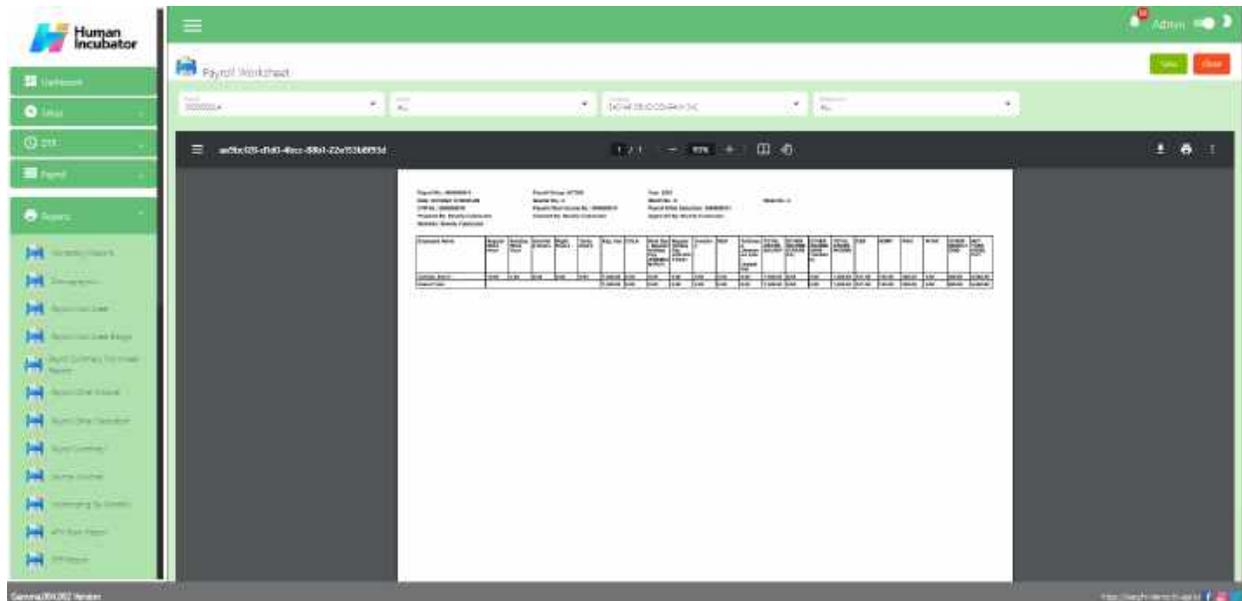
Payroll Worksheet

Overview

- Payroll Worksheet used to calculate and summarize the payroll for their employees. It's an essential tool for ensuring that employees are accurately compensated for their work, and it helps the employer comply with tax and labor laws.

Payroll Worksheet

- Generate or view reports
 - Select Payroll number
 - Select Branch (The user can select all Branches)
 - Select Company
 - Select Department (The user can select all Departments)
 - Click the View button to generate a Payroll worksheet report.



- The user can **Download** this report and also can **Print**.

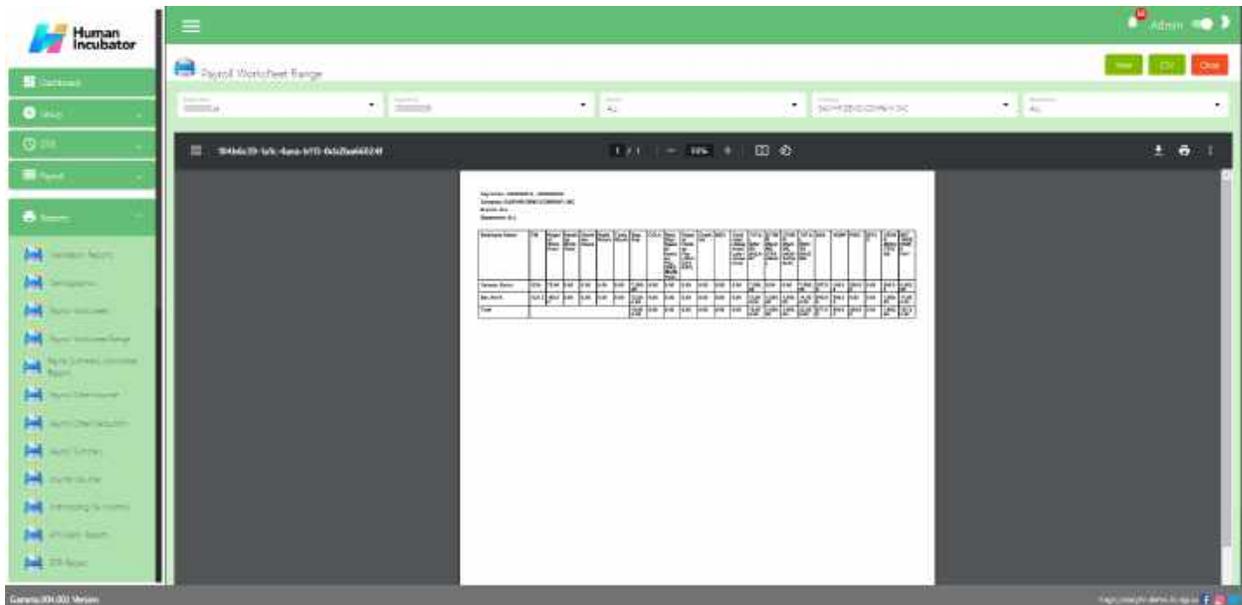
Payroll Worksheet Range

Overview

- Payroll Worksheet Range typically refers to the range of dates or time period covered by a specific payroll worksheet. This range is essential for accurately calculating and summarizing the payroll for a set period.

Payroll Worksheet Range

- Generate or view reports
 - Select Payroll Start
 - Select Payroll End
 - Select Branch (The user can select all Branches)
 - Select Company
 - Select Department (The user can select all Departments)
 - Click the View button to generate a Payroll worksheet range report.



- The user can **Download** this report and also can **Print**.
- Click the **CSV** button to download the CSV file

Employee	TIN	Regular Work Hour	Restday Work Hour	Overtime hours	Night Hours	Tardy Hours	Regular Pay	COA	Restday On Special Holiday Pay (Premium Pay)	Regular Holiday Pay/OLDRPHW	Overtime N/D	Total Tax	TOTAL GROSS SALARY	OTHER INCOM TAXABLE
Calabria, Ruffy	8294	72	0	0	0	0	7,000.00	0	0	0	0	0	7,000.00	0
San, Aza N. (ms)	8292	168	0	0	0	0	12,000.00	0	0	0	0	0	12,000.00	1,300.00

Payroll Other Income Report

Overview

- Payroll other income report that provides a summary of additional sources of income that employees receive in addition to their regular wages or salary. This report is used by businesses and organizations to track and account for various types of supplemental income that may affect an employee's overall compensation and tax liabilities.

Payroll Other Income Report

- Generate or view report
 - Select Payroll number
 - Select Department (The user can select all Departments)
 - Click the View button to generate a Payroll other income report.

Payroll Other Income Report

Report Date: 10/10/2023

Report For: 10/10/2023

Report Status: ACTIVE

ITEM NAME	AMOUNT
Rel. Ann. Pl.	800.00
Tax Allowance	1,000.00
Job Allowance	1,800.00
GRAND TOTAL	1,800.00

- The user can **Download** this report and also can **Print**.

Payroll Other Deduction Report

Overview

- Payroll Other Deduction Report provides a summary of deductions from an employee's pay that are not related to taxes, Social Security, or Medicare. These deductions can include items like insurance premiums, retirement contributions, union dues, or any other voluntary or mandatory deductions specified by the employee or employer. The report helps businesses and organizations track and account for various types of deductions that impact an employee's net pay and financial obligations.

Payroll Other Deduction Report

- Generate or view report
 - Select Payroll number
 - Select Other Deduction name (The user can select all other deductions)
 - Select Department (The user can select all departments)
 - Click **View** button to generate Payroll Other Deduction Report.

Payroll Other Deduction Report
Payroll No.: 002-00469014
Payroll Date: 09/10/2023
Payroll Group: ACTIVE
Other Deduction: ALL

Department	Branch	Employee Name	Position	Deduction	Total
DEPARTMENT	MANILA	Carolina, Ruth	TECH STAFF	400.00	400.00
DEPARTMENT	Cebu	Alfonso, Ruel	TECH STAFF	400.00	400.00
DEPARTMENT	Cebu	Salvador, Dennis	TECH STAFF	400.00	400.00
DEPARTMENT	MANILA	Salvador, Dennis	TECH STAFF	400.00	400.00
Grand Total					1,600.00

- The user can **Download** this report and also can **Print**.

Payroll Summary

Overview

- Payroll Summary provides a concise summary of the financial aspects of a company's payroll process. It typically includes key information related to employee compensation, taxes, deductions, and other payroll-related expenses for a specific period, such as a month or a pay cycle. This overview is essential for both accounting and management purposes, helping businesses keep track of their labor costs and ensure compliance with relevant regulations.

Payroll Summary

- Generate or view report
 - Select Payroll Group
 - Select Payroll Code number
 - Select Company
 - Select Department (The User can select all departments)
 - Click the View button to generate a Payroll Summary report.

EASYHR DEMO COMPANY, INC
Payroll Summary Report
Payroll No.: 2023-09040004
Payroll Date: 18/14/2023
Payroll Group: ACTIVE

No. of Pks	Department	Brand	Position	Total Working Days	Gross Pay	Salary Credit	Net Total
1	ACCOUNTING	HR	ACCOUNTANT	10	10000.00	0.00	10000.00
1	ACCOUNTING	HR	ACCOUNTANT	10	10000.00	0.00	10000.00
Grand Total					86,621.00	00	86,621.00

- The user can **Download** this report and also can **Print**.

Journal Voucher

Overview

- Journal Voucher is used in accounting to record financial transactions. It serves as a temporary or preliminary entry, which is later adjusted or corrected before it is posted to the general ledger. Journal vouchers are commonly used when a transaction doesn't fit neatly into the standard accounting entries or when there is a need for additional information or approval before finalizing the transaction.

Journal Voucher

- Generate or view report
 - Select Payroll Code number
 - Select Company
 - Click the View button to generate a journal voucher report.

Account	Debit	Credit
Salaries and Wages	94,950.00	0.00
Other Income	300.00	0.00
GSS Expense (Employer Contribution + GC)	1,300.00	0.00
PHIC Expense (Employer Contribution)	200.00	0.00
MCRAIF Expense (Employer Contribution)	300.00	0.00
Diary	0.00	33,045.33
GSS Payable	0.00	1,810.00
PHIC Payable	0.00	400.00
MCRAIF Payable	0.00	400.00
RYMAY Payable	0.00	0.00
Other Deductions	0.00	1,000.00
	96,958.33	96,958.33

- The user can **Download** this report and also can **Print**.
- The user can Integrate to **EasyFS** system

Withholding Tax Monthly

Overview

- Withholding Tax is a tax collected by a payer (typically an employer) from the payment made to a payee (usually an employee or a vendor) and remitted to the government on behalf of the payee. It's a mechanism used to ensure that individuals and businesses pay their income taxes or other applicable taxes throughout the year.

Withholding Tax Monthly

- Generate or view report
 - Select Year
 - Select Company
 - Select Month

Withholding Tax Monthly						
2020						
October						
RASVIVA GROUP COMPANY, INC.						
Name	TIN	Payroll No.	Tax Code	Net Salary	Other Income	Tax
Mr. Paul M.	12112	0000000000	0	5,000.00	0.00	0.00
		0000000000	0	4,750.00	0.00	0.00
		0000000000	0	5,000.00	0.00	0.00
			Sub Total	15,000.00	0.00	0.00
Default: None	1234	0000000000	0	8,000.00	0.00	0.00
			Sub Total	23,000.00	0.00	0.00
Total				23,000.00	0.00	0.00

- The user can **Download** this report and also can **Print**.

Download CSV

- Click the **CSV** button to download the CSV file.

ATM Bank Report

Overview

- ATM Bank report is a summary of the transactions and activities associated with a bank's network of ATMs over a specific period, such as a day, week, month, or year. These reports are generated to monitor the performance, usage, and financial aspects of ATM operations.

ATM Bank Report

- Generate or view report
 - Select Payroll Code number
 - Select Company name
 - Select Department (The User can select all departments)
 - Select Bank
 - Click the View button to generate a journal voucher report.

EASTHR DEMO COMPANY, INC
ATM Bank Report
Payroll No.: 2023-202300000000
Payroll Date: 10/14/2023
Payroll Group: ACTIVE

NA - Dubai Canada	9,281.88	1
NA - David Kakkai	43,702.78	1
Report		
Total	52,984.66	2

- The user can **Download** this report and also can **Print**.

Payslip Report

Overview

- Payslip Report is a document that provides a detailed summary of an employee's earnings, deductions, and net pay for a specific pay period. It is typically issued by an employer to an employee along with their salary or wage payment. The payslip serves as a record of an employee's compensation and is important for both financial management and legal compliance.

Payslip Report

- Generate or view report
 - Select Payroll Group
 - Select Payroll code number
 - Select Branch (The user can select all branches)
 - Select Department
 - Select All employees (The user can select one employee)
 - Click the **View** button to generate a Payslip report.

EMPLOYEE NAME	EMPLOYEE ID	BRANCH	DEPARTMENT	POSITION	COMPANY	BRANCH	EMPLOYEE TYPE	EMPLOYEE STATUS	EMPLOYEE DATE	EMPLOYEE DATE
JUAN DELA CRUZ	001	001	001	001	001	001	001	001	001	001
EMPLOYEE SUMMARY EMPLOYEE NAME: JUAN DELA CRUZ EMPLOYEE ID: 001 BRANCH: 001 DEPARTMENT: 001 POSITION: 001 COMPANY: 001 BRANCH: 001 EMPLOYEE TYPE: 001 EMPLOYEE STATUS: 001 EMPLOYEE DATE: 001 EMPLOYEE DATE: 001										
PAYROLL SUMMARY PAYROLL PERIOD: 01/01/2024 - 01/31/2024 GROSS SALARY: 10,000.00 DEDUCTIONS: 2,000.00 NET PAY: 8,000.00										
EMPLOYEE EARNINGS EMPLOYEE NAME: JUAN DELA CRUZ EMPLOYEE ID: 001 BRANCH: 001 DEPARTMENT: 001 POSITION: 001 COMPANY: 001 BRANCH: 001 EMPLOYEE TYPE: 001 EMPLOYEE STATUS: 001 EMPLOYEE DATE: 001 EMPLOYEE DATE: 001										
EMPLOYEE DEDUCTIONS EMPLOYEE NAME: JUAN DELA CRUZ EMPLOYEE ID: 001 BRANCH: 001 DEPARTMENT: 001 POSITION: 001 COMPANY: 001 BRANCH: 001 EMPLOYEE TYPE: 001 EMPLOYEE STATUS: 001 EMPLOYEE DATE: 001 EMPLOYEE DATE: 001										

- The user can **Download** this report and also can **Print**.

Payroll Other Income Payslip

Overview

- Payroll Other Income Payslip is a document that provides a summary of an employee's earnings, specifically focusing on additional or supplementary income beyond their regular salary or wages. This report details various types of "other income" or compensation that an employee might receive. It is an important component of the overall payslip, helping employees understand their complete compensation package.

Payroll Other Income Payslip

- Generate or view report
 - Select Payroll code number
 - Select Branch
 - Click the **View** button to generate a payroll other income payslip report

Payroll Other Income Payslip

Employee: Branch:

Employee No. 2023-0000000000
Other Income Date 10/12/2023
Admin. Christian JARA

Other Income	Amount
Wife Allowance	500.00
Total	500.00

Other Income No. 2023-0000000000
Other Income Date 10/12/2023
Non-Admin.

Other Income	Amount
ADDITIONAL ALLOWANCE	500.00
Total	500.00

Other Income No. 2023-0000000000
Other Income Date 10/12/2023
Christian, Ruel

Other Income	Amount
ADDITIONAL ALLOWANCE	12,000.00
Total	12,000.00

- The user can **Download** this report and also can **Print**.

SSS Loan

Overview

- SSS Loan Report is a document that provides a summary of loans obtained by an individual from the Social Security System (SSS) in the Philippines. The SSS is a government agency that provides social security benefits, including loans, to qualified members. The loan report helps individuals and borrowers keep track of their loan transactions, including details such as the loan type, amount, payments, balances, and the status of the loan.

SSS Loan

- Generate or view report
 - Select Year
 - Select Company
 - Select Month
 - Click the **View** button to generate an SSS loan report.

SSS No.	Employee Name	Payroll No.	Loan Amount	Priority	Total
103	Esa, Jho N		300.00	0.00	300.00
1034	Cabrera, Mark		300.00	0.00	300.00
GRAND TOTAL:					300.00

- The user can **Download** this report and also can **Print**.

Download CSV

- Click the **CSV** button to download the CSV file.

SSS Calamity Loan

Overview

- SSS Calamity Loan Report is a document that provides a summary of loans obtained by individuals from the SSS in the Philippines in response to a declared calamity or disaster. The SSS offers this type of loan to help its members cope with financial difficulties resulting from natural disasters or emergencies. The Calamity Loan Report helps borrowers keep track of their loan transactions, including details such as the loan amount, payments, balances, and the status of the loan, specifically related to calamity loans.

SSS Calamity Loan

- Generate or view report
 - Select Year
 - Select Company
 - Select Month
 - Click the **View** button to generate the report.

SSS No.	Employee Name	Payment No.	Loan Amount	Penalty	Total
024	Cabata, Gresh	04/08	0.00	0.00	0.00
GRAND TOTAL:					0.00

- The user can **Download** this report and also can **Print**.

Download CSV

- Click the **CSV** button to download the CSV file.

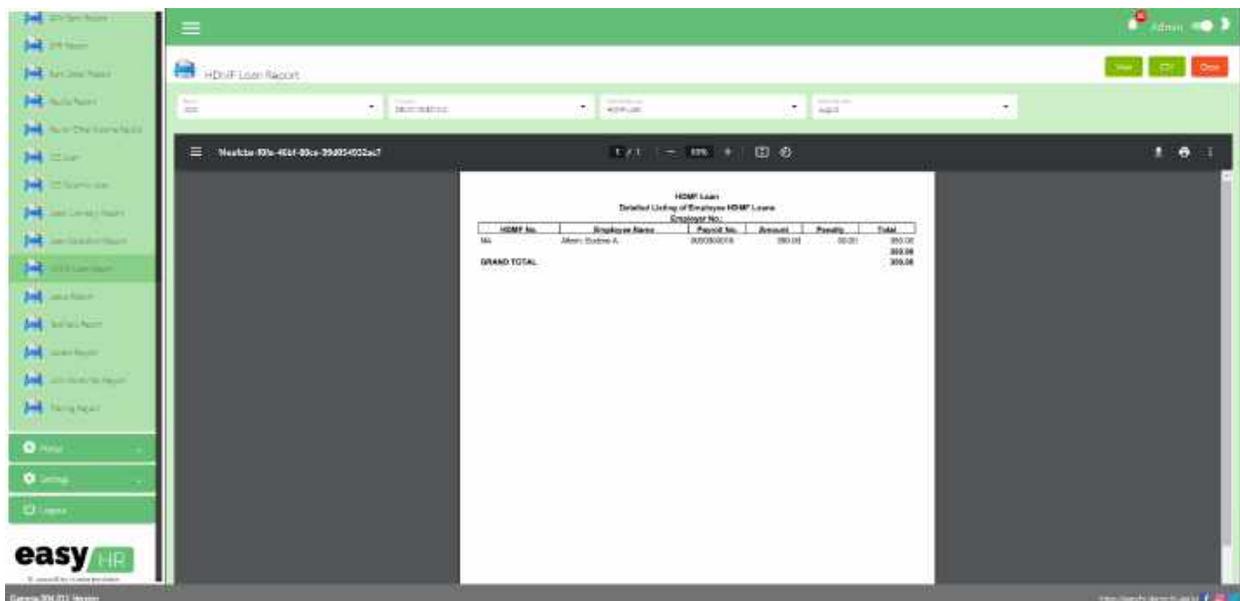
HDMF Loan Report

Overview

- HDMF Loan Report is a document that provides a summary of loans obtained by individuals from the HDMF in the Philippines. The HDMF, also known as Pag-IBIG Fund, offers various loan programs to help its members acquire homes, finance home improvements, or address their housing needs. The HDMF Loan Report is important for borrowers to keep track of their loan transactions, including details such as the loan type, amount, payments, balances, and the status of the loan.

HDMF Loan Report

- Generate or view report
 - Select Year
 - Select Company
 - Select HDMF Loan
 - Select Month
 - Click the **View** button to generate a HDMF loan report.



- The user can **Download** this report and also can **Print**.

Download CSV

- Click the **CSV** button to download the CSV file.

ID/ID Number	Employee Name	Parent Number	Standalone	Penalty	Total
NA	Alfon, Katura A.	18	208	0	208
Grand Total					208

Leave Reports

Overview

- Leave reports used in human resources and payroll management to record and track employee leaves, which can include vacation time, sick leave, personal days, and other types of paid or unpaid time off. These reports help organizations and HR departments monitor employee leave balances, ensure compliance with labor laws and company policies, and maintain accurate payroll records.

Leave Reports

- Generate or view report
 - Select Leave Report
 - Select Year
 - Select Payroll Group
 - Click the **View** button to generate a loan report.

Employee	Leave Type	Leave Used	Leave Credit	Balance
Carolina Perez	Sick Leave	08.00	0.00	08.00
Carolina Perez	Vacation Leave	48.00	0.00	48.00
Carolina Perez	Vacation Leave	0.00	05.00	05.00
Christian John Alvar	Sick Leave	0.00	19.00	19.00
Christian John Alvar	Sick Leave	0.00	01.00	01.00
Christian John Alvar	Vacation Leave	0.00	01.00	01.00
Christian John Alvar	Vacation Leave	0.00	01.00	01.00
Christian John Alvar	Vacation Leave	0.00	01.00	01.00
Christian John Alvar	Vacation Leave	0.00	01.00	01.00
Melissa Gutierrez	Sick Leave	08.00	0.00	08.00
Melissa Gutierrez	Vacation Leave	0.00	01.00	01.00
Ramsey Angellina	Sick Leave	08.00	0.00	08.00
Ramsey Angellina	Sick Leave	0.00	01.00	01.00
Barbara Lopez	Sick Leave	08.00	0.00	08.00
Barbara Lopez	Sick Leave	0.00	01.00	01.00
Barbara Lopez	Vacation Leave	08.00	0.00	08.00

- The user can **Download** this report and also can **Print**.

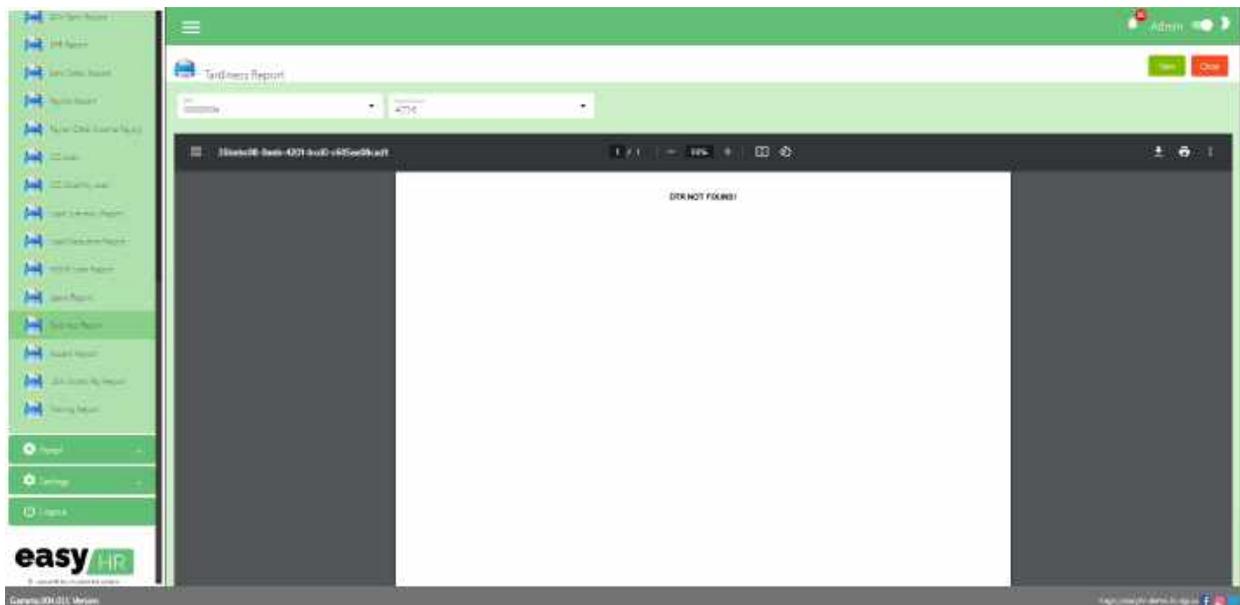
Tardiness Report

Overview

- Tardiness report is used in human resources and workplace management to monitor and track instances of employee tardiness. Tardiness refers to employees arriving late for work, meetings, or other scheduled activities. These reports help organizations and HR departments identify patterns of tardiness, address attendance issues, and implement appropriate measures to improve punctuality.

Tardiness Report

- Generate or view report
 - Select DTR code number
 - Select Payroll Group
 - Click the **View** button to generate a tardiness report.



- The user can **Download** this report and also can **Print**.

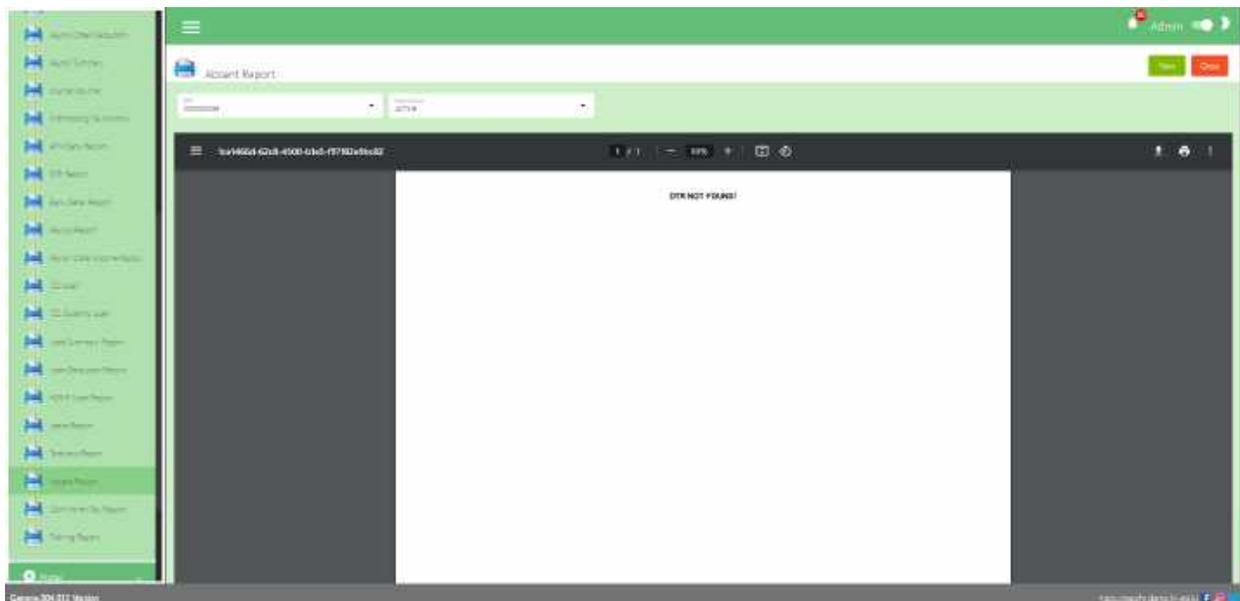
Absent Report

Overview

- Absent Report is a document used in human resources and workplace management to monitor and track instances of employee absences. These reports help organizations and HR departments identify patterns of absenteeism, ensure compliance with leave policies, and implement appropriate measures to manage attendance effectively.

Absent Report

- Generate or view report
 - Select DTR code number
 - Select Payroll Group
 - Click the **View** button to generate an Absent report.



- The user can **Download** this report and also can **Print**.

13th Month Pay Report

Overview

- 13th Month Pay Report is a document used in many countries, especially in the Philippines, to provide an overview of the 13th month pay or year-end bonus granted to employees. The 13th month pay is a mandatory benefit or bonus that is typically equivalent to one-twelfth (1/12) of an employee's annual basic salary. This report is essential for both employers and employees to document and understand the distribution of this bonus.

13th Month Pay Report

- Generate or view report
 - Select Company
 - Select Payroll Code number from
 - Select Payroll Code number to
 - Select All employees (The user can select one employee)
 - Click the **View** button to generate a 13th month pay report.

Employee	Gross Salary	13th Month
ADMIN		
Oliver, Christian John	16,700.00	1,391.67
Soriano, J.J. Leticia A.	0.00	0.00
Total	16,700.00	1,391.67
IT DEPARTMENT		
Reyes, Cassel R.	10,000.00	833.33
D. Jerusalem, Beverly	25,000.00	2,083.33
Soriano, Angelica	10,000.00	833.33
Jane, Chen	12,000.00	1,000.00
Urbina, Jedd	17,000.00	1,416.67
Total	74,000.00	6,116.67
Grand Total	90,700.00	7,508.34

- The user can **Download** this report and also can **Print**.

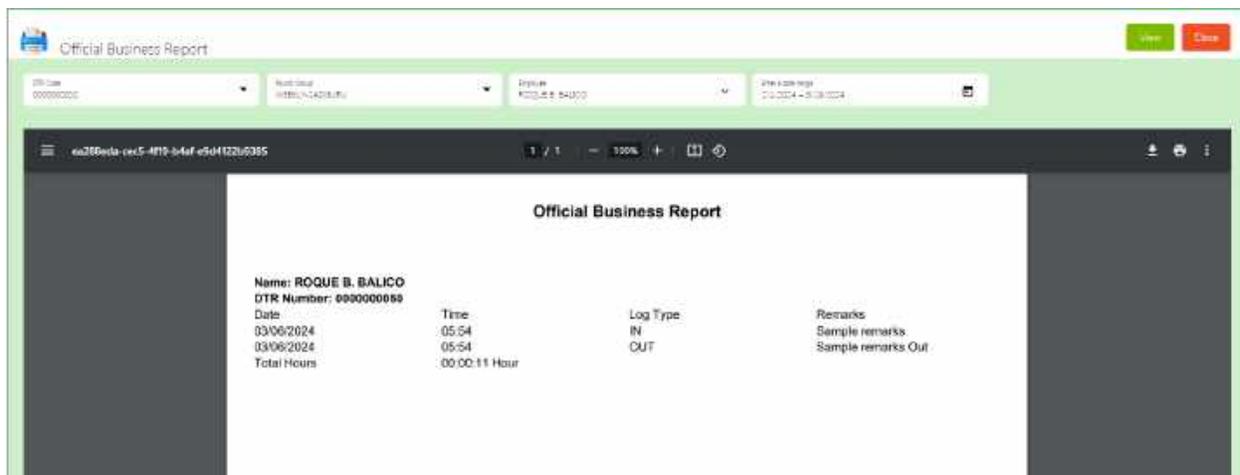
Official Business Report

Overview

- Official Business Report is a document report generated by easyHR to provide comprehensive information on various aspects related to workforce operations. to record and document their authorized absence from work for official business purposes. This report typically includes details about the purpose of the leave, the dates of absence, and any relevant information regarding the business-related activities that were conducted during the leave period.

Official Business Report

- Generate or View Report
 - Select DTR Code
 - Select Payroll Group
 - Select Employee
 - Enter the Date Range
 - Click **View** Button to generate the report



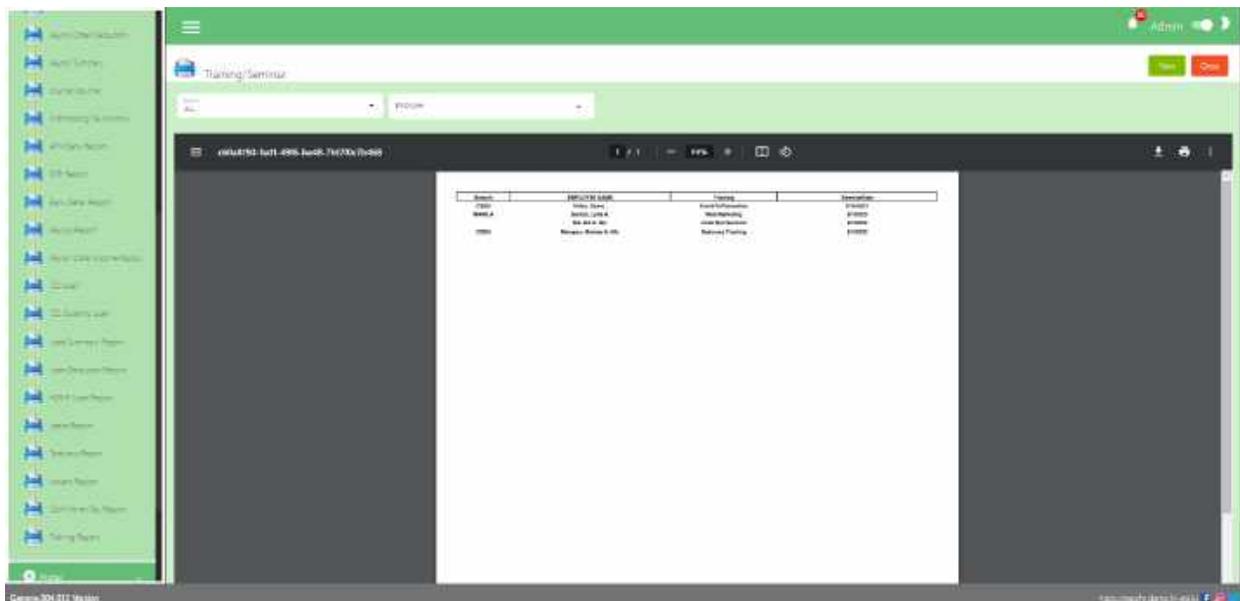
Training/Seminar

Overview

- Training/Seminar is a document that provides a comprehensive overview of a training session, workshop, seminar, or similar educational event. These reports serve as a valuable tool for documenting the details of the training, seminar, or workshop, assessing its effectiveness, and providing information for future reference and decision-making.

Training/Seminar

- Generate or view report
 - Select Branch
 - Select All employees (The user can select one employee)
 - Click the **View** button to generate a training/seminar report.



- The user can **Download** this report and also can **Print**.

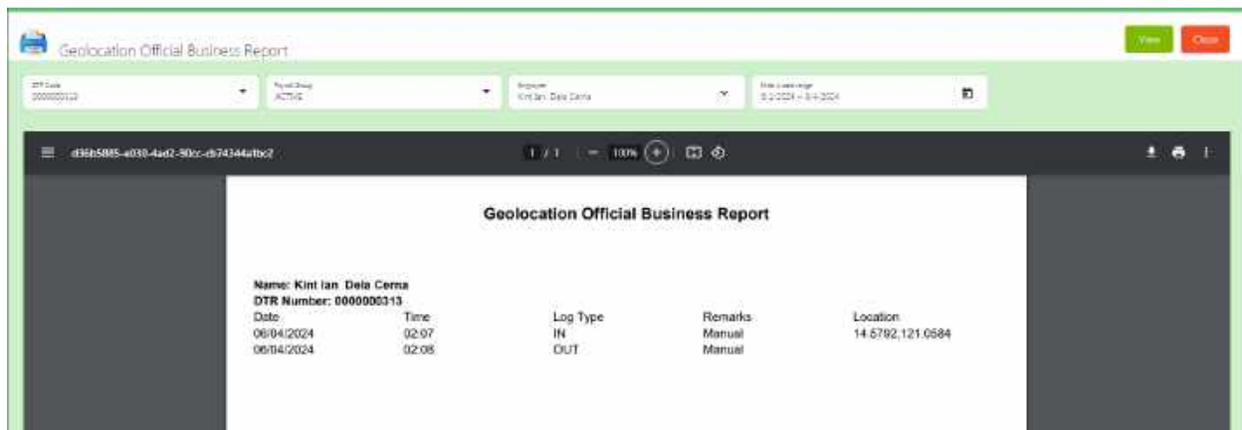
Geolocation Official Business Report

Overview

Geolocation Official Business Report is a document report generated by easyHR to provide comprehensive information on various aspects related to workforce operations. to record and document their authorized absence from work for official business purposes. This report typically includes details about the purpose of the leave, the dates of absence and its exact coordinates on the map, and any relevant information regarding the business-related activities that were conducted during the leave period.

Geolocation Official Business Report

- Generate or view report
 - Select DTR Code
 - Select Payroll Group
 - Select Employee
 - Enter Date Range



- The user can **Download** this report and also can **Print**.

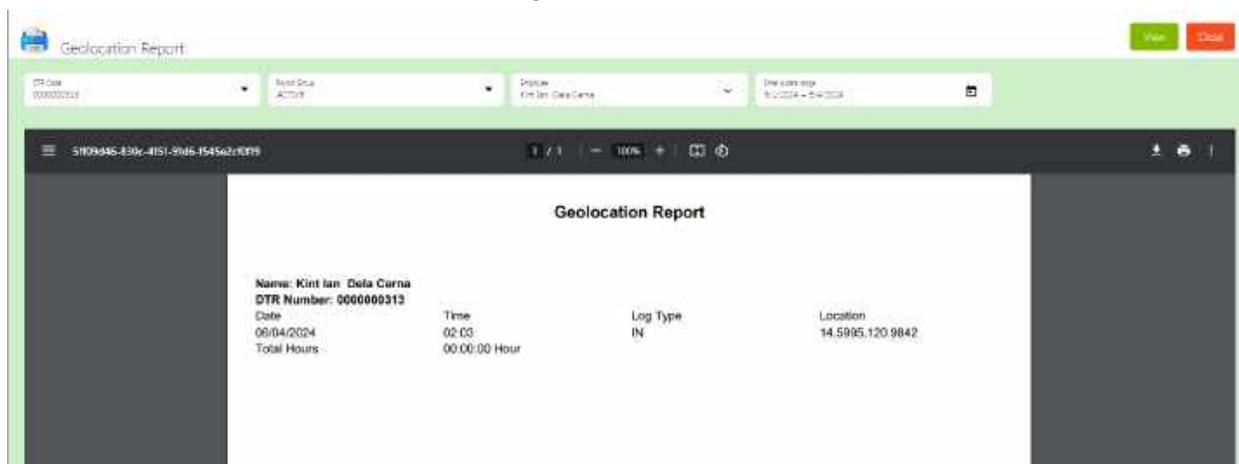
Geolocation Report

Overview

A Geolocation Report is a document that details geographic locations where the time In and Out of the Employee is recorded which includes location data (latitude and longitude), time stamps, date, and log types.

Geolocation Report

- Generate or view report
 - Select DTR Code
 - Select Payroll Group
 - Select Employee
 - Enter Date Range



- The user can **Download** this report and also can **Print**.

DTR Image Report

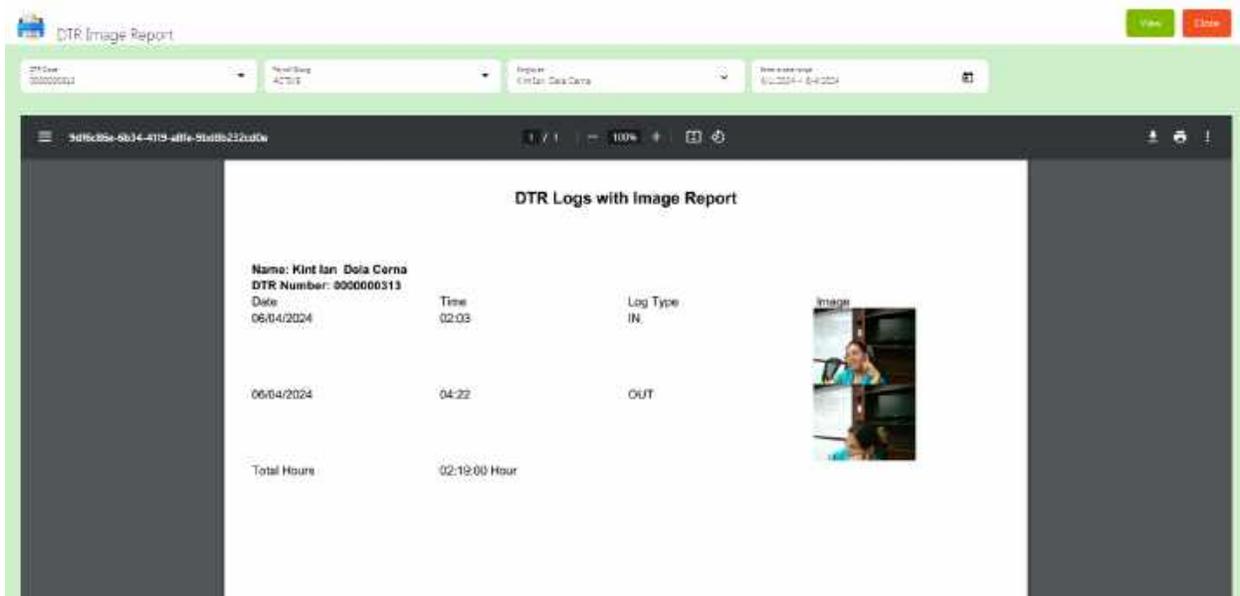
Overview

A DTR (Daily Time Record) Image Report is a concise document summarizing employees' attendance and work hours with employees' images, often captured by the camera. It provides a visual representation of each employee's clock-in and clock-out times, helping employers track

attendance, monitor punctuality, and ensure compliance with company policies. These reports streamline payroll processing and facilitate efficient workforce management by offering an accurate record of daily activities.

DTR Image Report

- Generate or view report
 - Select DTR Code
 - Select Payroll Group
 - Select Employee
 - Enter Date Range

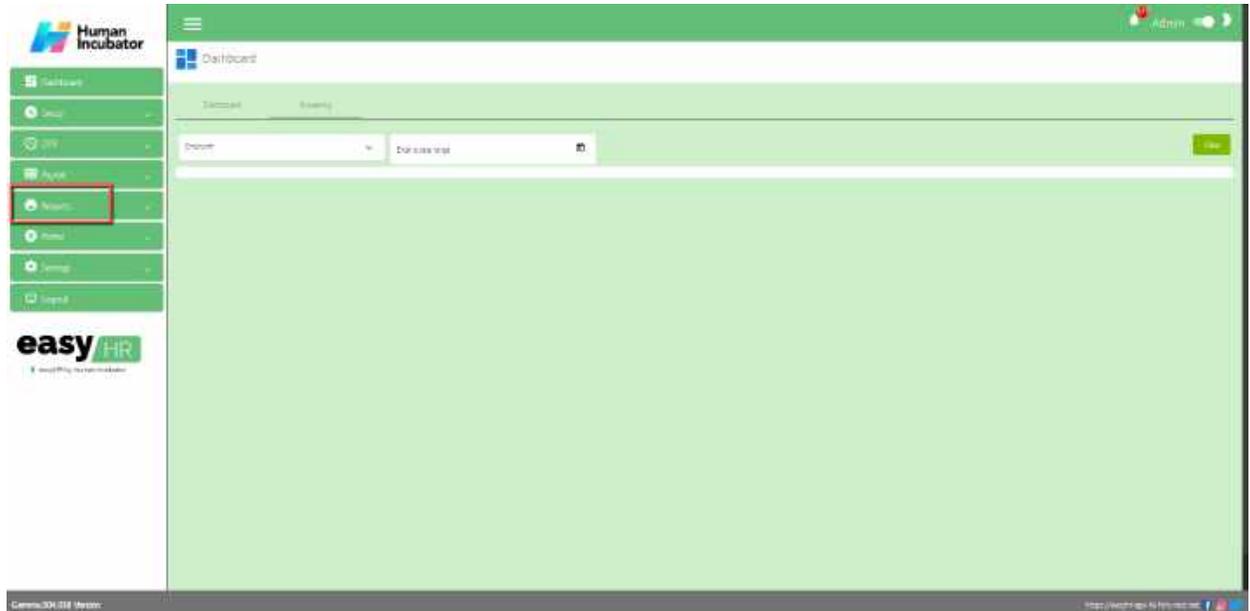


- The user can **Download** this report and also can **Print**.

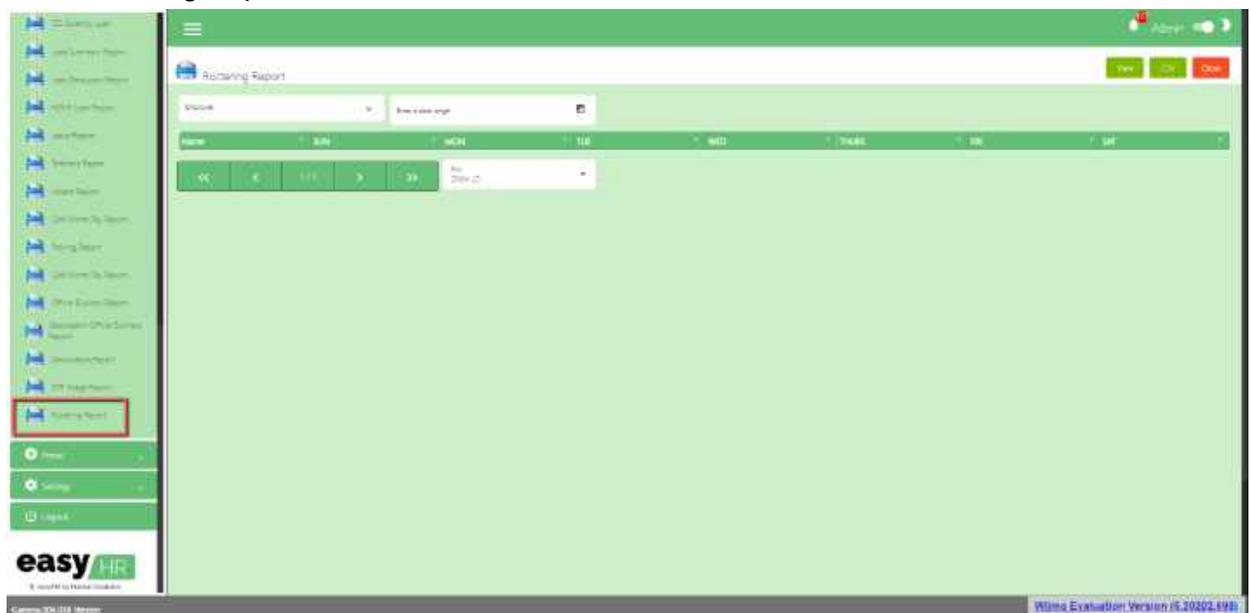
Rostering Report

Steps

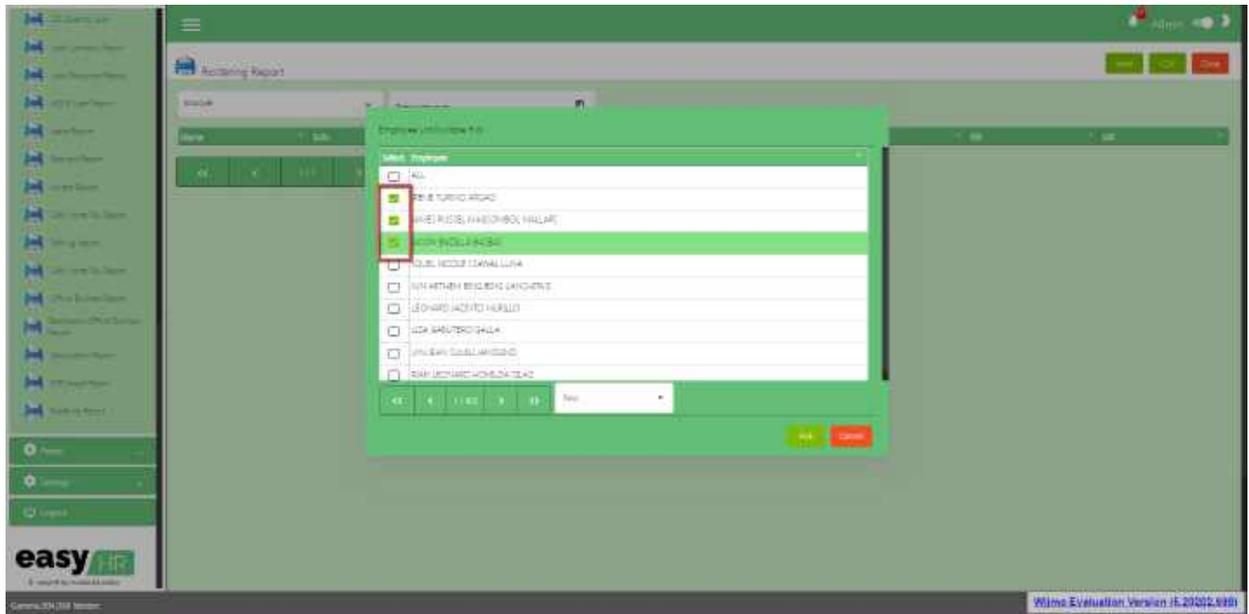
1. Go to Reports Module



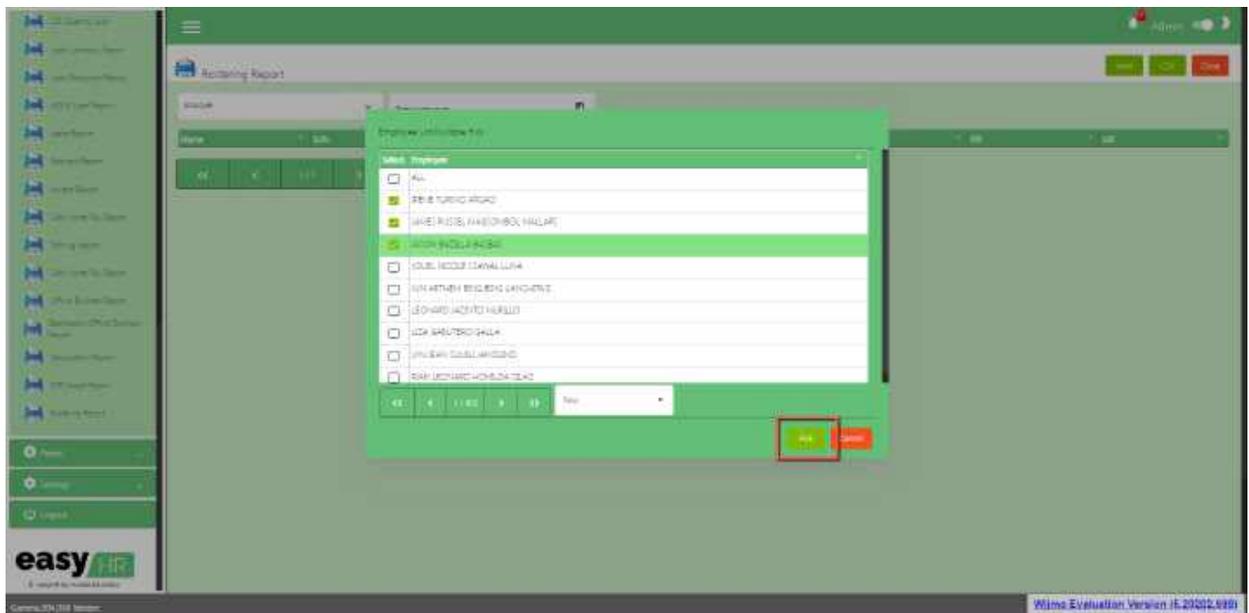
2. Click Rostering Report



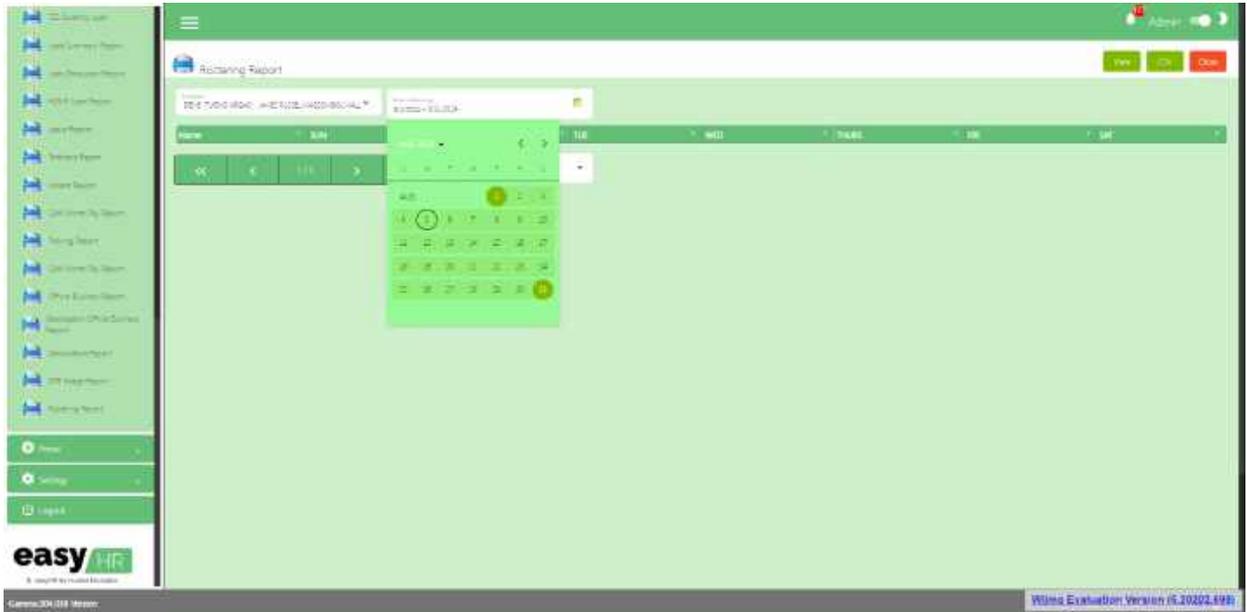
3. Click checkbox to Select one or multiple employees



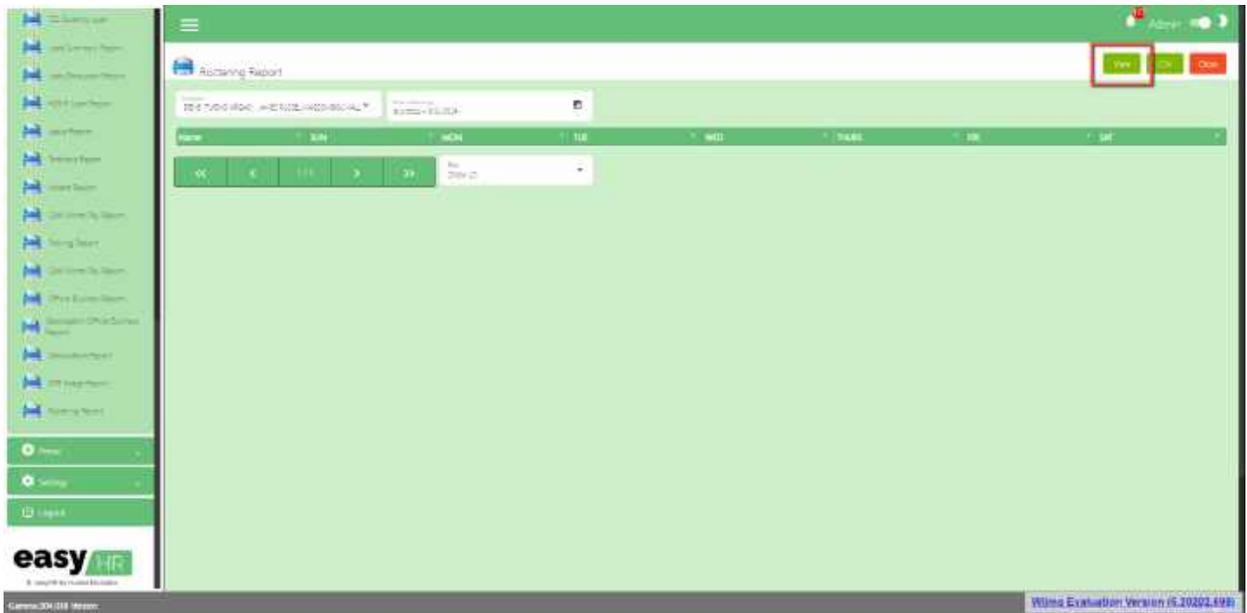
4. Click Pick



5. Select Date Range



6. Click View



7. Click CSV to download CSV file of this report

8. Scroll sideways to view the rest of the dates

9. You can check for the legends at the end of the scroll

The screenshot shows a calendar interface with a legend box in the top right corner. The legend is titled 'Legend' and contains three entries:

- Event Day (represented by a grey square)
- Party (represented by a green square)
- Six Leases (represented by a red square)

The calendar grid shows dates from Wednesday 08/23 to Saturday 08/26. The dates 08/24, 08/25, and 08/26 are highlighted in green, indicating they are 'Party' days. The dates 08/24, 08/25, and 08/26 also have a grey background, indicating they are 'Event Days'. The legend box is highlighted with a red border.

Section VIII: Portal

Employee Portal

Overview

- Employee Portal is used to provide employees with access to a wide range of information, tools, and self-service features related to their employment and the organization they work for and also the employee can view the DTR logs, Payslip, and 13th month.

Employee Portal

- Shows the information of the employee and also can view the leave balances
- The Employee can Change Password
- There are 9 tabs of employee portal
 - DTR logs
 - Overtime Application
 - Leave Application
 - Change Shift
 - DTR
 - Payroll
 - Other Income Payslip
 - Loan
 - 13th Month

The screenshot shows the Employee Portal interface. On the left is a profile card for 'Jorge Torres' with a placeholder image. To the right is a table of employee details:

Employee Code	000000024	ID No.	000000024	Employee No.	000000024
Surname	De Asa	Company	EASHE DEMO COMPANY INC		
Address	12345 CITY	Branch	Cebu		
Location	1234	Position	ASSOCIATE		
Job Title	1234	Employment Status	ACTIVE		
Accountance	Accountance Date	Sanction	Leave Balance		

At the bottom, there are navigation tabs: My Log, My Application, Leave Application, Change Shift, DTR, Payroll, Other Income Payslip, Loan, and 13th Month.

DTR logs

- In the **DTR logs** tab the employee can **Add** DTR logs.

ID#	Number	Year	Date	Date Type	In	Out
88000000000000000000	88000000000000000000	2024	01/16/2024	REGULAR W.	8:00AM	6:00PM
88000000000000000000	88000000000000000000	2024	01/17/2024	REGULAR W.	8:00AM	6:00PM
88000000000000000000	88000000000000000000	2024	01/18/2024	REGULAR W.	8:00AM	6:00PM
88000000000000000000	88000000000000000000	2024	01/19/2024	REGULAR W.	8:00AM	6:00PM
88000000000000000000	88000000000000000000	2024	01/20/2024	REGULAR W.	8:00AM	6:00PM
88000000000000000000	88000000000000000000	2024	01/21/2024	REGULAR W.	8:00AM	6:00PM
88000000000000000000	88000000000000000000	2024	01/22/2024	REGULAR W.	8:00AM	6:00PM
88000000000000000000	88000000000000000000	2024	01/23/2024	REGULAR W.	8:00AM	6:00PM
88000000000000000000	88000000000000000000	2024	01/24/2024	REGULAR W.	8:00AM	6:00PM

- **Assumption:** The employee already clicked the **Add** button on the upper right corner in the DTR logs Tab.
 - Select DTR Application number
 - Select Attendance Type
 - Input Remarks
 - Click Start Camera
 - Click Capture Image
 - Click **Save** button to add DTR log with Geolocation and Captured Image.

Note: Make sure the DTR number should not be locked by the admin so that employees can access the DTR Application number in DTR logs.

DTR logs

DTR Application Number
0000000313

Date
06/03/2024

Attendance Type

Time
13:42:44

Remarks

In
10:11AM

Out

Attendance Type (OB)

Time
13:42:44

In

Out

Start Camera

Capture Image

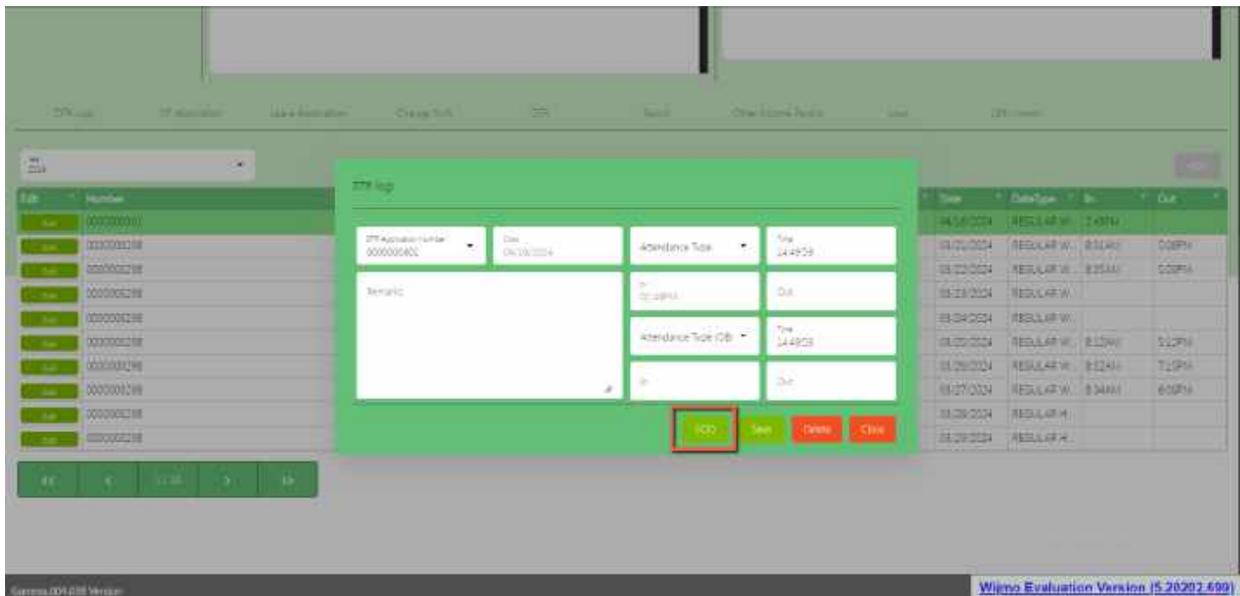
- Additionally once you click **Save** the **Add** button will be temporarily disabled,

Edt.	Number	Year	Date	DateType	In	Out
add	0000000313	2024	06/03/2024	REGULAR W.	000000	000000
add	0000000298	2024	06/02/2024	REGULAR W.	000000	000000
add	0000000298	2024	06/17/2024	REGULAR W.	000000	000000
add	0000000298	2024	06/18/2024	REGULAR W.	000000	000000
add	0000000298	2024	06/19/2024	REGULAR W.	000000	000000
add	0000000298	2024	06/20/2024	REGULAR W.	000000	000000
add	0000000298	2024	06/21/2024	REGULAR W.	000000	000000
add	0000000298	2024	06/22/2024	REGULAR W.	000000	000000
add	0000000298	2024	06/23/2024	REGULAR W.	000000	000000
add	0000000298	2024	06/24/2024	REGULAR W.	000000	000000

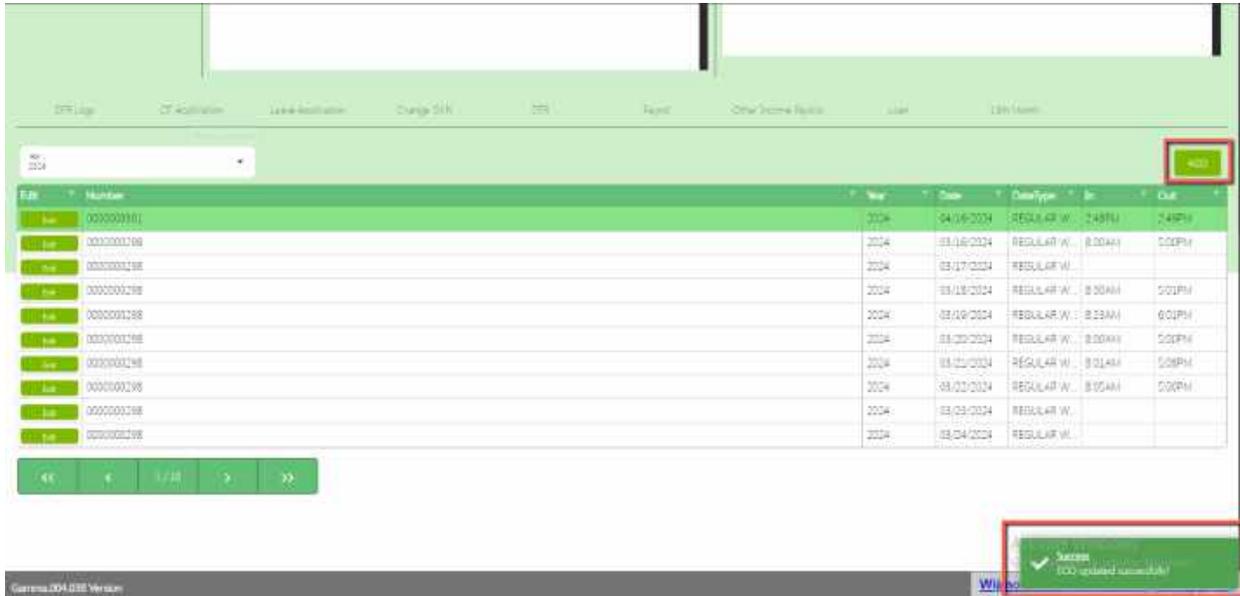
- in order for the Add button to be enabled again an **EOD** must perform first.

EOD (End of Day)

- DTR Logs
- Click **Edit**
- Click **EOD**



- After clicking the **EOD** button there is a message that “EOD Updated Successfully!”, and the **Add** button will be enabled.



OT Application

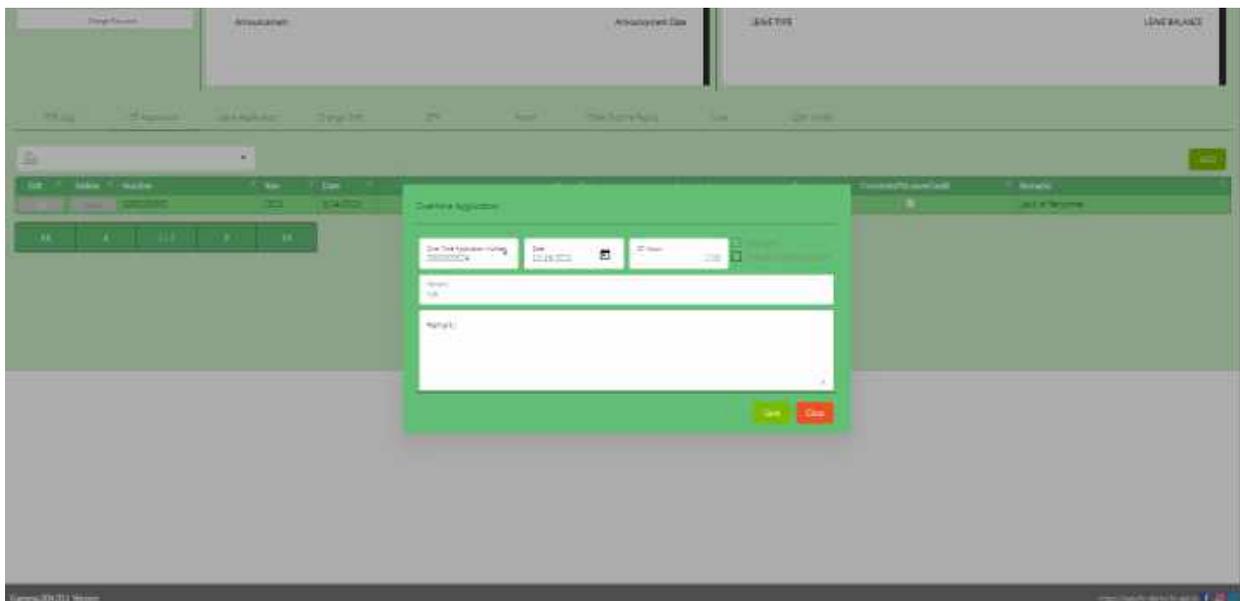
- In the **OT Application** tab the employee can **Add** overtime application.



- **Assumption:** The employee already clicked the **Add** button on the upper right corner in the OT application tab.

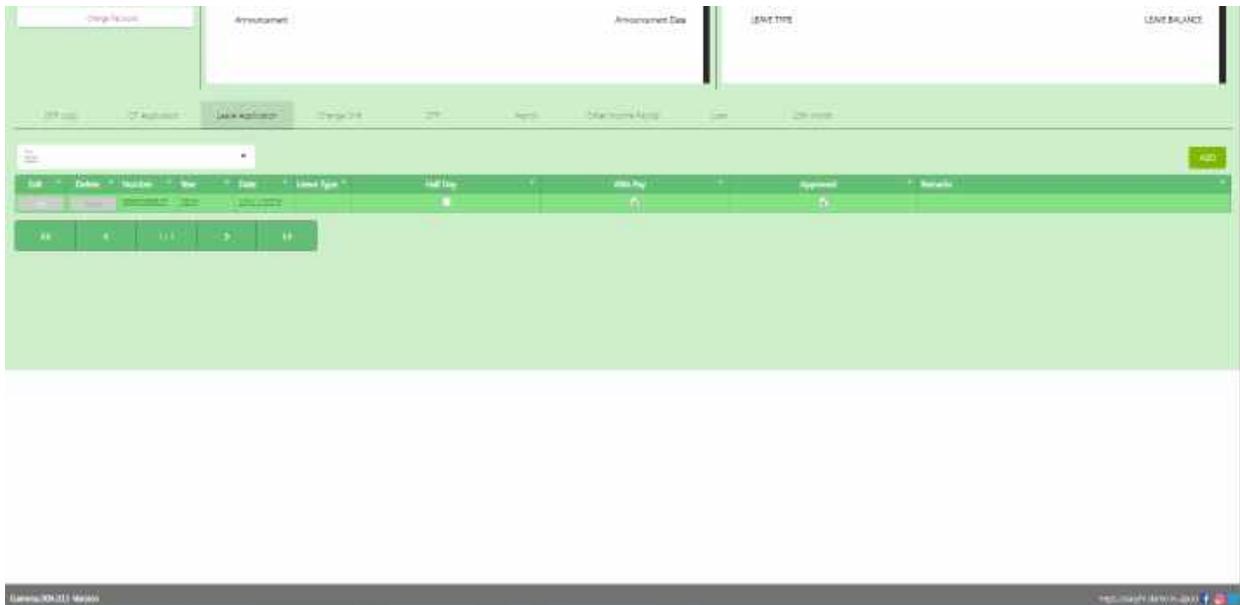
Note: Make sure the OT number should not be locked by the admin so that employees can access the Overtime Application number in Overtime Application.

- Select Overtime Application number
- Select Date
- Input OT Hours
- Input Remarks
- The Employee can Check the Checkbox **Convert to Offset Credits**
- Click **Save** button to add in overtime application employee table.



Leave Application

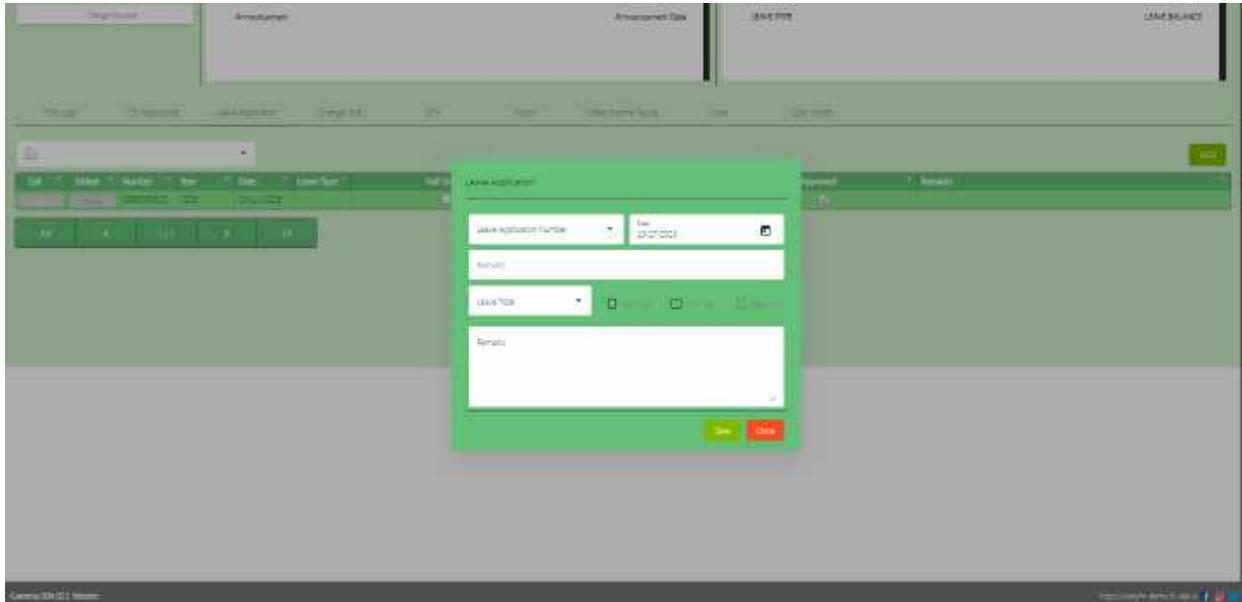
- In the **Leave Application** tab the employee can **Add** a leave application.



- **Assumption:** The employee already clicked the **Add** button on the upper right corner in the Leave application tab.

Note: Make sure the LA number should not be locked by the admin so that employees can access the Leave Application number in Leave Application.

- Select Leave Application number
- Select Date
- Select Leave Type
- Check the **Checkbox** if **Half Day** or **With Pay**
- Input Remarks
- Click **Save** button to add in the leave application employee table.



Change Shift

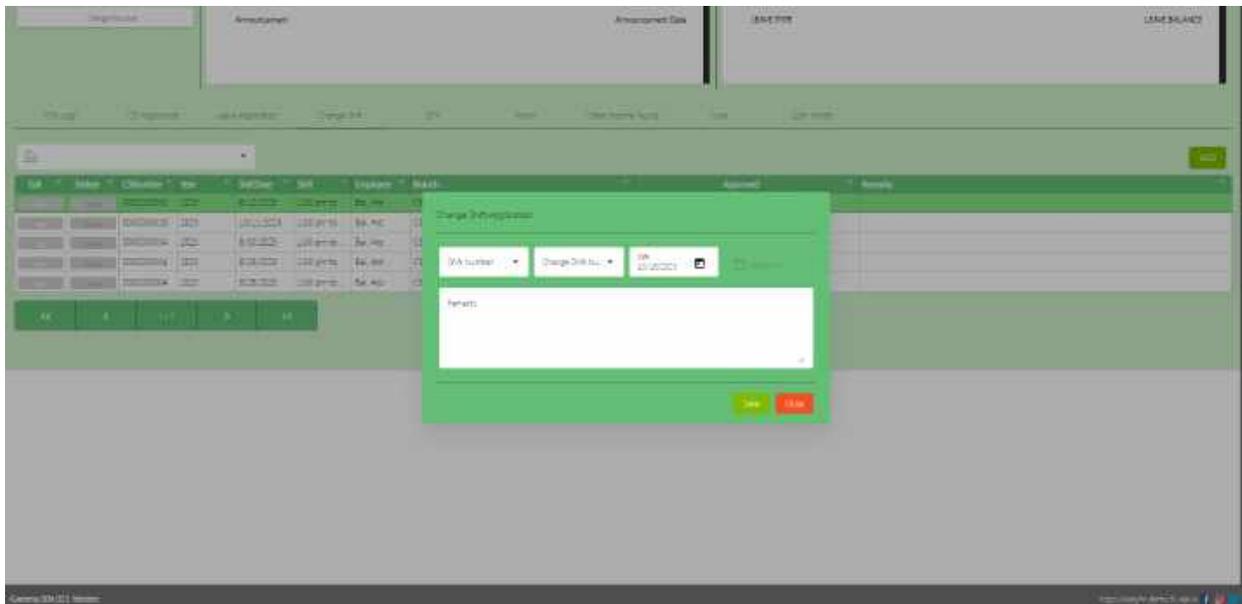
- In the **Change Shift** tab the employee can **Add** a Change Shift.



- **Assumption:** The employee already clicked the **Add** button on the upper right corner in the Change Shift tab.

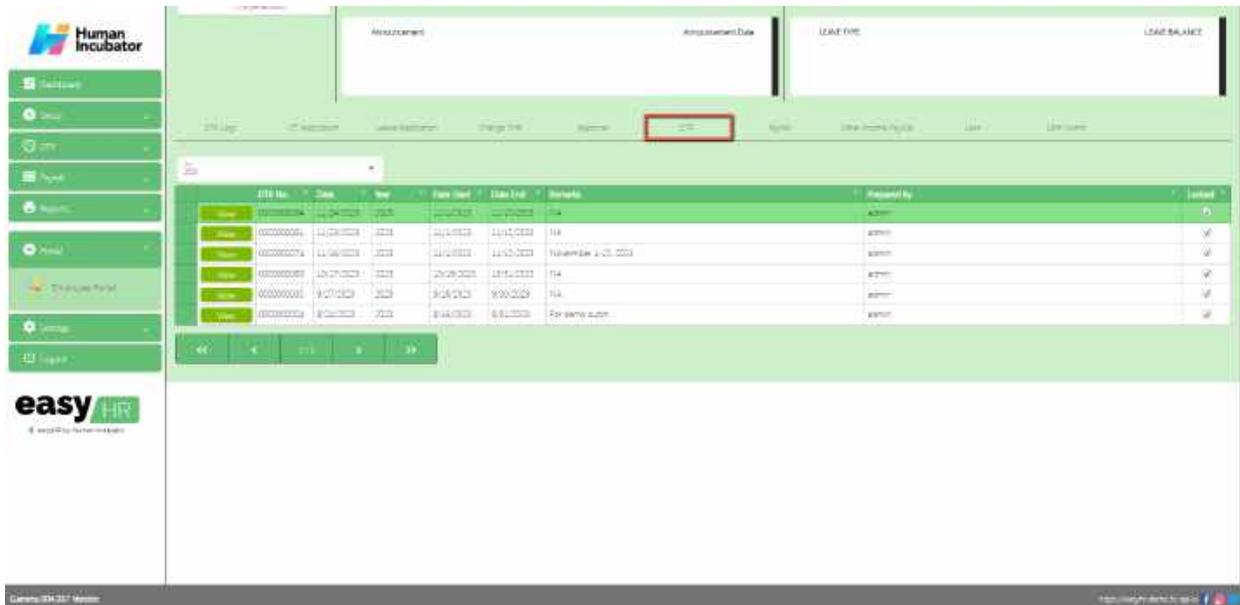
Note: Make sure the CS number should not be locked by the admin so that employees can access the Change Shift number in Change Shift.

- Select Shift number
- Select Change Shift number
- Select Date
- Input Remarks
- Click **Save** button to add in the Change Shift employee table.

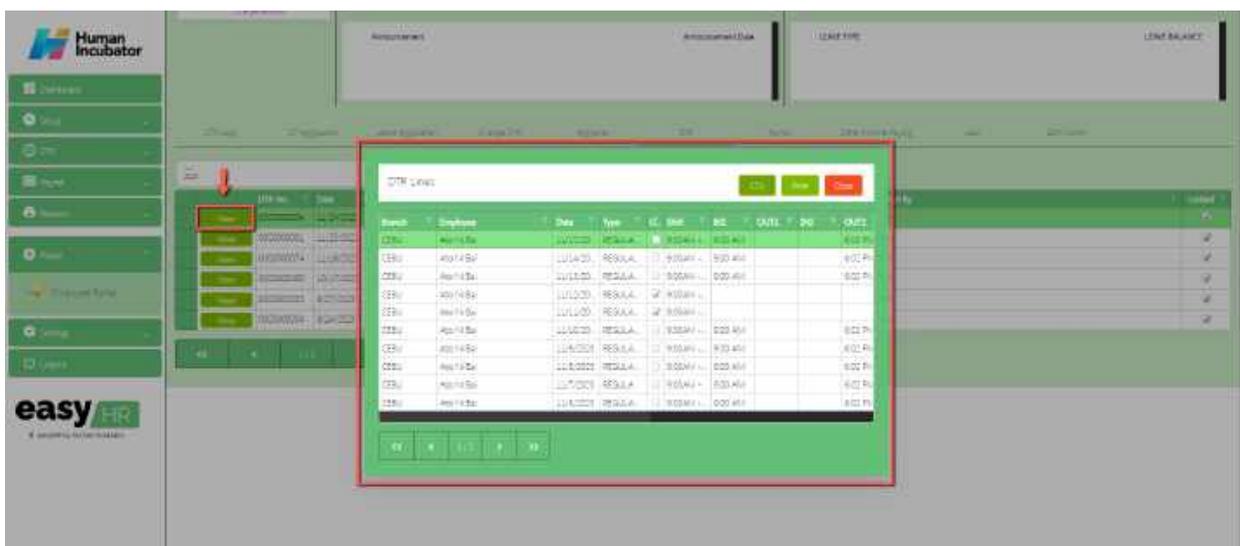


DTR

- In the **DTR** tab the employee can **View, Download CSV and Print** DTR logs.

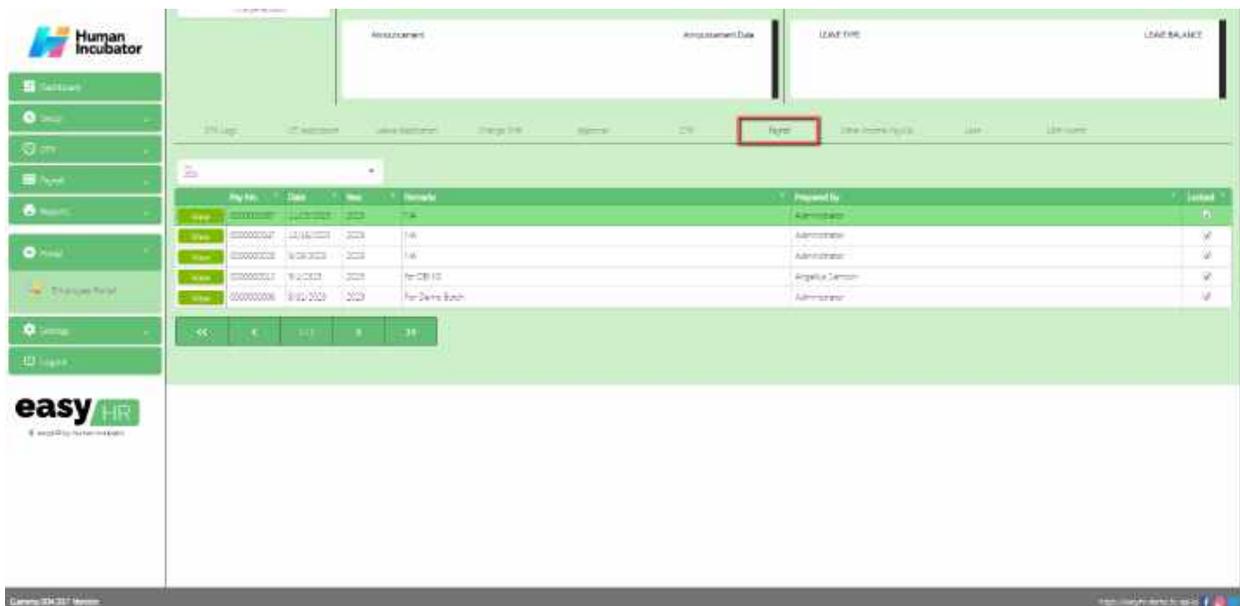


- **Assumption:** The employee already clicked the **View** button on the left side in the DTR table.
 - Can View DTR logs
 - Can Download CSV file
 - Can Print to PDF file

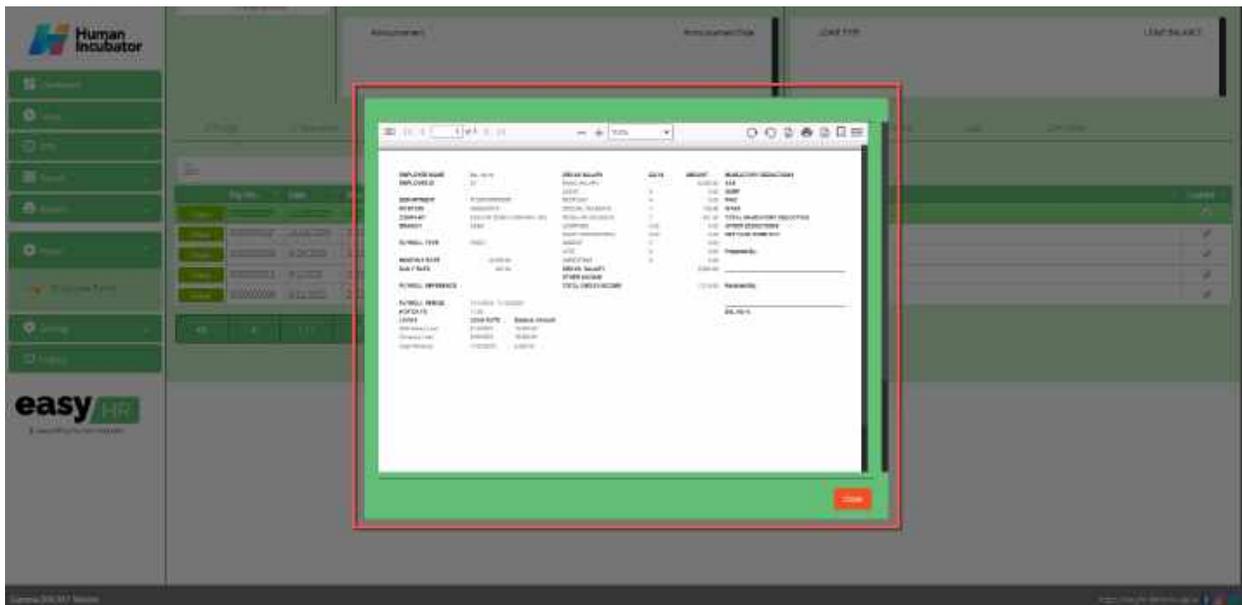
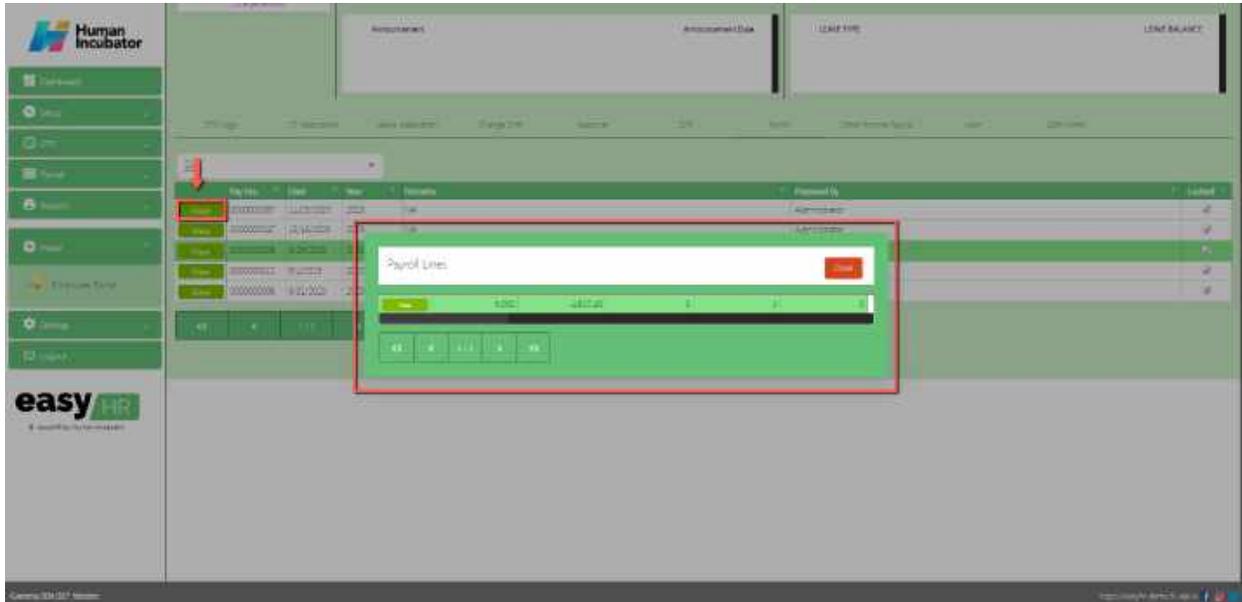


Payroll

- In the **Payroll** tab the employee can view Payroll Lines and Payslip.

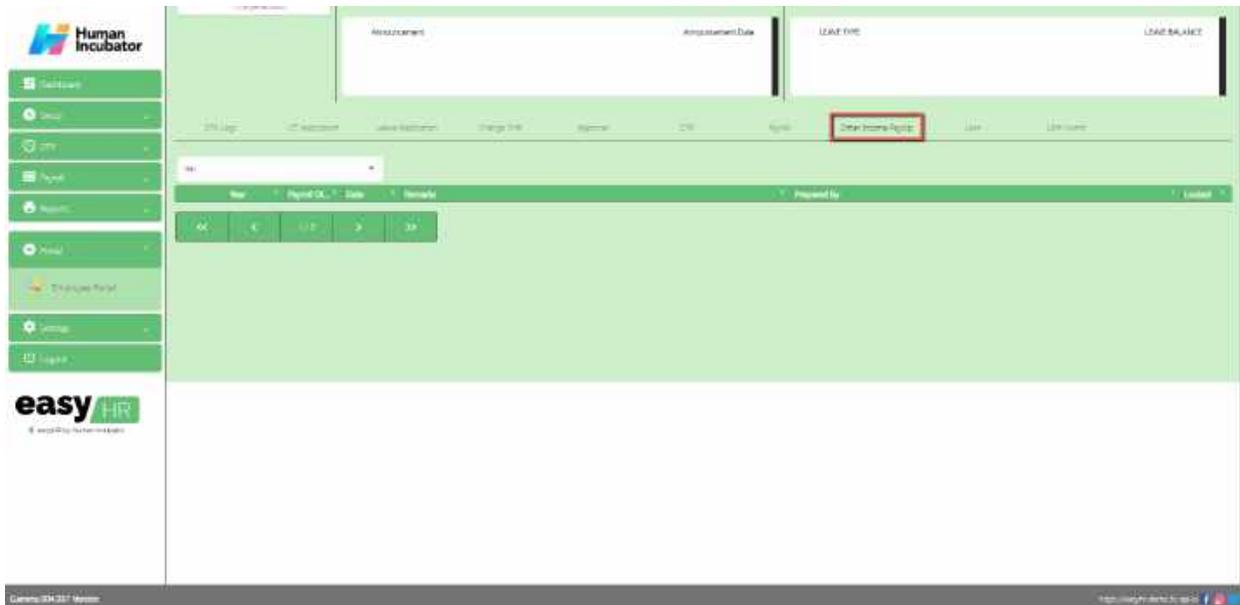


- **Assumption:** The employee already clicked the **View** button on the left side in the Payroll table.
 - Can view Payroll Lines
 - Click **View** button to view payslip
 - Can Download PDF file
 - Can Print

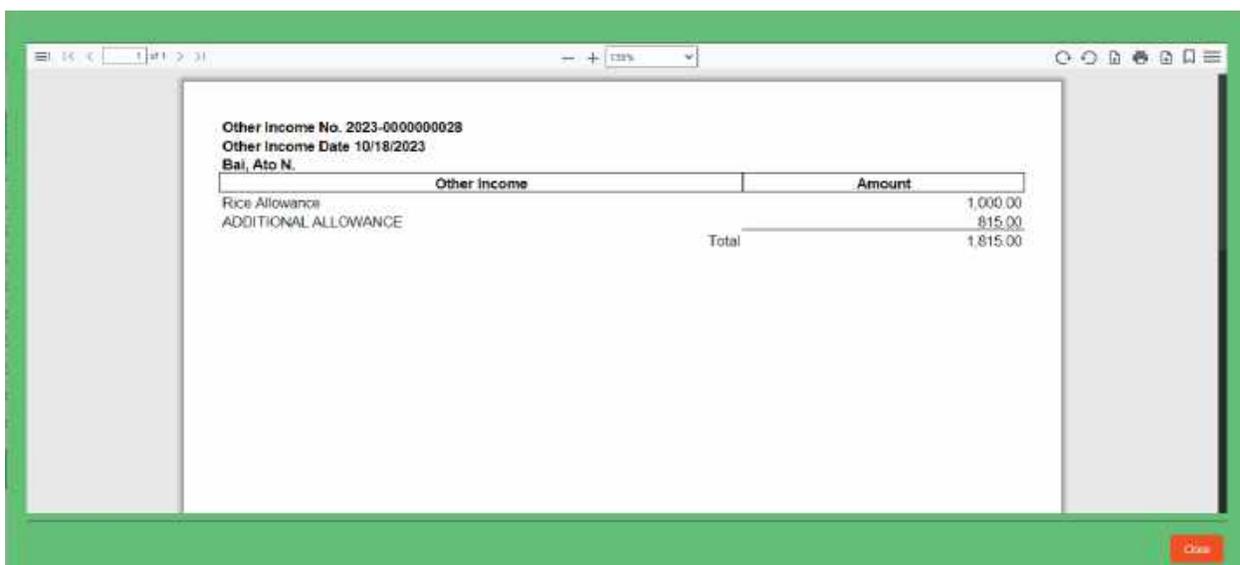


Other Income Payslip

- In the **Other Income Payslip** tab the employee can view Other Income Payslip if the employee has another income.
 - Select Year



- **Assumption:** The employee already clicked the **View** button on the left side in the Other Income Payscale table.
 - View Other Income Payslip
 - Can Download PDF file
 - Can Print



Loan

- In the **Loan** tab the employee can view loan details.

- **Assumption:** The employee already clicked the **View** button on the left side in the Loan table.
 - View Loan Detail

Payroll No.	Payroll Other Deduction No.	Amount
000000028	000000024	500
000000015	000000010	500

13th Month

- In the **13th Month** tab the employee can view the 13th month.



- **Assumption:** The employee already clicked the **View** button on the right side in the 13th month.
 - View Other Income Payslip
 - Can Download PDF file
 - Can Print

The screenshot shows a PDF report with the following content:

EASYHR DEMO COMPANY, INC
Employee 13th Month Report
Bai, Ato

Payroll Number	Gross Salary	13th Month
000000005	6,000.00	500.00
000000006	6,000.00	500.00
000000015	6,000.00	500.00
000000028	6,000.00	500.00
000000044	6,000.00	500.00
000000045	6,000.00	500.00
000000046	6,000.00	500.00
000000047	6,000.00	500.00
Grand Total	48,000.00	4,000.00

Section IX: Settings

System Tables

Overview

- System tables are used to add information categories of a company, multiple languages and accounts for integration.

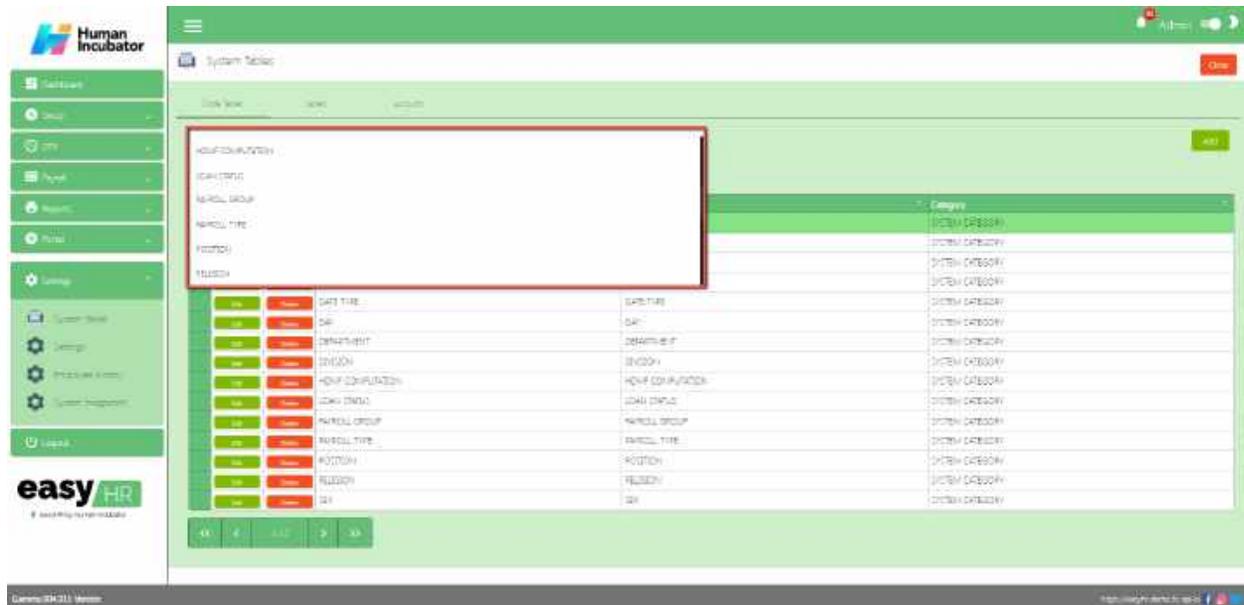
Note: Do not use special characters only "+", "-" are allowed.

- There are 3 tabs in system tables
 - Code Tables
 - Labels
 - Accounts

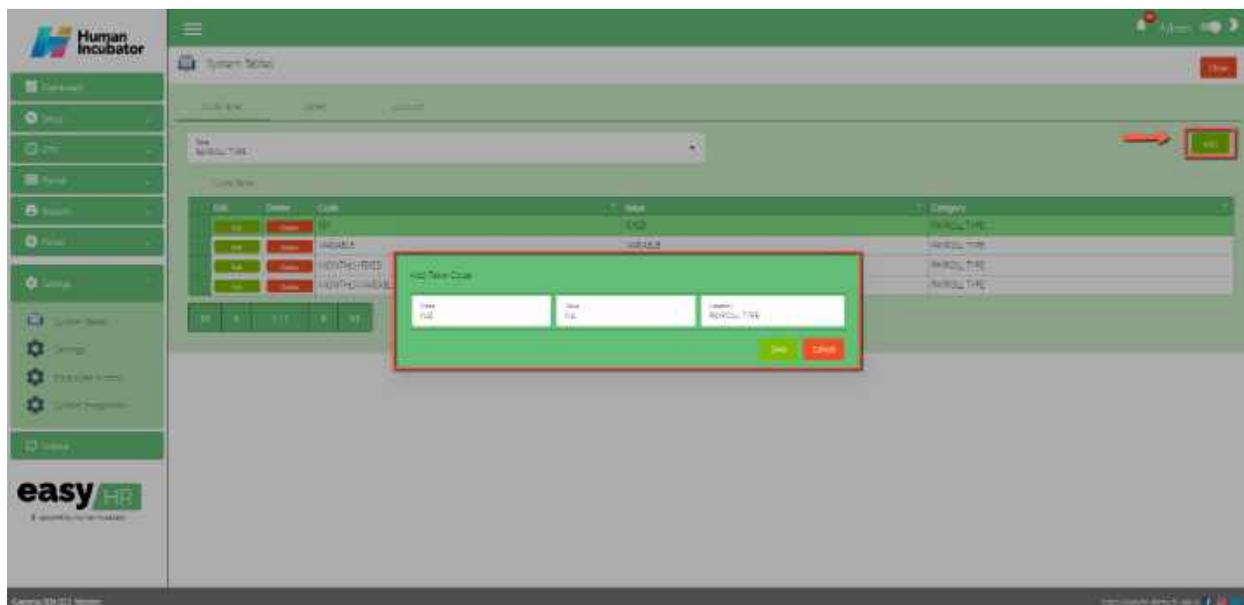
Edit	Delete	Code	Name	Category
		SYSTEM CATEGORY	SYSTEM CATEGORY	SYSTEM CATEGORY
		BLOOD TYPE	BLOOD TYPE	SYSTEM CATEGORY
		GENDER	GENDER	SYSTEM CATEGORY
		CIVIL STATUS	CIVIL STATUS	SYSTEM CATEGORY
		GATE TYPE	GATE TYPE	SYSTEM CATEGORY
		GAT	GAT	SYSTEM CATEGORY
		DEPARTMENT	DEPARTMENT	SYSTEM CATEGORY
		DIVISION	DIVISION	SYSTEM CATEGORY
		WORK EXPERIENCE	WORK EXPERIENCE	SYSTEM CATEGORY
		WORK STATUS	WORK STATUS	SYSTEM CATEGORY
		PARCELL GROUP	PARCELL GROUP	SYSTEM CATEGORY
		PARCELL TYPE	PARCELL TYPE	SYSTEM CATEGORY
		POSITION	POSITION	SYSTEM CATEGORY
		RELIGION	RELIGION	SYSTEM CATEGORY
		SEX	SEX	SYSTEM CATEGORY

Code Tables

- In the **Code Tables** tab the user can add information about the category of company.
- Select category in dropdown table

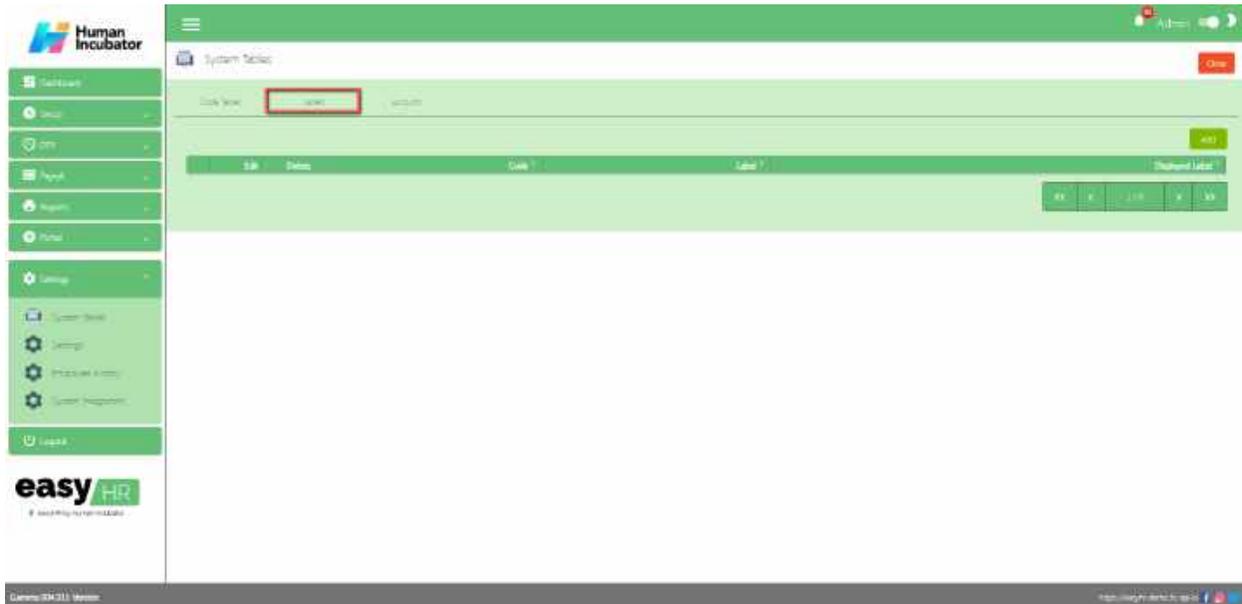


- **Assumption:** The employee already clicked the **Add** button on the right side in the code tables tab.
 - Input Code
 - Input Value
 - Click **Save** button to add in code tables list.

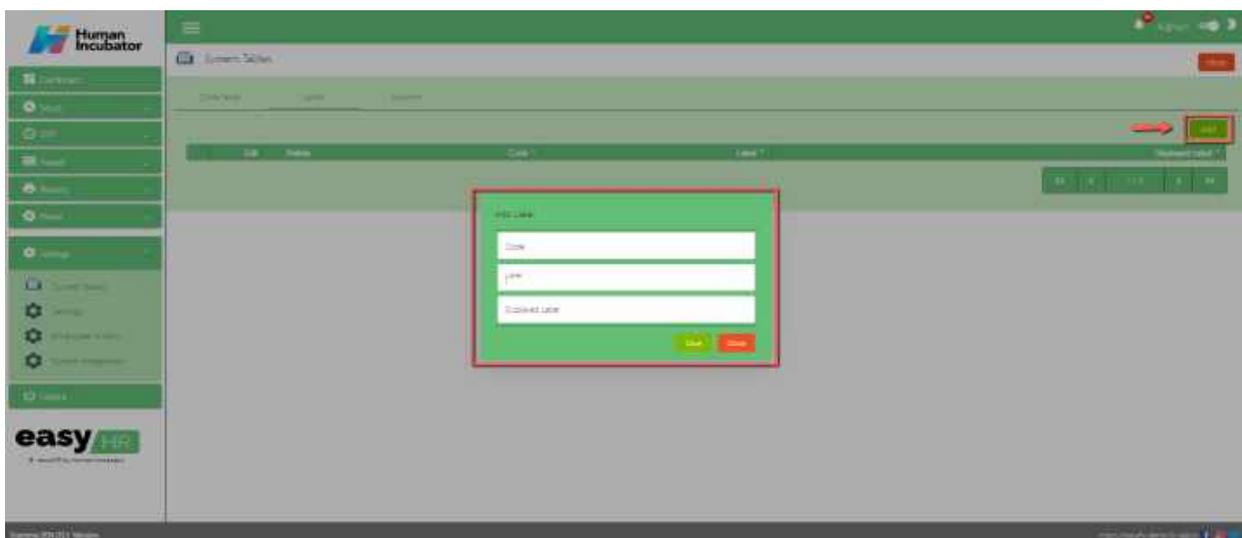


Labels

- In the **Labels** tab the user can add multiple languages.

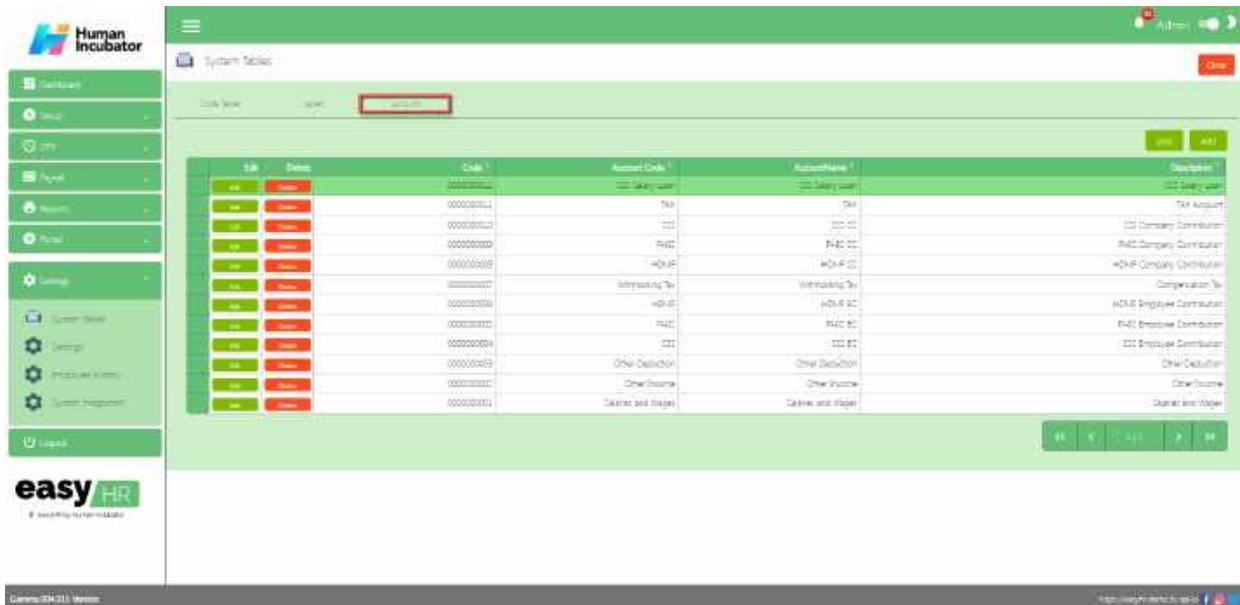


- **Assumption:** The employee already clicked the **Add** button on the right side in the labels tab.
 - Input Label
 - Input Displayed label
 - Click **Save** button to add in the label table list.



Accounts

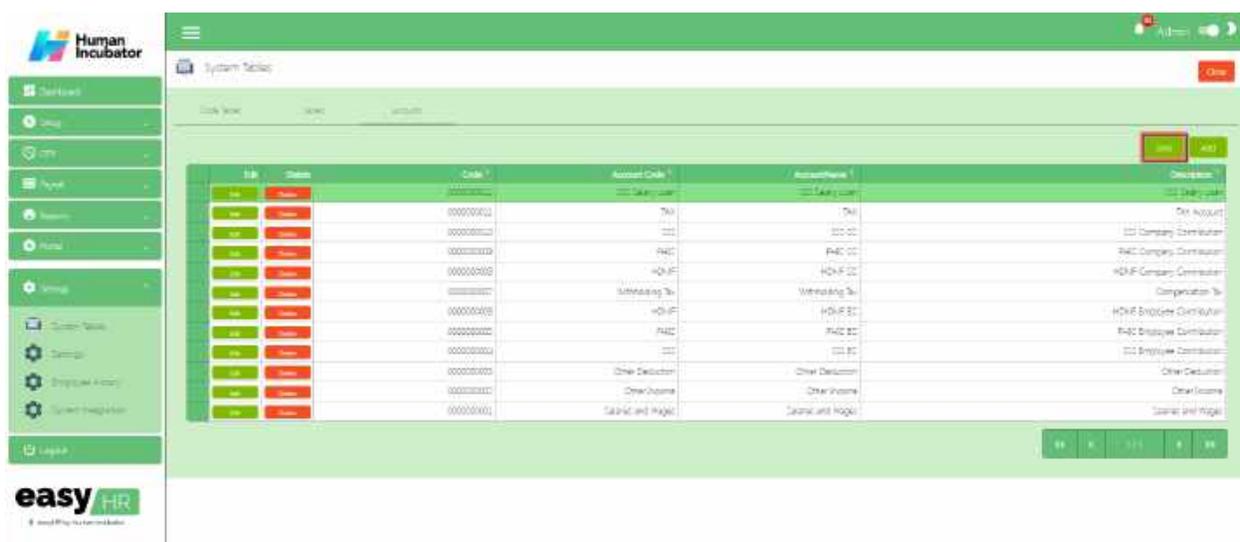
- In the **Accounts** tab the user can sync to EasyFS and add an account.



The screenshot shows the 'Accounts' tab in the Human Incubator system. A table lists various accounts with columns for ID, Status, Code, Account Code, Account Name, and Description. A red box highlights the 'Sync' button at the top right of the table area.

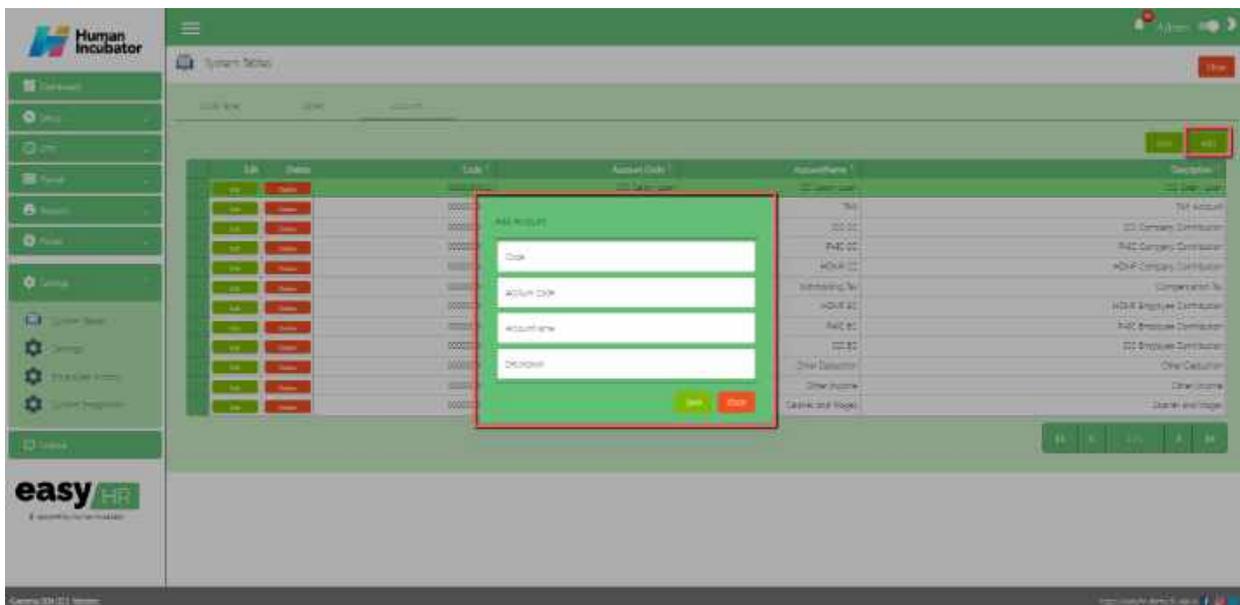
ID	Status	Code	Account Code	Account Name	Description
000000001	Active	000000001	TAX	TAX	TAX Account
000000002	Active	000000002	000	000	000 Company Contribution
000000003	Active	000000003	PAC	PAC	PAC Company Contribution
000000004	Active	000000004	HCP	HCP	HCP Company Contribution
000000005	Active	000000005	Withholding Tax	Withholding Tax	Compensation Tax
000000006	Active	000000006	HCP EC	HCP EC	HCP Employee Contribution
000000007	Active	000000007	PAC EC	PAC EC	PAC Employee Contribution
000000008	Active	000000008	000 EC	000 EC	000 Employee Contribution
000000009	Active	000000009	Other Deduction	Other Deduction	Other Deduction
000000010	Active	000000010	Other Income	Other Income	Other Income
000000011	Active	000000011	Others and Wages	Others and Wages	Others and Wages

- The user click the **Sync** button and all the accounts will sync to the EasyFS system.



The screenshot shows the 'Accounts' tab in the Human Incubator system after the 'Sync' button has been clicked. The 'Sync' button is now highlighted in red, indicating it has been activated.

- The purpose of the **Add** button is to add another account.
 - Click **Add** button
 - Input Account Code
 - Input Account Name
 - Input Description
 - Click **Save** button to add in Accounts table list.



Employee History

Overview

- Employee history is utilized to observe the recent modifications made to employee 201, and it provides visibility into the editor responsible for these changes.

Employee History

- Shows all the list of employee history.

Code	Date	Old Name	Old Rate	New Name	Date
000028700	11/29/2013	Subina	Samok, Subin D	Subin D Sample	11/29/2013
000028708	11/28/2013	DeputyMtl	933AM - 8:00PM / Multiple Br.	8:00AM - 6:00PM / Multiple Br.	11/28/2013
000028707	11/18/2013	FullTime	Samok, Subin D	Subin D Sample	11/18/2013
000028706	11/13/2013	DeputyMtl	8:00AM - 5:00PM / Multiple Br.	8:00AM - 6:00PM / Multiple Br.	11/13/2013
000028705	11/13/2013	FullTime	4:10 PM-2K A-7ya	MUDA-A ACTO/IA	11/13/2013
000028704	11/13/2013	DeputyMtl	8:00AM - 5:00PM	STANDARD / MULTIPLE BR/SALES	11/13/2013
000028703	11/14/2013	FullTime	Samok, Subin D	Subin D Sample	11/14/2013
000028702	11/15/2013	FullTime	Samok, Subin D	Subin D Sample	11/15/2013
000028701	11/20/2013	FullTime	Samok, Subin D	Subin D Sample	11/20/2013
000028700	11/10/2013	HighDifferentRate	5.0000	5.75	11/10/2013
000028699	11/13/2013	OvertimeHourlyRate	89.0000	72.50	11/13/2013
000028698	11/10/2013	UnderTimeHourlyRate	22.0000	27.50	11/10/2013
000028697	11/10/2013	UnderTimeRate	33.0000	27.50	11/10/2013
000028696	11/10/2013	EventDailyRate	440.0000	460.00	11/10/2013
000028695	11/10/2013	HourlyRate	55.0000	57.00	11/10/2013

System Integration

Overview

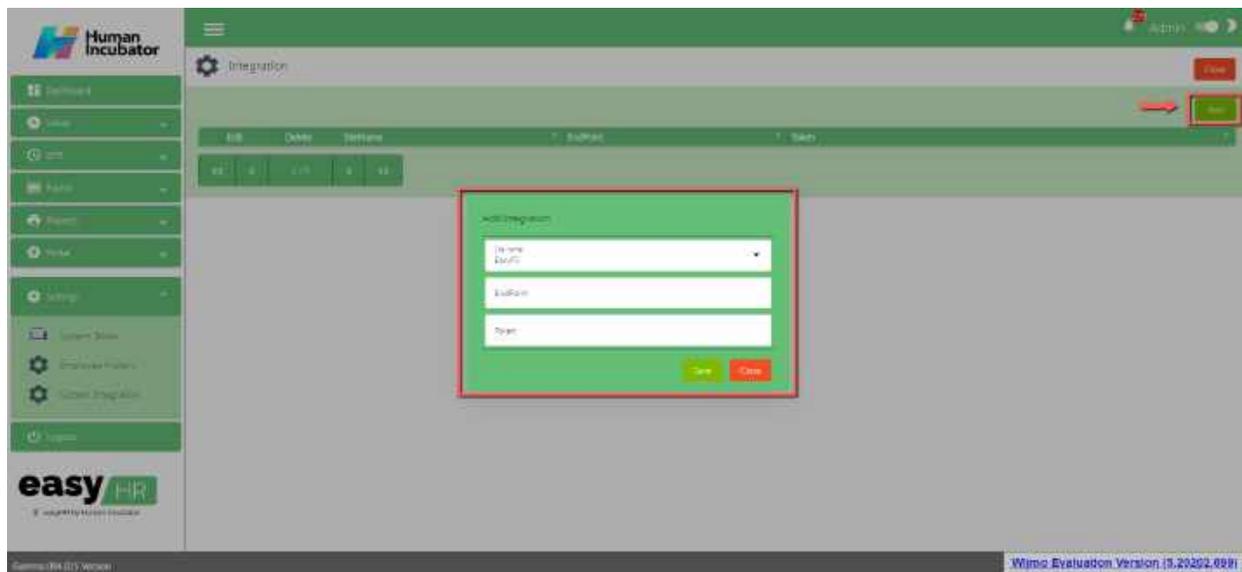
- System Integration is used to integrate to another system like EasyFS.

Integration

- Show the list of integration

Edit	Delete	Settings	Status

- The purpose of the **Add** button is to add integration.
 - Click **Add** button
 - Select Site Name
 - Input EndPoint
 - Input Token
 - Click **Save** button to add in the Integration table list.



Audit Trail

Overview

- A detailed record or log that tracks the series of activities or events happening in the system.

Audit Trail

- Record consisting of Action, module, details, who created and when was the action created.
- All the user have to do is select the Module and enter the date range

Audit Trail Save Close

Menu: Company Module Date Range: 10/28/2024 - 10/28/2024

Action	Module	Details	Created By	Created On
LOCK	MtcCompanyController	Click to show details	Administrator	11/4/2024
UPDATE	MtcCompanyController	Click to show details	Administrator	11/4/2024
UNLOCK	MtcCompanyController	Click to show details	Administrator	11/4/2024
LOCK	MtcCompanyController	Click to show details	Administrator	11/4/2024
UPDATE	MtcCompanyController	Click to show details	Administrator	11/4/2024
LOCK	MtcCompanyController	Click to show details	Administrator	11/4/2024
UPDATE	MtcCompanyController	Click to show details	Administrator	11/4/2024
UNLOCK	MtcCompanyController	Click to show details	Administrator	11/4/2024
LOCK	MtcCompanyController	Click to show details	Administrator	10/30/2024
UPDATE	MtcCompanyController	Click to show details	Administrator	10/30/2024
UNLOCK	MtcCompanyController	Click to show details	Administrator	10/30/2024
LOCK	MtcCompanyController	Click to show details	Administrator	10/28/2024
UPDATE	MtcCompanyController	Click to show details	Administrator	10/28/2024
UNLOCK	MtcCompanyController	Click to show details	Administrator	10/28/2024
LOCK	MtcCompanyController	Click to show details	Administrator	10/28/2024

Navigation: << < > >> Show 15

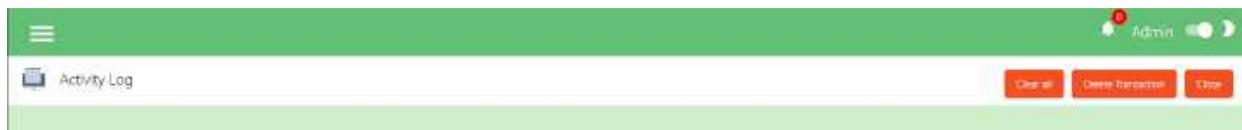
Settings

Overview

- Where all important buttons located

Activity Log

- 2 important buttons
- Clear All buttons and delete transaction button
- Used in either clear all or delete certain transactions



Section X: Logout

Logout

Overview

- Logout is used to terminate your current session and disconnect from the system, which can be important for security and privacy reasons.

Logout

- Click the **Logout** button to disconnect the account.



